

This checklist is designed as an easy reference to assist Managers and Departmental Administrators in ensuring that all the relevant steps are taken before an individual leaves their department to move to a new department. The third column shows whether capturing this information is always necessary, should be considered, or is dependent on the circumstance.

When to use this guide	When a current member of staff is transferring from one department to another within the University.
How to use this guide	This guide acts as a checklist of processes/ checks that must be completed before member of staff transfers within the University, and has been split into three sections: <ul style="list-style-type: none">• Resignation tendered• Pre-departure• Transfer's last day
Useful links and other supporting materials	Transfer between departments Make a service request



Note * Rows marked with an asterisk (*) denote compulsory checks/ processes that must be completed.

Name of individual:

Personnel no:

Resignation Tendered

Element/step	Guide	Employee	Non-employee	Worker	<input type="checkbox"/>
Transfer's resignation letter received and passed to relevant member of staff	N/A	Always	If applicable	If applicable	
Exit interview organised	N/A	If applicable	If applicable	If applicable	
Transfer date arranged and agreed with receiving department*	N/A	Always	Always	Always	
Transfer requested and approved*	Transfer between departments	Always	If applicable	If applicable	

Pre-departure

Element/step	Guide	Employee	Non-employee	Worker	<input type="checkbox"/>
Leaver's holiday entitlement agreed with new department*	Transfer between departments	Always	If applicable	If applicable	
Check outstanding loans from the University*	N/A	If applicable	If applicable	If applicable	
Remove access to work groups in HR Self-Service*	Make a service request	If applicable	If applicable	If applicable	

Transfer's last day

Element/step	Guide	Employee	Non-employee	Worker	<input type="checkbox"/>
Leaver has returned any departmental property*	As per departmental guidelines	If applicable	If applicable	If applicable	
IT department has been notified so leaver's departmental access to systems have been removed*	N/A	Always	Always	Always	