

This checklist should be used **when an employee transfers from one department to another** but does not separate employment from the university.

- Complete time entry in SAP
- Advise employee to return all university property and equipment. Keys issued at the request of the outbound department must be returned to Ingress Management Services (IMS) in Facilities Bldg. 780 at 151-1 E. Sessom Dr, Rm 104. The employee will be issued a receipt to return to their outbound department.
- Retain departmental personnel records for five years.

Notify the following offices to discontinue authorization/access:

- IT Assistance Center (ITAC) for telephone changes and IT access removal by visiting the [Employee Separation Support Website](#).

Note: ITAC will not deactivate the employee's NetID since this person will remain employed at Texas State. It is critical that you revoke access to your department-specific applications.

- Submit a customer request in [AiM](#) to remove departmental card access permissions. (512.245.2824) ingress_mgmt_svs@txstate.edu
- Travel for State Travel Charge Card (512.245.2775)
- Purchasing for P-card (512.245.2521)
- Financial Reporting & Analysis if transferring employee is an account manager. Send the [Account Manager Change Request](#) form to fiaccountrequest@txstate.edu.
- Submit a [PeopleAdmin Security Authorization form](#) (also located on the [HR Forms page](#)) to remove employee's access to PeopleAdmin system.

Applicable for regular staff only:

- Submit a [Request for Payment of Leave](#) form to Human Resources for any remaining FLSA Overtime balance.

A *Change in Position* Personnel Change Request (PCR) should be completed by the gaining department.

This form is for departmental use only – do not send to Human Resources