| Employee Information | | | |
|---|---|---|---|
| **Employee Name:** | | **Employee NetID:** | |
| **Old Department:** | | **New Department:** | |
| **Last Day at Old Department:** | | **Start Date at New Department:** | |

| Promotion / Transfer Checklist | |
|---|---|
| **Old Department:** | **New Department:** |

### Old Department:

☐ Employee has cleared all outstanding **advances and PCard transactions**.

☐ **Payroll Costing Allocation** has been end-dated.

☐ Any necessary adjustments for this employee's compensation charges have been made to the **Payroll Costing Allocation**.

☐ Requested access termination for applicable systems through the IT Service Portal, for example:

  ☐ Egencia
  ☐ STARS
  ☐ Workday Role Assignments
  ☐ PCard
  ☐ Voicemail
  ☐ Security code(s), door access ID swipe, etc.
  ☐ Other user accounts

☐ Employee has returned relevant University items, for example:

  ☐ Badge, dining hall card, stock room card
  ☐ Keys
  ☐ Computer equipment, cell phone, etc.
  ☐ Safety equipment, tools, uniforms
  ☐ Parking permits, passes
  ☐ Manuals, handbooks
  ☐ Other items

### New Department:

☐ **Payroll Costing Allocation** has been assigned via Workday inbox task to department business office.

☐ Employee **directory information** has been verified or completed in HR database, including:

  ☐ Office location and mail code
  ☐ Directory title
  ☐ Directory listing preferences

☐ Appropriate **user access and codes** have been requested, for example:

  ☐ Egencia
  ☐ STARS
  ☐ Workday Role Assignments
  ☐ PCard
  ☐ Voicemail
  ☐ Security code(s), door access ID swipe, etc.
  ☐ Other user accounts

☐ Employee has received relevant University items, for example:

  ☐ Badge, dining hall card, stock room card
  ☐ Keys
  ☐ Computer equipment, cell phone, etc.
  ☐ Safety equipment, tools, uniforms
  ☐ Parking permits, passes
  ☐ Manuals, handbooks
  ☐ Orientation, required seminars, etc.
  ☐ Other items

**Questions?  Contact** employee.services@yale.edu