


|    |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
|----|---------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|----------------------------------------|---|-----|----|-----|----------|--|
|    | A                                                                                                             | B                                                                                 | C                                                                                                                                                                                                                                        | D | E | F | G | H | I                                      | J | K   | L  | M   | N        |  |
| 1  |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 2  |                                                                                                               |                                                                                   | When a work-study student, part-time employee, or full-time employee is terminated or leaves their position at Penn State York, please follow the procedures below. Depending on the employee type, some measures may not be applicable. |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 3  |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 4  |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 5  |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 6  |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 7  |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 8  |                                                                                                               |  | TRANSFER/SEPARATION CHECKLIST                                                                                                                                                                                                            |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 9  |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 10 | Covered Individual Information                                                                                |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 11 |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 12 | Name (Last, First, Middle Initial):                                                                           |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   | PSU Employee ID#:                      |   |     |    |     |          |  |
| 13 |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 14 | Job Title & Appointment Type:                                                                                 |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   | Last Day Employed/Date of Transfer:    |   |     |    |     |          |  |
| 15 |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 16 | Work Unit & Department:                                                                                       |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   | Name of Supervisor/University Contact: |   |     |    |     |          |  |
| 17 |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 18 | Part I - University Property                                                                                  |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 19 | Item                                                                                                          |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   | Yes | No | N/A | Comments |  |
| 20 | Keys/Access Cards Obtained/Card Swipe access disabled (building/dept/office/filing cabinets/desk/etc.)        |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 21 | ID Card/Security Badge                                                                                        |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 22 | Purchasing Card/Credit Card                                                                                   |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 23 | Parking Permit                                                                                                |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 24 | Books/Supplies/Training Materials                                                                             |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 25 | Laptop/Tablet/Other Computer Equipment (includes storage devices and other media)                             |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 26 | Any property for which the individual is listed as the custodian in the Property System                       |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 27 | Other Department/Area Specific Items (Please specify and attach additional documentation if necessary)        |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 28 |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 29 | Part II - System Access                                                                                       |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 30 |                                                                                                               |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 31 | If the employee is part-time (including student workers), the manager/supervisor should immediately:          |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |
| 32 | 1. Initiate a termination of the employee's IT administrative access which can be completed at the following: |                                                                                   |                                                                                                                                                                                                                                          |   |   |   |   |   |                                        |   |     |    |     |          |  |

|    | A                                                                                                                                                               | B                                                                             | C | D | E | F | G | H | I | J | K   | L  | M   | N                                   |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|---|---|---|---|---|---|---|---|-----|----|-----|-------------------------------------|
| 33 |                                                                                                                                                                 | <a href="https://authorize.york.psu.edu/">https://authorize.york.psu.edu/</a> |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 34 | 2. The data steward for the department needs to remove access to specific drives to which the employee would have had access to. This can be completed at       |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 35 |                                                                                                                                                                 | <a href="https://accounts.psu.edu/">https://accounts.psu.edu/</a>             |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 36 | <b>If the employee is full-time, the manager supervisor should immediately:</b>                                                                                 |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 37 | 1. Please email ykhelpdesk@psu.edu to request IT administrative access be terminated on a designated effective date. Please include pertinent specific details. |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 38 | 2. The data steward for the department needs to remove access to specific drives to which the employee would have had access to. This can be completed at       |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 39 |                                                                                                                                                                 | <a href="https://accounts.psu.edu/">https://accounts.psu.edu/</a>             |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 40 |                                                                                                                                                                 |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 41 | Item                                                                                                                                                            |                                                                               |   |   |   |   |   |   |   |   | Yes | No | N/A | Comments                            |
| 42 | Access Account                                                                                                                                                  |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 43 | SIMBA                                                                                                                                                           |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 44 | Update/Remove Canvas, Starfish, and other University Software Access Groups                                                                                     |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 45 | LionPath                                                                                                                                                        |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 46 | Local IT Accounts and Network Access (including shared drives and user-managed groups)                                                                          |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 47 | Remove from social media access                                                                                                                                 |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 48 | Delete from all campus list-serves, Microsoft Teams channels, and other collaboration tools                                                                     |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 49 | Remove from online directory and department/unit websites                                                                                                       |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 50 | Database Access                                                                                                                                                 |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 51 | Department-specific Software Access                                                                                                                             |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 52 | Other Department/Area Specific Items (Please specify and attach additional documentation if necessary)                                                          |                                                                               |   |   |   |   |   |   |   |   |     |    |     | Shop OnLion (see attached document) |
| 53 |                                                                                                                                                                 |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 54 | Part III - Miscellaneous                                                                                                                                        |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 55 | Item                                                                                                                                                            |                                                                               |   |   |   |   |   |   |   |   | Yes | No | N/A | Comments                            |
| 56 | Resignation letter obtained                                                                                                                                     |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 57 | Time and attendance verified                                                                                                                                    |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 58 | EAP information provided                                                                                                                                        |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 59 | Employee Benefits Division contact info provided                                                                                                                |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 60 | Personal files from computer cleared                                                                                                                            |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 61 | Work files moved to a shared drive                                                                                                                              |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 62 | Personal belongings removed from office                                                                                                                         |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 63 | Telephone forwarded/coverage obtained/discontinued                                                                                                              |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 64 | Email autoreply created/email forwarded/listserv admins notified                                                                                                |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |
| 65 | Contact director of strategic communications for website updates upon termination or transfer                                                                   |                                                                               |   |   |   |   |   |   |   |   |     |    |     |                                     |

[illegible]