

Employee Out-Processing Checklist

INSTRUCTIONS: Use this checklist to document termination controls, obtaining certification of action by responsible party. If action not required indicate NA (not applicable). Maintain original in the employee's inactive personnel file.

Name	UIN		
Immediate Supervisor	Last Day	In Office	On Payroll
Voluntary Termination? <input type="checkbox"/> Yes <input type="checkbox"/> No*	* Was action reviewed by Engineering Human Resources? <input type="checkbox"/> Yes <input type="checkbox"/> No		

Employee is: Retiring Terminating Employment

Transferring with No Break in Service to: State Agency (not A&M System) Agency:
 Another A&M System Member Division:

1. Benefit Eligible Employees Terminating or Retiring
 Yes No Check with Engineering HR Benefits regarding deduct amount. 979-458-7699

Certified by: _____ Date: _____

2. Computer, Phone, & ID

<input type="checkbox"/> Deactivate computer access including access to division-shared files. Certified by: _____ Date: _____ <input type="checkbox"/> Deactivate email account. Certified by: _____ Date: _____ <input type="checkbox"/> Deactivate Centrex accounts (home internet) Certified by: _____ Date: _____	<input type="checkbox"/> Deactivate voice mail and reassign number via Telecommunications work request. Certified by: _____ Date: _____ <input type="checkbox"/> Retrieve Aggie ID card and destroy. Certified by: _____ Date: _____ <input type="checkbox"/> Delete from division publication information (website). Certified by: _____ Date: _____
---	--

3. Building and Office Access

<input type="checkbox"/> Retrieve Office/Building Keys Certified by: _____ Date: _____ <input type="checkbox"/> Remove Office/Building Access via ID Card Certified by: _____ Date: _____	<input type="checkbox"/> Deactivate Facility Access Codes Certified by: _____ Date: _____ <input type="checkbox"/> Retrieve Desk Keys Certified by: _____ Date: _____
--	--

4. Deactivate Electronic Access

List each system access held by the employee and confirm the date and how it was deactivated.

- Coordinate Workday Role re-assignment with Engineering Human Resources
- Coordinate FAMIS/AggieBuy/Canopy removal with TEESFAMISsecurity@exchange.tamu.edu

Certified by: _____ Date: _____

5. Workday & Leave

- Reassign employees who are supervised by departing employee.
- If employee was designated a delegate for another employee, put stop date on delegation assignment.

Note: Sick and Vacation leave balances are transferable to another A&M System member or State entity, if no break in service occurs.

- Ensure all leave documents are in **completed** status
- Remove all accruals posted after termination date.
- If employee is receiving Lump Sum payment for unused vacation, prepare appropriate form and submit to Payroll:
http://coe-intranet.tamu.edu/Business_and_Finance/TEES/Payroll/Forms.php

Certified by:

Date:

Workday will prompt the Absence Partner to perform actions as part of the Workday Off-boarding process.

6. Equipment and Inventory (coordinate with division property officer)

- Retrieve all equipment used off-campus.
- Retrieve equipment on loan from other divisions.
- Return equipment loaned from other divisions.
- Reassign inventory items.

Certified by:

Date:

7. TEES Fiscal Office

- Close CITI Bank Travel Account 979-458-7456

Certified by:

Date:

- Close CITI Bank Purchase Account 979-458-7456

Certified by:

Date:

8. Security Clearance Deactivation

Does departing employee have federal security clearance to classified/restricted information?

- Yes No *If yes, advise employee to transfer or deactivation **PRIOR** to departure date.*

Facility Security Office, Phone: 979-862-1965 or krigamache@tamu.edu

Certified by:

Date:

9. Foreign National Employees (excludes student positions)

- Yes No

If yes, submit the *Departure Notification Form* to Immigration Services for Faculty & Scholars (ISFS) **PRIOR** to employee's departure. Form is located at <http://ifss.tamu.edu/Main/Employers/End-of-Employment>

Certified by:

Date:

10. Personnel File

- Include resignation letter or approval to terminate in personnel file and move file to inactive. Retain according to retention schedule.

Certified by:

Date:

Actions to Be Taken By Employee

Provide this page to employee, or review with them, prior to termination date.

1. Are you retiring?

If you are retiring and your position is benefit eligible, make an appointment with Engineering Human Resources regarding benefits during retirement.

2. Security Clearance Deactivation

If you have federal security clearance to classified/restricted information contact the Facility Security Officer **PRIOR** to departure.

Phone: 979-862-1965 Email: krigamache@tamu.edu

3. Are you currently in a benefit eligible position?

If YES refer to the "Leaving Employment" document, on the Benefit Change section of the Engineering HR website, to learn how this status change may impact your benefits.

4. Parking Permit

Cancel and return permit to TAMU Transportation Services 979-862-7275. (Room 108 Koldus)

Information about auto payment cancellation deadlines available from Transportation Services

<http://transport.tamu.edu/parking/faqpermit/cancel.aspx>

5. Contact Information

Update contact information as appropriate in Workday, from employee profile. Include changes to personal contact information.

Email and other contact information is updated to health and retirement vendors weekly via Wednesday.

6. Exit Survey

As a departing employee you may participate in an exit survey. Participation is optional and may be completed by one of these methods:

Access [Exit Survey](#) from "Employee Forms" section of website OR contact Engineering HR 979-458-7698.
