

Employee Exit Checklist

INSTRUCTIONS This form may be used by a supervisor/designee or HR Liaison as a checklist during the exiting process for terminating employees. Sign and date the form to confirm your review of the checklist with the employee. Please place a signed copy in the employee's personnel file.

Employee Name:	Last Day of Work:		
Title:	UIN:		
Department:	Supervisor:		
Voluntary Termination? <input type="checkbox"/> Yes <input type="checkbox"/> No* * Regulation requires prior review of involuntary termination by the Employee Relations Office.			
PAYROLL, FINANCE AND HUMAN RESOURCES – Complete these forms or initiate these processes.			
<table style="width:100%; border:none;"> <tr> <td style="width:50%; vertical-align: top;"> <input type="checkbox"/> Payroll changes – EPA/PAR <input type="checkbox"/> On payroll through _____ <input type="checkbox"/> Last pay date: _____ <input type="checkbox"/> Time Sheet for PPR or adjust BVD <input type="checkbox"/> Direct Deposit (circle one): Yes No <input type="checkbox"/> Pickup paycheck/stub or mail to home (circle one) <input type="checkbox"/> Request for Leave forms/LeaveTraq <input type="checkbox"/> Vacation Leave Balance Hours: _____ (Lump sum vacation hours paid or remain on payroll and exhaust hours) <input type="checkbox"/> Holiday hours compensable _____ <input type="checkbox"/> Sick Leave Pool donation <input type="checkbox"/> COBRA Notification by certified mail </td> <td style="width:50%; vertical-align: top;"> <input type="checkbox"/> LeaveTraq/TimeTraq <input type="checkbox"/> Travel vouchers/receipts <input type="checkbox"/> Fiscal reimbursements <input type="checkbox"/> Update address in HR Connect for W2 <input type="checkbox"/> Personnel file to inactive status <input type="checkbox"/> Leave/FMLA file to inactive <input type="checkbox"/> Retirement benefits: Remind employee to call Human Resources at (979) 845-4141 <input type="checkbox"/> Remind employee to complete the Exiting Employee Survey online http://employees.tamu.edu/managers/liaisonResources/exitingEmployee/Default.aspx </td> </tr> </table>		<input type="checkbox"/> Payroll changes – EPA/PAR <input type="checkbox"/> On payroll through _____ <input type="checkbox"/> Last pay date: _____ <input type="checkbox"/> Time Sheet for PPR or adjust BVD <input type="checkbox"/> Direct Deposit (circle one): Yes No <input type="checkbox"/> Pickup paycheck/stub or mail to home (circle one) <input type="checkbox"/> Request for Leave forms/LeaveTraq <input type="checkbox"/> Vacation Leave Balance Hours: _____ (Lump sum vacation hours paid or remain on payroll and exhaust hours) <input type="checkbox"/> Holiday hours compensable _____ <input type="checkbox"/> Sick Leave Pool donation <input type="checkbox"/> COBRA Notification by certified mail	<input type="checkbox"/> LeaveTraq/TimeTraq <input type="checkbox"/> Travel vouchers/receipts <input type="checkbox"/> Fiscal reimbursements <input type="checkbox"/> Update address in HR Connect for W2 <input type="checkbox"/> Personnel file to inactive status <input type="checkbox"/> Leave/FMLA file to inactive <input type="checkbox"/> Retirement benefits: Remind employee to call Human Resources at (979) 845-4141 <input type="checkbox"/> Remind employee to complete the Exiting Employee Survey online http://employees.tamu.edu/managers/liaisonResources/exitingEmployee/Default.aspx
<input type="checkbox"/> Payroll changes – EPA/PAR <input type="checkbox"/> On payroll through _____ <input type="checkbox"/> Last pay date: _____ <input type="checkbox"/> Time Sheet for PPR or adjust BVD <input type="checkbox"/> Direct Deposit (circle one): Yes No <input type="checkbox"/> Pickup paycheck/stub or mail to home (circle one) <input type="checkbox"/> Request for Leave forms/LeaveTraq <input type="checkbox"/> Vacation Leave Balance Hours: _____ (Lump sum vacation hours paid or remain on payroll and exhaust hours) <input type="checkbox"/> Holiday hours compensable _____ <input type="checkbox"/> Sick Leave Pool donation <input type="checkbox"/> COBRA Notification by certified mail	<input type="checkbox"/> LeaveTraq/TimeTraq <input type="checkbox"/> Travel vouchers/receipts <input type="checkbox"/> Fiscal reimbursements <input type="checkbox"/> Update address in HR Connect for W2 <input type="checkbox"/> Personnel file to inactive status <input type="checkbox"/> Leave/FMLA file to inactive <input type="checkbox"/> Retirement benefits: Remind employee to call Human Resources at (979) 845-4141 <input type="checkbox"/> Remind employee to complete the Exiting Employee Survey online http://employees.tamu.edu/managers/liaisonResources/exitingEmployee/Default.aspx		
OFFICE ENVIRONMENT AND SECURITY – Retrieve, cancel, deactivate, or secure the following items:			
<table style="width:100%; border:none;"> <tr> <td style="width:50%; vertical-align: top;"> <input type="checkbox"/> Staff Identification Card <input type="checkbox"/> Office and/or desk keys <input type="checkbox"/> Facility automated access codes <input type="checkbox"/> Pager and/or cell phone <input type="checkbox"/> Parking permit / Business permit <input type="checkbox"/> Department network/e-mail account <input type="checkbox"/> Net ID account <input type="checkbox"/> Electronic files (workgroup/personnel) <input type="checkbox"/> Hard-copy files (workgroup/personnel) </td> <td style="width:50%; vertical-align: top;"> <input type="checkbox"/> SIMS/Compass account access <input type="checkbox"/> FAMIS account access/signature authority <input type="checkbox"/> BPP account access <input type="checkbox"/> Voice mail password: _____ <input type="checkbox"/> Telephone calling card <input type="checkbox"/> Payment Card and/or CBA Travel Card </td> </tr> </table>		<input type="checkbox"/> Staff Identification Card <input type="checkbox"/> Office and/or desk keys <input type="checkbox"/> Facility automated access codes <input type="checkbox"/> Pager and/or cell phone <input type="checkbox"/> Parking permit / Business permit <input type="checkbox"/> Department network/e-mail account <input type="checkbox"/> Net ID account <input type="checkbox"/> Electronic files (workgroup/personnel) <input type="checkbox"/> Hard-copy files (workgroup/personnel)	<input type="checkbox"/> SIMS/Compass account access <input type="checkbox"/> FAMIS account access/signature authority <input type="checkbox"/> BPP account access <input type="checkbox"/> Voice mail password: _____ <input type="checkbox"/> Telephone calling card <input type="checkbox"/> Payment Card and/or CBA Travel Card
<input type="checkbox"/> Staff Identification Card <input type="checkbox"/> Office and/or desk keys <input type="checkbox"/> Facility automated access codes <input type="checkbox"/> Pager and/or cell phone <input type="checkbox"/> Parking permit / Business permit <input type="checkbox"/> Department network/e-mail account <input type="checkbox"/> Net ID account <input type="checkbox"/> Electronic files (workgroup/personnel) <input type="checkbox"/> Hard-copy files (workgroup/personnel)	<input type="checkbox"/> SIMS/Compass account access <input type="checkbox"/> FAMIS account access/signature authority <input type="checkbox"/> BPP account access <input type="checkbox"/> Voice mail password: _____ <input type="checkbox"/> Telephone calling card <input type="checkbox"/> Payment Card and/or CBA Travel Card		
TRANSFER WITHIN A&M UNIVERSITY SYSTEM			
<table style="width:100%; border:none;"> <tr> <td style="width:50%; vertical-align: top;"> <input type="checkbox"/> Transferring to: _____ <input type="checkbox"/> Coordinate with new department </td> <td style="width:50%; vertical-align: top;"> <input type="checkbox"/> Vacation/Sick Leave Balance Notice <input type="checkbox"/> Transfer Personnel File (only if within Texas A&M) </td> </tr> </table>		<input type="checkbox"/> Transferring to: _____ <input type="checkbox"/> Coordinate with new department	<input type="checkbox"/> Vacation/Sick Leave Balance Notice <input type="checkbox"/> Transfer Personnel File (only if within Texas A&M)
<input type="checkbox"/> Transferring to: _____ <input type="checkbox"/> Coordinate with new department	<input type="checkbox"/> Vacation/Sick Leave Balance Notice <input type="checkbox"/> Transfer Personnel File (only if within Texas A&M)		

PRINT NAME of Supervisor/Designee or HR Liaison

SIGNATURE of Supervisor/Designee or HR Liaison

Date

DISTRIBUTION: Original to Employee's Personnel File Copy to Terminating Employee	NEED HELP? Liaison Administrator Phone (979) 862-3854 hrnetwork@tamu.edu
---	--