



## Employee Exit Checklist

**INSTRUCTIONS** This form, or a similar form customized by a department, should be used by a supervisor/designee and/or HR Liaison as a checklist to document activities completed during and following the exiting process for terminating employees. Not every action listed is applicable in every termination, but the comprehensive list is provided as a mechanism to confirm good management practices and to protect university property.

Employee Name:	Last Day in Office:	Last Day in Paid Status:																		
Title:	UIN:																			
Department:	Supervisor:																			
Termination from Department for: <input type="checkbox"/> <b>Voluntary Termination</b> - includes transfer to another department or A&M System member or death of employee <input type="checkbox"/> <b>Retirement</b> <input type="checkbox"/> <b>Involuntary Termination</b> - Involuntary termination for non-faculty employee requires prior review by HR Employee Relations																				
<b>PAYROLL, FINANCE AND HUMAN RESOURCES ACTIVITIES – Take action as appropriate</b>  <table border="0"> <tr> <td><input type="checkbox"/> Payroll changes / . Employee Personnel Action (EPA) Last Paycheck date: _____</td> <td><input type="checkbox"/> Travel vouchers/receipts completed</td> </tr> <tr> <td><input type="checkbox"/> LeaveTraq updated</td> <td><input type="checkbox"/> Fiscal reimbursements completed</td> </tr> <tr> <td>Vacation Leave Balance Hours: _____</td> <td><input type="checkbox"/> Personnel file to inactive status</td> </tr> <tr> <td>Comp Time Balance Hours: _____</td> <td><input type="checkbox"/> Leave/FMLA file to inactive</td> </tr> <tr> <td>Other leave hours payable _____</td> <td><input type="checkbox"/> Retirement: Employee must contact HR Benefits</td> </tr> <tr> <td><input type="checkbox"/> Sick Leave Pool donation</td> <td><input type="checkbox"/> Exiting Employee Survey at <a href="http://employees.tamu.edu/employees/employee-exit">http://employees.tamu.edu/employees/employee-exit</a></td> </tr> <tr> <td><input type="checkbox"/> Final Timesheet or monthly Budget Verification Document</td> <td><input type="checkbox"/> HRConnect updates: Employee retains access to HRC for 18 months from termination. Advise employee to keep UIN and password to modify email, home address and W2 delivery choice.</td> </tr> <tr> <td><input type="checkbox"/> Direct Deposit (circle one): Yes No</td> <td></td> </tr> <tr> <td>Electronic paycheck or pickup last paycheck/stub</td> <td></td> </tr> </table>			<input type="checkbox"/> Payroll changes / . Employee Personnel Action (EPA) Last Paycheck date: _____	<input type="checkbox"/> Travel vouchers/receipts completed	<input type="checkbox"/> LeaveTraq updated	<input type="checkbox"/> Fiscal reimbursements completed	Vacation Leave Balance Hours: _____	<input type="checkbox"/> Personnel file to inactive status	Comp Time Balance Hours: _____	<input type="checkbox"/> Leave/FMLA file to inactive	Other leave hours payable _____	<input type="checkbox"/> Retirement: Employee must contact HR Benefits	<input type="checkbox"/> Sick Leave Pool donation	<input type="checkbox"/> Exiting Employee Survey at <a href="http://employees.tamu.edu/employees/employee-exit">http://employees.tamu.edu/employees/employee-exit</a>	<input type="checkbox"/> Final Timesheet or monthly Budget Verification Document	<input type="checkbox"/> HRConnect updates: Employee retains access to HRC for 18 months from termination. Advise employee to keep UIN and password to modify email, home address and W2 delivery choice.	<input type="checkbox"/> Direct Deposit (circle one): Yes No		Electronic paycheck or pickup last paycheck/stub	
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<b>OFFICE ENVIRONMENT AND SECURITY – Retrieve, cancel, deactivate, or secure the following items:</b>  <table border="0"> <tr> <td><input type="checkbox"/> Staff Identification Card</td> <td><input type="checkbox"/> COMPASS account access</td> </tr> <tr> <td><input type="checkbox"/> Office and/or desk keys</td> <td><input type="checkbox"/> FAMIS account access/signature authority</td> </tr> <tr> <td><input type="checkbox"/> Facility access codes</td> <td><input type="checkbox"/> BPP account access</td> </tr> <tr> <td><input type="checkbox"/> Pager and/or cell phone</td> <td><input type="checkbox"/> Payment Card / other credit or purchase cards</td> </tr> <tr> <td><input type="checkbox"/> Voice mail password: _____</td> <td><input type="checkbox"/> Department network/e-mail account</td> </tr> <tr> <td><input type="checkbox"/> Telephone calling card</td> <td><input type="checkbox"/> Net ID account</td> </tr> <tr> <td><input type="checkbox"/> Parking permit / Business parking permit</td> <td><input type="checkbox"/> Electronic files</td> </tr> <tr> <td></td> <td><input type="checkbox"/> Hard-copy files</td> </tr> </table>			<input type="checkbox"/> Staff Identification Card	<input type="checkbox"/> COMPASS account access	<input type="checkbox"/> Office and/or desk keys	<input type="checkbox"/> FAMIS account access/signature authority	<input type="checkbox"/> Facility access codes	<input type="checkbox"/> BPP account access	<input type="checkbox"/> Pager and/or cell phone	<input type="checkbox"/> Payment Card / other credit or purchase cards	<input type="checkbox"/> Voice mail password: _____	<input type="checkbox"/> Department network/e-mail account	<input type="checkbox"/> Telephone calling card	<input type="checkbox"/> Net ID account	<input type="checkbox"/> Parking permit / Business parking permit	<input type="checkbox"/> Electronic files		<input type="checkbox"/> Hard-copy files		
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<b>TRANSFER WITHIN A&amp;M UNIVERSITY SYSTEM</b>  <input type="checkbox"/> Transferring to: _____ <input type="checkbox"/> Coordinate EPA actions with receiving department <input type="checkbox"/> Vacation/Sick Leave balances transferred <input type="checkbox"/> Transfer Personnel File (only if receiving department is within Texas A&M University) <input type="checkbox"/> Complete Verification of Receipt for Employee Files form		<b>OTHER DEPARTMENTAL ACTIVITIES</b>  <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>																		

Individual Completing Documentation of Exit Processing:

\_\_\_\_\_  
PRINT NAME of Supervisor/Designee or HR Liaison

\_\_\_\_\_  
SIGNATURE of Supervisor/Designee or HR Liaison

\_\_\_\_\_  
Date

<b>DISTRIBUTION:</b> Original to Employee's Personnel File	<b>NEED HELP?</b> Employee Relations Phone (979) 862-4027 Employee-relations@tamu.edu
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