



# OFFBOARDING CHECKLIST – RETIRING

*Initial once action is completed*

Employee Name: \_\_\_\_\_ UIN: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Termination Date: \_\_\_\_\_ Last Day of Work: \_\_\_\_\_ Pay Through Date: \_\_\_\_\_

*To prepare for employee’s departure, please complete the items on the checklist below*

## EMPLOYEE IS- RETIRING

- Workday
- FAMIS
- AggieBuy
- Canopy

## BENEFITS AND LEAVE

- Employee will meet with Engineering Benefits to discuss retirement procedure

### Review Leave in Workday

- Ensure all leave documents are in **completed** status.
- Remove all accruals posted after the termination date.
- If an employee is receiving a Lump Sum payment for unused vacation, prepare an appropriate form and submit to Payroll.
- Vacation payout can be moved to a TDA account

## WORKDAY

- Reassign employees who are supervised by departing employees (if applicable).
- If an employee was designated as a delegate for another employee, put a stop date on delegation assignment (if applicable).
- Please refer to the Workday Job Aid on how employees can remove delegations.
- Submit termination in workday and attach resignation letter.

## EQUIPMENT, INVENTORY, AND TECHNOLOGY

- Retrieve staff ID card/badge from employee and destroy.
- Department can request Retiree ID card through [myaggiocard.tamu.edu](http://myaggiocard.tamu.edu)
- Collect keys to the employee's office area.
- Retrieve payment or travel card.
- Submit Card Cancellation Form through Fiscal
- Retrieve voicemail passcode from the employee’s phone.
- Are there any business-related hard copy files/documents?
- Retrieve access to documents
- Remove the employee from the Departmental Parking Representative (DPR) list.
- Retrieve and update inventory for university-issued office equipment (e.g., laptop, iPad, etc.).

## PERSONNEL FILE

- Include retirement letter/notification in personnel file and move file to inactive.
- Retain personnel file according to retention schedule
- Retain offboarding checklist in personnel file.
- Link to exit survey
- Please reach out to Ninette Portales: [ninette@tamu.edu](mailto:ninette@tamu.edu) to complete an exit survey

## ACCESS

- Deactivate Electronic Access

Certified By: \_\_\_\_\_

Date: \_\_\_\_\_