



OFFBOARDING CHECKLIST – TERMINATING

Initial once action is completed

Employee Name: _____ UIN: _____ Supervisor: _____

Termination Date: _____ Last Day of Work: _____ Pay Through Date: _____

To prepare for employee’s departure, the below items are items are a checklist of items to be completed

EMPLOYEE IS- TERMINATING EMPLOYMENT

- Was the termination voluntary?
 - If yes, please reach out to Ninette Portales at ninette@tamu.edu to complete an exit survey
- Will the employee be employed at another state agency?
 - If yes, state service will transfer to new position

BENEFITS AND LEAVE

Benefit eligible?

- Benefits will end on the last day of the month that they terminate (e.g., if termination is on September 14, then benefits will end on September 30)

COBRA

- The Navia company will mail a COBRA packet to the voluntary terminating employee within 14 days.

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 within 30 days of termination.
- 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).
- Submit termination in Workday and attach resignation letter.

EQUIPMENT, INVENTORY, AND TECHNOLOGY

- Retrieve staff ID card/badge from employee and destroy.
- 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.).

ACCESS

- Deactivate Electronic Access
 - *Workday*
 - *FAMIS*
 - *AggieBuy*
 - *Canopy*
- Does the employee have federal security clearance to restricted information?
 - If yes, advise the employee to transfer or deactivate prior to departure date. (Please email: fso@tamus.edu or call: 979.845.7153)

PERSONNEL FILE

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

Certified By: _____

Date: _____