



OFFBOARDING CHECKLIST – TRANSFERRING

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 – TRANSFERRING

- Transferring with nor break in service?
 - Another A&M System Member Division
 - Department will need to clarify if transferring within A&M System if the resignation letter does not.
- What department are they transferring to?

BENEFITS AND LEAVE

- Benefits and Leave will transfer to new position within the A&M System
- If the employee is transferring the 1st of the month or in the middle of the month to another benefit-eligible position, the employee will not have to wait for SGIP.

EQUIPMENT, INVENTORY, AND TECHNOLOGY

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

The decision to allow the employee to retain their badge is based on department preference. Please be consistent in your practice.

- 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.
- New department will add a mail stop for the employee.
- Retrieve and update inventory for university-issued office equipment (e.g., laptop, iPad, etc.).

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).
- New department will request transfer in workday.

Be on the lookout for workday tasks

ACCESS

- Deactivate Electronic Access
 - *Workday*
 - *FAMIS*
 - *AggieBuy*
 - *Canopy*

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: _____