## The Texas A&M University System

## System Offices

HR 34 (09/20)

# Out-Processing Checklist

**To be completed by the department and emailed to Human Resources within one business day of the employee’s last day.**

*This form is only intended for termination of an employee. For instructions regarding employees transferring to another System Offices department, system member or state agency you must contact the Human Resources Office,* [*SystemOfficesEmployment@tamus.edu*](mailto:SystemOfficesEmployment@tamus.edu)*.*

Name       UIN       Supervisor name

Department       Last day worked Click or tap to enter a date. Click or tap to enter a date.

Date Paid Through\*

*\* If remaining on payroll past last day worked.*

**N/A Completed/Processed/Returned/Discussed (*A response is required for each item)***

The HR Contact or Manager must initiate the Terminate business process in Workday for Terminating/Retiring employees (Terminate business process in Workday date & resignation letter date must match). Reference the job aid titled *Termination (Voluntary)* on the Workday Help website for instructions. (Note, this business process does not apply to employees transferring to another department or TAMU system member.)

Please email the following verbiage for all transferring employees with the following email:

**To:** [Support@tamus.edu](mailto:Support@tamus.edu)

**Subject Line:** Delete Duo Account Request

**Email:** Employee’s name, UIN - is transferring from system offices to another TAMUS system member. In order to enable this person to utilize SSO from their new position, please permanently delete their old DUO account on the morning of (date of hire of other system member). Please see TeamDynamix problem #18864997 for more information).

After initiating the Termination business process in Workday (above) – if a preservation hold ‘Alert’ appears please follow the instructions and notify Human Resources at [SystemOfficesEmployment@tamus.edu](mailto:SystemOfficesEmployment@tamus.edu).

Email Information Technology at [SOHelpMe@tamus.edu](mailto:SOHelpMe@tamus.edu) for additional exit processing requirements.

Email ESS ([[safety@tamus.edu](mailto:safety@tamus.edu))](mailto:mhoffman@tamus.edu)%20-) – please provide employees name, UIN and last day worked.

Email the resignation letter/email to Human Resources, [SystemOfficesEmployment@tamus.edu](mailto:SystemOfficesEmployment@tamus.edu).

If the employee has Workday or SSO security roles, notify Dawn Santo ([dsanto@tamus.edu](mailto:dsanto@tamus.edu)).

If the employee is a Manager, confirm he/she has reviewed/approved all pending requests in Workday.

If the employee is due a lump sum vacation payment reference the Workday job aid *Maintain Accrual* (please select the option of ‘Lump-Sum – Vacation’) and zero out the vacation hours. Print the before and after vacation balance screens and email to [Payroll](mailto:so-payroll@tamus.edu) along with the [Payroll Payment Request](https://employees.tamu.edu/payroll/_media/forms/payroll-payment-requests.pdf) form. (Payroll will review and process.)

If the employee has FAMIS or Aggie Buy access, email a signed [FD-805 Financial Systems Access Request](https://fmo.tamu.edu/access-security/_media/fd-805.pdf) to Tori Smejkal, [vsmejkal@tamus.edu](mailto:vsmejkal@tamus.edu) to request removal of access.

If the employee has a communication allowance, email [Payroll](mailto:so-payroll@tamus.edu) the [Monthly Communication Allowance Enrollment](https://www.tamus.edu/business/budgets-and-accounting/accounting/general/communication-allowance-program-system-offices/) form.

If the employee has Laserfiche access, email [famis-security@tamus.edu](mailto:famis-security@tamus.edu) to request deactivation**.**

**Schedule Appointment with Employee**

Provide the employee contact information for System Offices Benefits Partners for all insurance/retirement related questions: Jennifer Navarro: 458-4236, [jnavarro@tamus.edu](mailto:jnavarro@tamus.edu) & Jessica Palacios: 458-6170, [jpalacios@tamus.edu](mailto:jpalacios@tamus.edu).

If the employee has a mobile internet device (Mi-Fi/Air Card), contact the vendor to cancel the service. Contact Information Technology at 458-6430 if you have questions.

Return SO-owned equipment such as a PC used at home, laptop, thumb drive, cell phone, Air Card, etc.

Ask if any data or information relating to state business resides on personal storage devices [thumb drives, cell phones, etc.]. If so, email [SOHelpMe@tamus.edu](mailto:SOHelpMe@tamus.edu).

Provide employee with the Workday *Time Off Balance* print screen reflecting vacation, sick and compensatory time balances.

Collect and destroy the System Offices ID card. Email Jody Ramirez, [jramirez@tamus.edu](mailto:jramirez@tamus.edu), to deactivate building access.

Provide [Sick Leave Pool Donation](https://assets.system.tamus.edu/files/hr/forms/27.pdf) form & [Family Leave Pool Donation](https://assets.system.tamus.edu/files/hr/forms/2063D.pdf) form, return to HR if employee donates hours. Please do not remove the sick leave hours from the employee’s balance.

Collect state-issued credit cards (travel and/or payment cards). Please complete the [online form](https://it-lf-ecmf.tamu.edu/Forms/Credit-Increase-Decrease-Card-Cancellation) to cancel the card. Destroy card upon receipt of cancellation confirmation email.

Collect keys issued for office, desk, etc.

Provide voice mail password (can be changed to a generic password before being shared).

Process professional certification reimbursement, if applicable.

Confirm that the employee has updated his/her email address in Workday for W-2 notification purposes.

Remarks:

Click or tap to enter a date.

*Supervisor or HR Contact signature* *Date*

***Scan and email the completed form to*** [*SystemOfficesEmployment@tamus.edu*](mailto:SystemOfficesEmployment@tamus.edu)***for retention in the employee’s personnel file.***