

# Termination and Exit Checklist for Staff

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TEXAS A&M UNIVERSITY  
Division of Research

This form should be completed by the supervisor or designee as a checklist to document activities completed during and following the exiting process for terminating employees. Not every action will be applicable in every termination, but the list is provided as a tool to confirm good management practices and to protect University property. Please contact your HR Liaison if you have questions or require assistance with this process.

Employee Name:	Last Day in Office:	Last Day in Paid Status:
Title:	PIN #:	UIN #:
Unit:	Supervisor:	

## Reason for Termination:

- Voluntary Termination** - Separation of employment initiated by the employee.  
Please select a termination code to show how this separation should be documented. Please [click here](#) for a detailed explanation of each code.
- 59 - Resignation - Reasons known or unknown       66 - End or expiration of contract or grant  
 65 - Transfer to a non-TAMUS agency or institution of higher education with no break in service
- Involuntary Termination** - Separation of employment initiated by the employer or by employee death. These require coordination with HR.  
Please select a termination code to show how this separation should be documented. Please [click here](#) for a detailed explanation of each code.
- 63 - Termination at will       66 - End or expiration of contract or grant  
 64 - Reduction in Force       69 - Death
- Retirement** - 68 - Employee must coordinate with TAMU HR to discuss retirement eligibility.
- Transfer Out** - Employee will transfer to another department or TAMUS agency  
Transferring to what department/TAMUS agency: \_\_\_\_\_

- Obtain letter of resignation from employee. (Notify and send to your Business Office as soon as possible.)
- Remind employee to submit any leave requests that have not been reported in Workday.

## Retrieve for Security and Deactivation and send to your Business Office along with this form:

- Office, building, desk keys       Ask employee to e-mail electronic files to supervisor or designee
- Parking/business permit (and HSC Overlay if applicable)       Ask employee to give hard copy files to supervisor or designee
- Staff Identification Card       Obtain voice mail password from employee \_\_\_\_\_
- Payment and/or Travel Card       Coordinate with HR Liaison to deactivate access. (FD-805, FAMIS, etc.)
- Office equipment: laptop, iPad, or other electronic devices       Any other miscellaneous items

## Other Departmental Activities:

- Organize farewell event
- Have employee contact the HR Benefits Office at 862-1718, to discuss insurance, retirement accounts, etc.
- Have employee update home and e-mail address in Workday and verify that their W-2 will be sent to them electronically
- Ask employee if they wish to [donate sick leave](#) balance to SLP

**\*If employee is moving out-of-state, please advise them that when changing their residential address, to enter an effective date after their last day of work; otherwise, they could have additional state taxes deducted from their last paycheck.**

\_\_\_\_\_ Date

## HR Liaison Actions - For Business Office Use Only:

- Annual leave balance - Lump sum or exhaust on payroll       Transfer or inactivate personnel file ([only transfer if within TAMU](#))
- Deactivate all keyless building access in Matrix/Frontier system       Process termination of access to secure user systems if not processed by unit office
- Route form to [cancel signature authority](#), if applicable       [Remove Communications Allowance](#), if applicable
- Submit a [Terminate User Request](#) to IT support via VPR intranet       Ensure employee is promptly removed from payroll upon termination date
- E-mail Financial Management Operations       Remove employee from biweekly payroll contact list (if applicable)
- Update the org chart for the business unit by vacating the position and updating the revised date

This form will be retained in the Employee's Personnel File. If you have questions, please contact Renee' Weidemann at 845-2060 or [r-weidemann@tamu.edu](mailto:r-weidemann@tamu.edu)