

TDCJ
Separation and Retirement Checklist
Use with Road Map 098, Separation and Retirement

Section I: Employee Information			
Use mm/dd/yyyy format to enter dates. Information needed in order to process: ASGNB, TIMX, final roster or timesheet from supervisor, and ERDU screen. Follow Retention Worksheet for employee files, prior to making inactive file.			
Payroll Name:		DOB:	
Mailing Address:		Phone #:	
		Shift Card:	
		Job Title:	
Section II: Review or Provide to Employee			
Date	Y	N	N/A Employee received the Separation and Retirement Guide:
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> In person <input type="checkbox"/> Mailed via first class to above address
	<input type="checkbox"/>	<input type="checkbox"/>	Benefits Election Form: ERS address change, if differs from above; scan and email to: hrinsurance@tdcj.texas.gov
	<input type="checkbox"/>	<input type="checkbox"/>	SAO Unique ID: print 2 copies; <input type="checkbox"/> Provided in person <input type="checkbox"/> Mailed Applicable codes: RS051, RS052, RS053, RS054, RS055, RS056, RS058, RS059, RE068, and TR065
	<input type="checkbox"/>	<input type="checkbox"/>	Complete Exit Interview Log for voluntary separations: CO III-V, PO I-II, FSM, LM
	<input type="checkbox"/>	<input type="checkbox"/>	Verbal resignation: IOC; Date employee verbally notified of resignation: _____; place in HR File
	<input type="checkbox"/>	<input type="checkbox"/>	Receive Letter of Resignation; date stamp; example in Forms Packet; Date received: _____
	<input type="checkbox"/>	<input type="checkbox"/>	Receive Letter of Intent to Retire; date stamp; example in Forms Packet; Date received: _____ ERS retirement effective date: _____; place in HR File
	<input type="checkbox"/>	<input type="checkbox"/>	Complete RETU screen in PPS for retirees; Date RETU completed: _____ Date PSC completed _____; place in HR File
	<input type="checkbox"/>	<input type="checkbox"/>	Separating return-to-work retiree: send email to hrinsurance@tdcj.texas.gov , include employee's name, employee ID, separation date, and state employee is a separating return-to-work retiree.
	<input type="checkbox"/>	<input type="checkbox"/>	Notify supervisor or department head, administration, laundry manager, if applicable, and SAFE Prison/PREA coordinator of separation
	<input type="checkbox"/>	<input type="checkbox"/>	Delete scheduled trainings; view PPS/TRNELS
	<input type="checkbox"/>	<input type="checkbox"/>	TNG99, TNG100: List SSN on card, email to employee.services@tdcj.texas.gov ; Date removed from HR File: _____
	<input type="checkbox"/>	<input type="checkbox"/>	PERS 327, Rehire Review Required; copy to employee; original to HRHQ;
	<input type="checkbox"/>	<input type="checkbox"/>	CO Transfer List; complete and send CO_TRN_CAN eform
	<input type="checkbox"/>	<input type="checkbox"/>	Print the ERDU PPS screen; update timesheet or roster
	<input type="checkbox"/>	<input type="checkbox"/>	Update OnBase PAY51300, Strength Report
	<input type="checkbox"/>	<input type="checkbox"/>	Request to Fill Vacancy: Complete and send REQ TO FILL eform
	<input type="checkbox"/>	<input type="checkbox"/>	Pull HR and Medical Files; Place in inactive files; follow Retention Worksheet for Discipline, Grievance, and EEO Files
Section III: Leave Balances			
Holiday/Comp	<input type="checkbox"/>	<input type="checkbox"/>	Employee: PERS 428, Leave Accrual Options, required; email to Payroll@tdcj.texas.gov ; copy in HR File; copy to employee
	<input type="checkbox"/>	<input type="checkbox"/>	Holiday Missed: Value reviewed
	<input type="checkbox"/>	<input type="checkbox"/>	PERS 500, In Lieu of Holiday: Take holiday previously received from CT, HT, VT, or OT
Vacation or Overtime	<input type="checkbox"/>	<input type="checkbox"/>	PERS 24, TDCJ Leave Request; more than three consecutive workdays, warden or dept head approval needed
	<input type="checkbox"/>	<input type="checkbox"/>	PERS 571, Lump Sum Deferral TexaSaver 401(k) and 457 Plans, scan & email to hrinsurance@tdcj.texas.gov ; only if unable to scan, fax to (936) 437-3577
Sick Time	<input type="checkbox"/>	<input type="checkbox"/>	Complete and send WORK_SUPP eform
	<input type="checkbox"/>	<input type="checkbox"/>	PERS 205, Sick Leave Pool Contribution; enter in PPS via SKPCU screen
	<input type="checkbox"/>	<input type="checkbox"/>	PERS 209, Family Leave Pool Contribution; enter in PPS via FLPCU screen
	<input type="checkbox"/>	<input type="checkbox"/>	PERS 637, Sick Leave Donation; scan & email to HRLeaves@tdcj.texas.gov ; only fax if unable scan to (936) 437-4140

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Section IV: Timekeeping	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Pending PR-1, Manual Time Adjustment: Verify time has been accounted for
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Obtain final time sheet or roster. Last physical date worked: _____ Last supervisor: _____; Last assigned shift: _____
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Key time; If card schedule required change, circle one - Z, OZ, or PZ
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Enter actual hours: RW + # of CT, HT, VT, ST, or OT hours taken
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Payroll Status Change; Reason Code: _____
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CO Recruitment Bonus repayment amount from PPS/BONUS screen: \$ _____
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Equipment Operators (Truck Driver) Bonus repayment amount from PPS/Bonus screen: \$ _____
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	MS I-V Recruitment Bonus repayment amount from PPS/BONUS screen: \$ _____
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Parole Officer Bonus repayment amount from PPS/Bonus screen: \$ _____
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Cancel laundry, barber, and commissary via BLCU screen; email laundry to cancel laundry number
Section V: Account Clearance: Applicable items must be turned in for account to clear and receive final paycheck	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Employee ID Card or Badge: <input type="checkbox"/> Received <input type="checkbox"/> Destroyed <input type="checkbox"/> Deactivated
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	PERS 430, Retiree ID Card Request: Mail PERS and ID card to HRHQ - Employment Section, ID Cards
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Keys, office, car, housing, post office box: Contact maintenance via email for cost replacement
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Uniforms: Contact Unit Supply, via email, for cost replacement \$ _____; employee must pay for unreturned clothing via check or MO; see RM-098, Separation and Retirement
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	State issued credit card
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Brad Livingston Administrative Headquarters parking sticker
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Laptop computer
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Cell phone
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Other state property not listed: _____
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Verify advance travel money has been returned; Consult regional/unit travel coordinator who received an advance.
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Account Clearance: Send PR_CLEAR eform when all state property is returned, verified, or paid for.
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	State Housing Disconnect Notice; employee must be completely vacated & keys returned before Disconnect Notice is sent; complete, scan & email to employee.housing@tdcj.texas.gov or fax to (936) 437-6250

Section VI: In-person Employee Acknowledgement

I received the Separation and Retirement Guide with the applicable handouts and will contact my HR rep with any questions.
 It is my responsibility to turn in all TDCJ property to the proper authority before I can be cleared to receive my final paycheck.
 If I retire, I will not be eligible to return to work for TDCJ for 90 calendar days from my retirement date.
 All rights to my retirement account will be cancelled if I separate employment and withdraw my retirement contributions to ERS.
 Class A or B criminal convictions occurring during my employment could make me ineligible for re-employment.
 I understand if I am a TDCJ correctional officer convicted of a qualifying felony arising from my duties as a correctional officer, I will be ineligible to receive a service retirement annuity. Upon conviction, ERS will suspend annuity payments. I am entitled to a refund, with interest, of my ERS contributions. See PD-44.

Employee Signature

Date: mm/dd/yyyy

HR Rep Signature

Date: mm/dd/yyyy

Section VII: Employee Not Present for Discussion (Section VI Remains Applicable)

HR Rep Signature

Date signed; Checklist, Guide mailed: mm/dd/yyyy