

# Separation Checklist Process

## AiM

### 2020

*Need help: call IMS 862-3388 <https://sscaimapp.assetworks.com/fmax>*



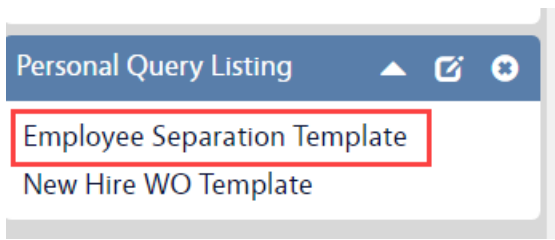
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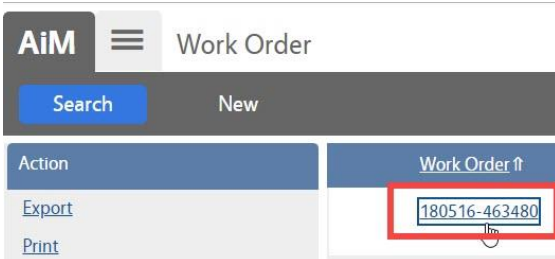


# Create the Work Order

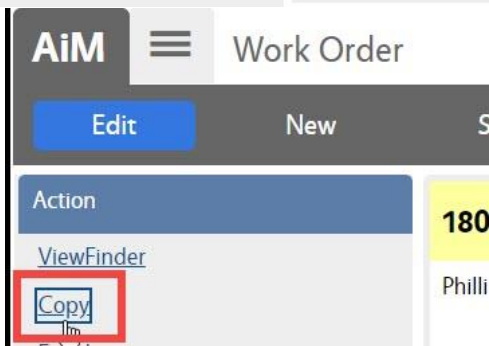
An ADMIN Work Order will be created for each new hire. The Work Order will have 4 phases. 1 for HR, 1 for Supervisors, 1 for Equipment and 1 for IMS.



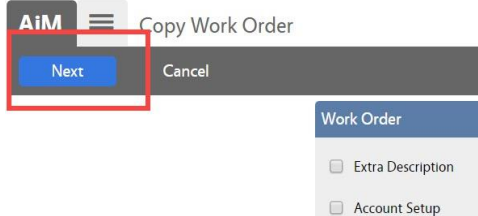
- In the top right hand corner of the AiM WorkDesk, Click Employee Separation Template



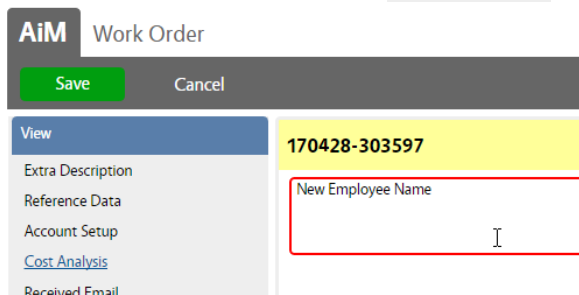
- Click on the Work Order number



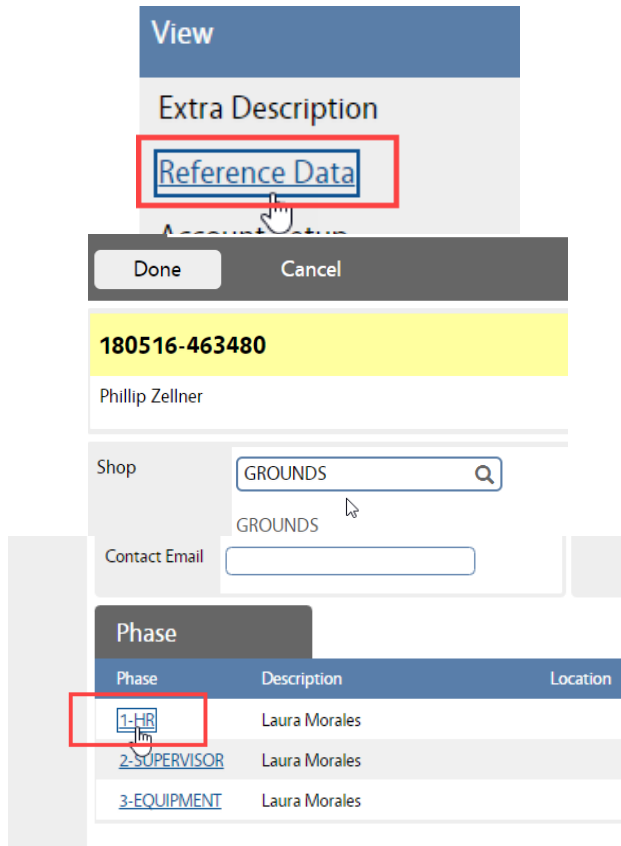
- Click Copy



- Click **Next**



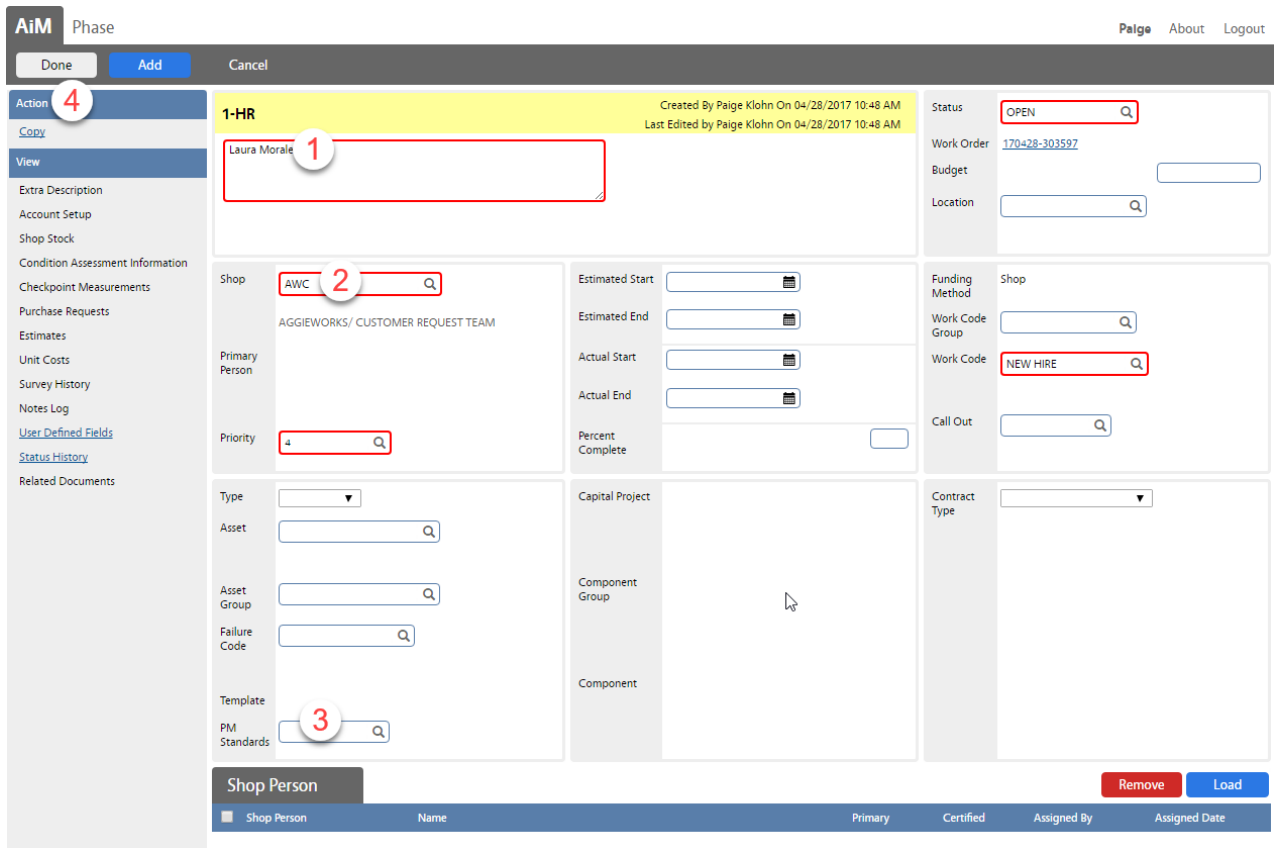
- Add the employee's name to the Description



- Click Reference Data

- Add the Shop hiring the employee
- Click **Done**

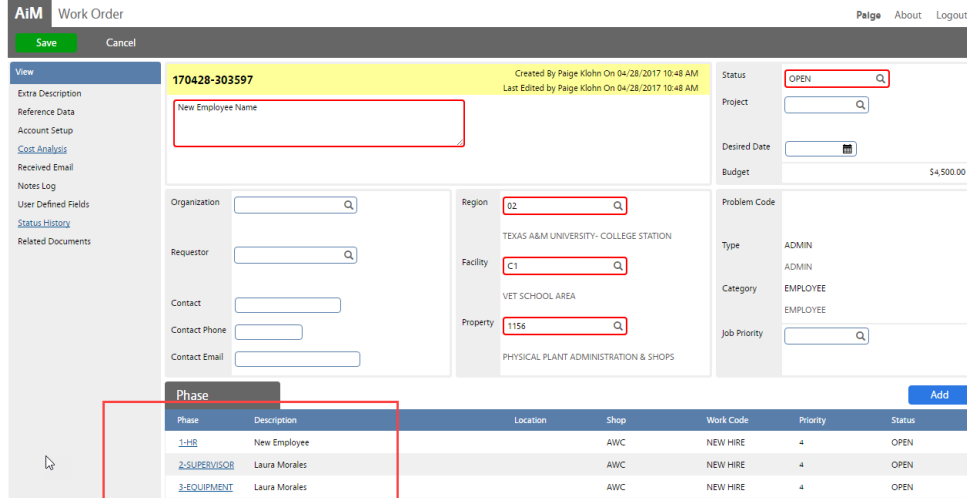
- Click on Phase 001-HR



1. Change the Employee Name
2. Change the Shop to the HR

3. Add EXIT HR to PM Standard field

4. Click 



Phase	Description	Location	Shop	Work Code	Priority	Status
1-HR	New Employee		AWC	NEW HIRE	4	OPEN
2-SUPERVISOR	Laura Morales		AWC	NEW HIRE	4	OPEN
3-EQUIPMENT	Laura Morales		AWC	NEW HIRE	4	OPEN

5. Repeat with the other 3 phases.

6. PM Standard to add is

- 002-SUPERVISOR – EXIT SUPERVISOR (Shop – Hiring Shop)
- 003-EQUIPMENT – EXIT EQUIPMENT (Shop – FSW)
- 004-IMS – EXIT IMS (Shop – IMS)

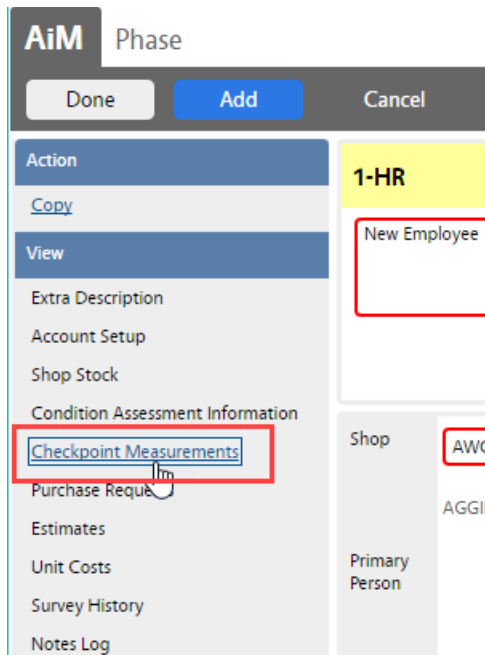
7. Click 

## Complete Checklist

On the Work Order phase,

Click 

Click Checkpoint Measurements on the appropriate phase to access the Checklist.



**AiM Phase**

Done Add Cancel

Action

Copy

View

Extra Description

Account Setup

Shop Stock

Condition Assessment Information

**Checkpoint Measurements**

Purchase Requisition

Estimates

Unit Costs

Survey History

Notes Log

**1-HR**

New Employee

Shop: AWC

AGGIE

Primary Person

**AiM Phase**

Done Add Cancel

**Action**

Copy

**View**

Extra Description

Account Setup

Shop Stock

Budget Change Order

Condition Assessment Information

Checkpoint Measurements

Cost Analysis

Dependencies

Purchase Requests

Estimates

Unit Costs

Survey History

Notes Log

User Defined Fields

Status History

Related Documents

Checkpoint	Value	Description	Extra Description
MENTOR	<input type="text"/>	MENTOR ASSIGNED	<input type="text"/>
ID BADGE	<input type="text"/>	EMPLOYEE ID BADGE WAS PICKED UP	<input type="text"/>
SHOP TOUR	<input type="text"/>	locate restrooms, water fountains, safety boards, punch clocks, supervisors office, etc.	<input type="text"/>
PARKING PERMIT	<input type="text"/>	Pick up parking permit from TAMU parking office (Koldus)	<input type="text"/>
KEYS	<input type="text"/>	List the Keys signed out to the new associate	<input type="text"/>
TOOLS	<input type="text"/>		<input type="text"/>
UNIFORM	<input type="text"/>		<input type="text"/>
VEHICLE	<input type="text"/>		<input type="text"/>
COMPUTER ACCESS	<input type="text"/>		<input type="text"/>
EMAIL	<input type="text"/>		<input type="text"/>
IPHONE	<input type="text"/>		<input type="text"/>

**Attribute Validation**

Done Search Cancel

Code #	Description
GENERAL ELECTRICAL TOOLS	
GENERAL HVAC TOOLS	
GENERAL MAINTENANCE TOOLS	
GENERAL PLUMBING TOOLS	
OTHER - LIST TOOLS IN NOTES	

**Date Fields**

**Notes**

**Validated Options to make requests**

Complete each item.

If an item does not apply, enter a date and add a note of Not Applicable.

Click **Done** to return to the Phase.

Once all items are complete, change the Phase status to COMPLETE.

HR – When all phases are complete, change the Work Order status to CLOSED.