# Separation Checklist Process AiM

#### 2020

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

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Complete Checklist Error! Bookmark no	t defined.

## **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.

JI.

Personal Query Li	sting	<b>•</b> C	ő 😆		
Employee Separa New Hire WO Ter		mplate			
AiM = Work	(Order				
Search N	ew				
Action		Wor	<u>k Order</u> îî		
Export Print		1809	516-463480		
	Wo	r <mark>k Ord</mark> er			
Edit		New	s		
Action		1	180		
ViewFinder Copy			Philli		
AiMCopy	Work Orde	er			
Next Can	cel				
		Work Order			
		Extra Desc			
AiM Work Order		Account S	etup		
Save Cancel					
View	470.000	202505			
Extra Description		-303597			
Reference Data Account Setup					
Cost Analysis			I		
Received Email					

- 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

View		
Extra	Description	
Refe	rence Data	
Done	Cancel	
400546.46		
180516-463	3480	
Phillip Zellner		
Shop	GROUNDS Q	
Contact Email	GROUNDS	
Phase		
Phase	Description	Location
1-HR	Laura Morales	
2-SUPERVISOR	Laura Morales	
3-EQUIPMENT	Laura Morales	

- Click Reference Data
- Add the Shop hiring the employee
- Click Done

• Click on Phase 001-HR

AiM Phase					Palge	About	Logout
Done Add	Cancel						
Action 4 Copy View Extra Description Account Setup Shop Stock	1-HR Laura Morale 1	Created By Paige Klohn On 04/28/2017 10:48 AM Last Edited by Paige Klohn On 04/28/2017 10:48 AM	Status Work Order Budget Location	OPEN <u>170428-303597</u>	<u>م</u> ر		
Condition Assessment Information Checkpoint Measurements Purchase Requests Estimates Unit Costs Survey History Notes Log <u>User Defined Fields</u> Status History	Shop Awc 2 Q AGGIEWORKS/ CUSTOMER REQUEST TEAM Primary Person	Estimated Start Estimated End Actual Start Actual End Percent Complete	Funding Method Work Code Group Work Code Call Out	Shop NEW HIRE Q	٩		
Related Documents	Type  Asset  Q Asset  Q Asset  Q Asset  Q Asset  Q Asset  Q Shop Person  Name	Capital Project Component Group Component	Contract Type Certified	Assigned By	▼ Remove	ssigned Dat	Load

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

- 3. Add EXIT HR to PM Standard field
- 4. Click Done

AiM Work Order					Pa	alge About	Logout
Save Cancel							
View	170428-303597		Created By Paige Klohn On 04/28/2017 10:48 Alv Last Edited by Paige Klohn On 04/28/2017 10:48 Alv		OPEN	Q	
Extra Description	New Employee Name		Last Edited by Paige Kionn On 04/28/2017 10:48 AN	Project	Q		
Reference Data Account Setup						5	
Cost Analysis		4		Desired Date			
Received Email				Budget			\$4,500.00
Notes Log							
User Defined Fields	Organization	Region	02 Q	Problem Code			
Status History Related Documents			TEXAS A&M UNIVERSITY- COLLEGE STATION	Туре	ADMIN		
	Requestor Q	Facility	C1 Q	type	ADMIN		
			,	Category	EMPLOYEE		
	Contact		VET SCHOOL AREA	congo.)	EMPLOYEE		
	Contact Phone	Property	1156 Q	Job Priority	Q	a	
	Contact Email		PHYSICAL PLANT ADMINISTRATION & SHOPS	,,		J	
			PHISICAL PEAK ADMINISTRATION & STOPS				
	Phase						Add
	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	

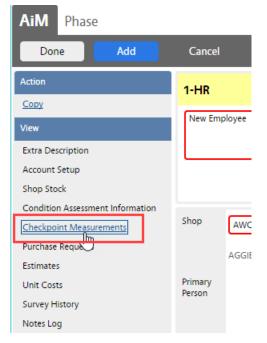
- 5. Repeat with the other 3 phases.
- 6. PM Standard to add is
  - a. 002-SUPERVISOR EXIT SUPERVISOR (Shop Hiring Shop)
  - b. 003-EQUIPMENT EXIT EQUIPMENT (Shop FSW)
  - c. 004-IMS EXIT IMS (Shop IMS)
- 7. Click Save

## **Complete Checklist**

On the Work Order phase,

Click Edit

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



AiM Phase Done Add Action	Cance		Date Fields	Notes
	Checkpoint	Value	Description	Extra Description
View	MENTOR		MENTOR ASSIGNED	
Extra Description Account Setup	ID BADGE		EMPLOYEE ID BADGE WAS PICKED UP	
Shop Stock Budget Change Order	SHOP TOUR		locate restrooms, water fountains, safety boards, punch clocks, supervisors office, etc.	
Condition Assessment Information Checkpoint Measurements Cost Analysis	PARKING PERMIT		Pick up parking permit from TAMU parking office (Koldus)	e
Cost Analysis Dependencies Purchase Requests	KEYS		List the Keys signed out to the new associate	
Purchase nequests Estimates Unit Costs	TOOLS		AiM = Attribute Validation	
Survey History Notes Log	UNIFORM		Done Search Cancel	
<u>User Defined Fields</u> Status History	VEHICLE		Code # Description GENERAL ELECTRICAL TOOLS	
Related Documents	COMPUTER ACCESS		Q GENERAL HVAC TOOLS	
	EMAIL		GENERAL MAINTENANCE TOOLS GENERAL PLUMBING TOOLS	
	IPHONE		Q.	
			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.