SEPARATING EMPLOYEE CHECKLIST

To be used when employee separates from the University

Berkeley Campus Shared Services

OWNER	TASKS
Supervisor/ Unit	☐ *Consult with HR/AP Partner* ☐ Approve and submit employee's final time in Caltime or Manual timesheet ☐ Verify with Employee (EE) if final check should be paper or direct deposit. ☐ If direct deposit, obtain written authorization. ☐ Submit ticket for separating EE; include resignation letter, manual timesheet, written authorization for direct deposit. ☐ If EE has direct reports, include who new supervisor(s) should be. ***Other suggested actions*** ☐ Transition of Employee's Work - Make transition plan with separating employee (EE). ☐ Phone - Notify IST Voice Services http://ist.berkeley.edu/services/catalog/voice to either change phone registration to a new EE or to disconnect the phone line (cellular and/or desk line). ☐ List Serves - Notify owner(s) of list serves to remove separating employee from mailing lists. ☐ Computer Equipment - Notify IT Departmental On-site Computing Support (DOCS) http://ist.berkeley.edu/docs/ or department IT desktop support to disconnect, store, or transfer desktop and computer hardware and remove system access. ☐ Business Systems Access: - Remove via SARA http://sara.berkeley.edu/ for BFS, BAIRS, etc. - Remove via e-mail or other request system for miscellaneous department- or unit-specific systems. ☐ Building Access - Notify building manager to deactivate separating EE's access to any secure buildings. ☐ BCal - Have EE remove all future meetings or transfer meetings to designated staff member. ☐ Website - Work with webmaster to remove EE name and contact information from staff website. ☐ E-mail Announcement - Send e-mail announcement to department, if desired. ☐ UC Equipment - Collect, including building keys, cabinet/desk keys, access cards, ID card, cell phone, pager, radio, laptop, wireless card, books, credit cards, parking pass, materials, manuals, etc. ☐ Phone - Have EE reset password on desk phone and cell phone to 7-digit extension and update greeting. ☐ Exit Meeting - If employee is not at work for the exit meeting, contact the employee to make arrangements for return of UC equipment and pick-up of personal items.
Separating Employee	☐ Timesheet – Enter time in Caltime or submit manual timesheet ☐ Final Paycheck – Indicate paper check or direct deposit to your supervisor. If you would like direct deposit please provide your supervisor with written authorization. ☐ Checklist - Review Termination of Employment Benefits Checklist: http://atyourservice.ucop.edu/forms_pubs/checklists_factsheets/termination_emp.pdf ***Other suggested actions*** ☐ Personal Items - Remove all personal items from desk/office, including books, CDs, pictures, food items, etc. ☐ List Serves - If managing a list serve, turn over management of list serve to designated staff member. ☐ Permanent Address - Update permanent address on http://blu.berkeley.edu. ☐ Payroll Deductions - Cancel parking, BART/bus pass, memberships. ☐ UC Equipment - Return all campus keys, access cards, cell phones, laptop, radio, credit cards, manuals, etc. ☐ Phone - Reset password on desk phone and cell phone to 7-digit extension, if applicable. Change greeting.
CSS HR/APS	**First Contact or Other** ☐ Gather all separation data and documents using the "Separation Checklist" found in the Knowledge Base ☐ Notify UCPD to discontinue FBI and DOJ background check feed per instruction on PAWS ☐ If applicable, when employee is enrolled in DMV Pull program, submit deletion of driver request form to DMV **Service Delivery** ☐ Conduct exit interview, if applicable, and collect any desk/office items as indicated to generalist or on separation PAWS ticket. ☐ Review request and advise as required ☐ For involuntary separations indicate distribution method and location for final pay **Timekeeping** ☐ Confirm direct deposit or paper check, if paper check confirm distribution preference for paper check ☐ If employee selects direct deposit, obtain written authorization ☐ Review time in Caltime or collect manual timesheet from supervisor ☐ Reconcile leave balances ☐ If Caltime signoff has occurred before the termination date, review PPS, verify and manually RX any transactions that were batched to PPS. ☐ Complete Payroll Separation Check Request Form - Process (incl. vacation/comp time to be paid out, if applicable) ☐ Submit separation check request form to central payroll ☐ Distribute paper check if applicable and notify supervisor or employee when check is ready for pick up ☐ Verify that the HCM transaction passed properly to PPS **HRIM** ☐ Separate job record in HCM ☐ If separating employee is a supervisor, update supervisor info for direct reports in HCM **HR Records** ☐ File documents ☐ Update personnel/medical file and move personnel file to "Separated" files; note destroy date