## Pre-Separation Checklist (Complete upon receipt of resignation/notification of termination.)

Please use the following checklist to ensure that all items related to the employment with the University are closed. It also provides Supervisor a process to collect the University’s property and to maintain the security of the physical and intellectual property of the organization. This checklist should be completed when an employee separates employment by resignation, involuntary separation, retirement, death, or non-renewal of appointment. All items may not apply to a given individual.

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<th>Task Leader</th>
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</table>
|            | Identify Separation Type | Types of Separation:  
- Voluntary Separation  
  - Voluntary Resignation (letter/verbal)  
  - Medical Separation  
  - Retirement  
  - Transferring to another department  
  - Job abandonment *(Failure to report to work for 5 consecutive days. Please discuss with HR)*  
- Involuntary Separation  
  - Medical Separation  
  - Release/dismissal  
  - End of Limited Appointment  
  - End Contract Appointment (Professionals and Support Appointment) | Supervisor |
|            | Separation Documentation | Obtain the letter of resignation or notification of termination from employee (via letter or email). | Supervisor |
|            | Notify Human Resources/Payroll/Benefits of Separation | Submit Biz E Bears (BEB) ticket to request employee separation. Please attach resignation and/or termination letter and acceptance of resignation for Human Resources.  
**Note:** If the separation is for more than 10 people, it is considered a Mass Transaction in BEB. Please contact your HR/Payroll team at least 3 weeks before | Supervisor - Payroll |
## Supervisor Checklist for Employee Separation

<table>
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<tr>
<th>Task</th>
<th>Instructions</th>
<th>Responsible Party</th>
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| **Acceptance/Notification of Termination**                          | **Voluntary Termination:**  
  - Upon receipt of an employee’s voluntary resignation, respond to the employee using an Acknowledgement of Resignation Letter. Please provide HR with a copy.  
  **Involuntary Termination:**  
  - Follow applicable policies regarding notification of termination. Please provide HR with a copy.                                                                                                                                                                                               | Supervisor/Human Resources        |
| **Employee Separation Checklist**                                   | Provide employee with the Employee Separation Checklist.                                                                                                                                                                                                                                                                                        | Supervisor/Human Resources        |
| **Payroll**                                                         | Ensure that employee submits his/her final timesheets 6 business days prior to end date. Payroll will coordinate final pay method with employee. For direct deposit option, make sure we have written documentation or it will not be an option.                                                                                                                        | Supervisor / Employee             |
| **Job specific duties/work procedures**                             | Coordinate with employee on the transition of any outstanding work, job specific duties, work procedures, and/or transitional training needs. Examples:  
  - Transfer equipment to appropriate person/department  
  - Transfer any approval responsibilities (e.g. BEB, Travel & Reimbursements etc)  
  - Transition of role in department’s specific committee/teams (ie Safety, Emergency Response, Ergonomics)  
  - Prepare to notify employee’s contacts (e.g. vendors, clients, etc.)                                                                                                                                                                                                                   | Supervisor / Employee             |
| **Performance Evaluation (if applicable)**                          | If the employee has not been evaluated in the past 12 months, or if the employee’s performance has changed substantially since the last evaluation, complete a final performance evaluation and provide a copy to the employee (optional for temporary employees).                                                                                                           |                                   |
| **Notify functional groups of separation (if applicable)**          | Send an announcement of separation to all relevant internal groups and campus partners.  
  **Sample Email:**  
  Dear Colleagues,                                                                                                                                                                                                                                                                                                                      | Supervisor                        |
(Employee’s Name) has announced his/her resignation as the (role) from (program/unit name), effective (date of separation). His/her (indicate relevant contributions made to the program/unit) are greatly appreciated and recognized. Please join me in wishing (Employee’s Name) the best in his/her future endeavors.

Sincerely,
(Your Name)

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<th>□</th>
<th>Reminder to Employee</th>
<th>Remind employee of their responsibilities which may include:</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>• Deposit check</td>
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<td>• Create Voice Mail and E-mail away message</td>
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<td>• Identify and transfer any business relates e-files, document or emails to a folder that can be accessed by others after the employee has separated</td>
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<td>• Make appointment with Human Resources <em>(if applicable)</em></td>
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<td>• Leave a correct forwarding address</td>
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<td>• If applicable, schedule exiting interview with Human Resources</td>
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<td></td>
<td></td>
<td>• If applicable, contact Benefits for retirement and Cobra forms</td>
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<td>• <strong>Remind employee that these reminders are simply a brief overview of his/her responsibilities and to ensure proper separation s/he must complete each task specified on the Employee Separation Checklist.</strong></td>
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<tr>
<th>□</th>
<th>Reemployment <em>(if applicable)</em></th>
<th>Explain eligibility for reemployment.</th>
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<tr>
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<th>Human Resources Documents <em>(if applicable)</em></th>
<th>Turn in any outstanding personnel documents relevant to the employee to Human Resources such as:</th>
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<tr>
<td></td>
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<td>• Performance Evaluations</td>
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<td>• Personnel file</td>
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<td>• Training Records</td>
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<td></td>
<td>• System Access agreements</td>
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<td></td>
<td></td>
<td>• Separation Checklist (completed)</td>
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</table>

| □ | Farwell Card *(if applicable)* | In functional group, create and sign farewell card for employee. |
| Farewell Event (if applicable) | • Request retirement gift for employees – submit as soon as you receive the proper paperwork.  
• If the resignation falls under applicable policy, the department can request a farewell event (i.e. retirement party) for the separating employee. Please coordinate with your Event Management team at:  
  http://campuslife.berkeley.edu/busops/events/contacts | Supervisor/Event Management Team |
### Supervisor Checklist for Employee Separation

#### Employee’s First and Last Name: [ ]

#### Supervisor: [ ]

#### Date: [ ]

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**Separation Checklist** *(Complete on the last day of work.)*

Please use the following checklist to ensure that all items related to the employment with the University are closed. It also provides the Supervisor a process to collect the University’s property and to maintain the security of the physical and intellectual property of the organization. This checklist should be completed when an employee separates employment by resignation, involuntary separation, retirement, death, or non-renewal of appointment. All items may not apply to a given individual.

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|            | **Equipment/Property**| Collect following items from employee and send to appropriate:  
  - Keys: Building, desk, filing cabinet, office keys, vehicle  
  - Building access cards  
  - Complimentary parking pass, Travel Card, ProCard, credit cards, etc.  
  - UC property given for term of employment (e.g. laptop, cell phone, books, disks/manuals, camera, etc.)  
  - Uniforms  
  - Tools and equipment  
  - Cal ID card (send to Cal I Card Office)  
  - Employee’s hardcopy and electronic files                                                                                                                                                                                                                                                                       | Supervisor        |
|            | **Building/Office Services** | Please ensure that all building and office services are removed/deactivated:  
Examples:  
  - Cancel Building Access Code (For RSSB, send email to Larry Wong to remove access)  
  - Cancel keypad codes to offices  
  - Cancel/reset/transfer phone line and voice mail  
  - Change employee’s voicemail message  
  - Notify the mail room of separation                                                                                                                                                                                                                                                                               | Supervisor        |
|            | **Workspace preparation** | Ensure that employee’s workspace is clean and personal items are removed.                                                                                                                                                                                                                                                                                   | Supervisor/Employee |
## Student Affairs
### Supervisor Checklist for Employee Separation

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<tr>
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<th>Description</th>
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| **Financial** *(if applicable)* | Complete the following tasks to ensure that all financial transactions with employee cease in a timely manner. Examples:  
- Check for personal charges on credit cards, personal calls on phones, etc.  
- Verify to make sure any outstanding reimbursement/expense reports are submitted for payment.  
- Verify if employee executed any Promissory Notes on behalf of UC and follow appropriate steps. *(if applicable)*  
- Obtain any reimbursement for overpayment by check made payable to UC Regents. *(if applicable)*  
- Obtain petty cash fund and provide notification of new custodian. *(if applicable)*  
- Remove employee’s name from any financial signature authority.  
- Change safe combinations *(if applicable)* | Supervisor |
| **List Serves** | Request to remove employee from applicable internal list serves and shared drives with HR and IT. | Supervisor |
| **Computer setup and software** | Coordinate with IT to remove appropriate system access, computer setup, hardware, software and network. Examples:  
- Calnet ID accounts  
- Cal Agenda  
- Active Directory  
- Close BFS and BAIRS account  
- Remove onsite and/or remote access to systems  
- Cancel employee access to computer data systems  
- Cancel email account  
- Transfer/forward employee existing /incoming emails to supervisor | Supervisor/Employee/SAIT |
| **Systems Access Deactivation** | Go to SARA (Systems Access Request Application) website to delete employee’s access on appropriate systems. Examples:  
- HCM  
- BAIRS  
- BIS | |
| Student Affairs  
| Supervisor Checklist for Employee Separation |

- BFS
- BIBS
- CARS
- PPS accounts

| ☐ Records Security | Complete the following applicable tasks to maintain the safety and security of the University’s records and data systems:
- Ask employee to return any UC records (e.g. paper, electronic, email) held in his/her work area or home office/computer.
- Obtain password rights to any administrative database, software application, information systems, etc., for which employee possesses the sole access rights.
- Cancel or change names on subscriptions, institutional memberships, etc. |
| | Supervisor |

| ☐ Separation Meeting | Discuss appropriate details regarding separation and review any relevant policies. Examples:
- Discuss confidentiality or proprietary information agreement |

| ☐ Additional: |

| ☐ Additional: |