

IST/OCIO Human Resources: SEPARATING EMPLOYEE CHECKLIST

IF INVOLUNTARY SEPARATION, CONTACT OUR CSS/HR PARTNER Carole Salerno clsalerno@berkeley.edu

Employee Name:		Effective Date of Termination:
OWNER	TASKS	
Supervisor/ Manager	<p>At least 14 days before actual separation date:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Plan complete work turnover <input type="checkbox"/> Notify the IST admin support team (istadminhelp@berkeley.edu), Access and Building Team (ist-access@lists.berkeley.edu), Margarita Zeglin (mzeglin@berkeley.edu) and provide last day or separation date. <input type="checkbox"/> Notify your Department Budget Officer and include a copy of the resignation letter (if applicable) and provide last day or separation date. <input type="checkbox"/> Collect keys (including T-keys, cabinet, building keys, access cards, ID card, cell phone, pager, radio, laptop, wireless card, UCB books, materials, and other department manuals and equipments) <input type="checkbox"/> Collect credit cards, parking pass <input type="checkbox"/> Complete account access changes/deletions: Calnet ID, Calmail, SHIPS/d, Active Directory, Kronos, Reset password on desk phone and returned cellphones <input type="checkbox"/> Remove business systems access through SARA http://sara.berkeley.edu/ and other system access <input type="checkbox"/> Remind employee to pick up final pay check. CSS/Payroll will provide instructions to the separating employee. <input type="checkbox"/> If employee is not at work for the exit meeting, contact the employee to make arrangements for pickup or delivery of personal items <input type="checkbox"/> If enrolled in DMV Pull, submit deletion of driver request form. 	
Department Budget Officer (DBO)	<ul style="list-style-type: none"> <input type="checkbox"/> Submit a CSS/HR ticket with name, employee ID and effective date of separation. You may also include a copy of the resignation letter. 	
Separating Employee	<p>At least 1 day before or on last day of work (may not be the actual separation date):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Return all campus keys, access cards, cell phones, laptop, radio, etc. <input type="checkbox"/> Remove all personal items from desk/office (including books, CDs, pictures, food items) <input type="checkbox"/> Reset password on desk phone <p>On last day of work</p> <ul style="list-style-type: none"> <input type="checkbox"/> Pick up final pay check based on instructions from the CSS Payroll office if paper check is preferred. Direct Deposit is also an option. 	
CSS-HR	<p>1-2 weeks before the end date</p> <ul style="list-style-type: none"> <input type="checkbox"/> Terminate job record in HCM <input type="checkbox"/> Update personnel/medical file <input type="checkbox"/> Notify UCPD of separating employee 	
CSS-HR-Payroll	<ul style="list-style-type: none"> <input type="checkbox"/> Process 72-hour payroll separation check request form <input type="checkbox"/> Pick up check from campus Payroll Office (if pick up is preferred). Direct Deposit is also an option. <input type="checkbox"/> Notify the hiring supervisor/employee before employee's last day when check is ready for pick up (if applicable). <input type="checkbox"/> Give final check (if applicable) to separating employee with explanation of termination pay including what happens to their vacation and sick balances 	
Building and Equipment Management	<ul style="list-style-type: none"> <input type="checkbox"/> Remove mailbox, cubicle name plates and emergency pack <input type="checkbox"/> Collect access cards, keys 	
Administrative Support	<ul style="list-style-type: none"> <input type="checkbox"/> Remove separating employee from staff directory, org chart, email lists, group list. <input type="checkbox"/> If separating employee is a supervisor, update supervisor info for direct reports. <input type="checkbox"/> Schedule an exit interview with AVC Larry Conrad (Margarita Zeglin) 	

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