

SEPARATING EMPLOYEE CHECKLIST

EXECUTOR	TASKS
Supervisor	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure formal communication of employee separating (i.e. letter of resignation/intent to retire, layoff notification, end of appointment memo, etc.) is submitted to Jasmine Lopez <input type="checkbox"/> Approve and submit the employee’s final time in Caltime as early as possible, indicating <u>any leave</u> the employee intends to use up to the separation date. An approved timesheet is required to calculate and issue final pay. <input type="checkbox"/> Transition of Employee’s Work - Make a transition plan with separating employee. <input type="checkbox"/> Phone - Notify Maria Martinez to either change phone registration to a new employee or to disconnect the phone line (cellular and/or desk line). Have employee reset password on desk phone and cell phone to 7---digit extension and update the greeting. <input type="checkbox"/> Notify listserv owner(s) to remove separating employee from mailing list(s). Employee can unsubscribe from all LHS Email List Serves by visiting bconnected.berkeley.edu <input type="checkbox"/> Notify System Administrator, Anna Maurer, so that access to file server and any other permission granted systems can be removed <input type="checkbox"/> BCal - Have employee remove all future meetings or transfer meetings to designated staff member. <input type="checkbox"/> E-mail Announcement - Send e-mail announcement to department, if desired. <input type="checkbox"/> Coordinate return UC Equipment & pick up of personal Items - - Notify Deborah Martinez of separating employee and coordinate a time for employee to return all UC Equipment. This includes building keys, cabinet/desk keys, access cards, ID card, cell phone, radio, laptop, monitors, any additional UC-purchased ergonomic equipment wireless card, books, credit cards, parking pass, manuals, etc. Employee will also need to plan to pick-up of personal items from the building. <p><i>If your employee is retiring,</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Discuss recognition preference with employee (e.g. do they want a celebration with the department or team). Retiring employees may receive a parting gift valued at up to \$400 as determined by the supervisor. <input type="checkbox"/> Contact the Discovery Corner Store Manager and Public Engagement Business Director to put together a retiree appreciation package, including Lawrence-branded swag, and arrange for it to be presented or sent to the departing employee. <input type="checkbox"/> Contact the Randy Brittainto have the employee added to the lifetime Carbon membership level list.
Separating Employee	<ul style="list-style-type: none"> <input type="checkbox"/> If resigning or retiring, submit a letter or email of resignation/intent to retire to supervisor and cc: Jasmine Lopez <input type="checkbox"/> Timesheet – Enter and approve time in Caltime or submit a manual timesheet. Indicate any leave you intend to use by the separation date to ensure your <u>final pay</u> is correct. <input type="checkbox"/> If you’re leaving the University of California, visit UCnet’s Leaving UC Employment for steps to consider <input type="checkbox"/> Complete the Lawrence Exit Survey <input type="checkbox"/> Complete the UC Exit Survey <input type="checkbox"/> Coordinate return UC Equipment - Contact Deborah Martinez to coordinate a time to return all UC Equipment. This includes building keys, cabinet/desk keys, access cards, ID card, cell phone, radio, laptop, monitors, any additional UC-purchased ergonomic equipment, wireless card, books, credit cards, etc. <input type="checkbox"/> Notify listserv owner(s) to remove you from mailing list(s). You can unsubscribe from all Lawrence Lists by visiting bconnected.berkeley.edu , selecting” Manage Your Mailing Lists" and then choosing “Leave This Group <input type="checkbox"/> Personal Items- Remove all personal items from desk/office, including books, pictures, food items, and return any remote work equipment purchased by UC. <input type="checkbox"/> Update permanent address in UCPath <input type="checkbox"/> Payroll Deductions - Cancel parking, BART/bus pass, memberships, etc. <input type="checkbox"/> Set E-mail out of office message <input type="checkbox"/> If you are getting your next job where CalPers is applicable, read the UCRP/CalSTRS Concurrent Retirement Guide. Questions should be directed to RASC at UCOP. <input type="checkbox"/> CalNet Identity- Review the details under the tab “Grace Period by Affiliation”.