

Department and Employee Separation Checklist

Please complete the below tasks in a timely manner to ensure smooth separation

1) HR Contact Information

HR Business Partner(HRBP):	Associate Business Partner (ABP):	HR Assistant(HRA):

2) Separating Employee Information

Separation Effective Date:	Employee Name:	Last Day On Site:	Supervisor Name:

3) Separation Steps Checklist - Step by step separation events timeline, listing roles and responsibilities for stated tasks.

Step #	Responsible	Deadline	Date Done	Task
1	Employee			Notify Department of Separation (provide resignation letter)
2	Department			Notify Human Resources (provide resignation letter with separation date)
3	Department & Employee			Separation/Transition Meeting (see transition topics below).
4	Department & Employee			Please discuss employee systems access (i.e BruinBuy, Tams) and ensure that access is disabled.
5	Employee			Complete Exit Survey (Email from DepartureView)
EMPLOYEES LAST WEEK ONSITE				
6	Department & Employee			Final timesheet submitted and approved in TRS 7 days prior to last day on site or as soon as possible.
7	Department			Determine if phone number will remain active after employee departure. If active, employee records out of office message
8	Employee			Record out of office email message indicating person to contact
9	Department			Remove Employee's name from the following: Emergency Contact List, Internal Forms, Web pages and directories

PROPERTY RETRIEVAL

Employee: Return UCOP property to Department

Department: Return collected property to Human Resources

Item	Date Returned	HR return to	Item	Date Returned	HR return to
Parking Card		BASC	Telephone Calling Card		ITS Phones
ProCard		BRC	Building Access Badge		WMC
Travel Card		BRC	Data Center Access Card		WMC
Cell Phone		ITS Phones	Office Keys		WMC

Separation/Transition Meeting Topics: Reassignment of Employee Tasks
 Training Plan for Replacement/Interim Resources
 Transfer of electronic and paper files, emails, documentation