Department and Employee Separation Checklist

Please complete the below tasks in a timely manner to ensure smooth separation and return checklist to Human Resources

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)
EMPLOYEE LAST DAY ONSITE				
6	Department & Employee			Final timesheet submitted and approved in TRS
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	-	Item	Date Returned	Employee return to
Parking Card		)	Telephone Calling Card		**Department**
ProCard/Travel Card		**D**epartment	Building Access Badge		**Department**
Mobile Phone		**D**epartment	Data Center Access Card		**Department**
Tablet/Wifi Hot Spot		**D**epartment	Office Keys		**Department**

Separation/Transition Meeting Topics: Reassignment of Employee Tasks

Training Plan for Replacement/Interim Resources

Transfer of electronic and paper files, emails, documentation

Off-Boarding Checklist