



SEPARATION CHECKLIST FOR EMPLOYEES*

The following employee separation checklist outlines important tasks to complete prior to the employee's last day in the office. Department retains this form to document clearance of the above items. *Note: Items on this checklist may not apply to every employee.*

EMPLOYMENT RELATED ITEMS	
<input type="checkbox"/>	Initiate the separation process using OnBase forms: 1) Voluntary Resignation: Provides written notice when resigning or retiring. <i>(Employee)</i> 2) Electronic Personnel Transaction Form (ePTF) <i>(Coordinate with Manager/Department HR Liaison)</i>
<input type="checkbox"/>	Discuss the status of work assignments and any pertinent information for team/department (Optional knowledge transfer worksheet)
<input type="checkbox"/>	Remove all personal items from work area(s)
<input type="checkbox"/>	Complete Absence Management entry for manager approval (in CMS Self-Service under the employee portal)
<input type="checkbox"/>	Update mailing address if needed (in CMS Self-Service under the employee portal)
<input type="checkbox"/>	Complete exit survey via Qualtrics (email from Human Resources)
<input type="checkbox"/>	Complete "Leaving Office" Conflict of Interest Form 700, if applicable (email from Human Resources)
<input type="checkbox"/>	Any questions regarding benefits, email: benefits@csus.edu
<input type="checkbox"/>	Any questions regarding accruals, email: payroll_office@csus.edu

RETURN ALL UNIVERSITY PROPERTY	
<input type="checkbox"/>	Keys/Fobs (Return to Facilities Management)
<input type="checkbox"/>	Parking Permits (Contact UTAPS to cancel permit deductions)
<input type="checkbox"/>	Computers/laptops/tablets or other peripheral equipment (e.g., printers, cameras) cellular phones, etc. (in office or at home)
<input type="checkbox"/>	Records (documents, files, correspondence, etc.)
<input type="checkbox"/>	All special accommodation equipment and any university owned equipment in office or at home
<input type="checkbox"/>	Research/data notebooks (may retain a copy)
<input type="checkbox"/>	Credit/procurement/travel card and related receipts
<input type="checkbox"/>	Library books, online, DVD, and/or CD media and texts, periodicals
<input type="checkbox"/>	Uniforms/gear/tools/instruments/job accessories

SETTLE OUTSTANDING FINANCIAL OBLIGATIONS (Reminders to the Employee)

<input type="checkbox"/>	Reconciliation of ProCard, Travel Card, and any other transactions
<input type="checkbox"/>	Complete outstanding travel claims
<input type="checkbox"/>	Reimburse any charges owed to university
<input type="checkbox"/>	Reimburse charges owed to other departments (e.g., Library, Parking)
<input type="checkbox"/>	Determine if any advances or petty cash need repayment, such as: <ul style="list-style-type: none"> • Moving and Relocation Reimbursement (< 2 years) • Cash Advances
<input type="checkbox"/>	Check with Payroll and Benefits regarding any outstanding Accounts Receivable

RECORDS /DOCUMENTS (Electronic, paper, etc.)

<input type="checkbox"/>	Retrieve or delete any personal files/information
<input type="checkbox"/>	Transfer access to any folders and files to another CSUS employee as directed
<input type="checkbox"/>	Return (transfer, copy, etc.) any data files, electronic documents, and records, etc. that are stored on your personal work PC or in your personal server file spaces
<input type="checkbox"/>	Transfer passwords for sole access rights to any administrative database, software application, information system, etc., that is necessary for program or unit operations, to the appropriate unit administrator, or arrange for a unit administrator to be given the access needed to assure continued operations
<input type="checkbox"/>	Delete or return any university owned/licensed software that is contained on a home computer. For assistance, contact the IT Help Desk
<input type="checkbox"/>	Remove from Department mailboxes, Teams groups, custom distribution lists and user access to external software/systems; Setup Out of Office Message in email
<input type="checkbox"/>	MPPs: Update Position Reporting, Delegation of Authority and complete any pending actions (e.g. Evaluations)
<input type="checkbox"/>	Legal Holds: Contact sacstatehumanresources@csus.edu

ENVIRONMENTAL HEALTH & SAFETY (EHS)

<input type="checkbox"/>	<i>Provide evidence of consultation with Environmental Health & Safety (EHS) to your supervisor regarding the disposition of any laboratory or hazardous chemicals, gas cylinders, biological materials (e.g., animal tissue, diagnostic specimens, microorganisms, cultures), bio-hazardous materials (e.g., infectious substances and CDC Select Agents), controlled substances, radiological materials and/or hazardous wastes</i>
--------------------------	--

*Under provisions of the State Administrative Manual (SAM) Sections 8580.4, 8595, and 8116.1, each full or part-time employee separating from CSU, Sacramento must obtain clearance from all financial obligations and state-owned items.