

Separation Checklist

Procedure

All employees separating from California State University, Fresno must go through the employee checkout process per (SAM 8580.4). All State property assigned to an employee must be returned to the specific departments prior to departure.

Process

Employee:

It is an employee's obligation to submit a letter of resignation/retirement to the employee's department chair/manager. This letter must site your intent to resign/retire and the effective date of this action. The chair/manager must respond in writing to your notification to resign from your position.

Manager:

Complete the online ETR page to separate the employee and attach the separation letter and acceptance letter. Written notification of separation must be received by Human Resources at least two weeks prior to the last day worked (or as soon as possible if less than two weeks' notice is given). *Note: Retirements are entered by the Benefits team.*

Human Resources will activate the online separation process based on the day the separation information is received in their office. An automatic email notification will be sent to both the employee and their reporting manager regarding the online separation process. The Employee Separation Checklist will also be activated in the My Fresno State portal under Human Resources Activities, My HR Worklist. This checklist is used to track and clear all assets assigned to an employee, as well as verify that all items have been returned or inactivated upon separating.

Retirees

Employees retiring from the university must submit a letter to their department chair/manager with a copy to the Human Resources/Benefits office. This letter must state the effective date of this action. The chair/manager must respond in writing to your notification to retire with a copy to the Human Resources/Benefits office. Human Resources will then process the online ETR on behalf of the employee two weeks prior to the last day physically worked. An automatic email notification will be sent to both the employee and their reporting manager regarding the online retirement process. The Employee Separation Checklist will also be activated in the MY Fresno State portal under Human Resources Activities, My HR Worklist. This checklist is used to track and clear all assets assigned to an employee, as well as verify that all items have been returned or inactivated upon retirement.

How to access the Employee Separation Checklist

Log into the My Fresno State portal and click the Human Resources Activities tile.

Human Resources Activities



Navigate to HR Transactions, My HR Worklist to access your checklist(s) by clicking on the link.



Employee Transaction Request

Employee Checklist

Pending Approvals

Reports To Maintenance

View Submitted ETR

My HR Worklist

Employee Separation Checklist

Save

Employee Checklist Find | View All | First 1 of 1 | Last

Checklist Date: 09/09/2010 Checklist: HSEP Employee Separation [Help](#)

Comment:

- Reports To manager id and name - 11622 Monica Shackleton
- Employee department id and name - 41406 Accounting Services
- Employee's last day physically worked - 09/30/2010
- Effective date of the transaction - 10/01/2010

In order for your checklist item to be removed from your worklist, mark the briefing status Completed or Not Applic. For detailed processing instructions select the "i" next to the Briefing Status Column.

Employee Checklist Items Customize | Find | First 1 of 21 | Last

Sequence	Description	Briefing Status	Status Date
1	100 Notify Library	Initiated	09/09/2010
2	150 Remove System Access/Aux	Initiated	09/27/2010
3	200 Collect Petty Cash/Change Fund	Initiated	09/09/2010
4	300 Travel Advance	Completed	10/05/2010
5	400 Travel Claim	Completed	10/05/2010
6	500 Cancel ProCard Account	Initiated	09/09/2010
7	600 ProCard Reconciliation	Not Applic	09/20/2010
8	700 Cancel BTA Account	Completed	10/05/2010
9	800 Cancel Amex Gov1 Card Account	Not Applic	09/27/2010
10	900 Remove Keyless Access	Initiated	09/09/2010
11	1000 Parking Decal	Initiated	09/09/2010
12	1100 Remove Info System Access	Initiated	09/09/2010
13	1200 Deactivate Email Access	Initiated	09/09/2010
14	1300 Inactivate Bulldog Card Acct	Initiated	09/09/2010
15	1400 Remove Dept System Access	Initiated	09/09/2010
16	1700 Collect Multimedia Equipment	Initiated	09/09/2010
17	1800 Collect Campus Keys	Initiated	09/09/2010
18	1900 Confirm All Assets Returned	Initiated	09/09/2010
19	2000 Collect Parking Decal	Initiated	09/09/2010
20	2200 Collect Dept Issued Assets	In Progress	09/29/2010
21	2300 Verify Checklist Complete	Initiated	09/09/2010

All items listed have been assigned to specific campus departmental personnel who will actively work the employee checklist clearing the assigned items. Once all items have been updated to **Not Applic or Completed** the employee is cleared for separation.

Codes and Links Tab

Save

Employee Checklist Find | View All First 1 of 1 Last

Checklist Date: 09/09/2010 Checklist: HSEP Employee Separation [Help](#)

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Employee Checklist Items Customize | Find | First 1 of 21 Last

State	Codes and Links	Info
Checklist Item Code	URL	
1 HSEP01		
2 HSEP28		
3 HSEP03		
4 HSEP04		
5 HSEP25		
6 HSEP05	U.S. Bank Access Online	
7 HSEP27		
8 HSEP07	Caltravel Store	
9 HSEP08	American Express	
10 HSEP09	Key Control	
11 HSEP10		
12 HSEP11		
13 HSEP12		
14 HSEP13		
15 HSEP14		
16 HSEP17		
17 HSEP18		
18 HSEP19		
19 HSEP20		
20 HSEP22		
21 HSEP23		

This page will be accessed by the checklist approvers. Web links have been provided here for easy access to the vendor's sites.

For detailed processing instructions regarding the checklist item click on the icon  to the right of the each description.

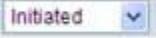
Ex. Travel Advance

Checklist Item Information

Please clear all outstanding travel advances.

Click on the  return button to back to the previous page.

How to update Briefing Status?

 Click on the , choose from one of the following statuses:

- Completed
- In Progress
- Initiated
- Not Applic
- Notified
- Received

* Remember to Save

Roles and Responsibilities

This document is divided into three sections providing instructions for the online separation process for the employee, manager, and the checklist authorizers all are responsible for clearing the employee checklist items.

Employee

It is the employee's responsibility to monitor their checklist to ensure that all items on the list have been completed prior to their last day work. The one item assigned specifically to the employee is to confirm all assets returned. You will need to update the status on the list to Completed prior to your last day worked.

Manager/Chair

It is your responsibility to monitor your employee's checklist to ensure that all items on the list have been completed prior to their last day worked. You will also be responsible for the collection of the following assets and updating the briefing status of the item on the checklist.

- Collect and destroy parking permit
- Collect all departmental issued assets

Checklist Approver

You have been designated as the individual in your respective area that is responsible for the clearance of an asset issued to an employee on their checklist. You will login daily to the My Fresno State Portal, click on the Human Resources Activities, HR Transaction, My HR Worklist, from there you will access the Separation Checklist for all separating employees.

The Workflow page will be updated nightly adding those employees who have initiated the separation process with Human Resources and or Faculty Affairs.