TERMINATION CHECKLIST – BENEFITED EMPLOYEE

Complete the supervisor portion of this form and submit with the Personnel Action Form (PAF)

EMPLOYEE NAME: ______________________________ TERMINATION DATE: __________

SUPERVISOR ACTION ONLY

☐ Termination PAF (Attach supporting documentation e.g. resignation letter, discharge notice etc.)

☐ Exit Meeting: collect items from employee

☐ Keys
☐ Credit Card
☐ Computer
☐ Cell Phone
☐ CSUC Parking Permit
☐ CSUC Wildcat ID Card
☐ Check if not applicable

☐ Collect items to be returned

☐ Check if not applicable Return to RF HR by the 9th of the month to avoid charges

☐ Check if not applicable Return to RF HR

☐ (other)

Date & Initial

SUPERVISOR ACTION ONLY

☐ Termination PAF (Attach supporting documentation e.g. resignation letter, discharge notice etc.)

☐ Exit Meeting: collect items from employee

☐ Keys
☐ Credit Card
☐ Computer
☐ Cell Phone
☐ CSUC Parking Permit
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☐ (other)

 Date & Initial

FOUNDATION HUMAN RESOURCES ACTIONS

Payroll

☐ Termination PAF ☐ Administrative Data Form (Change of Address) ☐ Final Timesheet __________

☐ Pending Benefit changes to PY (deductions may need to be adjusted for final paycheck) –

Termination in same month a Flex Adjust was made

Send to Employee

☐ Separation Letter ☐ DE 2320 __________

☐ COBRA Notice (as applicable)

- Acknowledgement
- Certification of Coverage
- Hipp Notice
- Enrollment Form
- Election Form
- Rate Sheet for Cobra Coverage

☐ Life Insurance Conversion/Portability __________

Additional Actions (as applicable)

☐ Confirm return of P-Card __________

☐ Health Insurance Removal __________

☐ Life/Voluntary Life/Long Term Disability (Via Spreadsheet) __________

☐ Dental Insurance Removal __________

☐ Vision Insurance Removal __________

☐ 403(b) Terminate in TRC __________

☐ Notify Accounting Tech of Separation (for Flex) __________

☐ Remove from Live Scan, DMV, Target Safety __________

☐ Terminate in HRIS (Spreadsheet) __________

Notify via email

☐ Central Operations Support CCSV ☐ PeopleSoft - Gretchen Tousey

☐ Wildcat Card - Zhang, Binhzhen “Sally” ☐ Library - Paula Woods

☐ Key Shop - Mark Gonzalez ☐ AS/Foundation IT

☐ University Advancement ☐ Cancel Parking Permit - Katy Rollo