

Diocese of Sacramento — Human Resources Services

SEPARATION CHECKLIST

When an employee leaves employment (voluntary or involuntary) of a parish or school, the following items need to be reviewed and/or completed. The employee and supervisor sign and date this checklist, a copy is provided to the employee and the original is placed in the personnel file.

Employee's Name (Please Print)

Employee's Social Security No.

Reason for Change in Status:

☐ Voluntary

☐ Layoff

☐ Involuntary

Parish / School Where Employed (Please Print)

DATE	ACTION
_____	Final check, including unused, accrued vacation pay
_____	Personnel Transaction: Termination (PT 200) completed and signed
_____	Provide Summary of Continuation of Benefits (PT 652) to benefit eligible employees only.
_____	Provide Pension Plan Benefit Distribution Process (SACL 200) to benefit eligible employees only. <i>Would the employee like to receive the materials via email</i> <input type="checkbox"/> NO <input type="checkbox"/> YES, please provide legible email address: _____
_____	Provide 403(b) Retirement Plan Distribution Request to benefit eligible employees only.
_____	Provide Retirement Planning Checklist to retirement benefit eligible employees only.
_____	LiveScan Procedures
_____	Keys/card returned
_____	Password - computer/e-mail, telephone/voicemail
_____	Equipment Return (i.e. laptop, cell phone, projector, etc.), if applicable
_____	Credit card returned, if applicable
_____	Personal items removed
_____	Exit Interview
_____	DE 2320 - For Your Benefit - California's Programs for the Unemployed
_____	W-2 address: _____ Street _____ City State Zip

Employee's Signature

Date

Supervisor's/Delegate's Signature

Date

OFFICE ONLY:

Copy PT 200 and PT 690 to:
Human Resources / Lay Personnel
2110 Broadway
Sacramento, CA 95818
Fax: (916) 733-0238