

N A N C E

People, Culture, and Technology Services (HR) Checklist & Workflow

Employee Name: _____
Location: _____
Dept: _____

PeopleSoft Empl ID : _____
Supervisor/Manager: _____
Requested Start Date: _____

1/ Campus Verify

- _____ Non-Academic Non-Classified Personnel Action Sheet (NANC PAS)
- _____ NANC Position Authorization Form (for Personal Services Contract assignments)
- _____ Personal Profile Form
- _____ Live Scan Clearance Date _____
- _____ I-9 Clearance Date _____
- _____ Complete Application
- _____ Student waiver and class schedule (for Students)
- _____ Enrollment/Beneficiary Designation for FICA Alternative (3121 Plan)
- _____ Tuberculosis Clearance Certification
- _____ Vaccination Card (2nd dose date/single dose date)
- _____ Vaccination Exemption (Requires Risk Management Review)
- _____ SSA-1945 Form (Employment in Job not covered by Social Security)
- _____ Beneficiary Designation for Deceased Employee
- _____ Retirement Status Form
- _____ Notice of Exclusion from CalPERS Membership for State Agencies
- _____ Medical Certificate (retirees only)

Signature _____ Date _____

2/ Employment

- | | |
|--------------------------------------|-------------------------|
| _____ Modify a Person/Add a Person | _____ Physical Exam/TB |
| _____ Job Data | _____ Vaccination Date |
| _____ Add Term Row to Job Data | _____ Person Profiles |
| _____ Update Earning Distribution GL | _____ Emergency Contact |

Signature _____ Date _____

3/ Retirement

- _____ PERS Retirement (If indicated that EE was a prior member of CalPERS)
- _____ Retirement Status Form
- _____ Leaves
- _____ Sew / My CalPERS

Signature _____ Date _____

4/ Payroll

- _____ Taxes
- _____ Dues, Workers Comp
- _____ Direct Deposit
- _____ Date TB Pulled

Signature _____ Date _____