

People, Culture, and Technology Services
NANCE Checklist & Workflow

Employee Name: _____ PeopleSoft Empl ID : _____
Location: _____ Supervisor/Manager: _____
Dept: _____ Requested Start Date: _____

1/ Campus Verify

- _____ Personnel Action Sheet (PAS) NANCE
- _____ NANCE Short-Term Board Request Form (for Personal Services Contract assignments)
- _____ Personal Profile Form
- _____ Live Scan Clearance Date _____
- _____ I-9 Clearance Date _____
- _____ Complete Application
- _____ Student Enrollment Verification, NANCE and Class Schedule (for Students)
- _____ TB Risk Assesment and/or Examination
- _____ AFT Membership Packet
- _____ 3121 Enrollment - Beneficiary Designation Form
- _____ Statement Concerning Your Employment in a Job Not Covered by Social Security (SSA-1945)
- _____ Designation of Beneficiary for Final Pay Warrant
- _____ Retirement System Status Information
- _____ CalPERS Notice of Exclusion from CalPERS Membership for State Agencies
- _____ CalPERS Member Reciprocal Self-Certification Form (If applicable)
- _____ CalPERS Pre-Retirement Lump-Sum Beneficiary Designation (If applicable)

Type your name: _____ Date _____

2/ Employment

- _____ Modify a Person/Add a Person _____ Physical Exam/TB
- _____ Job Data _____ Person Profiles
- _____ Add Term Row to Job Data _____ Emergency Contact
- _____ Update Dist GL

Type your name: _____ Date _____

3/ Retirement

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

Type your name: _____ Date _____

4/ Payroll

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

Type your name: _____ Date _____