

OCP GUIDE AT A GLANCE: OFF-BOARDING/SEPARATION

This guide is for off-boarding employees who are transferring internal to campus/the UC system, retiring, or fully separating from the University to pursue opportunities elsewhere.



Partners	Required Items
<ul style="list-style-type: none"> • Employee • Supervisor • Unit Support (as applicable) • Shared Services Organization • OCP Business & Technology Services 	<ul style="list-style-type: none"> • Aggie Service Access • Formal resignation
Initiation Time Frame: Initiate as soon as notice is given. Ideally 2-3 weeks prior to employee leaving.	

PRELIMINARY INFORMATION

Off-Boarding is a general term used for the following subtypes:

- Full Separation
 - Employee leaving UCD campus entirely
- Transfer
 - Employee has accepted a position in a non-OCP unit elsewhere on campus
- Retirement
 - Employee is retiring from employment and no longer working elsewhere in the UC system. *Also a type of full separation. Please see the Additional Considerations section for additional steps that need to be taken for retirement off-boarding.*
- Temporary Employment (TES)
 - Employees brought on through the UCD Temporary Employment Services office. Modified off-boarding.
- Student Employee
 - A modified off boarding for non-benefit eligible student positions.

Please note that involuntary separations (layoff, termination, etc.) should not be handled directly, and will be administered by OCP Personnel in partnership with a unit as necessary.

STEPS

1. Employee provides formal resignation to the Supervisor. Supervisor and/or support staff do an initial review of the Department Off-Boarding Checklist (page 1 of the tool kit).
2. A case is created in [Aggie Service](#).
 - a. Ticket navigation: Payroll- Appointment Changes/Separation
 - b. Options: End Appointment/Transfer/Separation
 - i. End appointment: Where simultaneous appointment is held and one needs to be ended
 - ii. Transfer: Employee is leaving current UCD unit for another UCD unit
 - iii. Separation: Employee is leaving UC Davis completely.
3. Aggie Service case routes for approval. The submitter is primary contact for all questions.
4. Primary contact submits a separation checklist (both the dept & business partner checklists) to OCP Personnel, Finance, the supervisor and the employee to initiate departmental separation process (EMAIL TO BUSINESS PARTNERS). The email is then forwarded to IET (ithelp@ucdavis.edu).
5. Primary contact follows up with the Employee and Supervisor regarding submitting the last timesheet, with direction provided by SSO Payroll as needed (EMAIL TO SUPERVISOR & EMAIL TO EMPLOYEE).
6. SSO Payroll processes the action in the payroll system (PPS) and updates the employee's appointment accordingly, and notifies department contact regarding when the employee will receive the final pay. A paper time sheet may be necessary depending on SSO direction.
7. The primary contact manages the off-boarding details at departmental level. Schedules an off-boarding appointment with the employee to provide with final paperwork, including but not limited to:
 - a. IDOC-provided by SSO via attachment to the case and email notification.
 - b. PARTING REMINDERS contact sheet and off-boarding summary
 - c. Request to Inspect, Monitor, or Disclose Electronic Records form (optional-see below)
8. OCP Personnel provides an exit survey to separating employee via email by their final day in office. SSO closes the case and the primary contact completes any follow up needed from off-boarding. Unit ensures all necessary items have been collected and worked with campus partners to remove access electronically and physically. Request non-UC contact information (email, etc.) and follow up actions completed as needed.

ADDITIONAL CONSIDERATIONS

ACCESS & THE REQUEST TO INSPECT, MONITOR, OR DISCLOSE ELECTRONIC RECORDS FORM

Employee access to any systems granted as part of their position should be removed via the *Business Partners* email and/or handled internally as applicable. This email will ensure standard OCP electronic access is removed effective midnight of the final day. Another aspect of access is the

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https://ucdavis.co1.qualtrics.com/jfe/form/SV_afnPgCnikJ8P89f

Request to Inspect, Monitor, or Disclose Electronic Records form, which is presented at the off-boarding appointment for the employee's review. This form is optional, and this should be shared with the employee as well. When asking for signature, share that the scope is limited to business need, and that the form is only to indicate their consent, affirmative or otherwise. Employees can reference the policy that outlines an employee's as well as the University's rights (<https://ucdavispolicy.ellucid.com/documents/view/361/381>) regarding

FINAL PAY

Final pay varies for different staff types and situations. Final pay regularly includes the last applicable wage and any vacation needed to be paid out (in the case of full separations and retirement). Sick leave is not paid out, but can be transferred to eligible public service positions within California (please contact [UC Davis Benefits](#) for specific information). The SSO will note how the pay will be delivered in case correspondence. Some represented positions have strict guidelines as to how final pay is provided, so be sure to note any related deadlines that SSO shares. Paper checks are rarely given, and majority of separating employees are paid through their regular method (example: if utilizing direct deposit, final pay will be provided via direct deposit). For additional information, the UCD Accounting & Financial Services has published a page on final wages (including the represented position pay guidelines) which can be found [here](#).

RESIGNATIONS

Acceptable resignations include:

- Letter or email from the employee as shared by the department
- Campus/list serv announcement (common for retirements or on campus transfers)
- Notice of the employee no longer working or left prior (primarily only acceptable for limited staff or student employees usually)

*The dates in the letter matter as the Payroll processors usually review. Ensure that your ticket has notes differentiating anything that the notice has that doesn't match what you are trying to get processed. In some cases, a new letter may be requested, which depending on the situation can be handled by the employee and/or unit.

RETIREMENT

Retirement is a varied, fast changing process. While many are excited for retirement, it can also be an emotional transition both for the retiree and the unit. Considering the following may help as we support retirees:

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- Retirement is a multi-step process that has specific deadlines. If an employee is considering retirement, they should review the UC and UCD retirement websites, which have a collection of resources and information for planning: <https://www.hr.ucdavis.edu/employees/benefits/retirement-savings>. The SSO and OCP Personnel are also available to share these resources on a basic level, with the employee researching next steps accordingly.
 - *Do not* research retirement credit on behalf of the retiree. All inquiries should be routed through the appropriate partners (Benefits and the UC Retirement Center primarily) as they will be able to provide the most accurate information and guidance.
- The OCP requirement for unit retirement gifts is \$400, regardless of how long the employee has been part of the unit. Some units use these funds, sometimes along with donations, to purchase a gift. This should not be done without consideration that the retiree may be expecting the monetary gift. *Please consult [OCP Personnel](#) if this is an option being considered.*
 - A campus wide gift is also coordinated. Please contact [Employee & Labor Relations](#), who will send a web link directly to the retiree with information about selecting a retirement gift (gift availability based off years of service).
- If backfilling, consider overlapping any [temporary employee](#) or new hire to ensure timely knowledge transfer. This will help both the retiree and unit ensure a smooth transfer for the business need. Do remember though to be considerate of all parties as the transition may be emotional, and some staff may need space and/or support.

STUDENT SEPARATIONS

Student separations are modified from staff off-boarding as the process in the following ways:

- No formal resignation letter/notification (beyond the student initiating) is needed
- No formal off-boarding appointment is conducted
- No IDOC is produced by the SSO
- No exit survey is provided
- No notification to business partners is needed *unless* the student had been grant access to specific systems

If a student is leaving for a quarter or longer, their appointment should be ended. If they do not have another appointment (many students hold multiple positions on campus simultaneously) they will be formally separated in PPS. If they are rehired later on, they will need to complete the onboarding process again.

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TEMPORARY EMPLOYEES/TES

Temporary employees are *not* to be formally separated by the unit they are currently working in. Temporary Employment Services (TES) formally handles the administration of temporary appointments, and while an off-boarding checklist email should be sent to partners to remove any specific accesses that have been granted, no case should be opened with the SSO.

If there is an anticipated impact to business and a unit knows that interim support will be needed, TES should be contacted as soon as possible to put in a request so that some knowledge transfer can occur before the separating employee leaves. Additional information about TES and requesting a temporary employee can be found on their main page [here](#).

TIME REPORTING/TIME SHEETS

Final timesheets should be submitted as soon as possible. Often, the SSO requests that any remaining time be projected so final pay can be prepared. Please note that staff fully separating from the University cannot use vacation on their final day unless retiring. While the SSO will share deadlines and outlines the range of time reporting needed, units can help initiate this process by utilizing either the bi-weekly or monthly paper time sheet templates provided in the off-boarding tool kit to complete any time sheets not available in TRS. The employee should first complete the time sheet in TRS, and then the paper time sheet can be submitted at the case initiation or in the early stages of processing.

TRANSFERS

Employees who are transferring within the UC Davis campus will not be fully separated from the campus system. They will receive their pay as usual, unless transitioning from non-exempt to an exempt (or vice versa) position. If the unit that the employee is transferring to is not serviced by the SSO, a representative may reach out requesting certain information that may not be accessible. These requests should be shared with the SSO, who can help support. It should also be noted in any communication with partners that the employee is transferring, so as to not impact any standard UCD staff permissions.

EXIT INTERVIEW

Once notified, OCP Personnel will send a separating employee a link to take the OCP Exit Survey online. Supervisors are also encouraged to conduct exit interviews either prior to the final day, or as part of the unit off-boarding process. This meeting should focus on *voluntary* feedback the employee may have to share via prepared, standardized questions and themes that are relative to business need. Exit interviews are wonderful opportunity to have open discussion about a position, its workload and contribution to the mission overall, and should never focus on any personal aspects of

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an employee unless they choose to discuss as such. Supervisors can consult with OCP Personnel as needed to prepare if needed.

RESOURCES

[UC Davis Central HR Retirement Resource Page](#)

[Temporary Employee Request](#)

[Employee AYSO portal](#)

[Accounting & Financial Services Final Pay Guidelines](#)

[Final Check Inquiries \(SSO\)](#)

[Email Forwarding](#)

[UC Davis Benefits](#)

[UC Davis Retiree Center](#)

EMAIL TEMPLATES

EMAIL TO BUSINESS PARTNERS

First send: [OCP Business Operations](#); [OCP Personnel](#); [OCP Finance](#);

Then forward to: IThelp@ucdavis.edu (this will prevent everyone being cc:ed on the correspondence)

Attach: Department Off-Boarding Checklist/Business Partner Off-Boarding Checklist

Subject: Off-Boarding – NAME

Hello All,

Please review the attached Off-Boarding checklist for any items in your purview. NAME's last working day with DEPARTMENT is LAST DAY WORKING, and their retirement date is IF APPLICABLE.

Thank you,
SIGNATURE

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EMAIL TO SUPERVISOR

To: Manager/Supervisor CC: OCPPersonnel@ucdavis.edu as needed

Attach: Department Off-Boarding Checklist/Business Partner Off-Boarding Checklist

Subject: Separation: SEPERATING EMPLOYEE

Hello SUPERVISOR,

In preparation for SEPARATING EMPLOYEE's separation on SEPARATION DATE, we have asked EMPLOYEE to please submit any final timesheets at their earliest convenience, no later than SSO DEADLINE. Please ensure their timesheets are approved promptly upon receipt.

Attached is the off-boarding checklist for your review for additional items that may need to be addressed.

Please share if EMPLOYEE will need to be removed from having access to any systems such as Banner, PPS, OPTRS or Decision Support, etc.

Please let us know if you have any questions or concerns.

Thank you,
SIGNATURE

EMAIL TO EMPLOYEE REGARDING SEPARATION Importance: High

To: Separating employee Cc: Supervisor/manager; any relevant internal support staff
Attach: Department Off-Boarding Checklist/Business Partner Off-Boarding Checklist

Subject: Final Details

Hello NAME,

We have provided the information to the Shared Services Organization (SSO) to end your appointment with the DEPARTMENT in PPS effective FINAL DATE. At this time, we would like to provide you with a few reminders to prepare for your departure.

The SSO cannot process your final timesheet until it has been submitted and approved by your supervisor. Please submit your final timesheet(s) with your projected hours through FINAL WORKING DAY, and work with your supervisor to get it approved as soon as possible, no later than BEFORE SSO PROVIDED DEADLINE.

In the meantime, I have scheduled an off-boarding appointment for you on OFFBOARDING APPOINTMENT, at 9: 00 a.m., LOCATION. At that appointment you will meet with SUPERVISOR, and be provided with your final paperwork and any final details will be discussed.

The off-boarding process for you has begun utilizing an off-boarding checklist that informs you of things you may need to consider. Please review that checklist (attached) for any items you need to take care of before your last day with DEPARTMENT.

In the meantime, we ask that you please connect with SUPERVISOR/APPROPRIATE STAFF regarding returning any necessary items, such as keys, computer equipment, etc.

Please also check the department's policy to change your telephone password on the day of your departure, if you have not already done so.

Additional resources for employees leaving UC Davis are available at:

- [UC Separation To-Dos](#)
- [UC Separation and Benefits for Employees](#)
- [RETIREES: UCD HR Retirement home page](#)
- [RETIREES: UCD Retiree Center](#)

Thank you,
SIGNATURE

Have feedback on the process? Email OCPPersonnel@ucdavis.edu or provide feedback at:
https://ucdavis.co1.qualtrics.com/jfe/form/SV_afnPgCnikJ8P89f

DEPARTURE DETAILS

Name: _____ Last working day/end date: _____
Unit: _____ Supervisor/Unit Coordinator: _____

INITIATION

- Obtain resignation/formal notification of separation from employee
- Submit ticket via the [SSO Aggie Service portal](#) (Payroll-Apt Change/Separation-Separation OR End Apt if campus transfer)
- Consult with OCP Personnel as needed

PREPARATION FOR DEPARTURE

- Review the Business Partner off-Boarding checklist (next page) for any actions relevant that may be applicable to the unit process.
- Send copy of this checklist with departure details to OCP partners. Forward to IT Help
- Support employee in scheduling off-boarding appointment(s) as applicable
- Coordinate final [TRS](#) time sheet(s), utilizing a [paper time sheet](#) to project time as directed by the SSO if necessary
- Notify supervisor of any pending time approvals
- Review system access' that may need to be revoked or transitioned (if a campus transfer)
- Share resources and helpful reminders for the employee regarding benefits, retirement, email, etc. as applicable

SUPERVISOR

- Review checklists for any supervisory action items (back and front of current document).
- Review and approve any pending time sheets for the separating employee
- Review succession plans. Initiate a [Temporary Employee Request](#) or start a recruitment process
- Consider an off-boarding meeting to discuss employee's experience and reflection on the position
- Cancel/transfer memberships on committees and professional organizations
- Communicate departure to staff and others as applicable. Consider a farewell event if applicable
- Review system access' that may need to be revoked or transitioned (if a campus transfer)
- RETIREES ONLY: Order campus retirement gift via [Employee & Labor Relations](#). Coordinate internal gift as well

FINAL DAY IN OFFICE

- Check in with the employee regarding their schedule and set up a time towards the end of the day for final review
- Review the UC [Electronic Consent form](#). Please note this is optional. Further Info can be found in the UCD [PPM 310/24](#)
- Share Separation Information and Reminders document. Review when and how they will receive final pay
- Provide reminder to complete the online exit survey (as sent and provided by OCP Personnel)
- Coordinate collection of access, equipment, and anything additional

AFTER THE EMPLOYEE HAS LEFT

- Ensure electronic and physical access' has been revoked accordingly. Work directly with building coordinators as needed.
- Follow up on any information requests and/or actions discussed on the employee's final day
- Review succession plan/efforts

COMMON INQUIRIES AND RESOURCES

- [Final Check Inquiries \(SSO\)](#)
- [UC Davis Benefits](#)
- [UC Retirement Center](#)
- [Employee AYSO portal](#)
- [Mail forwarding](#)

DEPARTMENT ROUTING STRUCTURE OR OCP PERSONNEL AS APPROPRIATE

- Resignation letter/email, release or termination letter received
- Aggie Service case submitted. IDOC and information final pay will be provided by SSO
- PPS IDOC printed and provided to separating employee
- Have employee sign PPM 310-24a: Electronic Records Consent Form
- Update time reporting. If a separating supervisor, interim/new information provided to SSO.
- Endorsed systems access (PPS, BANNER, etc.) changed/cancelled.

DEPARTMENT ROUTING STRUCTURE OR OCP BUSINESS AS APPROPRIATE

- Keys (metal and Cardkey) returned
- Cardkey account deactivated/deleted
- UCD ID card returned
- Department name tag/badge returned
- Telephone voice mail password reset /disconnect service as determined
- P Card/Corporate card returned/cancelled
- KFS account changed/cancelled
- Cell Phone Returned/Cancelled
- Check for Pending KFS/MyTravel Documentation
- Remove mail box
- Update Org Chart
- Update Emergency Phone Tree / Evacuation List / Emergency Contact System
- RETIREES ONLY: Order campus retirement gift via [Employee & Labor Relations](#). Coordinate internal \$400 gift as well

DEPARTMENT ROUTING STRUCTURE OR OCP BUDGET AS APPROPRIATE

- FTE salary provision set-up
- Turnover savings draw-off

DEPARTMENT ROUTING STRUCTURE OR IT HELP AS APPROPRIATE

- Telecommuting computer equipment returned
- Disposition/transfer of electronic and/or hard copy files/documents
- Computing Accounts
- E-mail account updated (campus mail ID remapped)
- Local network account deactivated/deleted
- IAIS account changed/cancelled
- Remove from all distribution lists
- Remove EDMS access

NOTES:

UC DAVIS SEPARATION CONTACTS

UC Davis Shared Services Organization

For questions regarding your final check, please ask for the Payroll Department.



Phone Number: (530) 754-4772



Email: sschelp@ucdavis.edu

UC Davis Employment Benefits Office Hours

Employee Benefits customer service telephone hours are 8:30 a.m. to 12:30 p.m. (Monday- Friday)*

Walk-in hours are 8:30 a.m. to 4:30 p.m. (Monday- Friday)*

*Excluding holidays. The Human Resources Administration Building is closed for lunch from 12 p.m. to 1 p.m. daily.



Phone Number: (530) 752-1774



Fax: (530) 752-1993

Employment Verification

Employment verification can be found on the At Your Service Online (AYSO) employee portal: <https://atyourserviceonline.ucop.edu/ayso/>

Need help with AYSO or employment verification? Please contact Accounting & Financial services:



Phone Number: (530) 752-7750



Email: ppshelp@ucdavis.edu

If You Return to UC Employment

Rules governing re-enrollment in lapsed or canceled plans vary with the particular plan and the length of time you have been separated from UC. For information, see your local Benefits Office within 31 days of your rehire date.

Retirement Contact Information

On January 2, 2014, the Davis Campus and UCDHS Benefits Offices began a partnership with the Retirement Administration Service Center (RASC) at the Office of the President in Oakland to assist employees in transitioning to the next important phase of their lives - Retirement.



To contact a specialist please:
call 1-800-888-UCOP (8267)

OR

you can access assistance online:

<http://ucnet.universityofcalifornia.edu/contacts/csform.html>

**Still have questions or need assistance?
Please contact OCP Personnel Services:
Phone: (530) 752-8503 Email: OCPPersonnel@ucdavis.edu**

Name: _____ Department: _____

Last day in office: _____ Last day of employment: _____

You are:

- Transferring elsewhere on campus to _____
- Leaving UC Davis entirely
- Retiring!

You will receive your final pay on: _____

You met with _____ who can be reached at _____.

If you need any information not found on this sheet or in prior emails,
please feel free to reach out for assistance.

Notes:

**Request to Inspect, Monitor, or Disclose Electronic Records—
Access with Consent**

Instructions: Use this form to monitor compliance with the provisions for access to records with the consent of the record holder. See UC Davis Policy & Procedure Manual 310-24, paragraph V.A. Attach documentation as necessary.

Name of record holder _____
Records sought from (date) _____ to (date) _____
What records are sought?
Why are these records needed?
Requested by _____ Date _____

Individuals who have been granted access with consent:

- a. Must not use the grant of access to obtain records other than those required to continue University business in the holder's absence.
- b. Must limit their inspection of the records to the least perusal of contents and the least action necessary to obtain the needed records.
- c. May not seek out, use, or disclose personal information contained in the records.
- d. Must not violate the UCD Acceptable Use Policy regarding use of a false identity.
- e. Must take all necessary steps to protect the access and/or account from unauthorized use.

I give my consent for access to my records. <input type="checkbox"/> Yes <input type="checkbox"/> No
Comments:
Record holder _____ Date _____
Department _____

Original: System Administrator Copy: Record Holder Retain: 3 years

**UNIVERSITY OF CALIFORNIA, DAVIS
EMPLOYEE BIWEEKLY TIME RECORD**

Payroll Period: _____ through _____

Employee Name: _____ Employee ID: _____

Department Name: _____

Week One								Week Two							
Sun	Mon	Tue	Wed	Thur	Fri	Sat	Total	Sun	Mon	Tue	Wed	Thur	Fri	Sat	Total

1																	Total
Time Worked																	
Paid Time Off																	
Total Paid Time																	
FAU:																	

2																	Total
Time Worked																	
Paid Time Off																	
Total Paid Time																	
FAU:																	

DEPARTMENT USE ONLY - OPTIONAL SUMMARY OF LEAVE TIME PAID																
Vacation Taken																
Sick Lv Taken																
Other																

Paid Time Off Codes	
V	Vacation
S	Sick Leave
CT	Comp Time Off
H	Holiday Pay
J	Jury Duty

FOR DEPARTMENT USE ONLY								
	REG	SDF	OTS	OTP	TOC	VAC	SKL	CTO
Account #1								
Account #2								
TOTAL								

I hereby certify that the time recorded is correct:

Employee Signature: _____

Date: _____

Supervisor's Signature: _____

Date: _____

Monthly Time Record

Funding/Distribution#: _____

Employee Name

Employee ID#

For the Month of _____, 20____

Please submit timesheet on a Case Management, "EMPLOYEE TIMESHEET CHANGES"

TICKET NO LATER THAN THE 15TH OF EACH MONTH

	Estimated hours worked to the end of the month															Total																				
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15			16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
All Hours Worked																																			0	REG
Actual Hours Worked 16th-31st																																			0	REG
Sick/Family Care																																			0	SKL
Vacation																																			0	VAC
Comp Time Used																																			0	CTO
Holiday Worked																																			0	HOL
Jury Duty																																			0	
Shift																																			0	SDF
																																			0	NDF
*REMEMBER: Any adjustments to your timesheet must be reported with a "REVISED" timesheet with department signature for changes. Please submit revised timesheet as soon as possible																												Total		0						

Timesheet Comments:

I certify that no other hours have been worked except as noted above.

Employee's Signature

Supervisor's Signature

Employee's Signature

Supervisor's Signature

*REVISED

*REVISED

For SSC Use Only	
CTA	
OTS	
OTP	
SDF	
LWOP	
OTS	
OTP	
OTHER	