UCDAVIS

Department Off-Boarding Checklist
For internal unit use

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

UCDAVIS

Business Partner Off-Boarding Checklist

To be sent via email to process partners

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:

RETAIN A COMPLETED COPY IN SUPERVISORY FILE AFTER OFF-BOARDING HAS BEEN COMPLETED