

Separation & Off-Boarding Checklist

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 [SSC Aggie Service portal](#) (Payroll-Apt Change/Separation-Separation OR End Apt if campus transfer)
- Consult with OCP Personnel as needed

PREPARATION FOR DEPARTURE

- Send copy of this checklist with departure details to OCP Personnel, OCP Finance & 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 SSC 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 Supervisor portion of the [UCD HR Separation Checklist](#)
- 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.
- 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- Ensure electronic and physical access' has been revoked accordingly.
- 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 \(SSC\)](#)
- [UC Davis Benefits](#)
- [UC Retirement Center](#)
- [UC Path](#)
- [Mail forwarding](#)

**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) start date _____ to (date) _____
What records are sought? Electronic business communications/documents/email related to UC Davis business functions.
Why are these records needed? To insure transfer of university business related information is complete after separation of employee.
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

UC DAVIS SEPARATION CONTACTS

UC Davis Shared Services Organization (SSO)

For questions regarding your final check, please ask for the Payroll Department.
(530) 754-4772 or aggieservice@ucdavis.edu

UC Davis Employment Benefits Office Hours

Employee Benefits customer service phone and walk-in hours are 8:30 a.m. — 12:00 p.m. and 1:00 — 4:30 p.m. (Monday—Friday, excluding holidays)
(530) 752-1774 or benefits@ucdavis.edu

UC Path Access for Former Employees

After you leave UC Davis, you will be able to access employment information online, for three years after your separation date. If you had your personal email address stored in UCPATH, you will receive an email from the UCPATH Center with notification that your account was created and instructions on access. If your personal email address was NOT in the UCPATH system or you do not receive that email confirmation, please call UCPATH Center at (855) 982-7284.

Employment Verification

Employment Verifications are administered by The Work Number at <https://www.theworknumber.com/>.

How to Provide Proof of Your Employment and Income

Please provide your employment verifier the following information:

- Inform them that UC uses The Work Number
- Provide them the University of California Employer Code: **15975**
- Provide them your Social Security Number

- In some instances, you may also need to create a "Salary Key" in order to complete an income verification. If your employment verifier requests a salary key, follow these steps:
 1. Log in to The Work Number as an employee.
 2. Enter the following information:
 - UC Employer Code: **15975**
 - User ID: Your **Social Security Number**
 - Personal PIN: Your birthday (**MMDDYYYY**).
 3. Select the "Create a Salary Key" option.
 4. Provide your verifier the six-digit salary key.

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

The Davis Campus and UCDHS Benefits Offices have a partnership with the Retirement Administration Service Center (RASC) at the Office of the President in Oakland to assist employees in transitioning into retirement.

To contact a retirement 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:
Email: OCP-Personnel@ucdavis.edu

Parting Reminders

Name: _____ Department: _____

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

You are:

Transferring elsewhere on campus to _____

Leaving UC Davis

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:

**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

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	*Estimated hours worked to the end of the month*											Total									
	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							
																											Total		0							

*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

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	