OCP Off-boarding Checklist

1. Upon the receipt of the letter of resignation, a separation case has been submitted to the Shared Services Organization (SSO) Payroll team to end the appointment.
2. It is the primary responsibility of the department manager or supervisor to ensure that all steps are followed at a point of an employee's separation or transfer to another department.
3. Check with your department for specific off-boarding procedures.

EMPLOYEE

o Complete and submit final timesheet(s). Use a paper time sheet to project time, if directed by the SSO Payroll.
o Work closely with your supervisor and begin to sort through business related e-files, documents, or emails, and ensure that they can be accessed by others after you are separated.
o Develop a transition plan with supervisor for any ongoing projects.
o Change outgoing phone message. Provide voicemail pin code to supervisor.
o Review and sign PPM 310-24a: Electronic Records Consent Form (included below). Return the signed copy to OCP HR at ocp-personnel@ucdavis.edu for our records.
o Return all keys, ID badge, and University credit cards. Note: Employees transferring within UC Davis should retain their ID cards.
o Review your employment information in At Your Service to ensure all of the information is correct (Ex: address, leave accruals, etc.). Contact SSO Payroll if you have questions or you think there may be an error.
o Contact Employee Benefits regarding health and retirement related options.

SUPERVISOR OR DEPARTMENT POINT OF CONTACT

o Ensure that a separation case has been submitted to SSO Payroll via Aggie Service system.
o Review and approve any pending time sheets for the separating employee.
o Communicate departure to staff and others as applicable.
o Ask the employee to review and complete the UC Electronic Consent form (below). Further information can be found in the UCD PPM 310/24. Signed copy should be sent to OCP HR ocp-personnel@ucdavis.edu.
o If a supervisor is separating - reassign any direct reports to a new supervisor and request SSO Payroll to update TRS time reporting.
o Review system access that may need to be revoked or transitioned (if a campus transfer).
o Process any non-reimbursed travel expenses prior to separation date.
o Cancel/transfer memberships on committees and professional organizations.
o Update organization chart.
o Remove from recurring meetings in Outlook as an attendee.
o Consider an off-boarding meeting to discuss employee's experience and reflection on the position.
o Have the employee lay out key details for pending work, and job related details.
o Identify key information, files and data that needs to be transferred.
o Initiate a Temporary Employee Request or start a recruitment process.
o On the last working day, collect issued assets such as cell phone, laptop, etc.
o On the last working day, obtain employee's keys and ID badge.
o After employee's last day, verify building access and security cards have been deactivated.

DEPARTMENT OR OCP FINANCE

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

**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?

 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. ☐ Yes ☐ No

Comments:

Record holder_____Date_____

Department_____

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

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:aggieservice@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:
Email: OCP-Personnel@ucdavis.edu