

Please utilize the following Off-boarding Checklist to separate staff within your unit.

Employee Name:	Unit:	Position:
Email:	Phone:	Supervisor:
Employee Type:	Employee End Date:	Unit Support:
Reason for Off-boarding (Retired/Transfer within UC/Leaving UC)		

Initiate Off-Boarding		
Supervisor		Employee
<input type="checkbox"/>	Obtain resignation/formal notification of separation from employee	Submit formal notification of separation
<input type="checkbox"/>	Submit ticket via AggieService (Payroll-Apt Change/Separation-Separation OR End Apt if campus transfer) or work with OCP-HR (only if leaving campus)	Review UC Employment Compensation & Benefits Roadmap for Leaving UC Davis
<input type="checkbox"/>	Complete OCP IT Offboarding Form	
<input type="checkbox"/>	Consult with OCP Personnel as needed	

Prepare for Departure		
Supervisor		Employee
<input type="checkbox"/>	Approve final TRS timesheet(s), utilizing a paper time sheet to project time, only if requested by the SSC	Complete final timesheet
<input type="checkbox"/>	Review system access that may need to be revoked or transitioned (if a campus transfer)	Schedule final supervisor meeting
<input type="checkbox"/>	Work with OCP Finance and IT Help to complete separation items	Work closely with your supervisor to begin to sort through your business related e-files, documents or emails to ensure that they can be accessed by others after your departure
<input type="checkbox"/>	Ensure knowledge transfer for projects and tasks employee was working on	Review resources and helpful reminders regarding benefits, retirement, email, etc. as applicable (page 3)
<input type="checkbox"/>	Communicate departure to staff	Set up UC Path Access
<input type="checkbox"/>	Schedule an off-boarding meeting to discuss employee's experience, reflection on the position, and thank them for their service to the department.	If eligible, set up e-mail forwarding
<input type="checkbox"/>	Review succession plans. Initiate a Temporary Employee Request or start a recruitment process	Reprogram your voicemail account
<input type="checkbox"/>	RETIREE ONLY: Coordinate retirement gift with OCP HR.	Clean out office space
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Final Working Day	
Supervisor	Employee
Attend final employee meeting either virtually or in-person	Attend final supervisor meeting
Complete the UC Electronic Consent form and share with employee. Further info can be found in the UCD PPM310/24 . Please note this is optional.	Make an election and sign electronic consent form and return to OCP HR (optional – page 4)
Coordinate collection of access, equipment, and any additional UC Davis owned items	Turn in keys, equipment, phone, any other University owned items

After the employee has left	
Supervisor	
	Ensure electronic and physical access has been revoked accordingly.
	Follow up on any information questions and/or actions discussed on the employees final day
	Review succession plan/efforts
	Update Org Chart (evacuation list/emergency contact system)

Common Inquiries and Resources
<ul style="list-style-type: none"> • Final Check Inquiries (SSO)
<ul style="list-style-type: none"> • UC Davis Benefits
<ul style="list-style-type: none"> • UC Retirement Center
<ul style="list-style-type: none"> • UC Path
<ul style="list-style-type: none"> • E-mail forwarding

UC Davis Separation Contacts

[UC Employment Compensation & Benefits Roadmap for Leaving UC Davis](#)

Comprehensive guide to leaving UC employment with info about medical coverage, benefits, and retirement.

[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 hours are 8:30AM-noon and 1-4:30PM (Monday thru Friday excluding holidays)

530-752-1774 or benefits@ucdavis.edu

[Employment Verification](#)

Employment verifications are administered by [The Work Number](#)

UC Employer Code: 15975

Personal PIN – Initial PIN is your birthday (MMDDYYYY)

[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.

800-888-8267

[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 confirmation, please call UC Path Center at 855-982-7284

OCP HR Services

OCP-HR@ucdavis.edu

Returning 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 re-hire date.