

# Offboarding

Name: \_\_\_\_\_

Exit Interview Appointment Time/Date \_\_\_\_\_

Employee ID: \_\_\_\_\_

Job Code(s): \_\_\_\_\_

Job Code Description(s) \_\_\_\_\_

Effective Date: \_\_\_\_\_

Employee-Provided Termination Resources			
	Unemployment Insurance Termination form	If Applicable	Transactional Unit
	Notify employee to update their email address online	Required	Transactional Unit
	Provide information regarding Former Employee Portal	Required	Transactional Unit
	Exit Interview Survey	If Applicable	Transactional Unit
Termination Benefits			
	COBRA Notification Process	If Applicable	UCPath Center/Vendor
	Submitting Life Insurance and AD&D Claims	If Applicable	UCPath Center
	Disability Claims	If Applicable	Benefits
	Death Benefits Administration	If Applicable (death only)	UCPath Center
	Local Beneficiary Care Coordinator Process	If Applicable (death only)	UCPath Center
Local Processes Checklist			
	Confirm Employees final timesheet has been submitted and Approved by the supervisor	Required	Shared Services Center
	Review EACS and Revoke Access as appropriate per UCR Policy	Required	Transactional Unit
	Update Enterprise Directory	Required	Department if immediate inactivation is required
	File resignation/termination document in Personnel File	Required	Department/Office of Record
	Contact TARS Time and Attendance Administer to add Exception Routing in TARS for final timesheet	If Applicable	Transactional Unit
	If employee is non-resident, send email to the International Students and Scholars Office	If Applicable	Transactional Unit

Academic Considerations			
	Onboarding for Adjunct position	If Applicable	Shared Services Center
	Onboarding for Emeritus status	If Applicable	Shared Services Center
Data Entry			
	One Time Pay	If Applicable	Shared Service Center
	Initiate Termination/Retirement Template	Required	Transactional Unit
	Attach supporting documentation to template	Required	Transactional Unit
	Insure proper Termination Reason Code is entered for the specific termination	Required	Transactional Unit
	Ensure all applicable Empl Records have been terminated	Required	Transactional Unit
	Death Pay Process	If Applicable	Shared Service Center
	Final Pay Request	Required	Shared Service Center
	General Deduction Remittance	Required	UCPath Center
	Off-Cycle Checks	If Applicable	Shared Service Center
	Overpayment Recovery	If Applicable	UCPath Center
Verification of Data Entry			
	Verify Termination Date	Required	Shared Service Center
	Verify Action/Reason Code	Required	Shared Service Center
	Verify Job Data	Required	Shared Service Center
	Approve/Deny Transaction	Required	Shared Service Center
	If Transaction is Denied send notice to Transactional Unit Initiator	Required	Shared Service Center
UCPC Approval			
	Verify Job Data	Required	UCPath Center
	Approve/Deny Transaction	Required	UCPath Center
	If Transaction is Denied send notice to Transactional Unit Initiator	Required	UCPath Center