

OFFBOARDING

OFFBOARDING begins with the decision to end the current employment relationship (by either the Employee or the University) and ends with the confirmation that the employee has been separated or transitioned (e.g. emeriti faculty), all access to systems and facilities has been updated or terminated (if applicable) and all outstanding university and employee obligations related to compensation are settled.

AS-IS PAIN POINTS

- Inconsistent process to initiate, monitor and confirm completion of Offboarding tasks
- No consistent way to identify and recover assets before last day
- Lack of campus-wide tracking for Do Not Hire and Preferential Rehire lists

IMPROVEMENTS

- Online Task Management (see appendix)
- Coordinated transactional support with consultation from Central Offices
- Job end date reports for initiating Offboarding process
- UC Systemwide Do Not Hire & Preferential rehire information

BENEFITS

- Consistent streamlined Offboarding process
- Centralized request and document management
- Reduced risk of non-compliance
- Metrics to track progress to completion
- Higher probability of return of assets

ROLES FOR OFFBOARDING



HR/AP STAFF INITIATOR (REQUIRED)

Collects Offboarding information from the department/employee. Tailors Checklist tasks for the specific employee and initiates the request.



DEPARTMENT FULFILLER(S) (REQUIRED)

Completes tasks assigned to the task queue. Department or org level gets assigned a task by the SS fulfiller. Orders equipment, creates/reactivates Net ID, etc. (See appendix).



SSC FULFILLER(S) (REQUIRED)

Completes Checklist tasks assigned to the SSC task queue. Completes the UCPath transaction (See appendix).

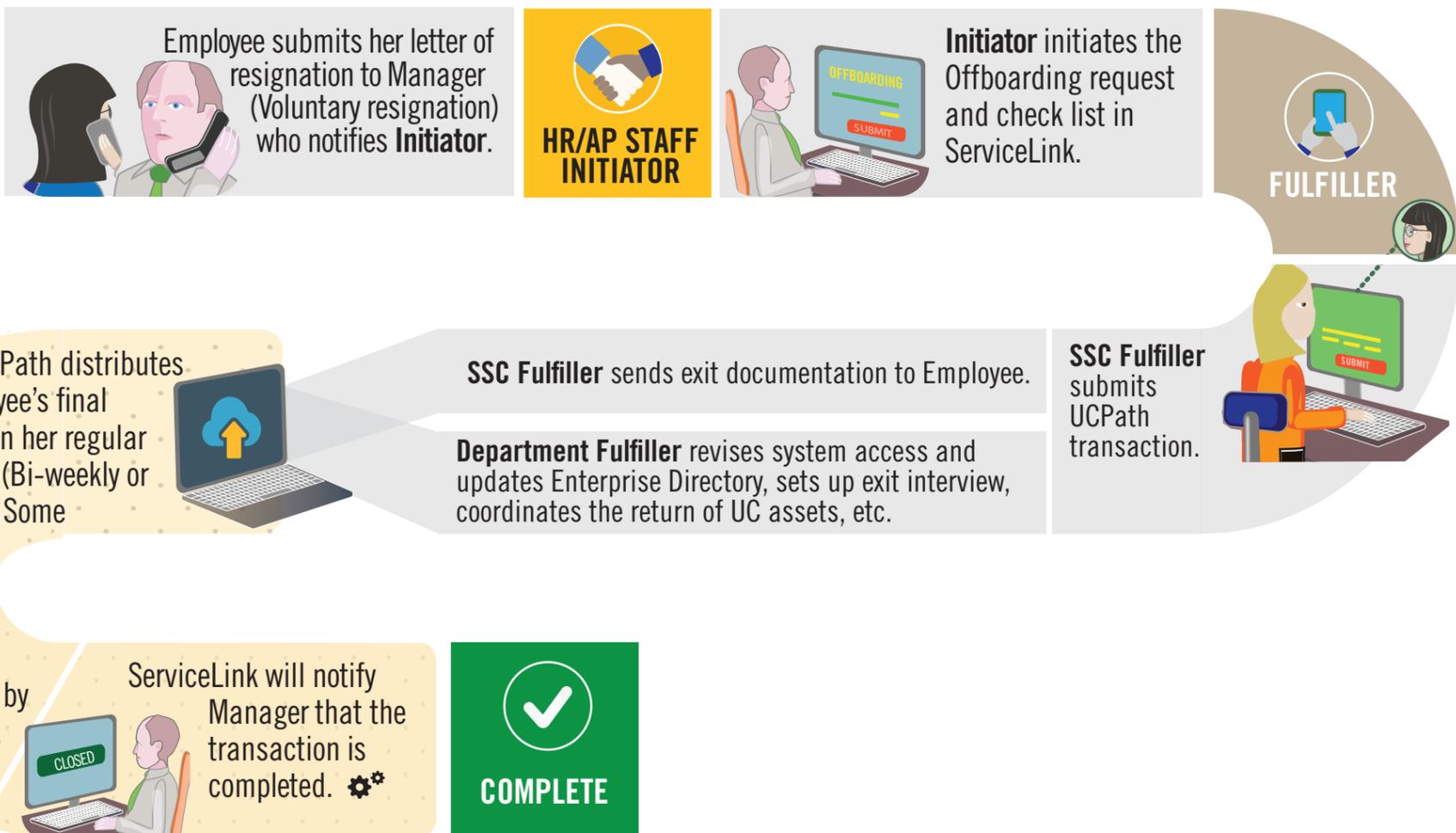


INQUIRERS - (HR/AP STAFF AND DEPARTMENT/SSC FULFILLERS) (OPTIONAL)

Monitors overall request and communicates with Offboarding stakeholders as required to ensure timely completion. Have the ability to view the status of the request and tasks.

OFFBOARDING MAP

Roadmap presents the most common business case. Additional business cases and details are available in the appendix.



Please note, an individual may assume one or many roles.

DID YOU KNOW?

In accordance with campus contractual agreements or new UC policy, some checks may be processed off-cycle. In these cases, SSC will submit an exception request to UCPath for processing (these requests take at LEAST 24 hours to process)

Checks and reimbursements are no longer processed by UCR. All transactions are processed by UCPath.

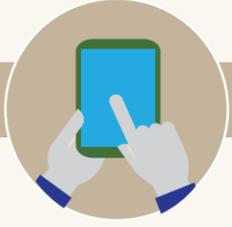
THE PROCESS IS SUCCESSFUL IF...

- ✓ All access to systems and facilities have been updated or terminated.
- ✓ All assets are returned to the University.
- ✓ All outstanding University and employee obligations related to compensation are settled.

LEGEND

- System Actions
- People Actions
- SSC: Shared Services Center
- TARS: Time and Attendance Reporting System

OFFBOARDING APPENDIX



DEPARTMENT FULFILLER

- **Revise/Revoke System Access**
- **Update Enterprise Directory**
- **Send Exit Interview Link (Staff) or Schedule Exit Interview (Academic)**
- **Coordinate return of UC Assets and Property**
- **Initiate Onboarding request (for transfers and transitions)**

NOTE: When the employee holds jobs in multiple Accountability Structures, the home department will initiate the request and the other department(s) will receive a Checklist task to review the request.



SSC FULFILLER

- **Submit UCPATH Transaction (or expedited case for time-sensitive terminations)**
- **Send Exit Documentation to Employee**
- **Submit Request for Off-cycle Final Paycheck if Applicable**

Note: ServiceLink will send a notification to the International Students and Scholars Office if the employee is on a Visa.