To-Be Offboarding Process

1. **Start**
2. Learn of employee's death
3. **Initiate Involuntary termination**
4. Consult & Advise As Needed
5. **Monitor Job End Date Reports and Flag for Potential Action**
6. **Returns to Initiator with Comments**
7. Provide Information for Termination Template
8. **Initiate “Digital Transition”**
9. **Resolve issues and resubmits template**
10. **Confirms return of assets and notify department**
11. **Initiates termination template**
12. **Was Template approved or denied?**
13. **Resolve issues and resubmits template**
14. **Coordinate Exit Interview**
15. **Confirm that “Digital Transition” is complete**
16. **Returns UC Assets to the Dept**
17. **Coordinate Return of Assets Workflow**
18. **Update separation checklist**
19. **Coordinate Payments and Last Check**
20. **Final Pay**
21. **Returns UC Assets to the Dept**
22. **Process / Route Digital Transition Items**
23. **Initiate Digital Transition**
24. **Employee Offboarded**

**Notes:**
- AM/PO Workers’ Compensation
- WFA 07 Job Record End Date Monitoring
- WFA 11 Probationary Status and Trial Employment
- WFA 13 Short Work Break
- WFA 17 Work Authorization Re-Verification
- Onboarding
- Leave Administration
- Future State Operating Model Process Diagram

**Version:** FSOM
**Last Updated:** 04/16/2016
**Work In Progress:**
To-Be Offboarding Process: UCPC Activity

1. UCPC A
   - Receives Notification from UCPath Center to Notify them of employee's death
   - UCPC A

2. UCPC B
   - Receives Notification from UCPath Center
   - UCPC B

3. UCPC C
   - UCPC C

4. UCPC D
   - UCPC D

5. UCPC A
   - UCPC A

6. UCPC B
   - UCPC B

7. UCPC C
   - UCPC C

8. UCPC D
   - UCPC D

9. UCPC A
   - UCPC A

10. UCPC B
    - UCPC B

11. UCPC C
    - UCPC C

12. UCPC D
    - UCPC D

13. UCPC A
    - UCPC A

14. UCPC B
    - UCPC B

15. UCPC C
    - UCPC C

16. UCPC D
    - UCPC D

- BN.02 COBRA Notification Process
- BN.03 Death Benefits Administration
- BN.28 Submitting Life Insurance, Disability and ADD Claims
- PY.02 Death Pay Processing
- PY.05 Final Pay
- PY.06 General Deduction Remittance
- PY.10 Off-Cycle Checks
- PY.11 Overpayment Recovery
- PY.19 Unemployment Insurance Claims
- TA.02 Time & Attendance Processing
- Local Beneficiary Care Coordinator Process
- Local Off-Boarding Process
- Local Position Management Process

Start

Future State Operating Model Process Diagram
<table>
<thead>
<tr>
<th>Step #</th>
<th>Context/Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Employees or Department HR/AP Analysts may consult with various central offices for offboarding support as needed throughout the process. These organizations include HR, AP, BN, E&amp;LR, PY, Campus Council, Internal Scholar Center, 3rd Party vendors.</td>
</tr>
<tr>
<td>General</td>
<td>Typical Exit Documentation may include unemployment Insurance form, notification that benefits will end 30 days from separation date, terminate deductions (parking), pro-card, travel card.</td>
</tr>
<tr>
<td>2</td>
<td>Campus agreement is to handle offboarding due to death as a one-off/case management process. Included on this map to accommodate UCPath processing only.</td>
</tr>
</tbody>
</table>
| 3,4 | - All involuntary terminations require consult with Central Offices, optional for voluntary.  
- Involuntary Terminations can also start above the dept level (Org, Central, Campus Counsel, etc.) and if part of bargaining could have a time requirement.  
- In some (rare cases) decision to terminate and initiation of the process may originate from outside the department (Central Office, OP, Regents, etc.). In these highly sensitive terminations the Central Offices may work directly with shared services or the UCPath Center to initiate and approve terminations with notification to the appropriate personnel in the depart/org. |
| 7 | - Department supplies all information available for offboarding including system access revocation, NetID removal, UCPath Template info, etc.  
- In cases of layoff employee may also be added to preferential rehire list or in certain cases, offboarding could be future dated. |
| 8 | - Digital Transition is a dashboard/checklist that includes all items required for offboarding, items would be statused and reportable through process lifecycle.  
- Items can include UCPath SmartHR Template, Asset Inventory to Return, System Access to Revoke, Exit Interview Scheduling, Separation Checklist for Final Payments/Check, etc.  
- Items should be bundled by employee type and/or offboarding type to simplify process with ability for partner to add/revise as needed for specific case. |
| 14 | Assume there is an interactive process to return assets and if not able to return, agreement to repay UC for cost, cannot tie to distribution of final pay due to legal constraints. |
| 16 | - Certain appointments or retirees may retain limited access.  
- Assumption that access changes/removal can be automated based on "Digital Departure" info. |
| 17 | - Exit Interview would ideally be online process to collect standard set of information from employee regarding their separation and experience with UCR.  
- Undetermined if Partner would be initiator/owner of this process. May occur with 3rd party, org level or other party? |
| 18 | Includes UCPath checklist items (This includes: Timesheet/enter time, submit final hours, update employee personal data, verify outstanding balances, Trm empl ben checklist, uniform deposit refund, settlement payment, end addl pay, uc future service. In cases of death it also includes: next/kin question, receipt survivor questionnaire, receipt survivor affidavit, death payment/1 month equiv, final payment to beneficiary, death notification to RASC, death notification to carriers). |
| 18 | Ideally, assets would be tracked/managed in central system. Beyond Onboarding and Offboarding, management of assets during entire employee lifecycle has not been discussed. |
| 19 | Includes determining if employee owes UC and if applicable agreement to repay for unreturned assets. |
| 20 | Final Pay may occur on or after final day of employment. The final pay sub-process includes but is not limited to the severance payment process, settlement process and coordination of addition payments (need to follow up to include these necessary data fields on digital transition workflow). |
| Multiple | Need to determine if/when endpoints connect to local process. |
Start / End

Shows the start and end of a process. The text should indicate the trigger action or condition that puts the process flow in motion or indicates that it is complete.

Task/Activity

Captures a specific task or activity. Written starting with a verb ("Prepare Form"). A box should reflect a single role and tool to complete a specific output.

Automatic Process

Represents a process, task, or activity that is accomplished through a system or program. For example, "Upload Data (Nightly).

Off-page reference

Shows the continuation of the flow on another page. Label the inside of the symbol with a capital letter and number (e.g., "A/2" indicates look for point A on page 2).

One way connection

Connection arrows show the direction that the process flows.

Roles and Tools

These annotation boxes are placed below task/activity boxes or decision points to clarify the generic role that performs the step (e.g., "Manager") and/or to clarify the functionality or tool that supports it, e.g. Workflow, PPS. These boxes are not required for each step.

UCPath Central Process

Color indicates processes performed by UCPath as defined on related Central FSPD Maps (cannot be revised on local map).

UCPath Local Process

Color indicates processes performed by Local Campus as defined on related Central FSPD Maps (cannot be revised on local map).

On-page Reference

On page connectors link one point in a process flow diagram to another. They help reduce flow lines that cross other shapes and lines. They are labeled with capital letters to show matching jump points.

Subprocess

Indicates another process or set of processes formally defined elsewhere. For example, "Perform Background Check" as part of the Onboarding process.

Decision

Indicates divergent paths for process; typically phrased in Yes/No format. For example, "Approve Leave".

Or Connector

Shows when processes diverge, usually for more than two branches. Can be helpful in indicating variations (e.g., one path for Faculty, one for Staff, one for Students).

Consultation/Collaboration

Consultation/collaboration lines link two task/activity boxes that are performing the same function together or in consultation with each other. Not used for formal reviews or approvals.

Annotation

Provides comments or clarification to a task, connector, or subprocess. Helpful to indicate where there is variability or inefficiency or where complex rules may apply to how a particular task is completed.