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

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

DEPARTMENT FULFILLER (REQUIRED)
Completes Checklist tasks assigned to the Department (Accountability Structure) Fulfiller queue. (See appendix).

SSC FULFILLER (REQUIRED)
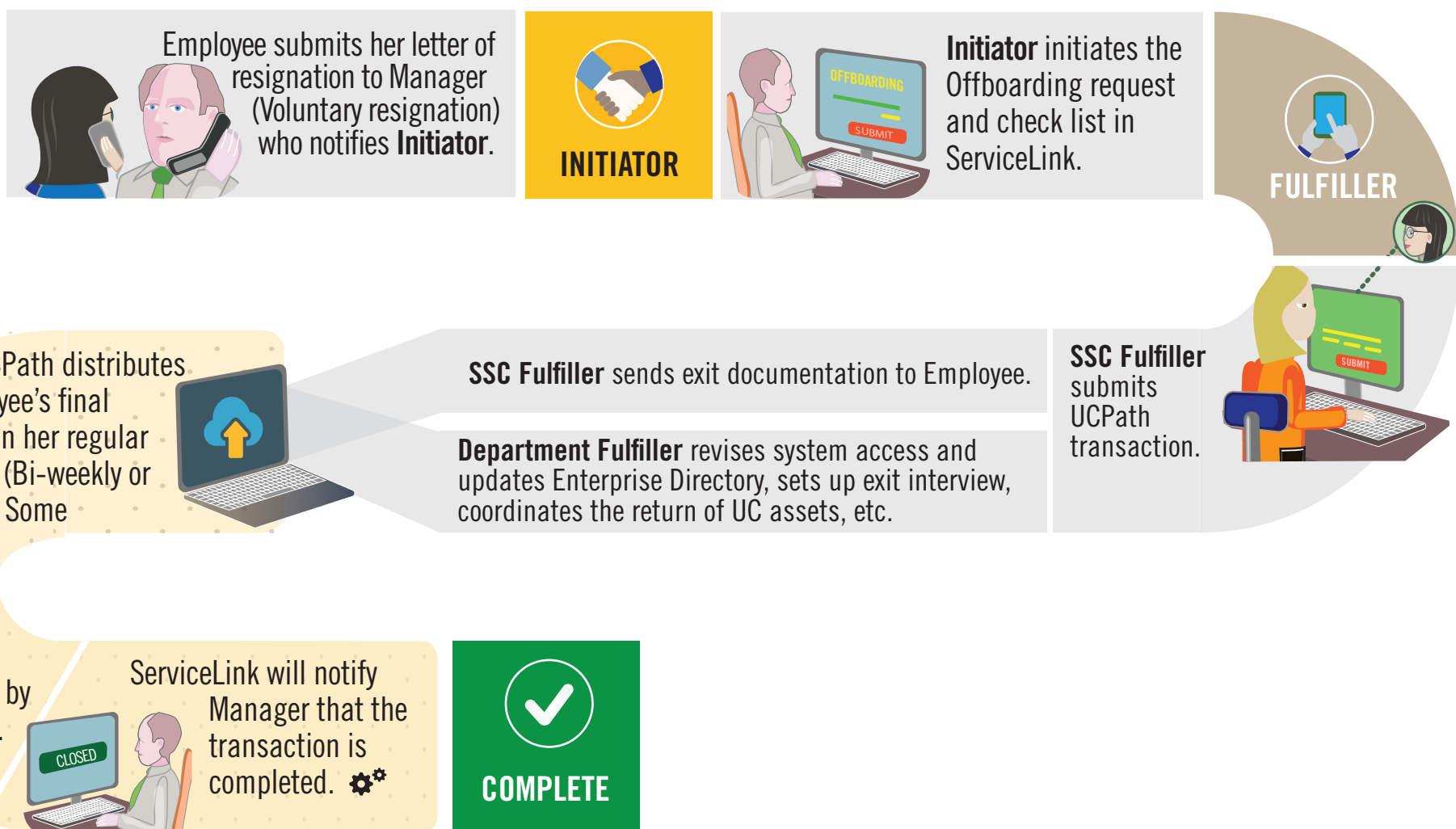Completes Checklist tasks assigned to the SSC Fulfiller queue. (See appendix).

INQUIRER (OPTIONAL)
Monitors overall request and communicates with Offboarding stakeholders as required to ensure timely completion.

OFFBOARDING MAP

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

Employee submits her letter of resignation to Manager (Voluntary resignation) who notifies **Initiator**.

INITIATOR

Initiator initiates the Offboarding request and check list in ServiceLink.

FULFILLER

SSC Fulfiller submits UCPath transaction.

SSC Fulfiller sends exit documentation to Employee.

Department Fulfiller revises system access and updates Enterprise Directory, sets up exit interview, coordinates the return of UC assets, etc.

UCPath distributes Employee's final paycheck on her regular pay schedule (Bi-weekly or monthly). Note: Some checks are processed off cycle (e.g. per contractual agreement or by UC policy).

ServiceLink will notify Manager that the transaction is completed.

COMPLETE

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 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