When an Employee Separates – Employee’s Checklist

- As soon as you know that you are separating from your department, you should provide your supervisor with ample time (at least two weeks’ notice) to prepare for your departure.

- Provide a forwarding address as soon as possible. This is important for timely delivery of W-2 forms, which are mailed after the end of the current year.

- Work closely with your supervisor to sort through your business related e-files, pending work, documents or emails and ensure that they can be accessed by others after you are separated.

  - If you are a supervisor with access in eHR Manager Self Service: Ensure that direct reports are reassigned to your supervisor prior to termination date.

- Voicemail account
  
  a. Reprogram your voice mail with an extended absence greeting, redirecting callers to a main department number.
  
  b. Reprogram VM with a new password and provide to your supervisor.

- Benefits, Investments, and Retirement Balances
  
  a. Contact the UCDHS Benefits Office at (916) 734-8099 to discuss impact on future UCRP pension benefits, CAP distributions, or conversion to individual policies of the UC group life, legal or AD&D plans. (To determine if you have a CAP balance, access the At Your Service Online (AYSO) (http://atyourservice.ucop.edu)
  
  b. Visit the Benefits Checklist on Termination of Employment, available on AYSO, which discusses all issues that the individual should be aware of when specific employment actions are taken
  
  c. Visit Fidelity Retirement Services, available via AYSO, to obtain DCP/403(b)/457(b) plan balances, investment options and distribution/rollover procedures, or contact:
     - 1-866-682-7787
     - http://netbenefits.com