When an Employee Separates – Supervisor’s Checklist

- If this is a layoff or other involuntary termination, ensure that you have completed all procedures required by UC Policy and/or contractual agreements before initiating termination action.

- Resignation, release, or termination letter received. (For Academic employees send resignation letter to Academic Personnel, SOM Dean’s Office – preferably 60 to 90 days prior to end date for Faculty).

- Coordinate with other departments in which the employee has an appointment.

- Process termination in eHR (via Manager Self Service).

- For Staff employees, process final time in Kronos or on timesheet. For Faculty/Academic Employees, follow UCD/OPTRS payroll procedure for timekeeping and terminal pay.

- Remind employee to contact Benefits so that retirement forms, COBRA forms, etc. are completed and signed.

- Computer Access:
  - You and the separating employee share in the responsibility to identify and transfer any business related e-files, documents or emails to a folder that can be accessed by others after the employee has separated. Once an employee has separated from your department, access to their electronic documents by someone other than the separated employee requires authorization by the separating person through UCDHS Policy 2402.
  - Advise UCDHS IT of all changes to application access, unit folders, distribution lists and web changes, etc. Visit LotusNotes Workspace to submit the Online Access Request to revoke employee’s access.
  - Note: For supervisors with access in eHR Manager Self Service: Ensure that direct reports are reassigned prior to termination date.

- Voicemail – ensure that VM is reprogrammed and password changed to allow access by supervisor; employee provides supervisor with new password; OR disconnect phone service through a UCDHS Telecommunications Work Order Form.

- Ensure that all UCDHS Property is returned, per UCDHS Policy 2281.
  - Obtain keys (building, office, desk,) and building access cards.
  - Obtain ID card and/or badge.
  - Obtain UC property (laptops, cell phones, books, disks/manuals, etc).
  - Obtain UC credit card, purchasing card, garage card, copy card, phone card, etc.

- Obtain employee’s forwarding address (important to remain current for W-2 purposes).

- Cancel or transfer memberships in committees and/or professional organizations.

- Communicate departure to staff and other relevant contacts.

If employee is retiring with 10 or more years of service: Please note, the practice of providing a retirement gift through Human Resources has been discontinued; however, the following link may be helpful for providing recognition upon retirement http://www.ucdmc.ucdavis.edu/hr/hrdepts/admin/non_cash.pdf

Revised 3/21/2011