

## Separation - Voluntary Retirement

### UCSC Local Procedures

(A.20b) Rev. 1/9/2007

## Employee Procedure

### 1. Notification

- A. **Consult with the [Benefits Office](#)** to determine your retirement date and related options.
  - a. Begin the retirement process by requesting a "Personal Retirement Profile" about three months before you wish to retire.
  - b. Refer to [Retiring from UC - I am Ready to Retire Now](#) for important information on the retirement process.
- B. **Inform your supervisor** of your intent to end appointment.
- C. **Discuss** the following **with your supervisor**:
  - Tasks that need to be reassigned
  - Willingness to train replacement

### 2. Things To Do

- A. **Provide** the following to **your supervisor**:
  - Final time record
  - Disposition of e-mail and files
- B. **Close out your workspace**:
  - a. Remove unnecessary or personal files from your office and computer.
  - b. Complete outstanding travel reimbursements.
- C. **Return all UC property** to your supervisor or appropriate office:
  - Copy Card
  - ProCard
  - Keys
  - Office/Building access cards
  - [OPERS card](#)
  - [Parking Permit/Bus Pass](#)
  - Campus Library Books
  - Staff ID card
  - Equipment

### 3. Last Day Activities

- A. **Record interim "reply" message** on e-mail and voice mail (if applicable).
- B. **Change voice mail pass code** to phone number extension (e.g., xxxx).
- C. **Meet with your [HR Service Team Representative](#)**:
  - Complete separation paperwork.
  - Provide forwarding address (if applicable).
  - Pick up final paycheck and the [Termination of Employment Benefits Checklist](#).
- D. **Important Information Regarding your Benefits**:
  - To determine the impact of your separation on each of your benefit plans, see [I am Leaving UC Employment](#) and the [Termination of Employment Benefits Checklist](#).
  - Medical, dental, vision and legal coverage through the campus ends on the last day of the last month for which a premium is paid, normally the end of the month following separation.
  - If you are eligible to continue your medical, dental and/or vision coverage through the [COBRA/Continuation of Group Insurance Coverage](#) process, you will receive a COBRA election form from the Benefits Office. This form is mailed to your home address the month following the date your separation has been processed. If you have an immediate need to obtain a COBRA election form, you may request one from the Benefits Office. You have 60 days from the date you lose coverage by reason of a qualifying event (employment termination) or from the date you receive notice of your continuation rights, whichever is later, to elect COBRA continuation. COBRA premiums must be paid retroactive to the coverage ending date.
  - Questions regarding distributions from the Retirement Savings Program should be directed to FITSCo at 1-(866) 682-7787. Please note that distribution requests may take up to 90 days to be processed and will be cancelled if you are rehired before the distribution occurs.

- Contact the [Benefits Office](#) if you have any questions regarding your benefits, including COBRA.

## Help, Forms & Other Resources

### *How to Use*

The steps for these procedures have been divided into sets of activities for each role involved in the procedure. When you select a role, you will only see the activities and steps the selected role is involved in. To see activities and steps for a different role, choose the desired role.

### *Forms*

- [Background Investigation No Longer Interested \(NLI\) Form](#)
- [Proof of Service Form](#)
- [Separation Data Collection Document \(SEPR\)](#)
- [Unemployment Insurance Termination Report](#)

### *Resources*

- [At Your Service](#)
- [Benefits Office](#)
- [California Employment Development Department \(EDD\)](#)
- [COBRA/Continuation of Group Insurance Coverage](#)
- [I am Leaving UC Employment](#)
- [Management Guide to Layoff](#)
- [Retiring from UC - I am Ready to Retire Now](#)
- [Termination of Employment Benefits Checklist](#)
- [UCSC Job Opportunities](#)