

Supervisor Checklist for Off-Boarding Employees

This checklist provides clear guidance for the separation of an employee on or before their separation date. Supervisors are expected to review this checklist with their employees on or before the date of separation. Please email completed forms to bapper-group@ucsc.edu.

EMPLOYEE APPOINTMENT INFORMATION

Employee _____ Employee ID _____ Supervisor _____
Department/Unit _____

SUPERVISOR RESPONSIBILITIES - This checklist is to be completed by the supervisor.

Obtain from Employee:

- ☐ Keys/door access cards (including but not limited to vehicle, lab, or master keys)
- ☐ Pro-card and/or credit card and see guidelines for [Changing or Cancelling a Cardholder Account](#)
- ☐ Cell phone and submit a ticket via IT Request to close service
- ☐ Unit parking pass
- ☐ Approve or submit final timesheet
- ☐ Badge/Staff ID card
- ☐ Computer, laptop and any other university owned equipment
- ☐ Uniform(s)
- ☐ Submit IT Request for all account closures, e.g. InfoView, RMS, UCPath
- ☐ Contact the Career Center to close their Student ER System account
- ☐ Review [Records Access Notice](#)

☐ When all university business records have been transferred to an accessible location, submit an IT Request to securely erase data from employee's computer, laptop, or other devices

☐ Cancel funding approval authorization, aka "signature authorization"

☐ Ensure voicemail is reset to 0000, an extended absence greeting is recorded, or calls are redirected to another line

☐ If employee has direct reports, notify their Financial Affairs Payroll Administrative Specialist of who will be approving their CruzPay timesheets going forward

☐ Remove the employee's name from the following areas, where applicable:

- Emergency contact list
- Internal forms
- Office security codes, access codes or keypads
- Security alarm lists
- Web pages and directories
- Faculty/Staff directories and organization charts

☐ Ensure departure is communicated to staff and customers

☐ Notify Payroll Administrative Specialist to request removal of the background check

☐ Email completed forms to bapper-group@ucsc.edu



Supervisor Checklist for Off-Boarding Employees

SUPERVISOR INSTRUCTIONS TO EMPLOYEE

- | |
|---|
| <input type="checkbox"/> Instruct employee to remove personal records from their University devices and accounts, and by when |
| <input type="checkbox"/> Have employee provide access to or transfer ownership (transfer of roles for access) of any University records to the department. This includes records stored on non-University devices, and deleting copies from those devices |
| <input type="checkbox"/> Ensure access to all university records from email, thumb drives, external hard drives, file transfer sites (ftp) |
| <input type="checkbox"/> Instruct employee to change ownership of all Google productivity applications |
| <input type="checkbox"/> Instruct employee regarding pending reimbursements from FAST. Employee should verify correct home address is listed in UCPath Self Service. Reminder: FAST has a 10 day turn around time. |
| <input type="checkbox"/> Instruct employee to cancel or transfer memberships in committees and professional organizations, and cancel all subscriptions that are delivered to the employee via campus mail |