1. KNOWLEDGE TRANSFER

☐ Tie up any loose ends at the office (finish up projects; hand off)
☐ Move files locally maintained to shared drive or other secured storage and assign permissions (BOX)

2. UCLA HEALTH PROPERTY

☐ Return devices (e.g. laptop, phone, hot spot, pager, iPad, etc.) to department coordinator (if applicable)
☐ Return badge and any keys to department coordinator
☐ Contact department coordinator to close Travel Card (if applicable)
☐ Log on to Bruin ePermit Portal to cancel your parking. If applicable, return parking placard and gate keycard to Transportation Services.

3. EXPENSES, PAY, BENEFITS, RETIREMENT, TAXES

☐ Submit outstanding expenses for reimbursement to department coordinator (if applicable)
☐ Submit final timesheet in HBS
☐ Keep contact information (mailing address, email address and phone number) up to date on UCPath Portal. W2 forms will be available by the end of January each tax year.
☐ Contributions to the voluntary Fidelity retirement plans typically stop on the paycheck prior to your final paycheck. If the balance in each account is at least $2,000, you may keep the money in the plan at Fidelity.
☐ If you participate in UCRP, contact the Retirement Administration Service Center (RASC) for questions about your pension account and for balance information visit At Your Service / UCRAYS
☐ If you participate in Medical, Dental and Vision insurance for you and your covered family members, insurance will be in effect until the last day of the month in which you separate from employment. You will receive a COBRA notice in the US Mail from our COBRA administrator, for you and your eligible family members, should you wish to continue coverage.

4. ADMINISTRATIVE

☐ Manager approves final timesheet in HBS for payroll processing.
☐ Manager updates org chart and reporting structure in UCPath/Cornerstone/Supervisor Tracking by submitting a PAR
☐ Work with your manager to set out of office replies on phone and email with redirection instructions
☐ If assigned access or approver/review roles within financial or other systems, work with your manager to identify proxy, contact system owner to update and remove access.

HELPFUL RESOURCES AND CONTACTS

Fidelity https://myucretirement.com/
Retirement Administration Service Center (RASC) 800-888-8267 M-F 8:30a – 4:30p
At Your Service / UCRAYS https://atyourserviceonline.ucop.edu/ayso/
https://retirementatyourservice.ucop.edu/UCRAYS/Account/LoginE?ReturnUrl=%2fUCRAYS
UCPath http://ucpath.universityofcalifornia.edu/
Bruin ePermit https://flexport.ts.ucla.edu/FlexPort/Account/Portal