

Offboarding Separation/Transfer Guide For Managers & Supervisors

Offboarding refers to the following actions: (a) voluntary separation from UCLA Health; (b) involuntary separation as defined in policies PPSM-60, 61, 64, 65, 66, 67; or (c) interdepartmental transfer, promotion or demotion to another UCLA Health or Campus department.

It is the primary responsibility of the department director, manager and supervisor to ensure that all separation or transfer steps outlined below are followed at a point of an employee's voluntary or involuntary separation from UCLA Health or transfer to another department within UCLA.

ALL SEPARATIONS

- Complete TRF or PAR Form to ensure final check in processed timely.**
 - Select appropriate form at <http://hr.uclahealth.org/body.cfm?id=54&otopid=43>

 - Notify Hospital Payroll Representative of impending separation.**

 - Collect all UCLA Health property, including:**
 - Keys
 - ID badge
 - Pager / cell phone and other mobile devices if applicable
 - Lap top, iPad or other mobile device, if applicable
 - Travel Expense Card
 - If employee has local key code access, notify appropriate staff to disable access.
 - Employee should delete any voicemail messages (or is it possible to have the telecom folks wipe messages?)

 - Ensure all UCLA data is returned or removed:**
 - Verify that employee has discussed with supervisor whether there is any UCLA data (including research data) in his/her possession should be transferred to others at UCLA including, but not limited to, UCLA data in emails, email personal folders, network file shares to which only the employee has access (H: drive), hard drives, or on any personally owned devices.
 - If employee is OK will allowing supervisor to access all his/her electronic files on UCLA systems, then the employee should sign the MITS Consensual Access form to document that.
 - Unless the employee has obtained authorization from the appropriate parties to retain UCLA data, ask the employee to confirm that all UCLA data, including research data, has been securely deleted from any personally owned devices (home computer, laptops, USB drives, etc.). Refer employee to IT if he/she requires assistance.
 - Ask the employee to sign the Separation Agreement that he/she no longer has any UCLA data in his/her possession or, if authorization has been granted to keep UCLA data, that he/she is now accepts all liability for the protection and security of the data.
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VOLUNTARY SEPARATIONS

- Ask employee for a letter of resignation or transfer confirming effective date. If employee does not provide a letter, supervisor to send email acknowledging resignation.
- Inform employee of his/her vacation/PTO accrual, employee will be paid for unused vacation.
- Remind employee to review their benefits upon separation, including COBRA rights.
- Refer employee to the Benefits Office at 310-794-0500.
- If retiring direct employee to UCLA Emeriti Center for fringe benefits at <http://www.errc.ucla.edu/>
- Conduct exit interview with employee.
- Provide Parking Cancellation form. What do you give to employees whose separation is not voluntary? Seems like this would apply to all separations
- Provide Conflict of Interest for Termination (if applicable). Is this a release?
- Initiate requisition process.
- For questions regarding unemployment insurance benefits, refer employee to the State of California EDD website at <http://edd.ca.gov/>; Provide EDD Booklet, Unemployment Insurance Claim letter (Separation).

INVOLUNTARY OR EMERGENCY SEPARATION

- Discuss all involuntary separations with the UCLA Health Human Resources Employee Relations
 - Contact appropriate offices IMMEDIATELY in order to process separation and cancel access to UCLA Health data and systems
 - Human Resources Office
 - UCLA Health Security to cancel proximity access
 - MITS Identity Management in order to delete all accounts
 - Complete Service Now request at
 - Assure access is removed from any department specific applications.
 - Pharmacy Access for Pyxis access termination
 - Notify department MITS authorizer of the action
 - Notify department Directory Administrator to remove employee from directory
 - Directory Services at x51990 or x51033, or send an email to ucladir@cts.ucla.edu
 - Notify MITS Help Desk or local IT support to reimage computer for new user.
 - Discuss with Employee Relations and UCLA Health Security the appropriate process for removal of employee's contents from office or workspace and securing computer networks and files.
 - Layoffs provide Indefinite Layoff Benefits Checklist (separation only); Layoffs refer employee to Talent Management, if applicable.
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INTERDEPARTMENTAL TRANSFERS

It is the responsibility of the department manager and supervisor to follow the steps below to ensure that department specific accesses and property are terminated prior to the employee transferring to the new department.

- Ask employee an email or letter confirming the transfer effective date.
 - Contact appropriate offices in order to cancel accesses within your department
 - Human Resources Office
 - UCLA Health Security to cancel or change proximity access
 - MITS Identity Management in order to delete all accounts
 - Complete Service Now request selecting transfer at
 - Pharmacy Access for Pyxis access termination
 - Notify department MITS authorizer of the action
 - Notify department Directory Administrator to remove employee from directory
 - Directory Services at x51990 or x51033, or send an email to ucladir@cts.ucla.edu
 - If employee has local key code access, notify appropriate staff to disable access.
 - Verify that employee has discussed with supervisor whether there is any UCLA data (including research data) in his/her possession that should be transferred to others at UCLA including, but not limited to, UCLA data in emails, email personal folders, network file shares to which only the employee has access (H: drive), hard drives, or on any personally owned devices.
 - Unless the employee has obtained authorization from the appropriate parties **to retain UCLA data acquired in the former position for the work in the new position, ask the employee to confirm that** all UCLA data, including research data, **has been** securely deleted from any personally owned devices (home computer, laptops, USB drives, etc.). Refer employee to IT if he/she requires assistance.
 - Would we ask the employee to sign some sort of data responsibility agreement if they were only transferring?
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