

The Great Innovate

Processes
Palooza

UC Controller Onboarding and Offboarding

Overview

Location: University of California Controller's Office

Process Title: Enhancing the Career Staff Onboarding and Offboarding Experience

Background info

The UC Controller's Office is a department within the division of Finance at The University of California, Office of the President (UCOP); The University's systemwide headquarters.

As part of the UC Finance division, the office provides systemwide financial management, reporting, policies and procedures. The employee onboarding and offboarding process spans HR, IT, Administrative Staff, Building Services, and more. These processes are essential to ensure employees are effectively brought into their roles and securely and efficiently transitioned out when they depart.

However, the complexity, and lack of process clarity create inefficiencies and pain points for both the employees, hiring managers, and support staff. Onboarding and offboarding can feel disjointed and overwhelming and is burdened with unclear responsibilities and duplicate work.

Problem Statement

The current onboarding and offboarding processes suffer from a lack of standardized workflows, inconsistent communication, and redundant manual steps across the department. This results in:

- Delays in system access, workspace setup, and training
- Missed steps due to unclear ownership and insufficient documentation
- Inconsistencies and variation with how new hires are introduced to their team and department
- Frustration among hiring managers, new hires and separating employees

Pain Points (supported by VoC data):

- 25% of new hires reported not having access to all systems on Day 1
- 20% lacked sufficient workspace setup
- 33% were unable to complete pre-day-one setup activities
- Managers reported 80% rate of encountering roadblocks before Day 1

Qualitative feedback highlights issues such as:

- Overcommunication through multiple, uncoordinated emails
- Gaps for fully remote new hires
- Lack of clarity in onboarding and offboarding tasks
- No formal department specific checklist used during the 30–90 day period (100% of hiring managers report this)
- 80% of managers are unclear on their offboarding responsibilities

Impact on Customers:

Employees feel confused, especially in hybrid/remote settings. Departments waste time on rework and miscommunications. Estimated delays in full onboarding readiness range from 3 to 10 business days.

Gap Analysis:

There isn't a current approach for tracking onboarding/offboarding progress. The gap lies in transitioning from reactive, email-based coordination to proactive, standardized workflows. The measure phase of this project noted a gap in the onboarding checklist to exclude ergonomics resources.

About the Process

Onboarding:

1. Manager submits onboarding ticket which takes about 5 minutes if the hiring manager has provided all of the correct information up front
2. Onboarding appointment with HR takes place and usually takes 30 minutes unless the new hire is missing paperwork items
3. IT and Facilities receive tasks for equipment, access, and setup
4. Buddy assignment and first-day plan initiated
5. Employee receives first day and first week tasks
6. New hire email and welcome sent by the Executive Assistant (EA)

Offboarding:

1. Employee submits resignation notice and the standard notice is two weeks however, some employees will offer extended amounts of time leading up until their last day.
2. Manager notifies team and submits offboarding ticket
2. EA sends departure communications
3. IT and Building services removes access
4. Employee returns equipment, confirms exit steps
5. Stakeholders receive confirmation emails and finalize transitions

Around the Process

- Overcommunication is a common frustration, with new hires receiving duplicate or unclear instructions from multiple sources. HR specifically in addition to the UC Controller's Office necessary communications and instructions.
- IT controls equipment distribution and setup however, the UC Controller Executive Assistant can be a middle man to help facilitate/troubleshoot, pick up equipment when it is ready, etc.
- The UC Controller's Office does not perform the new employee's actual onboarding appointment or employee data entry into the HRIS system which can also cause downstream impacts to overall systems access. Both through onboarding and offboarding.
- Badge credentials/setup are managed by the facilities department and the UC Controller does not have control over any issues that may arise with building access.
- Fully remote staff reported challenges navigating onboarding alone and not knowing who to contact on Day 1
- There is a lack of consistent tools such as onboarding checklists—100% of surveyed hiring managers said they don't use the UCOP 30–90 day checklist or a department specific checklist.
- Onboarding varies depending on whether an employee is new to UC or transitioning from within; this leads to unequal experiences
- Hiring managers expressed confusion about timing of formal offers, UCPath/HRIS coordination, and their own role in the process
- Managers also noted that offboarding is ambiguous, especially regarding notice processing, termination steps, and exit interviews

Process Actors

UC Controller's Office		UC Controller's Office		UC Controller's Office	
Sam Okana, Hiring Manager Role - Point person for new hire specific to job responsibilities Needs - Clarity on checklists and roles/responsibilities throughout the process Pain Points - Submitting the onboarding ticket, lack of clarity, first day welcome email template		Elaine Madison, Elaine Madison Role - Supports new hire and department staff throughout the process Needs - Variances removed and clarity on roles and responsibilities Pain Points - Back and forth communications, manual steps, duplicate efforts across stakeholder groups		Jerrod Marshall, New Hire Role - Individual preparing for work readiness Needs - A smooth experience in order to feel welcomed and appreciated by the department. Both for on and offboarding Pain Points - Overcommunication and overwhelming amounts	
					

Staff from Supporting Departments		
IT, HR, Building Services • Role Out of Scope for what's in the department's control but still a player in the process		

Process Narrative

Jerrold Marshall, a Jerrod joining the UC Controller's Office, receives her offer letter and eagerly awaits instructions. Elaine Madison, the Executive assistant along with HR, and Sam Okana, the hiring manager, sends email welcome and varying instructions. Jerrod receives separate onboarding instructions from varying stakeholders—each with different pieces of information.

Jerrold finds himself overwhelmed: 74% of surveyed new hires felt confident after offer acceptance, but 20% did not—and Jerrod is one of them. He struggles to track his tasks due to multiple email threads from various departments. On the day before his start date, he still hasn't received clarity on parking.

On Day 1, Jerrod logs in from home only to realize he lacks access to key systems—like 25% of new hires surveyed. His workspace setup is incomplete; he's unsure what tools he can request. Although Elaine is responsive and helpful, the absence of a standardized one email checklist leaves Jerrod confused and guessing his next steps, also navigating through the varying email communications.

Over the next few weeks, Jerrod begins settling in. He appreciates his buddy but notes that his orientation isn't until 3 weeks out. It is also at this time where Jerrod is first informed of his ergonomics resources. Productivity is slow to ramp—voice of the customer results show it can take 1–2 days up to 2–3 months to feel fully productive, especially when transitioning from outside of UC.

Meanwhile, Jerrod's Manager Sam, prepares to offboard another team member but finds the process confusing. Like 80% of managers surveyed, Sam is unsure of his offboarding responsibilities. Sam doesn't receive confirmation when access is revoked, and the departing staff's knowledge isn't formally transitioned—this causes disruptions in the weeks following their departure.

Attached

- VoC High Level Summary Matrix
- MSA Variability Analysis

Phase	Themes (Feedback)	Opportunities (Suggestions)
Offer Accepted	Info overload (too many emails); Delay between verbal and written offer; Positive feedback on administrative functions of the process.	Simplify communication flow; Reduce lag between verbal/written offers; Leverage recruiter/point-of-contact
Pre-Start Date	Strong logistics support; Remote hires more likely to feel lost	Pre-first-day Zoom check-ins; Unified email/setup communications; Clear instructions/logistics guidance
First Day	Workspace often ready; System access varies widely; Remote equipment sometimes delayed; Buddy program praised; Inconsistencies across roles	Standardize equipment provisioning; System access checklists; Role-based system provisioning
Systems Access	Varies (3–4 days vs. weeks); Differences in provisioning standards	Single application for multi-system access; Role-based system templates
Team Integration	Some isolation for remote/new hires; Welcoming experience generally positive; Lacking department-level orientation	Department-specific onboarding materials; Unified checklists; Visual aids like org charts, photos
Post-First Day	Productivity ramps vary (1–2 days up to 3 months); Self-learning vs. active onboarding impacts experience	Formal department-specific checklists; Cross-functional exposure; Daily touchpoints
Hiring Manager View	No formal intro structure; Inconsistencies in onboarding ticket submission; Appreciation for admin and IT teams	Standardized intro templates; More training and role-based access mirroring; Ergonomics info from admin
Offboarding	Lack of clarity and structure; Knowledge transfer is challenging; Exit interviews valued	Formalized checklists for all exit types; Early transition planning; More HR coordination/support

Critical to Quality / CTQ Metric	Current Definition	Observed Variability	Proposed Standard Definition
Employee notification instructions (departmental specific)	Onboarding appt. info./time, badge appt., workspace info., ucop email and phone #, visitor parking pass or permit, public transportation, arrival time and location, dress code, IT tips (adding holidays to calendar) useful links to NEO, benefits, etc.)	Related to outcomes of the overall experience: *Not just location on first day but where in the building to arrive (e.g. Broadway vs. Franklin side) *What employee's can expect: A phone call from the new hire's manager prior to first day. Variations with remote employees: equipment and software / follow-up instructions	Notification should include: Onboarding appt. info./time, badge appt., workspace info., expectations for equipment, software, and pre and post first day communications from manager, ucop email and phone #, visitor parking pass or permit, public transportation, arrival time and location inclusive of specific area in the building, dress code, IT tips (e.g. adding holidays to calendar) useful links to New Employee Orientation, benefits, etc.)
Employee Readiness	Equipment obtained, all systems access requests submitted, received badge, email account, physical workspace ready, first day trainings?, onboarding appointment completed	Meeting w/manager. 1-3 days for readiness? (Expected timeframe) *Defining expectations for the new hire: Knowing what is expected and at what time. 30-60-90-day plan. *Position specific trainings and systems. List of tools. General process documentation for each position.	Readiness is/means: Equipment obtained, all systems access requests submitted, received badge, email account, physical workspace ready, first day trainings?, onboarding appointment completed. The manager has discussed expectations for 30-60-90 days specific to position. Employee has received recommended trainings, tools, and systems list.
Systems Access Revoked on Time	Access is removed on last day of employee working	Variations based on the terms on which an employee is leaving. Equipment hand-off. Variations on access removal being on separation date with entity OR last day in the office/last day working. *Ideal state revoked on last day. (Oppt. Checklist of how to ensure access is removed.)	Revoked on time means: system access is removed at the end of the business day on the last day worked and equipment is turned in. Note: Variations will occur dependent on the terms in which employee has resigned and/or is leaving.

Schedule introductory department meetings	Executive Assistant: Introducing new hire to their specific team. Department meetings highlight new staff or staff leaving. Informal introductions with partners and key stakeholders specific to the position.	Hiring Manager: Introductory email to department of new employee's arrival and high level background. Manager schedules meetings within OP. Opportunity: *Staggering intro meetings. Start at core and work out. Space in between. Establish a cadence.	Executive Assistant: Introducing new hire to their specific team. Department meetings highlight new staff or staff leaving. Informal introductions with partners and key stakeholders specific to the position. Hiring Manager: Introductory email to department of new employee's arrival and high level background. Manager schedules meetings within OP. Opportunity: *Staggering intro meetings. Start at core and work out. Space in between. Establish a cadence.
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