What do I need to know before I begin the process for the Separation of an employee?

It is important to note that a _**timely**_ payment is contingent upon **all** employee timesheets being **_completed/approved_** and appropriate request for Termination/Final Pay has been submitted by department/unit to the Payroll Services team with sufficient time for processing with UCPATH Center.

Special Note for Involuntary Separations:

- *If this is an involuntary staff separation, please consult Human Resources before proceeding.*

- *If this is an involuntary Academic separation, please consult Academic Personnel before proceeding.*

- *If this is an involuntary undergraduate student separation in a student assistant 1-4 position, no need for further consultation. Consultation may be needed for Resident Hall Assistants.*

What do I need to provide on the Payroll Separation Request Form?

In order to initiate a **_Separation Request_** you will need to provide:

Requested By *: This should be the name of an authorized representative within the designated unit.

Requestor Email * This should be the email of an authorized representative within the designated unit.

Employee ID *: This should be the UCPATH ID number for the employee that you are requesting on the Separation form.

Employee Last Name * This should be the **Last Name** for the employee that you are requesting on the Separation form.

Employee First Name * This should be the **First Name** for the employee that you are requesting on the Separation form.

Position Number *: This should be the UCPATH Position number for the employee position that you are requesting on the Separation form.

Please ensure the position number provided above is accurate for the separation request. *If an incorrect number is provided and the separation processed, the department will be required to*

submit a reinstatement request. Please note, the reinstatement process may take 5-7 business days, during which time the employee will not have access to report time related to the position.

Last Date Worked *: This date is most commonly the day before the date of separation. **Please review timesheet(s) to accurately reflect the last date of work and the separation date.**

> *Please note if your employee is on a Short Work Break- That is not considered as Time Worked. Last Date Worked would be the last date they were active and performing services for the University.*

Date of Separation *: Date of separation is **one** day after the last date worked unless other extenuating circumstances exist (separation after leave, etc.)

> **Please note:**
> Some Academic employees have a **service period** that is shorter than the **appointment period** entered in UCPath.
> - The earnings that would generate during the appointment period are owed in full if the employee completes all the work within their service period.
> - If a job is termed earlier than the Expected End Date in UCPath, it will reduce pay to the employee to which they may be entitled.
>
> *If the appointment period of an Academic employee with a service period is reduced by an earlier separation, please reach out to Academic Personnel to confirm if additional monies are owed or if an overpayment situation has been created.*

Reason for Separation: Select from the Dropdown Menu.

       Note next to Separation Reason includes Voluntary versus Involuntary.

Required Attachments:
- Letter of Resignation from employee (Staff Employees only)
- Separation Agreement (If applicable- only in rare cases approved by HR/APO with consultation of Office of Legal Counsel)

When will Final Pay be issued to the Separating Employee?

The following information conveys when an employee can expect final wages to be paid upon separation. In most instances, final pay will be disbursed per the employee's normal method of pay (i.e. direct deposit, paper check).

	VOLUNTARY SEPARATION	INVOLUNTARY SEPARATION
Represented	Final Check requested off-cycle and disbursed 5 business days (not including weekends, holidays or pay confirm days) from date of request processed in UCPATH	Final check issued on day of separation via off-cycle pay processing
Non-Represented	Final check issued during next on-cycle pay processing (your next available pay date)	Final check issued on day of separation via off-cycle pay processing

UC's Office of General Counsel has determined that the university is not subject to California Labor Code, Sections 200-243 which requires employers to pay all wages due immediately upon separation.

It is important to note that **timely** processing of the separation in UC Path and timely final pay to the employee is contingent upon 1) the submission and approval of **all** outstanding employee timesheets and 2) the departments accurate submission of the Separation webform **with sufficient lead time** to allow for Payroll Services processing with the UC Path Center.

Where can the separating employee learn more about what they should consider related to UC Benefits?

The systemwide website UCNET provides links and details regarding employee considerations. These can vary depending on employee type and reason for separation (example: retirement).

- UCNET provides a walkthrough of <u>What to Do when Leaving UC</u>

- <u>UCPATH for Former Employees Portal</u>

How will separated employee's access historical UCPATH Earnings Statements and W2 information?

Former employees can continue to access past UC earning statements and W-2 forms through UCPath online with former employee access. Click **here** to find out more.

Former Employees may access system for up to three years after their separation date, so they should make sure to download any information

Questions? Contact the UCPath Center at 855-982-7284.

What if the employee that is separating is a Primary or Backup Supervisor in TRS (timekeeping)?

If the employee being Separated was TRS Supervisor or a designated backup TRS Supervisor please initiate the following steps:

Individual TRS Approver/UCPath "Reports To" Update

TRS MASS Approver Update

Utilize this form to...

- Update a large group (**not less than 40**) of employees reporting from one approver to another in a specific approver type (primary, secondary, optional back up)

  o *Example: Change everyone who is reporting to "X" employee to "Y" employee in one or more approver role types*

What if the employee that is separating is in a "Reports To" role where UCPATH positions report into this position that is about to become Vacant?

UCPATH "Reports To" Update for **Staff** can be requested via the UCPATH "Reports To" webform. Please note that UCPATH does not have any Mass Update ability for Reports To information.

UCPATH "Reports To" Update for **Academic positions** must go through Academic Personnel Office. Payroll Services will not process forms received from units directly. Please note that UCPATH does not have any Mass Update ability for Reports To information.

What other *Non- Payroll* items do I need to consider when requesting a Separation for an employee?

User Access to Data and Systems

As part of your departments internal separation process you may want to review Systems that the employee had access to at the University. Those system access owners may need to be contacted to initiate a request to terminate system roles/access. (Be sure to consult with your department for your internal unit process.)

DATA Related:

Email Guidance from OIT

For Banner, BLink, MyDegreePath, OnBase (Student Data Access):

    Contact: regsystems@ucmerced.edu

For UC Merced Cognos/ODS (non-UCPath)

    Contact: UCM_DataAccess@ucmerced.edu and regsystems@ucmerced

For Oracle Database (non-financial related)

    - Contact: UCM_DataAccess@ucmerced.edu

Systems Related Access Examples:

For DFA Related System updates to system user access provisioning is handled via ServiceNow. Visit the **DFA Service Portal** and search *Access* under the Search Bar.

HCM Systems: USER Access Provisioning

- **UCPath Cognos** - Software used to run various reports.
- **UCPath** - UC's central system of information.
- **UCPath Jira** - Create tickets for projects and software changes.
- **Time Reporting System (TRS)** - Where employees clock their worked hours.
- **eDoc** - Used for digitally signing, creating, and distributing documents.

Oracle Financials System: User Access Provisioning

- **Oracle Financials**.
- **Oracle Procurement** -
- **Concur (Admin)**
- Concur delegate and approver access is managed by Travel & Expense, p
- **UCMPLAN (EPBCS)** - Specify Campus Viewer, Campus User, or FPA

User Access to Pcard or Travel Card

When an employee is separating from the University and has a PCard or Travel card, it's important to review the PCard and/or T&E statements to ensure all items are reconciled. You can also review available transactions in Concur to ensure there are no outstanding charges. Please consult your department for any specific internal processes regarding this review.

- The employee's T&E card and/or PCard must be surrendered to the University on or before their separation date. For additional information, refer to the(FAQ's)

User University Equipment

If your separating employee was issued a University cell phone, laptop, desktop, monitors etc. these must be surrendered on or before Separation. (Be sure to consult with your department for your internal unit process.)

User Building Access

If your separating employee was issued access to buildings, labs etc. you may need to reach out to Lock and Access Services. (Be sure to consult with your department for your internal unit process.)

(See Next Page for Policy Links)

Additional Reference Links:

Employment Policy links housed at UCNET:

https://ucnet.universityofcalifornia.edu/resources/employment-policies-contracts/#academic

Disciplinary and Separation Actions for PPSM Covered Staff Employees

- PPSM60 Layoff and Reduction in Time from Professional and Support Staff Career Positions
- PPSM61 Release During the Probationary Period or From Limited, Casual/Restricted, and Floater Appointments
- PPSM62 Corrective Action — Professional and Support Staff
- PPSM63 Investigatory Leave
- PPSM64 Termination and Job Abandonment
- PPSM67 Termination of Career Employees — Managers and Senior Professionals, Salary Grades VIII and IX
- PPSM66 Medical Separation

Disciplinary and Separation Actions for Represented Employees vary by bargaining unit. (See link and Consult with HR Labor relations/APO Office for more details)

- Collective Bargaining Agreements

Consult with Academic Personnel Office APO Office for more details on Academic Policies

- Academic Personnel Manual