Overview

The procedures described in this section are for separating an employee from UCSC employment for one of the following reasons:

AA - To accept another job
AB - To look for another job
AC - Self employment
AD - Dissatisfied with job
AE - Pregnancy, did not desire leave
AF - Family and/or health care
AG - Health
AH - To attend school
AI - Military Service
AJ - Failed to return from leave
AK - Other
AM - Resignation – moved out of area
AN - Resignation – no reason given
BA - Grant/contract expired
BB - Appointment/contract appt expired
BC - Visa/work authorization expired
CA - Indefinite layoff with rehire/recall rights
CB - Termination of limited employee
CF - Per diem release
CG - Indefinite layoff with severance
CH - Indefinite layoff with reduced severance and rehire/recall rights
CI - Indefinite layoff with no severance or rehire/recall rights
DA - Released during -probationary period
EA - Lack of performance
EB - Misconduct
EC - Quit without notice
ED - Job abandonment
EE - Never started employment
EF - No longer certified or licensed
EG - Do not rehire – settlement (employee agrees not to return)
GA - Medical separation
KA - Death
RA - Retirement – regular
RD - Retirement – compulsory for SMG and regents’ officers

Policy Summary

A separation action occurs when an employee separates from university employment. Final Pay for separating employees is subject to the 72-hour rule. For more information see Separation from Employment Guide.

Steps to be considered during the separation process:

- separation action should be processed at first “open” opportunity
- future address should be updated for end of the year (W-2) forms to be mailed to
- contact the Payroll Office for guidance with a separation during a Leave of Absence
- separation date should be the appointment end date, unless otherwise instructed: i.e., in cases of LWOP directly prior to separation
- when the separation date falls on a pay date, follow the Separation from Employment Guide payment process procedure

Refer to http://shr.ucsc.edu/shr-procedures/topics/layoff-separation.htm for more information.
Before You Start

Prior to processing the OEU for a separation, Refer to the SHR Procedures Manual. This will give you guidance to determine the delegations of authority and policy procedure.

Obtain required approval to perform the PPS action.

Have the employee complete the following forms:

- Letter of resignation (voluntary separations)
- Unemployment Insurance Termination Report (U5602)
- Provide employee with the Termination Benefits packet (available from the Benefits office.)

Forward the Unemployment Insurance Termination Report to the Benefits Office.

Retain letter of resignation for Staff Human Resources records.

For issues related to the timing of this action, refer to Section 2.3, Timing.

Data Entry

Enter data for the separation via the SEPR bundle. This bundle contains the following functions:

- **ESEP** (Separation)
- **EAPP** (Appointments/Distributions)
- **ELVE** (Leave of Absence)
- **EADD** (Employee Address)
- **EPD1** (Employee Personal Data 1)

Accessing SEPR

1. Log on to the Payroll/Personnel System.
2. At the Next Func field, type EEDB and press Enter.
3. Type SEPR, employee ID number, and then press Enter.

The ESEP Separation function is displayed.
Completing the ESEP Separation Function

**THE ESEP (SEPARATION) FUNCTION**

1. Enter data in the following fields as applicable:
   - **Last Day on Pay**: The last day the employee was on pay status in the format: MMDDYY
     (Last day on pay status may not be the same as the separation date, i.e., ee on LWOP and then separates)
   - **Separation Date**: The date upon which the separation is effective in the format: MMDDYY.
   - **Reason**: Enter the Code indicating the reason for separation. (From UI form or F1Help)
   - **Destination**: Enter the Code indicating the employee’s destination following employment with the University. (F1Help for applicable codes)
   - **Future Inst Code**: Enter the Code indicating the institution the employee will be affiliated with for future employment if appropriate. (F1Help for applicable codes)

2. Press **Enter** to invoke range/value edits.
3. Press **F11** to continue to the next function.

The EAPP Appointment function is displayed.

**ESEP Notes and Tips**

The Separation Date is usually the same as the last day on pay status unless employee has been on a leave of absence without pay.
Completing the EAPP Function

THE EAPP(APPOINTMENTS/DISTRIBUTIONS) FUNCTION

EAPP Notes and Tips

- All appointments and distributions must be ended on or before the separation date.
- If the employee has future appointments/distributions (i.e., the begin date comes after the date of separation), you can use the Delete Command to cease the future appointments and distributions.

(See Section 1.5, User Navigation and Entry/Update Commands, for instructions on the use of the Delete command.)

The Appointment Level Procedure

1. **Tab or F15 NewLine** to the current appointment(s).
2. Enter data in the following fields, as applicable:

<table>
<thead>
<tr>
<th>Actions</th>
<th>Leave Blank. System Derived for a separation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appt End</td>
<td>Enter the date on which the separation is effective in the format: MMDDYY.</td>
</tr>
<tr>
<td>Dur</td>
<td>Enter an asterisk (*) to delete data in this field, if applicable.</td>
</tr>
</tbody>
</table>

The Distribution Level Procedure

1. **Tab or F15 NewLine** to the current distribution(s).
2. Enter data in the following fields, as applicable:

<table>
<thead>
<tr>
<th>Actions</th>
<th>There is no required action code at the distribution level.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay End</td>
<td>Enter the date on which the separation is effective in the format: MMDDYY.</td>
</tr>
</tbody>
</table>

3. Press **Enter** to invoke range/value edits.
4. Press **F11 Next Func** to continue to the next function.

The ELVE (Leave of Absence Data) function will be displayed.
Completing the ELVE Function

The ELVE (Leave of Absence Data) Function

ELVE Notes and Tips

- If an employee is on a leave of absence and the return date is after the separation date, then you should change the return date to match the separation date.
- If the return date is before the separation date and the employee will return before separating, then take no action.
- If the return date is before the separation date, but the employee will not return prior to separation, then extend the leave of absence to the point of separation.

The ELVE Procedure

1. Enter data in the following fields, as applicable:
   - Leave of Absence Begin Date
   - Return Date from LNP
   - Sabbatical Credit Balance
   - Sabbatical Credit Accrued
   - Sabbatical Credit Used
   - Total Sabbatical Credit Balance
   - TRIP Rebate

2. Press Enter to invoke range/value edits.

3. Press F11 Next Func to continue to the next function.
Completing the EADD Function

THE EADD (EMPLOYEE ADDRESS) FUNCTION

If the employee is changing their address, then update this information, otherwise you should proceed to the next function.

EADD PROCEDURE

1. Enter data in the following fields, as applicable:

   **Permanent Address**
   - **Line 1**: First line of the address to which all university mail may be sent (e.g., benefits statement, tax information.) Maximum 30 characters.
   - **Line 2**: Automatic continuation of address Line 1, if the first line of the address is exceptionally long (e.g., use for apartment numbers, building names, etc.) Maximum 30 characters.

   **Foreign Address**
   - **Ind**: Enter F if this is a foreign address.
   - **Prov**: Foreign addresses only. Province associated with the address, if applicable. Maximum 30 characters.
   - **Cntry**: Foreign address only. Two-digit country code associated with the address. Press F1 Help to see valid codes.
   - **Postal Code**: Foreign addresses only. Postal code associated with the address.

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.
Completing the EPD1 Function

EPD1 (EMPLOYEE PERSONAL DATA 1) FUNCTION

The EPD1 function allows you to change the check disposition address. (If there are no changes, proceed to Review.)

**Pay Disposition Code**

Enter Mail Code (See Appendix J, Mail Codes). Used to deliver checks and surepay stubs.

1. Press **Enter** to invoke range/value edits.
2. This is the last function of the SEPR bundle. Proceed to **Review**.

Review

1. Use **F10** or **F11** to navigate through the SEPR bundle.
2. Make sure you have completed all the required data elements.
3. Review all entered data for accuracy and consistency.

Updating the Employee Database

Press **F5 Update** to display the PAN Subsystem Notification Preparation screen.

Consistency Edits

If there are consistency edits, the Consistency Edit (ECON) screen is automatically displayed. Review all error messages and make necessary corrections.

How to Correct Consistency Errors

From the ECON screen you may:

- Correct errors directly on the ECON screen.
- **F3 Return** to the last data entry function, make any corrections, then do one of the following:
  - Press **F5 Update** to invoke PAN.
  - Press **F2 Cancel** twice to cancel the update and leave the EDB unchanged.

See **Consistency Edit Messages (ECON)** in **Section 1.6, System Messages** in this manual for more information and instructions.
PAN Preparation

After pressing **F5 Update** from a data entry screen (if there are no consistency edits) or an ECON screen, you are automatically positioned at the PAN **Comments Entry** screen. From here you can add comments and additional reviewers to the PAN.

1. Add a description of the action and any significant details in the **Comments Entry** screen.
2. Press **F10 NotfPrep** to display the **Notification Preparation** screen, where you can add reviewers as desired.
3. Press **F11 Detail** to display the **Activity Review** screen, where you can review the notification before sending it.
4. Press **F5 Update** to complete the update and send the notification.

If the update is successful, the first function in the bundle appears and displays:

```
U0007 UPDATE PROCESS COMPLETE
```

For more information about PANs and additional PAN features, please refer to [Section 1.8, Post Authorization Notification (PAN)](#).

Accessing IMSG

1. To access the Message Report Screen go to the **Next Function** field, type IMSG and press **Enter**.
2. When the IMSG screen is displayed, review any remaining messages and take the appropriate action.

Disposition of Forms

- Forward the appropriate approval document to the mandatory reviewer.
- Fax the separation payment AB2410 form [http://financial.ucsc.edu/Financial_Affairs_Forms/Separation_Payment_AB2410.pdf](http://financial.ucsc.edu/Financial_Affairs_Forms/Separation_Payment_AB2410.pdf) to the Payroll Office at 459-3702.