Overview

The procedures described in this section are for separating an academic 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
AL - Resignation – accept job at newly created health corporation (Same Desk Rule)
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
CE - Graduation/no longer enrolled as a student
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
CL - Layoff – accept job at newly created health corporation (Same Desk Rule)
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
I4 - Inactive for 4 consecutive months
KA - Death
LA - Other – termination (coaches, management program) or separation (per diem nurses, vocational nurses)
RA - Retirement – regular
RD - Retirement – compulsory for SMG and regents’ officers
**Policy Summary**

A separation action occurs when an individual’s university employment ends.

Please note:

- if the employee has a positive balance of accrued vacation, the Home Department must take the appropriate action to pay it
- a separation action should be processed at the first “open” opportunity following the employment end date
- the employee’s address should be updated to ensure that end of the year (W-2) forms are mailed to the correct address
- if you are processing a separation during a leave of absence, contact the Payroll Office for guidance
- Intercampus Transfers must be processed by the Home Department. See Section 4.6, Intercampus Transfers for more information
- do not separate an employee who has an ongoing appointment in another unit

**BEFORE YOU START**

1. Obtain the required approval to perform the payroll/personnel action.
2. Have the employee submit a written notice of resignation (for voluntary separations in advance of the appointment end date only).
3. Prepare the Unemployment Insurance Termination Report (form U5602) and submit it to the Benefits Office. **Do not** complete the Termination Report for “without salary” employees unless they previously held a paid appointment with the University.

**Data Entry**

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

- **ESEP** (Separation Data)
- **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 **BUND** and press **Enter**
4. Type **SEPR** and the **employee ID number**, then press **Enter**

The ESEP function displays the selected employee.
Completing the ESEP Function

THE ESEP SEPARATION FUNCTION

ESEP Notes and Tips

- The Separation Date is usually the same as the Last Day on Pay, even if the separation action is processed on a different date.

- For an employee who is on a leave of absence without pay and decides not to return, the separation date is the date the employee notified the hiring unit of their decision.

- If an appointment has been entered, but the employee does not actually begin working, enter the appointment begin date as the separation date, and use Reason Code EE: Never Started Employment.

The ESEP Procedure

1. Enter data in the following fields as applicable:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Day on Pay</td>
<td>The last day the employee will receive compensation in the format: MMDDYY. For without-salary appointees, enter the separation date.</td>
</tr>
<tr>
<td>Separation Date</td>
<td>The date upon which the separation is effective, in the format: MMDDYY.</td>
</tr>
<tr>
<td>Reason</td>
<td>Code indicating the reason for separation. Refer to Overview at the beginning of this section, or press F1 Help to see valid codes.</td>
</tr>
<tr>
<td>Destination</td>
<td>Code indicating the employee’s destination following employment with the University. Press F1 Help to see valid codes.</td>
</tr>
<tr>
<td>Future Institution Code</td>
<td>Code indicating the institution the employee will be affiliated with for future employment. Press F1 Help to see valid codes.</td>
</tr>
</tbody>
</table>

2. Press Enter to invoke range/value edits.

3. Press F11 Next Func to continue to the next function.
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 this is a retirement action for a member of the Academic Senate, do not add the Emeritus appointment until the following day and refer to **Section 7.15, Emeritus**, for procedures.
- If the employee has future appointments and/or distributions (i.e., the begin date comes after the date of separation), use the Delete command to remove them.

(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** to the current appointment(s).
2. Enter data in the following fields, as applicable:
   - **Actions (Action Code)**: Leave Blank. System Derived for a separation.
   - **Appt End**: Enter the date on which the separation is effective in the format: MMDDYY.
   - **Dur**: Enter an asterisk (*) to delete data in this field, if applicable.

The Distribution Level Procedure
1. **Tab or F15 NewLine** to the current distribution(s).
2. Enter data in the following fields, as applicable:
   - **Actions (Action Code)**: There is no required action code at the distribution level.
   - **Pay End**: Enter the date on which the separation is effective in the format: MMDDYY.
3. Press **Enter** to invoke range/value edits.
4. Press **F11** to continue to the next function.

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

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, 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.

The ELVE Procedure

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

   | Leave of Absence Begin Date | Should be no change to existing leave of absence begin date. |
   | Return                      | Enter the appropriate return date. See ELVE Notes and Tips. |

2. Press Enter to invoke range/value edits.
## Completing the EADD Function

### THE EADD (EMPLOYEE ADDRESS) FUNCTION

#### Notes and Tips
- Make changes to this function only if the employee indicates a change of address.

#### The EADD Procedure
1. Enter data in the following fields, as applicable:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent Address</td>
<td><strong>Line 1:</strong> First line of the address to which all university mail may be sent (e.g., benefits statement, tax information.) Maximum 30 characters.</td>
</tr>
<tr>
<td></td>
<td><strong>Line 2:</strong> 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.</td>
</tr>
<tr>
<td></td>
<td><strong>City:</strong> City portion of the address. US and foreign addresses. Max 21 characters.</td>
</tr>
<tr>
<td></td>
<td><strong>State:</strong> State portion of the address. United States addresses only.</td>
</tr>
<tr>
<td></td>
<td><strong>Zip:</strong> Zip code associated with the address. United States addresses only.</td>
</tr>
<tr>
<td>Foreign Address</td>
<td><strong>Ind:</strong> Enter F if this is a foreign address.</td>
</tr>
<tr>
<td></td>
<td><strong>Prov:</strong> Foreign addresses only. Province associated with the address, if applicable. Maximum 30 characters.</td>
</tr>
<tr>
<td></td>
<td><strong>Cntry:</strong> Foreign address only. Two-digit country code associated with the address. Press F1 Help to see valid codes.</td>
</tr>
<tr>
<td></td>
<td><strong>Postal Code:</strong> Foreign addresses only. Postal code associated with the address.</td>
</tr>
</tbody>
</table>

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to proceed 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. |

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

Review

Use F10 Prev Func and F11 Next Func to navigate through the SEPR bundle.

1. Make sure you have completed all the required data elements in the bundle.
2. Review all entered data for accuracy and consistency.

Updating the Employee Database

Press F5 Update to invoke consistency edits and to display the PAN Subsystem Notification Preparation screen.

Consistency Edit Errors

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:

4. Correct errors directly on the ECON screen.
5. F3 Return to the bundle, make any corrections, then do one of the following:
   6. Press F5 Update to invoke PAN.
   7. Press F2 Cancel twice to cancel the update.

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.