

7.13 SEPARATIONS - ACADEMIC (SEPR)

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)

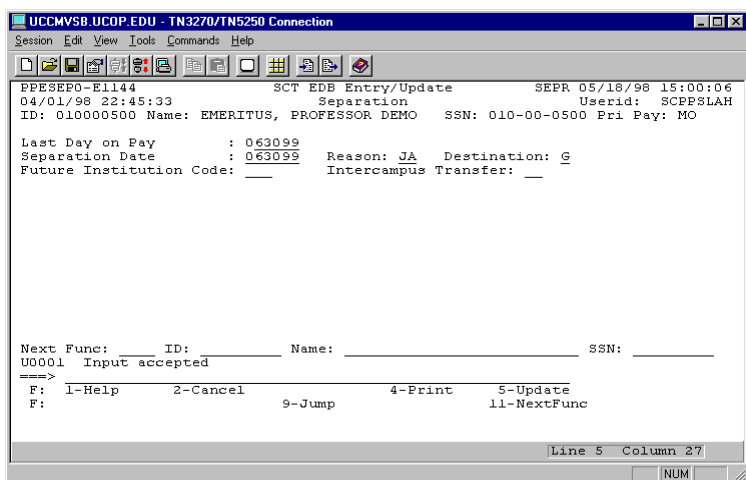
EPD1 (Employee Personal Data 1)

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

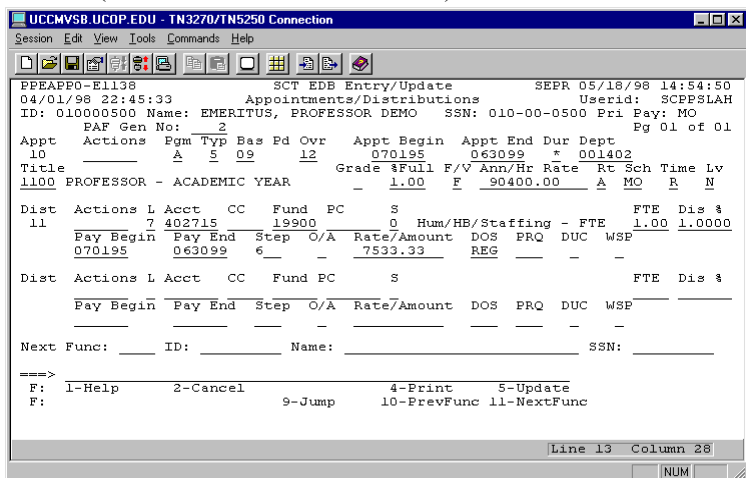
1. Enter data in the following fields as applicable:

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

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:

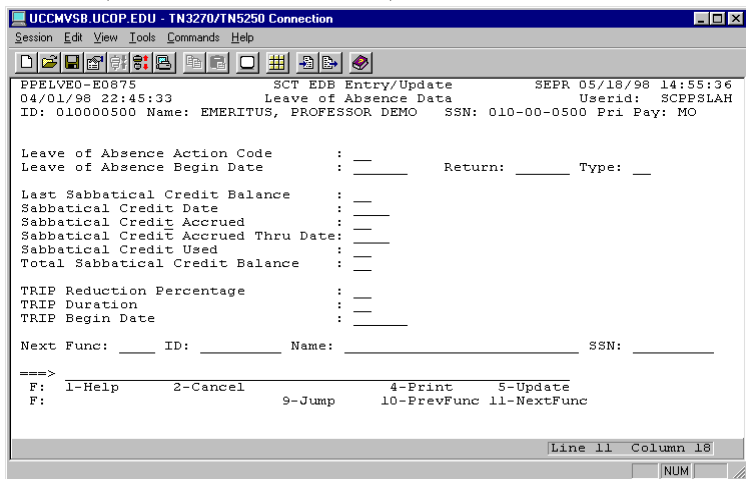
Actions (Action Code)	There is no required action code at the distribution level.
Pay End	Enter the date on which the separation is effective in the format: MMDDYY.

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

The screenshot shows a terminal window titled 'uccmvsb.ucop.eduuccmvsb.ucop.edu - TN3270/TN5250 Connection'. The main display area contains the following text:

```

PPEADD0-E1302      SCT EDB Entry/Update      SEPR 11/26/00 12:48:12
10/26/00 13:12:56      Employee Address Data      Userid: SCPPSJL
ID: 010000500 Name: EMERITUS, PROFESSOR DEMO  SSN: 010-00-0500 Pri Pay: M0

Permanent Address Line 1: 222 PARK AVE
                    Line 2:
                    City: SANTA CRUZ          State: CA Zip: 95060
Foreign Addr Ind:  _ Prov:          Country:  _
Postal Code:
Home Phone: 4444444   Spouse Name: POLLY
Campus Release Codes - Perm Address:  _ Home Phone:  _ Spouse Name:  _
Employee Organization Disclosures - Perm Address:  _ Home Phone:  _

Campus Address Line 1:
                    Line 2:
                    City:          State:  _ Zip:  _
Campus Phone 1: 0002          Phone 2:
Campus Room: 000400 Building:

Next Func:  _ ID:          Name:          SSN:

====>
F:  1-Help          3-PrevMenu  4-Print    5-Update
F:  9-Jump         10-PrevFunc 11-NextFunc 12-Exit
    
```

At the bottom of the terminal window, it shows 'IBM-3278-2E LU=L10TAA0W' and a 'NUM' indicator.

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:

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.
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Permanent Address	<p>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.</p> <p>City: City portion of the address. US and foreign addresses. Max 21 characters.</p> <p>State: State portion of the address. United States addresses only.</p> <p>Zip: Zip code associated with the address. United States addresses only.</p>
Foreign Address	<p>Ind. Enter F if this is a foreign address.</p> <p>Prov. Foreign addresses only. Province associated with the address, if applicable. Maximum 30 characters.</p> <p>Cntry. Foreign address only. Two-digit country code associated with the address. Press F1 Help to see valid codes.</p> <p>Postal Code. Foreign addresses only. Postal code associated with the address.</p>

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

```

uccmvsb.ucop.edu - TN3270/TN5250 Connection
Session Edit View Commands Script Help
PPEPD10-E1302      SCT EDB Entry/Update      SEPR 11/20/00 12:52:22
10/26/00 13:12:56  Employee Personal Data 1      Userid: SCPPSJL
ID: 010000500 Name: EMERITUS, PROFESSOR DEMO  SSN: 010-00-0500 Pri Pay: M0

Date of Birth: 071350
Sex: M
Ethnic: F
Veteran Status Codes - Vietnam: N War/Campaign: _ Disability: N
Disabled Status: N
Citizenship: C
Student Status: 1 No. of Reg. Units: ____
Pay Disposition Code: 000400

Next Func: ____ ID: ____ Name: ____ SSN: ____

====>
F: 1-Help          3-PrevMenu  4-Print     5-Update
F:                9-Jump      10-PrevFunc 12-Exit

Line 6 Column 17
IBM-3278-2E LU=L10TAA0W
  
```

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.
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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.