

6.19 SEPARATIONS - STAFF (SEPR)

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.)

Prepare the Data Collection Document, **SEPR**.

Forward the Unemployment Insurance Termination Report to the Benefits Office.

Retain letter of resignation for Staff Human Resources Service Team 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)

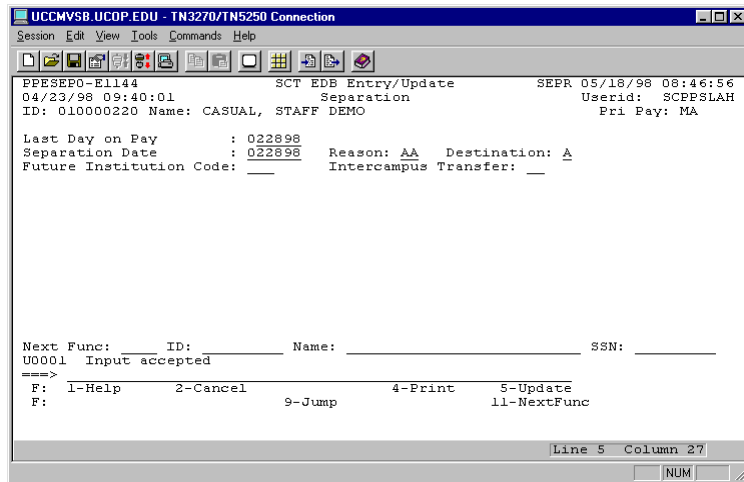
Accessing SEPR

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



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.

The ESEP Procedure

1. Enter data in the following fields as applicable:

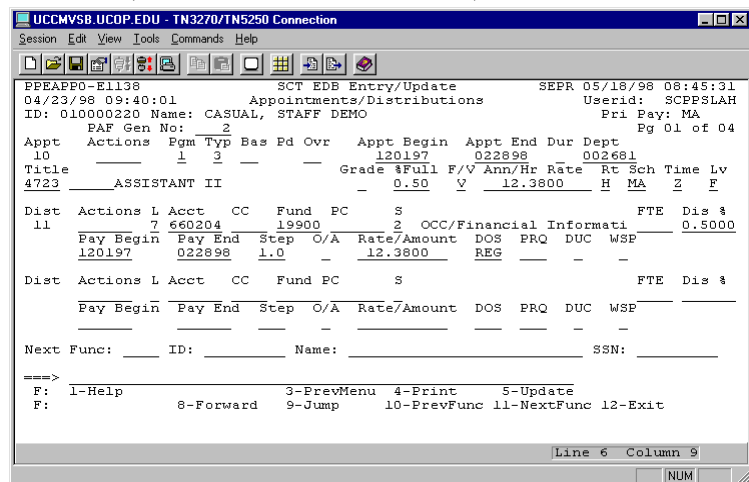
Last Day on Pay	The last day the employee was on pay status in the format: MMDDYY (Last day on pay status may not be the same as the separation date, i.e., ee on LWOP and then separates)
Separation Date	The date upon which the separation is effective in the format: MMDDYY.
Reason	Enter the Code indicating 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.

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:

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

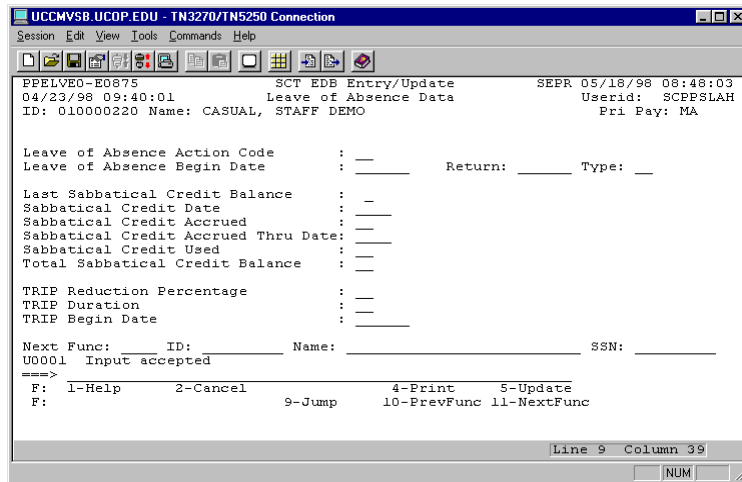
1. **Tab** or **F15 NewLine** to the current distribution(s).
2. Enter data in the following fields, as applicable:

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 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

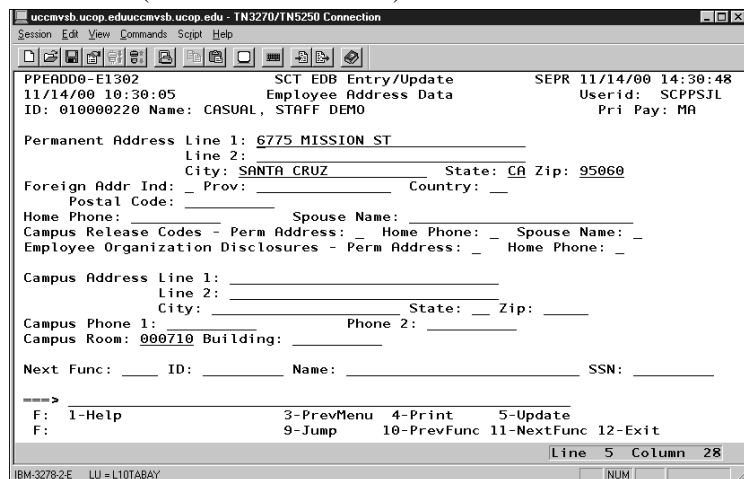
1. Enter data in the following fields, as applicable:

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

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	<p>Line 1: First line of the address to which all university mail may be sent (e.g., benefits statement, tax information.) Maximum 30 characters.</p> <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>
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Permanent Address	<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 continue to the next function.

Completing the EPD1 Function

EPD1 (EMPLOYEE PERSONAL DATA 1) FUNCTION

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Session Edit View Commands Script Help

PPEPD10-E1302 SCT EDB Entry/Update SEPR 11/14/00 14:34:09
 11/14/00 10:30:05 Employee Personal Data 1 Userid: SCPPSJL
 ID: 010000220 Name: CASUAL, STAFF DEMO Pri Pay: MA

Date of Birth: 050273
 Sex: F
 Ethnic: B
 Veteran Status Codes - Vietnam: N War/Campaign: _ Disability: N
 Disabled Status: N
 Citizenship: C
 Student Status: 1 No. of Reg. Units: ____
 Pay Disposition Code: 000710

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=L10TABAY NUM

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.
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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

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.
- Refer to the Separation Data Collection Document for disposition of forms information.
- Fax the separation payment AB2410 form http://financial.ucsc.edu/Financial_Affairs_Forms/Separation_Payment_AB2410.pdf to the Payroll Office at 459-3702