Advanced FOM
ServiceLink Offboarding – v2
Voluntary Terminations, Involuntary Terminations, Transfers and Retirement
Trainer Introduction

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Title: Principal Trainer
Department: HR | UCPath
Years @ UC: 1 year
Previous Experience: 10+ years of experience in instructional design and training in higher education. Taught Information System Management at the undergraduate and graduate levels.
Housekeeping

- Cell Phones
- Breaks
- Restrooms
Course Agenda

1. Voluntary Termination
2. Involuntary Termination
3. Transfer
4. Retirement

Offboarding

Terminate, transfer out, or retire an employee
Offboarding is the process of ending the current employment relationship by either the employee or University. It also includes situations in which we terminate one job, but do not entirely separate the employee.

**Examples:**
- A staff employee with two 50% jobs,
- A student with several casual jobs
- A professor whose term as dean has ended
- A staff or Academic Appointee transferring to UCLA
ServiceLink Offboarding Transactions

1. Voluntary Termination
   • Employee resigns from current position

2. Involuntary Termination
   • Decision by the University to end employment

3. Transfer Out
   • Employee transfers out of Department or UCR.
   • Inter-Location / Intra-Location

4. Retirement
   • Employee decides to retire from UCR
ServiceLink Roles
Offboarding FOM Process

Essential Roles & Responsibilities

1: Offboarding Initiator (HR/AP Staff) → ServiceLink

2: Offboarding Accountability Structure Fulfiller(s) → ServiceLink

3: Shared Services Center Offboarding Fulfiller(s) → UCPath

4: Shared Services Center AWE Approver → UCPath
First is the Initiator role, who initiates an Offboarding request using ServiceLink with final pay additional compensation, if applicable.

This is a required role.

Can be assigned to one or several employees in the department org.

Assigned to:
- HR/AP Business Partner
- HR/AP Generalist

The Initiator is the individual responsible for collecting Offboarding information from the department/employee.
The Offboarding Accountability Structure Fulfiller is the second role in the process. Completes tasks assigned to the task queue. Confirms submission of final timesheet with supervisor. Departments can have more than one Offboarding Accountability Structure Fulfiller.
The third role is the SSC Fulfiller, who submits the termination transaction in UCPPath. Completes tasks assigned to the SSC task queue. This is a required role.

Fulfillers:  
- Shared Services

Communicates with department if there are any issues with the request and marks requests complete within ServiceLink.
Offboarding FOM Process

Essential Roles

1: Offboarding Initiator → ServiceLink

2: Offboarding Accountability Structure Fulfillers(s) → ServiceLink

3: Shared Services Center Fulfiller(s) → UCPath

4: Shared Services Center Approver → UCPath

SSC AWE Approver

Provides a final review in UCPath for quality assurance after SSC Fulfiller submits transaction.

This is a required role.

Approvers:
• Shared Services
# Offboarding ServiceLink (EACS) Roles

<table>
<thead>
<tr>
<th>ServiceLink Form</th>
<th>Type of Request</th>
<th>SAA Assigned ServiceLink Role Required</th>
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</thead>
<tbody>
<tr>
<td>Offboarding</td>
<td>Voluntary Termination</td>
<td>Offboarding Initiator</td>
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<tr>
<td></td>
<td>Involuntary Termination</td>
<td>Offboarding Accountability Structure Fulfiller</td>
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<tr>
<td></td>
<td>Transfer OUT or Retire an employee</td>
<td>SSC Offboarding Fulfiller</td>
</tr>
</tbody>
</table>

**Offboarding**
- Terminate, transfer out, or retire an employee
Access to ServiceLink Forms is granted by the department SAA. Role Name indicates what Form and Role has been assigned in ServiceLink.
In the Offboarding Request Form, if the Offboarding Initiator role has not been assigned, no records will be displayed when attempting to fill out Employee Name.
Voluntary Termination - Staff
The same ServiceLink Form – Offboarding – is used to terminate, transfer out, or retire Staff and Academic Appointees, and concurrent workers. To terminate a relationship with a Contingent worker or person of interest, submit a Generic Form Request.
Employee Information – Staff

When an employee voluntarily resigns from 1 or more positions the “Voluntary Termination” reason is used.
Employee Information – Staff

Once the Employee Name field is populated, the incumbent’s Position Number(s) will appear. If the incumbent has more than one job, the first position number will be their primary job. Click on the downward arrow to see additional positions.

Incumbent Job and Position Data will populate below. Note that the UCPath Employee ID is included in this dataset. This data is for informational use and is pulled from UCPath via HRDW. The data is accurate as of 24 hours ago.
Voluntary Termination - Offboarding Reason Codes

ServiceLink Reason Codes

There are 14 Offboarding reason codes for a Voluntary Termination.

**Note:** Appointment Expired, Death and No Longer a Student are not Voluntary Termination reason codes.

If you need to terminate an employee for any of these 3 reasons, use the **Involuntary Termination** form.
Voluntary Termination (Staff)
ServiceLink Offboarding Reason Codes

Resign Accept Another Job
**Usage:** Use to terminate an employee due to employee accepting another job.
**Example:** Employee has accepted a job with the NASA

Resign Dissatisfied w/job
**Usage:** Use to terminate an employee due to employee being dissatisfied with job.
Resign Failed To Return From Leave

**Usage:** Use to terminate an employee due to employee’s failure to return from an approved leave of absence.

**Example:** Employee failed to return to work after a medical leave of absence.

Resign Job Abandonment

**Usage:** Use to terminate an employee due to job abandonment

**Example:** Employee doesn’t return after their vacation and doesn’t give notice of resigning.
Resign Look For Another Job

**Usage:** Use to termination an employee due to employee looking for another job.

Resign Military Service

**Usage:** Use to termination an employee due to employee planning to enter military service.
Resign Moved Out Of Area

Usage: Use to termination an employee due to employee moving out of area.

Resign No Reason Given

Usage: Use to termination an employee when employee did not provide reason for resignation.
Become Self - Employed

**Usage:** Use to termination an employee due to employee planning to work for him or herself.

Resign Personal Reasons

**Usage:** Use to termination an employee due to personal reasons.

**Example:** Employee decides to become a stay at home parent.
Resign Quit Without Notice

**Usage:** Use to termination an employee due to employee quitting without notice.

Resign Attend School

**Usage:** Use to termination an employee due to employee planning to attend school.
Resign Self Employment

**Usage:** Use to terminate an employee due to employee planning to work for him or herself.

Release From Trial Employment

**Usage:** Use to terminate an employee from trial employment initiated by the employee.
Voluntary Termination – Dates

**Effective Date Field**: First day that the employee should not be paid and the job should be inactivated in UCPath.
Example: If employee’s last day worked and on pay status is a Friday the Effective date should be Saturday.

**Last Day Worked Field**: Last day that the employee was present and performed work for UCR. Usually the last day worked is one calendar day before the Effective Date, but **MAY BE** earlier if the employee took a **Leave of Absence** before being terminated.

**Date Fields**: These 2 dates SHOULD NOT BE THE SAME DATE.
In the **Additional Compensation-Final Paycheck** field, select Yes or No. If No is selected and employee is owed accrual payouts for *vacation, compensatory time off, etc.*, final paycheck will be processed automatically by UCPath and will be distributed on the employees next regular pay cycle.

If Yes is selected, additional information is required to validate final pay processing, such as:
- **Earnings Code**
- **Earnings Amount**
- **Earnings Begin and End Date**
- **FAU Chartfields if available**

Additional Compensation refers to One Time or Recurring Payments.
Additional Compensation is any payment that is in addition to an employee’s regular base compensation.

• One Time Payments
• Recurring Payments

Examples:
- Summer session teaching
- Department chair stipends
- Clinical incentives
- Consultant services
- Reading manuscripts
- Lectures and similar services
- Certification pay
- Uniform allowance
- Military service / Supplement pay for non-exempt employees
- STAR award
- Severance
- Separation Payment
Voluntary Termination – Tasks

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

Four out of five possible tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Offboarding transaction.
Comments can be added to ensure that all needed data to complete a UCPath Offboarding transaction is included. 
NOTE: Enter employee’s personal email address to ensure Exit Interview Survey and Former Employee Portal access.

When adding an attachment only include information needed for fulfillment with private info redacted. Resignation letter, termination notice, etc. should not be attached due to privacy.
This task defaults to the department/org unit, however if a SSC want to take ownership of this task, they should communicate this change with their client base.
Exit Interview Link- UCR HR Policy

Procedure - When a Staff Member Announces their intent to leave the Campus:
1. The organizational unit/department will provide the model communication to departing staff member asking him/her to complete an electronic exit survey.
2. The org unit/dept will ask the departing staff member for their preferred email address to send an email communication with instructions and a link to complete the UCR exit survey.
3. If the staff member does not have an email address, the organizational unit/department will provide the staff member a letter that will include instructions on how and where to complete the exit survey and a link to the survey.
4. At least one week prior to the staff members last day of work, the organizational unit/department will remind the employee to complete the exit survey.

Here’s a link to the local procedure: http://hr.ucr.edu/policies/exit_survey_local_procedure_july_2016.pdf
Exit Interview – UCR HR Communication Template

To: [Enter Staff Member Name]
From: University of California, Riverside – Human Resources
Re: Exit Survey – Requesting Your Feedback

Dear [Enter Staff Member Name],

As you leave your position at UC Riverside (UCR), we would like to give you the opportunity to share your honest opinions about UCR by completing a confidential exit survey. We believe you have a unique perspective on the work environment and will be able to provide information about what you found valuable and what we can improve.

The survey is being conducted by a third party provider (Corporate Leadership Council [CLC]), and is accessible via the internet. You may use a computer in your department, a smart phone with Internet access or use the Human Resources (HR) computer kiosk in the HR department located at 1201 University Ave., Suite 208 to complete the survey.

Please complete the survey before your last day of employment; it will take approximately 10 minutes to complete. You can access the survey site in two ways:

1) click on the URL/hyperlink provided below; or

2) enter the URL in the address location window of your web browser (Internet Explorer, Google Chrome, Firefox, etc.).

Survey link:

https://www.surveymonkey.com/s/J511374530AA2C7B

Again, your responses to the survey are completely confidential. UCR will not receive any individual results. Your answers will be combined with those of other departing staff members at UCR for analysis.

If you have any questions, please contact Mary White by telephone (901) 327-2022 or by email at mwhite@ucr.edu.

We wish you all the best in your future endeavors.

communication template link:
http://hr.ucr.edu/policies/email_communication_for_staff.docx
Employee Exit Survey

Exit Survey link: https://www.survey-executiveboard.com/se.ashx?s=25113745300A2C78
Exit Interview Link - Voluntary Termination (Staff)

CEB Corporate Leadership Council

We would first like to ask you a few questions for benchmarking and comparison purposes. *Note your individual responses will not be shared with the organization and all survey participants are guaranteed full confidentiality.*

Please select the location that you worked at:

- UC Riverside

Please select the business unit or division that you worked in:

- UC Riverside – SDIV127 – VC - Finance & Business Ops

Please select your ethnicity:

- American Indian or Alaska Native (C) – A person having origins in any of the original peoples of North and South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment.
- Asian
- Chinese/Chinese American (2) – A person having origins in any of the original peoples of China.
- Filipino/Filipino (L) – A person having origins in any of the original peoples of the Philippine Islands.
- Japanese/Japanese American (B) – A person having origins in any of the original peoples of Japan.
- Native Hawaiian or Other Pacific Islander (Z) – A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Island.
- Pakistani/East Indian (R) – A person having origins in any of the original peoples of the Indian subcontinent (e.g., India and Pakistan).
- Other Asian (X) – A person having origins in any of the original peoples of the Far East or South East Asia (including Cambodia, Korea, Malaysia, Thailand, and Vietnam).
- Black/African American (A) – A person having origins in any of the Black racial groups of Africa. (not of Hispanic origin)
- Hispanic/Latino
- Mexican/Mexican American/Chicano (E) – A person of Mexican culture or origin regardless of race.
- Latin American/Latino (S) – A person of Latin American (e.g., Central American, South American, Cuban, Puerto Rican) culture or origin regardless of race.
- Other Spanish/Spanish American (W) – A person of Spanish culture or origin, not included in any of the Hispanic categories listed above.
- White (not of Hispanic origin) (F) – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- Prefer not to respond

Please select the choice that most closely describes your level in the organization you’re departing:

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Voluntary Termination - AP
Selecting the Offboarding Reasons and entering the Employee Information is the same as Staff voluntary terminations.

Offboarding Reason
When an employee voluntarily resigns from 1 or more positions the “Voluntary Termination” reason is used.
Employee Information – AP

Employee’s First & Last Names. You can also search by Employee ID or Home Department.

Once the Employee Name field is populated, the incumbent’s Position Number(s) will appear. If the incumbent has more than one job, the first position number will be their primary job. Click on the downward arrow to see additional positions.

Incumbent Job and Position Data will populate below. Note that the UCPath Employee ID is included in this dataset. This data is for informational use and is pulled from UCPath via HRDW. The data is accurate as of 24 hours ago.
Voluntary Termination - AP

If an Academic Employee is selected, a checkbox titled "Transitioning to Courtesy Title" will appear. If selected, there will be an additional task assigned to the Accountability Structure Fulfiller to submit an Onboarding Request for the transfer. The Onboarding request will need to be submitted before the Offboarding request can be completed.

Same Reason Codes apply as Staff Voluntary terminations.
Voluntary Termination – Tasks

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

Four out of five possible tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Offboarding transaction.
Involuntary Termination - Staff
ServiceLink Form (Involuntary Termination- Staff)

The same ServiceLink Form – Offboarding – is used to involuntary terminate Staff and Academic Appointees, and concurrent workers.

To terminate a relationship with a Contingent worker or person of interest, submit a Generic Form Request.
Offboarding Reason
When an employee is terminated from 1 or more positions the “Involuntary Termination” reason is used.
Employee Information – Staff

Employee’s First & Last Names. You can also search by Employee ID or Home Department.

Once the Employee Name field is populated, the incumbent’s Position Number(s) will appear. If the incumbent has more than one job, the first position number will be their primary job. Click on the downward arrow to see additional positions.

Incumbent Job and Position Data will populate below. Note that the UCPath Employee ID is included in this dataset. This data is for informational use and is pulled from UCPath via HRDW. The data is accurate as of 24 hours ago.
Involuntary Termination – Dates

**Date Fields:** These 2 dates SHOULD NOT BE THE SAME DATE.

**Effective Date Field:** First day that the employee should not be paid and the job should be inactivated in UCPath. Example: If employee’s last day worked and on pay status is a Friday, the Effective date should be Saturday.

**Last Day Worked Field:** Last day that the employee was present and performed work for UCR. Usually the last day worked is one calendar day before the Effective Date, but MAY BE earlier if the employee took a Leave of Absence before being terminated.
Involuntary Termination - Staff

ServiceLink Reason Codes

For Involuntary Terminations Only

Check the Expedite box under Options to escalate termination to UCPC. If this box is checked, SSC will be instructed to open a case with UCPC to expedite. This should be used when an employee needs to be terminated the same day.
Involuntary Termination - Staff

ServiceLink Reason Codes

UCPath Reason Codes

Involuntary Termination Offboarding Reason Codes in ServiceLink are equivalent to Reason Codes in UCPath.
Voluntary Termination - Tasks

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

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<table>
<thead>
<tr>
<th>Accountability Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a Single Task for all Tasks listed below</td>
</tr>
<tr>
<td>Review EACS and Revoke access as appropriate per UCR Policy</td>
</tr>
<tr>
<td>Update Enterprise Directory</td>
</tr>
<tr>
<td>Coordinate Return of Assets &amp; University Property</td>
</tr>
<tr>
<td>File Decision Doc in Personnel File (do not attach)</td>
</tr>
<tr>
<td>Confirm Employee’s final timesheet has been submitted and Approved by the supervisor</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Shared Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Interview Link and Cover Letter (Staff)</td>
</tr>
<tr>
<td>Complete UCPATH Termination Template</td>
</tr>
<tr>
<td>Send Offboarding Information to Employee</td>
</tr>
<tr>
<td>Identify Employee’s final TimeSheet in TAR and mark as ‘Do not submit to UCPATH’</td>
</tr>
<tr>
<td>Complete UCPATH Final Pay Request in UCPATH (only applicable if sep. from UCR)</td>
</tr>
</tbody>
</table>

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Four out of five possible tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Offboarding transaction.
Involuntary Termination (Staff)
ServiceLink Offboarding Reason Codes

AppointmenExpired

Usage: Use to terminate an employee with an appointment end date or expiration of contract in accordance with the terms of the contract or appointment.

Example: Employee/Student

Dismissal - Attendance

Usage: Use to terminate an employee due to attendance.
Involuntary Termination (Staff)
ServiceLink Offboarding Reason Codes (continued)

Death

Usage: Use to terminate an employee due to death.

Do Not Protest (Settlement)

Usage: Use to terminate when an employee has a settlement with the university. UCPC will not protest any UI claims if the employee has this action/reason code.
Do Not Rehire (Settlement)

**Usage:** Use to terminate an employee with an Agreement/Settlement. Employee agrees not to return.

Dismissal – Falsified App

**Usage:** Use to terminate an employee due to falsification on application.
No Longer a Student

**Usage:** Use to terminate due to employee graduating or no longer student status.

**Example:** Employee/Student

Involuntary Termination - Other

**Usage:** Use to terminate an employee for other reasons not stated.
Involuntary Termination (Staff)
ServiceLink Offboarding Reason Codes (continued)

Layoff – Accept Health Care

**Usage:** Use to track employee who are laid off and accept job at new Healthcare Corporation. Note: Used for Conversion purposes only.

Medical Separation

**Usage:** Use to terminate an employee due to an employee who became unable to perform essential functions of his or position due to a disability.
Dismissal - Misconduct

**Usage:** Use to terminate an employee due to misconduct.

Dismissal – No Longer Cert/Lic

**Usage:** Use to terminate an employee due to lack of certification or license.
Never Started Employment

**Usage:** Use to terminate an employee due to prospective employee never started work. This is used to void the employee record rather than deleting it.

Elimination of Position

**Usage:** Use to terminate an employee due to elimination of a MSP position or a layoff of an Academic position where no severance or rehire rights are provided.
Involuntary Termination (Staff)
ServiceLink Offboarding Reason Codes (continued)

Per Diem Release
**Usage:** Use to terminate due to the end of a per diem appointment.

Dismissal – Lack of Performance
**Usage:** Use to terminate an employee due to performance.
Involuntary Termination (Staff)
ServiceLink Offboarding Reason Codes (continued)

Released During Probation

**Usage:** Use to terminate an employee due to employee not passing probation.

Layoff – Reduced Sev. Reh/Recall

**Usage:** Use to indefinite Layoff – Reduced Severance and Preferential Rehire/Recall Rights.
Involuntary Termination (Staff)
ServiceLink Offboarding Reason Codes (continued)

Layoff – Rehire/Recall Rights
*Usage:* Use for indefinite Layoff – Rehire/Recall Rights.

Layoff - Severance
*Usage:* Use for indefinite Layoff - Severance
Involuntary Termination (Staff)
ServiceLink Offboarding Reason Codes (continued)

Release from Trial Employment
**Usage:** Use for release from trial employment initiated by the University.

Visa/Work Permit Expired
**Usage:** Use to terminate an employee due to expiration of visa and/or work permit.
Involuntary Termination (Staff)
ServiceLink Offboarding Reason Codes (continued)

Grant/Contract Expired
**Usage:** Use to terminate an employee due to the expiration of a grant or contract.

Void Employee Record
**Usage:** Used when the record needs to be voided because it was erroneously created and will not be used.
Involuntary Termination - AP
ServiceLink Form (Involuntary Termination - AP)

The same ServiceLink Form – Offboarding – is used to terminate Academic Appointees.
Offboarding Reason
When an employee is terminated from 1 or more positions the “Involuntary Termination” reason is used.
Employee’s First & Last Names. You can also search by Employee ID or Home Department.

Once the Employee Name field is populated, the incumbent’s Position Number(s) will appear. If the incumbent has more than one job, the first position number will be their primary job. Click on the downward arrow to see additional positions.

Incumbent Job and Position Data will populate below. Note that the UCPath Employee ID is included in this dataset. This data is for informational use and is pulled from UCPath via HRDW. The data is accurate as of 24 hours ago.
Involuntary Termination – Dates

**Date Fields:** These 2 dates SHOULD NOT BE THE SAME DATE.

**Effective Date Field:** First day that the employee should not be paid and the job should be inactivated in UCPath. Example: If employee’s last day worked and on pay status is a Friday the Effective date should be Saturday.

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Involuntary Termination - AP

ServiceLink Reason Codes

<table>
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<th>Request Information</th>
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<tr>
<td>* Offboarding Reason Code</td>
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<table>
<thead>
<tr>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Expedite</td>
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</tbody>
</table>

For Involuntary Terminations Only

Check the Expedite box under Options to escalate termination to UCPC. If this box is checked, SSC will be instructed to open a case with UCPC to expedite. This should be used when an employee needs to be terminated the same day.
Involuntary Termination for Academic Personnel in ServiceLink & UCPATH include three additional Reason Codes.
Involuntary Termination - Tasks

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

Four out of five possible tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Offboarding transaction.
Involuntary Termination (AP)
ServiceLink Offboarding Reason Codes

Academic Incompetent Performance
**Usage:** Academic Personnel Use. Termination based on APM 075.

Academic Presumptive Resignation
**Usage:** Academic Personnel Use. Used to terminate an academic appointee per APM 700-30.
Involuntary Termination (AP)
ServiceLink Offboarding Reason Codes (continued)

Academic Terminal Appointment

Usage: Academic Personnel Use. Used to terminate an academic appointee who did not receive tenure.
Offboarding Transfers
Offboarding Transfers

- **Offboarding**
- **Transfer Out**
  - Inter-Location Transfer (out of UCR)
  - Intra-Location Transfer (within UCR)
- **HR System**
  - UCPATH
  - PPS
- **Business Unit**
  - UC Merced
  - UCLA, UCSB, UCSF, etc.
  - Dept./Org Unit within UCR
Offboarding Transfers

Interlocation

UCR Employee transfers to another UC University. Involves an Offboarding transaction in ServiceLink and UCPath.
### Intralocation

Employee transfers between departments at UCR. Will be an Offboarding from the department and Onboarding to new department in ServiceLink and UCPath.
Offboarding Transfers

- Offboarding
- Transfer Out
  - Inter-Location Transfer (out of UCR)
  - Intra-Location Transfer (within UCR)
- HR System
  - UCPATH
  - PPS
- Business Unit
  - UC Merced
  - UCLA, UCSB, UCSF, etc.
  - Dept./Org Unit within UCR
**NO Break in Service**

To ensure no break in service, the Effective Date of the transaction must be the DAY after the employee's final day at UCR.

The UC locations must coordinate to ensure the effective dates for Onboarding & Offboarding transactions are the same.

Example: Jane Smith’s last day worked is Friday Aug 25th. The Job Effective Date will be Saturday Aug 26th, even though she is starting at UCLA on Monday Aug 28th.
Interlocation Transfers - Staff
The same ServiceLink Form – Offboarding – is used for transfer out of UCR Staff and Academic Appointees.
Interlocation Transfer (Staff) ServiceLink

Offboarding Reason Codes

This transfer type is for transfers OUTSIDE UCR (BU=Campus/Location)

Transfer from UCPath PS (UCPath to PPS)

**Usage:** Use for employee transfers from a UCPath-PeopleSoft location to a PPS location. Used during conversion period only. Inactive after all campuses are live on UCPath.

**Example:** A staff employee at UCR is transferred to a new position at UC Davis. There is no break in service.

Interlocation (BU) Transfer (UCPath to UCPath)

**Usage:** Use when an employee is transferring from one Business Unit to another and both Business Units are on PeopleSoft (the existing Employee Record will be terminated and the receiving Business Unit will add a new Employee Record.

**Example:** A UCR staff employee is transferred to a new position at UC Merced with no break in service.
Offboarding Reason
When an employee transfer from UCR to another UC Location the “Transfer” reason is used.
Employee Information – Staff

Employee’s First & Last Names. You can also search by Employee ID or Home Department

Once the Employee Name field is populated, the incumbent’s Position Number(s) will appear. If the incumbent has more than one job, the first position number will be their primary job. Click on the downward arrow to see additional positions.

Incumbent Job and Position Data will populate below. Note that the UCPath Employee ID is included in this dataset. This data is for informational use and is pulled from UCPath via HRDW. The data is accurate as of 24 hours ago.
The first two Reason Codes: Transfer from UCPath PS & Interlocation (BU) Transfer are the only Interlocation Transfer Reason Codes in ServiceLink.

In UCPath the Reason Codes are the same but Interlocation transfers for both Staff and Academic Appointees are transacted using the Voluntary Termination template.
Interlocation Transfer – Dates

**Effective Date Field**: First day that the employee should not be paid by UCR. Example: If employee’s last day worked and on pay status is a Friday the Effective date should be Saturday.

**Last Day Worked Field**: Last day that the employee was present and performed work for UCR. Usually the last day worked is one calendar day before the Effective Date, but may be earlier if the employee took a leave before being terminated.
1. Transfers from UCR to a UC location on UCPath.

Requires UFIN-300 to ensure personnel files are transferred from UCR.
2. Transfers from UCR to a UC location on PPS.

Requires UFIN-300 and UFIN-301A & 301B.

***UCPC will manage the UFIN-301 process which ensures transfer of benefits, accruals and service information data to the PPS location.***

UFIN Forms 301A & 301B are located in the UCPath Portal Dashboard under Human Resources.
Intralocation Transfers - Staff
The same ServiceLink Form – Offboarding – is used to terminate, transfer out, or retire Staff and Academic Appointees, and concurrent workers. To terminate a relationship with a Contingent worker or person of interest, submit a Generic Form Request.
Intralocation Transfer Offboarding Reason Codes

Transfer Reason Codes in ServiceLink are also in UCPath
Intralocation Transfer (Staff) ServiceLink

Offboarding Reason Codes

This transfer type is for transfers Within UCR

Voluntary Demotion

**Usage:** Use for voluntary transfer to a position with a lower salary range maximum in a different department.

Involuntary Demotion

**Usage:** Use when for transfer to lower salary range maximum for disciplinary reasons in a different department.
Intralocation Transfer (Staff) ServiceLink

Offboarding Reason Codes (continued)

This transfer type is for transfers Within UCR

**Lateral Transfer**

**Usage:** Use to transfer an employee from one position to another position in a new department.

**Promotion**

**Usage:** Use to change an employee from one position to another position which has a higher salary range maximum. Promotions are normally obtained through a competitive recruitment process. UCOP – This will be used when there is a change in department.
Intralocation Transfer (Staff) ServiceLink

Offboarding Reason Codes (continued)

This transfer type is for transfers Within UCR

Temp Out of Class Assignment

**Usage:** Use to transfer a represented employee, according to the employee’s bargaining contract, to a full perform the functions of a position in a different classification. The University shall determine the duration and end date of such assignment. The temporary assignment shall not result in the permanent reclassification of the employee. This moves employee into a new department.
Retirement - Staff
The same ServiceLink Form – Offboarding – is used to Retire Staff and Academic Appointees.
Offboarding Reason
When an employee retires from UCR the “Retirement” reason is used.
Employee Information – Staff (continued)

Employee’s First & Last Names. You can also search by Employee ID or Home Department

Once the Employee Name field is populated, the incumbent’s Position Number(s) will appear. If the incumbent has more than one job, the first position number will be their primary job. Click on the downward arrow to see additional positions.

Incumbent Job and Position Data will populate below. Note that the UCPath Employee ID is included in this dataset. This data is for informational use and is pulled from UCPath via HRDW. The data is accurate as of 24 hours ago.
Retirement Offboarding Reason Code - Staff

Note: In ServiceLink and UCPath there is only one Reason Code when Offboarding employees due to Retirement.

Options: If a Staff Employee is selected, the Emeritus checkbox appears under Options. An additional task for the Accountability Structure Fulfiller to initiate an Onboarding Request. The request will have to be submitted for the employee before the Retirement request is completed.
**Retirement - Offboarding Reason Codes**

In the **Effective Date** field, enter the date on which the retirement takes effect. This date should be one day after the employee’s Last Day worked.

Enter the employee’s **Last Day Worked**. This is usually the last day employee was on pay status and separation date. This date should always be a date earlier than the **Effective Date**.
Retirement – Offboarding Final Pay

In the **Additional Compensation-Final Paycheck** field, select Yes or No. If No is selected and employee is owed accrual payouts for **vacation, compensatory time off, etc.**, final paycheck will be processed automatically by UCPath and will be distributed on the employees next regular pay cycle.

If Yes is selected, additional information is required to validate final pay processing, such as:

- **Earnings Code**
- **Earnings Amount**
- **Earnings Begin and End Date**
- **FAU Chartfields if available**

Additional Compensation refers to One Time or Recurring Payments.
Retirement - Offboarding Tasks

You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

Four out of five possible tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Offboarding transaction.
Retirement - AP
Offboarding Reason: When an employee retires from UCR the "Retirement" reason is used.
Employee Information – AP

Employee’s First & Last Names. You can also search by Employee ID or Home Department

Once the Employee Name field is populated, the incumbent’s Position Number(s) will appear. If the incumbent has more than one job, the first position number will be their primary job. Click on the downward arrow to see additional positions.

Incumbent Job and Position Data will populate below. Note that the UCPash Employee ID is included in this dataset. This data is for informational use and is pulled from UCPash via HRDW. The data is accurate as of 24 hours ago.
Note: For Retirements in July, there must be a minimum of 1 business day break in service. If not, COLA will be affected for those retiring on July 1st. If error in date occurs, employee has to wait 2 years for COLA.
**Retirement – Offboarding Final Pay**

If Yes is selected, additional information is required to validate final pay processing, such as:
- Earnings Code
- Earnings Amount
- Earnings Begin and End Date
- FAU Chartfields if available

Additional Compensation refers to One Time or Recurring Payments.

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<table>
<thead>
<tr>
<th>Final Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note</strong></td>
</tr>
<tr>
<td>If the employee has multiple jobs and only one job is being offboarded, all final pay for that employee will be paid off-cycle. Approving the employee’s final timesheet quickly will help ensure that the employee receives final pay in a timely manner.</td>
</tr>
<tr>
<td><strong>Voluntary and Retirement:</strong></td>
</tr>
<tr>
<td>Final paychecks for represented employees are paid off-cycle. Approving the employee’s final timesheet quickly will help ensure that the employee receives final pay in a timely manner.</td>
</tr>
<tr>
<td><strong>Involuntary:</strong></td>
</tr>
<tr>
<td>Final paychecks for Involuntary Offboardings are paid off-cycle. Approving the employee’s final timesheet quickly will help ensure that the employee receives final pay in a timely manner.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Is the employee owed additional compensation on their final paycheck?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>-- None --</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

Must provide the following information to process final pay:
- Earnings Code
- Earnings Amount
- Earnings Begin Date
- Earnings End Date
- FAU Chartfields if available

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In the **Additional Compensation-Final Paycheck** field, select Yes or No. If No is selected and employee is owed accrual payouts for **vacation, compensatory time off, etc.**, final paycheck will be processed automatically by UCPath and will be distributed on the employees next regular pay cycle.
You will need to select at least ONE task as the Accountability Structure Fulfiller (assigned to Assignment Group Dept._Onboarding Accountability Structure Fulfiller). Clicking on the “Create a single task for all Task Listed Below” will create one task that will need to be closed once completed. Individual tasks can also be selected. All selected tasks will be generated at once. Tasks assigned to the Shared Services Center will also be generated simultaneously.

Four out of five possible tasks are required and cannot be modified. These tasks will be assigned to Assignment Group SSC Name_Onboarding Shared Services Fulfiller. Tasks will need to be closed in the ServiceLink fulfiller view as part of an Offboarding transaction.
Confirmation Notification
Once the Offboarding form is successfully submitted, the Initiator will be directed to this confirmation page. Every transaction is composed of a Request Number (REQ), Item (RITM), and Tasks (SCTASK). The RITM Number and Description are hyperlinks that will take you to the ServiceLink Fulfiller view (read-only) for the submitted Offboarding ticket. This “Stage” icon allows you to track a transactions’ progress through fulfillment. Three green checks mean that all tasks are closed and the submitted transaction is complete.
RITM View is a read only view. It displays Offboarding information form details entered by Initiator. At the bottom of the screen, you will see a task catalog that displays all generated tasks. This is shown on the next slide.
In the Tasks section you can see that this Offboarding ticket has created 4 tasks to complete.

The Department Fulfiller task has been assigned to the Accountability Structure “Assignment Group” but does not have an “Assigned To” name. This task can be assigned at this time.
Final Pay and TARS
Final Pay & TARS

1. Employees should submit their final timesheet in TARs on or before their final workday.
2. The employee’s supervisor must approve the employee’s final timesheet as soon as possible after the employee finalizes it.
3. The department fulfiller must communicate with the supervisor to ensure that the employee’s time has been finalized and approved. Once confirmed, the department fulfiller should close the task in ServiceLink.
4. SSC will begin the final pay process by pulling the employee’s final timesheet from TARS and ensuring it is not sent through the regular payroll process.

Note: If the employee has multiple jobs and only one job is being offboarded, all final pay data and workflow steps will be bypassed.
## UCPay Path Deployment - Final Paycheck

### UCPC
- UCR will no longer produce paychecks.
- UCPC will process off-cycle paychecks.
- Same day paychecks will not be available.

### Off-Cycle
- Represented Employees
- Voluntary Terminate
- Involuntary Terminations
- Retirement
- SSC will request off-cycle paychecks

### On-Cycle
- Non-Represented Employees
- Voluntary Terminated
- Employees will receive their final paychecks on their usual payday.
If Yes is selected, additional information is required to validate final pay processing, such as:

- Earnings Code,
- Earnings Amount
- Earnings Begin and End Date
- FAU Chartfields if available

Additional Compensation refers to One Time or Recurring Payments.

If Yes is selected and employee is owed accrual payouts for vacation, compensatory time off, etc., final paycheck will be processed automatically by UCPATH and will be distributed on the employees next regular pay cycle.
Additional Compensation is any payment that is in addition to an employee’s regular base compensation.

- One Time Payments
  - Also includes severance pay or
  - Separation payment
- Recurring Payments

Examples:
- Summer session teaching
- Department chair stipends
- Clinical incentives
- Consultant services
- Reading manuscripts
- Lectures and similar services
- Certification pay
- Uniform allowance
- Military service / Supplement pay for non-exempt employees
- STAR award
- Severance
- Separation Payment
Offboarding Final Timesheet Tasks

The Offboarding Accountability Structure Fulfiller is assigned the task to ‘Confirm Employee’s final timesheet has been submitted and Approved by the supervisor’.

The Offboarding Shared Services Fulfiller will also be assigned the task to ‘Complete UCPath Final Pay Request in UCPath (only applicable if employee is separating from UC)’. 
Employees should submit their final timesheet in TARs on or before their final workday, unless they cannot because they are terminated without notice or have another unusual circumstance.

This applies to all employees who submit time or leave takes.
The employee’s supervisor must approve the employee’s timesheet as soon as possible after the employee finalizes it.

After approving timesheet, supervisor must Save.

This applies to all employees who submit time or leave takes.
Once the Employee’s final timesheet has been submitted and completed in TARS the SSC begins the final pay process by:

- Pulling the employees final timesheet from TARS
- Beginning an E-078 Final Pay Transaction and entering the employee’s time worked and/or leave taken for the entire final pay period.
- Accruals, vacation and comp time must be paid out by checking the “Payout Accruals” tab on the “Leave” tab of the Final Pay Form.
- Clicking the “Submit Final Pay” transaction in UCPath

Note: If employee is owed additional compensation along with their final pay you would add this payment on the “Earnings” tab
Supervisor Assignment Using ‘Reports To’

- In the new TARS system, Supervisors will be maintained using the ‘Reports To’ field in UCPath’s Position Management feature, **NOT** in Enterprise Directory.
- This includes students.
- This change allows TARS to identify a supervisor for each job.
- If an employee’s ‘Reports To’ information is incorrect, needs to be changed, or you are not receiving the correct timesheets in TARS, **contact your department ServiceLink initiator** and request that they make an update to the ‘Reports To’ field in Position Management.
- Please contact Timesheetfeedback@ucr.edu if you have questions or concerns!
Reinstatement
Reinstatement

- If an employee is mistakenly terminated (e.g., because of the auto-termination feature or a business process mistake), do not open a case with UCPC.
- Please use the rehire template with the “Reinstatement” action reason and the same effective date as the termination.
- This will ensure benefits, accruals, and service credit are reinstated correctly.
Former Employee Portal
Welcome to UCPath, where you can view and/or update your personal information. If you have questions about UCPath or need assistance, please contact the UCPath Center at 855-982-7284.

Authorized users sign in below:

- University of California - Office of the President
- University of California, Los Angeles
- University of California, Merced
- University of California, Riverside
- University of California: Former Employees

Login to UCPath

If you're a former UC employee who needs access to UCPath, create your personal account below:

Don't have an account?

Create Account

Email:

Password:

Login

Forgot Password

Modify Account

Need more help?

Contact the UCPath Center to speak with an associate M-F from 8 a.m. to 5 p.m. at 855-982-7284 or by email at ucpath@universityofcalifornia.edu
Former Employee Portal
Additional Courses

• UCRONB200: Advanced FOM ServiceLink Onboarding
• UCRJDC200: Advanced FOM ServiceLink Job Data Changes
FOM|UCPath Training Team Email

FOMUCPathtraining@ucr.edu
Training Resources

http://fomucpath.ucr.edu/training/resources.html
Your Feedback Please

https://tinyurl.com/ucrfomucpathfeedback
Thank You