

Separation Form Instructions

1. Enter Employee Name
2. Enter Employee ID number
3. Select the Type of Separation (**Pick from the drop down box**)
 - a. Involuntary – if the employee is receiving negotiated severance pay.
 - b. Voluntary – if the employee gave notice and/ or is receiving negotiated severance pay.
 - c. Voluntary – if no notice was given
4. Enter the Last Day of Pay Status – the last day the employee is to be paid.
5. Enter the Separation Date – the day the employee is separated from UCB.
6. Enter the HCM Reason Code – the reason the employee is separating
7. Date HCM Updated – the date the employee separation/ termination date was entered in HCM. Please note: HCM does not have to be updated before the form is submitted to Payhelp; however, the department should update HCM to ensure the employee is not overpaid.
8. Enter all employee final pay in this section (i.e. REG, TRM, CMP, OTS/OTP, ITS or VTS):
 - A. Period End Date – pay period the employee last worked
 - B. Title Code – Four digit job code
 - C. Chartstring – please verify that the Chart of Accounts is valid to avoid delay
 - D. Rate – enter the employee rate: monthly employees, enter monthly rate for REG, convert to hourly rate for TRM, OTS/OTP, CMP (conversion formula: monthly rate divided by 174)
 - E. DOS – the description of service
 - F. HRS/% – Enter % of time for monthly rate and number of hours for hourly rate (**EXAMPLE:** for a salaried employee use **0.1904%** **OR** for an hourly employee use **32.00 H**)
 - G. WSP – Work-study code
9. Enter negative hours on the form to collect overpayments (RX). If collecting from previous months, departments must have the employees consent on file.
10. Select Pay Disposition – "Produce Check" for a paper check or "Direct Deposit" for EFT or TotalPay Card - enter TotalPay Card in the Comment Section (#12).
11. For voluntary separation employee receiving a paper check – select if department or the employee will pick up the check
12. Enter departmental information
 - A. Form Prepared by – the person in the department preparing the form
 - B. Department – department requesting the separation
 - C. Contact phone number – best number to reach the preparer
 - D. Prepared Date – date which the request was prepared
13. Comment – any additional information, special circumstances, etc.

NOTE: Please use [72HourPayrollSeparationChecklist_2nd page](#) for additional transactions. Please indicate page number.

If an employee is exempt and on CalTime, please remember to terminate the employee in Caltime.