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.