

End Date Monitoring

Departments are responsible for monitoring appointments with upcoming end dates and taking appropriate action to:

- Extend continuing appointments
- Terminate ending appointments
- Apply **Short Work Break (SWB)**, if applicable (see [SWB Matrix](#))

Proactive action is necessary to avoid unintended impacts such as erroneous termination, missed-/over-payments, loss of benefits, or system access interruptions.

Action Items:

- Run the *Cognos Jobs with Approaching End Dates (R-103)* or *Data Warehouse Jobs Ending* report to identify employees with upcoming end dates.
- Determine if appointments are scheduled to auto terminate:
 - If the **End Job Automatically** box is checked, the job will auto-terminate on the **Expected Job End Date**.
 - If the **End Job Automatically** box is not checked, the employee will remain active and pay continues.
- Determine the appropriate action, and initiate necessary transaction(s) to update the employee's job record.

Academic Student Employees:

Initiate a **PayPath** transaction to:

- Extend continuing appointments.
- Apply **Job Data** changes. (FTE, Pay, etc.).
- Apply **SWB**, including the *Expected Return Date*.
- Check **End Job Automatically** box to terminate on the **Expected Job End Date**, (or submit **Termination** template).

Academic Non-Students:

Appointments Extending:

Initiate the AP Appointment process to extend, modify or re-appoint in advance of the existing **Expected Job End Date**.

- If Appointment approvals are pending, and **Job Data** changes will not be in place by Pay deadline, submit an *AP Folio UCPATH Cert Request* (as needed) to remove the **End Job Automatically** checkbox.

Appointments Ending:

Appointments with the **End Job Automatically** box selected will auto-terminate based on the **Expected Job End Date**.

- If the appointment is not set to end automatically, submit a **Termination** template.

Use of the End Job Automatically check box

Departments are able to select the **End Job Automatically** checkbox in the original **Hire** transaction for academic employees. When selected, the position will auto-terminate as of the **Expected Job End Date**. Use of this checkbox does not collect important separation reasons necessary for reporting purposes and in determining eligibility for unemployment benefits; can create delays in Final Pay processing; and if not properly monitored, can lead to erroneous termination resulting in unintended employee pay and benefit impacts.

To avoid unintended impacts, the **End Job Automatically** checkbox may only be used on temporary appointments:

- Academic Student Employees (ASE) where the appointment is ending.
- Temporary academic term appointments (e.g. Augmentations, Supplemental assignments)
- Visiting appointments
- Summer Compensation jobs
- Release to Grant Research title appointments

Selecting End Job Automatically Checkbox versus Submitting a Termination Template

- Select the **End Job Automatically** checkbox via the **Hire** template when a temporary term appointment will end on the **Expected Job End Date**, and there is no intent to extend.
- Use a **Termination** or **Retirement** template to apply the appropriate termination reason code in Job Data. See [Job Aid: Template Transactions – Action Reason Codes and Descriptions](#) (pages 5-7) for a full list of separation **Template** types {**Termination** (voluntary or involuntary) or **Retirement**}, descriptions and action reason codes. This will ensure the most accurate separation reason information is identified and avoid erroneous terminations that lead to negative pay and benefit impacts to the employee.

Jobs Terminated in Error

Jobs that ended erroneously may have negative pay and benefit impacts to the employee, and require careful review and additional action by the department to mitigate impacts:

- Submit a **Rehire/Reinstatement** template to reinstate an employee to active status.
- Review **Job Data** to validate that all data points are correct once reinstatement is fulfilled by UCPC.
 - If issues are identified, email ap-path@ucsb.edu to request correction of Job Data attributes.
- Initiate *Missed Pay* with BFS, if needed.
- Initiate a **Case** with UCPC (if needed) to request:
 - Benefits review/reinstatement prioritization, and
 - **Hire Date** review/correction.

Ending Jobs not Terminated Resulting in Overpayment

Jobs that did not end via the **End Job Automatically** checkbox and/or timely submission of a **Termination** template may result in an overpayment.

- Process the appropriate **Termination** template. See [Job Aid: Template Transactions – Action Reason Codes and Descriptions](#) for a full list of **Termination Template** types, descriptions, and action reason codes on Pages 5-7.
- Initiate *Over-Pay* with BFS via ServiceNow - <https://ucsb.service-now.com/payroll>, as needed.