

Terminations and Retirements:

When an employee provides notice to their department of their intent to separate from the University (either to pursue other opportunities or to retire), or if an appointment is ending and will not be reappointed, the department is responsible for managing the Offboarding process with the employee.

Policy

For academic appointees managed in AP Folio, departments must provide notification of the separation to the appropriate Dean's office (as applicable) and to Academic Personnel. If the separation is due to non-renewal of an ending appointment, this can be conveyed by checking the "Appointment Ending" box within the Reappointments/Modifications module.

Please see RB VI-26 for additional information.

UCPath

Terminations

Departments are responsible for identifying the correct process to terminate an existing appointment:

- **Temporary Appointments** (ASE, Augmentations, Visiting Appointments, etc.) can be set to auto-terminate by applying the End Job Automatically checkbox within the Hire transaction; for ASE's, departments can also update via a PayPath transaction with the DTA/TMF Action/Reason.
- **Voluntary Terminations** (the employee provides notice of resignation) are managed via the **Voluntary Termination** template.
 - If the employee is leaving UC, the **Voluntary Termination** template should be initiated with the **Reason Code** that best aligns with the employee's resignation reason to end the job.
 - See the [Initiate Voluntary Termination Template Transaction](#) job aid.
 - If the employee is leaving to accept another position at UC (no break in service):
 - This is considered a **Transfer**, and actions must be coordinated with the Hiring campus/department.
 - If the new appointment is at UCSB
 - The **Voluntary Termination** template should be initiated with the *Transfer-Intra Location Reason Code*
 - See the [Initiate Voluntary Termination Template Transaction](#) job aid.
 - If the new appointment is at another UC
 - the **Voluntary Termination** template should be initiated as part of the Inter Campus Transfer process with the *Inter Location (BU) Transfer Reason Code*
 - See the [Initiate Interlocation Transfer \(Terminate\) Template Transaction](#) job aid
- **Involuntary Terminations** (an ending appointment not initiated by the employee) are managed via the **Involuntary Termination** template.
 - See the [Initiate Involuntary Termination Template Transaction](#) job aid.

Retirements

When an employee retires, there is only one template used for all retirement scenarios – see the [Initiate Retirement Template Transaction](#) job aid. Note additional processes for employees who meet certain criteria:

The 1976 Retirement Tier

Employees in the 1976 Retirement tier are eligible for a Cost of Living Adjustment (COLA) – refer to the [Job Aid: Retirement Transaction Process for July 1 Retirement Date – COLA](#) for processing guidance.

Emeritus

Faculty who have earned Emeritus status must be hired into an Emeritus position to access the benefits of this status (parking, Library access, etc.). Departments are responsible for:

- Requesting an Emeritus position via the [AP Folio UCPath Certification and Input Form](#).
- Initiating the Emeritus Hire – refer to the [Job Aid: Emeriti Processing Following Retirement](#) for processing guidance.

Other Offboarding Actions

- Remind the employee to update their contact information prior to separating from UC:
 - UCPC may send important information to employees following their separation.
 - A personal email is required to set up former employee access, giving the former employee access to pay stubs, employment verification resources, and W2's.
- Provide the employee with information on how to set up their Former Employee Portal access - <https://ucnet.universityofcalifornia.edu/compensation-and-benefits/ucpath-former-employees.html>
- Work with BFS on any final pay actions (typically required for employees in accruing titles, non-exempt appointments, or with a mid-pay-period separation date.)

Related Resources:

- [Hiring and Termination - Lecturer Best Practices](#)
- [End Date Monitoring](#)
- [Red Binder VI-26: Separations from the University](#)