

**Topic Based Zoom:**  
**7/1 Retirement**  
5/18/22



# Today's Topics

 Review Key Terms

 How to Initiate a Retirement

 When and How to Request Final Pay

 Resources

 Best Practices and Q&A



Term	Description
Effective Date	<p>This date is entered in the <b>Effective Date</b> field for use within the <b>UC_RETIREMENT</b> Template transaction. This date reflects the first day on which the employee is no longer on Active HR status.</p> <ul style="list-style-type: none"><li>• Note: The effective date does <u>not</u> reflect the first day of retirement. The first day of retirement should be determined/coordinated with the UC Retirement Administration Service Center (RASC)</li></ul>
Last Date Worked	<p>This date is entered in the <b>Last Date Worked</b> field for use within the <b>UC_RETIREMENT</b> Template transaction. This date reflects the last day the employee physically worked. This date must be at least one day prior to the <b>Effective Date</b> but could be earlier.</p>

# How to Initiate a Retirement

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- Pre Process
- 7/1 Considerations
- Retiring while on LOA
- System Steps



- Review the **Person Organizational Summary** page for the employee to ensure complete understanding of employee record
- Review the *Template Transactions – Action Reason Codes and Descriptions* job aid to ensure you utilize the correct template and reason code
- Review the *Payroll Processing Calendar* to ensure you submit your transaction in time for approval before deadline

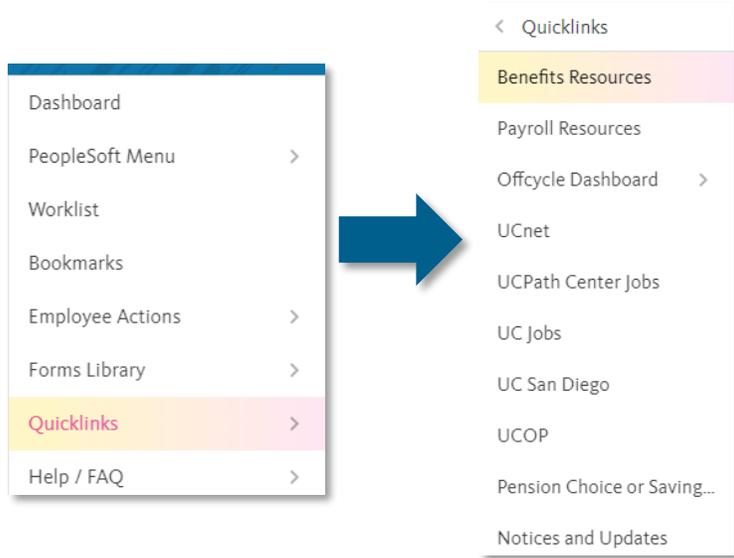


- Coordinate with other departments for last day worked in other jobs
- When UCPC receives a Retirement transaction, they will retire the employee from all other UC jobs



Have the information you need to complete the template handy, including:

- Empl ID
- Empl Record/Position
- Effective date (first day of Inactive HR status)
- Last day worked (last day employee physically worked)



Under the **Location Users-Administrators** section you will find the **Savings Plan Enrollment/Change Effective Dates (403b/After Tax DC and 457b)** that will take you to the schedule

## BENEFITS RESOURCES

### For Employees

- Benefits Billing Portal
- Benefits Deduction Calendars
- Taking A Leave of Absence
- UCPath Help - How To & Job Aid

### Location Users - Administrators

- Benefits Billing Calendars
- **Savings Plans Enrollment/Change Effective Dates (403b/After Tax DC and 457b)**
- UCPath Help - How To & Job Aid



## UC 2022 Voluntary Retirement Savings Program Enrollment/Change Effective Dates

The [Savings Plans \(403b/After Tax DC and 457b\) Enrollment/Change Effective Dates - 2022 schedule](#) will provide guidance regarding the cutoff date for elections for the employee's corresponding paycheck

Pay Cycle	Check Date	Pay Period Dates		After Tax Defined Contribution Plan (DCP) and Tax-Deferred 403(b) Plan	457(b) Deferred Compensation Plan
		Begin	End	Recommended last day of election made in Fidelity (by noon PST)	Elections made by employee with Fidelity by noon (PT)
MO	Fri 07-01-22	06-01-22	06-30-22	Wed 06-22-22	5/1/2022 - 5/31/2022
B1	Wed 07-06-22	06-12-22	06-25-22	Fri 06-24-22	No changes are processed on B1
B2	Wed 07-20-22	06-26-22	07-09-22	Fri 07-08-22	6/1/2022 - 6/30/2022

## Consideration for 7/1/22 Retirement

UCPath does not determine Inactive COLA eligibility. Eligibility should be determined/confirmed in coordination with the employee and the UC Retirement Administration Service Center (RASC).

- UCRP benefit recipients who are eligible to receive the *Inactive* COLA need to reflect as terminated for at least one business day prior to July 1st.

### Example:

- **Effective Date** of Retirement template = June 30th (Thursday)
- **Last Day Worked** = June 29th (Wednesday)
- June 30th represents the 1 business day that they would not work and not receive pay.

**Note:** This process only addresses the actions in UCPath. Standard Retirement Administration Service Center (RASC) retirement business process and Academic Personnel Manual (APM-120) policy must be followed.

## For employees on retiring while on a Leave of Absence (LOA) or Short Work Break (SWB)

Employees on a paid LOA do not need to return from LOA/SWB to retire

- Last Day Worked on the retirement template = Last Day Worked entered on the LOA transaction
- For employee's on Short Work Break, the Last Day Worked should reflect a date before the start of the SWB

**Example:** Employee on LOA effective March 27 with their last day worked entered as March 26. The employee will retire effective June 30. Enter on Retirement Template: **Effective Date** = June 30 and **Last Date Worked** = March 26

**Note:** Employees on an *unpaid* leave of absence or short work break (SWB) will need to be returned from inactive payroll status prior to termination in order for final pay to be issued

- **Select Template**
- **Enter Effective Date** (first day as “retired”)
- **Click Create Transaction**

Smart HR Transactions

Select a template and press Create Transaction.

**Transaction Template** ?

Transaction Type: All 2 Effective Date: [calendar icon]

1 Select Template [input field]

Transaction Type: All

**Transactions in Progress** ?

You do not have any transactions in progress.

Go To Transaction Status

3 Create Transaction [button]

Look Up Select Template

Search by: Template begins with [input field] Help

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-21 of 21 Last

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - Staff Only
UC_REHIRE_AC	Rehire - Academic
UC_REHIRE_REI	Rehire Reinstatement - For Staff Appointments
UC_REHIRE_REI_AC	Rehire Reinstatement - For Academic Appointments
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
<b>UC_RETIREMENT</b>	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

- Enter **Employee ID**
- Select **Employment Record Number**
- Review **Effective Date**
- Click **Continue**

## Smart HR Transactions

### Enter Transaction Details

The following transaction details are required.

**Template** Retirement

**Organizational Relationship** Employee

\*Employee ID  

\*Employment Record Number

\*Effective Date

**Action** Retirement

**Reason Code** Retirement

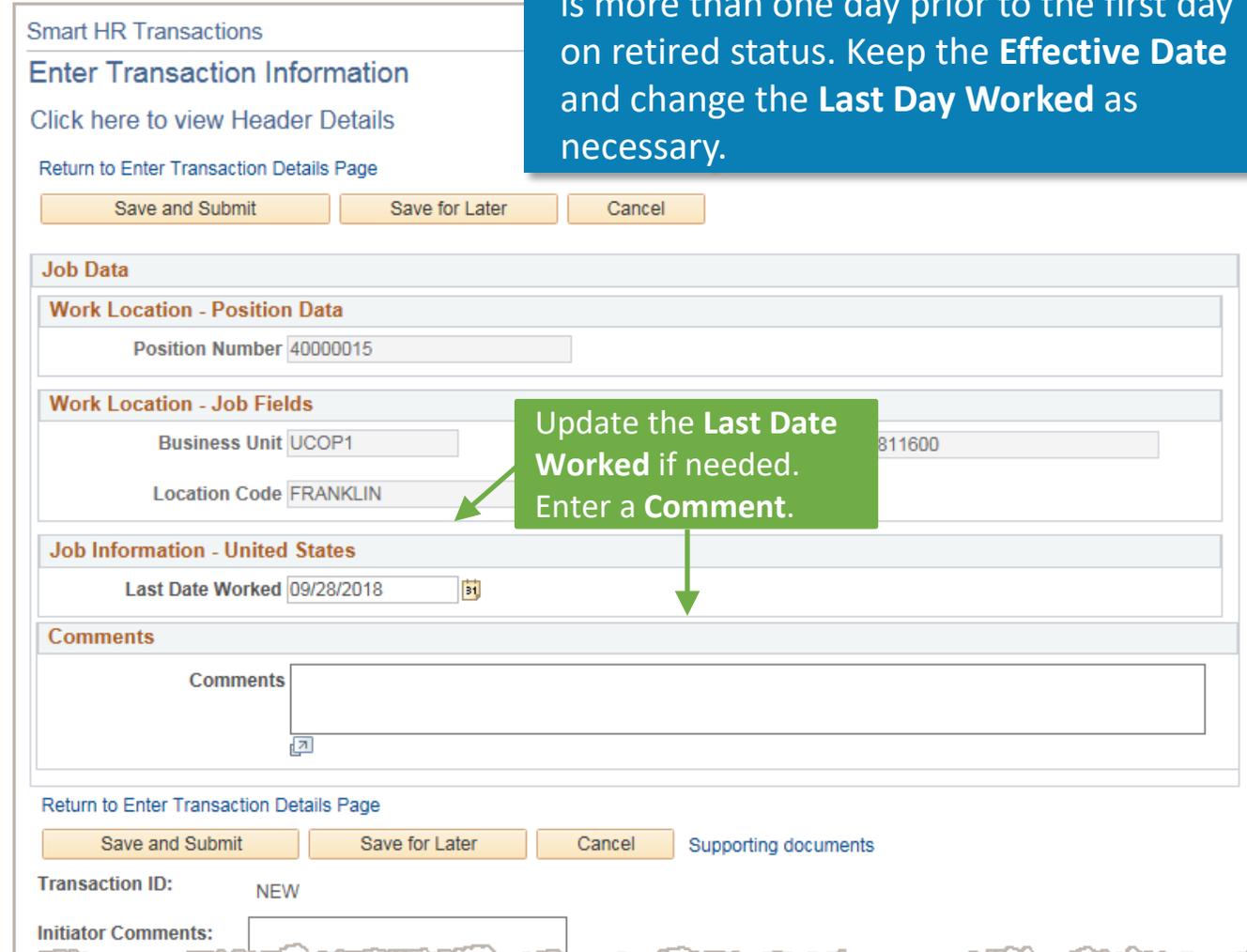
Continue

Cancel

The **Last Date Worked** automatically populates with a date that is one day prior to the **Effective Date**.

- **Last Date Worked** is the last day employee physically worked
- If the **Effective Date** is a Monday, the **Last Date Worked** defaults to the previous workday (Friday)
- The **Last Date Worked** field can be changed, however, the **Last Date Worked** must be prior to the **Effective Date**
- Enter **Comments** for UCPC, describe transaction
- When complete, click **Save and Submit**

Note that oftentimes the **Last Day Worked** is more than one day prior to the first day on retired status. Keep the **Effective Date** and change the **Last Day Worked** as necessary.



Smart HR Transactions

### Enter Transaction Information

[Click here to view Header Details](#)

[Return to Enter Transaction Details Page](#)

#### Job Data

##### Work Location - Position Data

Position Number

##### Work Location - Job Fields

Business Unit

Location Code

##### Job Information - United States

Last Date Worked

##### Comments

Comments

[Return to Enter Transaction Details Page](#)

[Supporting documents](#)

Transaction ID:

Initiator Comments:

## How to Request Final Pay

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- When to Submit Final Pay
- System Steps
- Quick Reference Guide: Processing Final Pay for 7/1 Retirees

# When to Submit Final Pay & Final Pay Distribution

UCPath determines whether Final Pay is On-Cycle or Off-Cycle. You cannot override this determination. If there are special handling instructions for final pay, those must be included in the Comments section of the request.

## OFF-CYCLE

- Employee is represented and their contract requires off-cycle final pay; work with Campus/Med Center HR to identify which employees are covered by the 48 Hour Pay-Out rule
- Employee is being involuntarily terminated

## ON-CYCLE

- Non-represented employee has accruals to pay out
- Non-represented employee is exempt and used hours (sick/vacation/PTO) that will not be picked up by the monthly or biweekly pay compute deadlines

NOTE: If none of these apply, no final pay action is needed. Employee will receive their final pay on the next On-Cycle pay period.

If ALL the following is true, no final pay request is required:

**Voluntary termination AND**

- Non-represented OR
- Represented with contract not requiring Off-Cycle pay

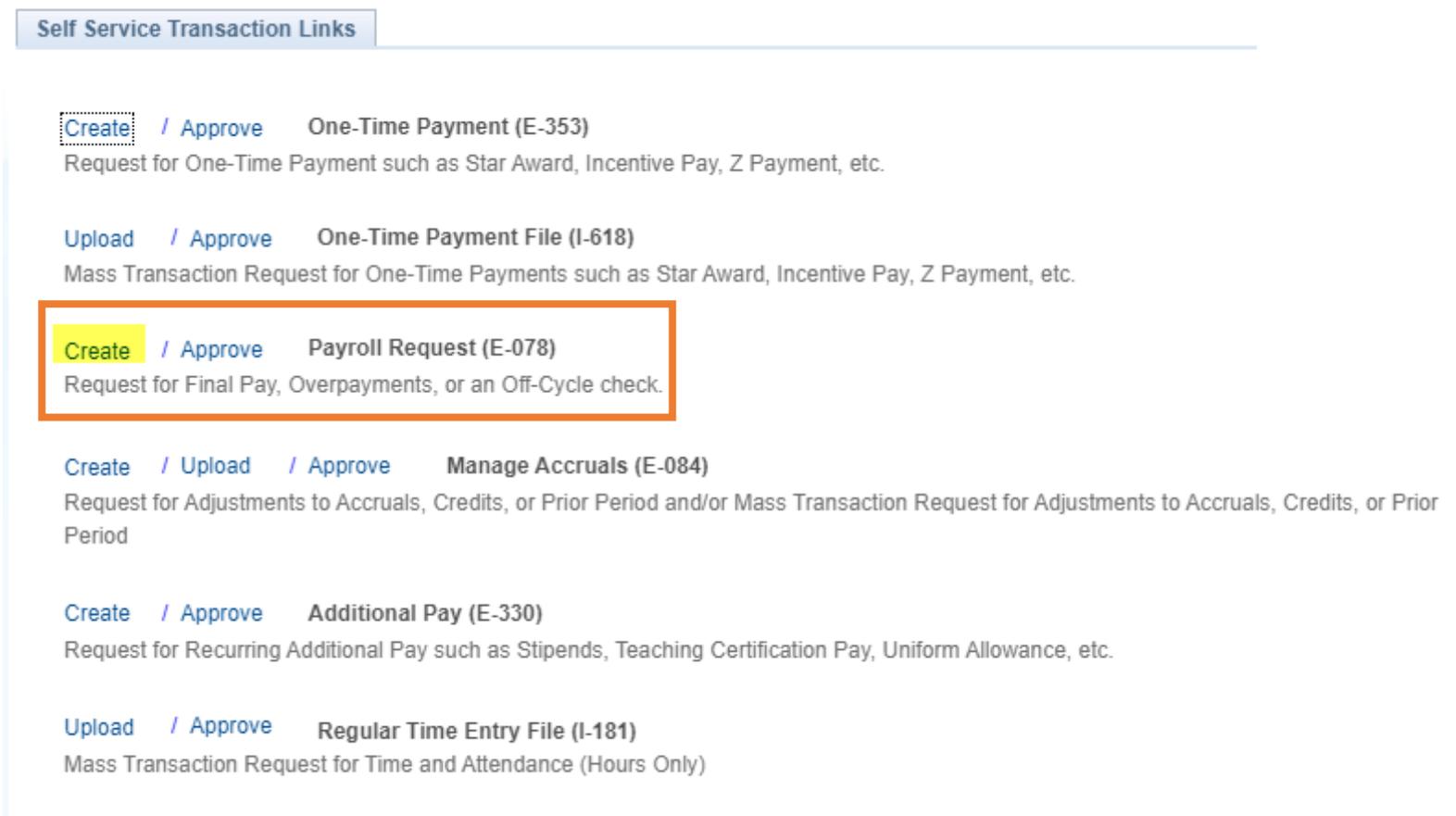
**Employee  
did not accrue hours  
that need to be paid out**

**All earnings and leave usage  
will be picked up in the  
On-Cycle pay process**

In order to submit a Final Pay Request, navigate to the **Self Service Transaction Links** page and select the **Create** link next to **Payroll Request (E-078)**.

## NAVIGATION

- PeopleSoft Menu
- UC Customizations
- UC Extensions
- **Self Service Transaction Links**



**Self Service Transaction Links**

[Create](#) / [Approve](#) **One-Time Payment (E-353)**  
Request for One-Time Payment such as Star Award, Incentive Pay, Z Payment, etc.

[Upload](#) / [Approve](#) **One-Time Payment File (I-618)**  
Mass Transaction Request for One-Time Payments such as Star Award, Incentive Pay, Z Payment, etc.

[Create](#) / [Approve](#) **Payroll Request (E-078)**  
Request for Final Pay, Overpayments, or an Off-Cycle check.

[Create](#) / [Upload](#) / [Approve](#) **Manage Accruals (E-084)**  
Request for Adjustments to Accruals, Credits, or Prior Period and/or Mass Transaction Request for Adjustments to Accruals, Credits, or Prior Period

[Create](#) / [Approve](#) **Additional Pay (E-330)**  
Request for Recurring Additional Pay such as Stipends, Teaching Certification Pay, Uniform Allowance, etc.

[Upload](#) / [Approve](#) **Regular Time Entry File (I-181)**  
Mass Transaction Request for Time and Attendance (Hours Only)

## Payroll Requests

**Payroll Request Type**

1 \*Payroll Request:

2 Termination Type:

**Employee Selection Criteria**

3 Empl ID:

Empl Rcd:

Last Name:

First Name:

Business Unit:

Department:

Job Code:

1. Select Payroll Request = **Final Pay**
2. Select **Termination Type**
3. Enter **EMPL ID**
4. Click **Get Employees**
5. After results are displayed, click the **employee's name** to proceed to the request page

4

For Employees with multiple jobs, verify the Empl Record, and select the desired record.

Personalize | Find | View All | First 1 of 1 Last

Name	Business Unit	Empl ID	Empl Record	Empl Status	Action	Reason Code	Effective Date	Position Number
<input type="text"/>	SDCMP	<input type="text"/>	0	Retired	RET	RET	06/30/2021	<input type="text"/>

# Final Pay Request | Earnings Detail – Exempt

**Earnings** | Leave

Transaction ID: NEW

Rennie Alarcon-Reverte EMP ID: 10339638 Empl Record: 0 Payroll Request: Final Pay Reason: Retirement  Off Cycle?

Do you want to override the ChartField values?

**New Payroll Requests** Find | View All First 1 of 1 Last

1 \*Earnings Code: REG Regular Pay  Gross-Up

2 \*Earnings Begin: 03/01/2018 \*Earnings End: 03/31/2018

3 Salary %: 20.00 Monthly Salary: 12724.814167

Hourly Rt Used: 73.131116 Calc Salary: 2544.962833

Hours: 34.800000

Pay End Date defaults to end date of current pay cycle (biweekly or monthly) based on Employee Pay Group and cannot be updated.

Any time worked after this date must be entered in the Comments with Earn Code, Begin and End Date, and Hours.

The Earnings End date cannot be a date after the employee's separation date.

If discrepancies in Calc Salary, provide detailed notes in comments box; do not modify Salary %.

4 Initiator Comments:

5 Upload Documents View Attachment

Submit Return

1. Enter Earnings Code
2. Enter Earnings Begin and Earnings End to encompass pay period days worked (Earnings End = Last Day Worked)
3. Enter Salary %= (Standard Hours associated with Earnings Dates / Total Working Hours for the Month) x FTE; press Tab to prompt calc of pay fields
4. Enter Initiator Comments; both local Approver and UCPC will see these comments.
5. Upload Documents if needed

# Final Pay Request | Earnings Detail – Non-Exempt

**Earnings** | Leave

Transaction ID: NEW

Rennie Alarcon-Reverte EMP ID: 10339638 Empl Record: 0 Payroll Request: Final Pay

Reason: Retirement  Off Cycle?

Do you want to override the ChartField values?

**New Payroll Requests** Find | View 1 First 1-2 of 2 Last

<b>1</b> *Earnings Code: REG	<input type="checkbox"/> Gross-Up
Earnings: <input type="text"/>	*Pay End Date: 04/06/2019
<b>2</b> *Earnings Begin: 04/05/2019	*Earnings End: 04/05/2019
Salary %: <input type="text"/>	Pay Rate: <input type="text"/>
Hourly Rt Used: <input type="text"/>	Calc Salary: <input type="text"/>
<b>3</b> Hours: 8.000000	Hourly Rate: <input type="text"/>
+ -	
*Earnings Code: REG Regular Pay <input type="checkbox"/> Gross-Up	
	*Pay End Date: 04/06/2019
*Earnings Begin: 04/03/2019	*Earnings End: 04/03/2019
Hours: 8.000000	

**4** Pay End Date defaults to end date of current pay cycle (biweekly or monthly) based on Employee Pay Group and cannot be updated.

Any time worked after this date must be entered in the Initiator Comments with Earn Code, Begin and End Date, and Hours.

The Earnings End date cannot be a date after the employee's separation date.

1. Enter Earnings Code
2. Enter Earnings Begin and Earnings End date (must match)
3. Enter Hours worked that day
4. Add rows and repeat as needed to capture time worked to Pay End Date
5. Enter Initiator Comments; both local Approver and UCPC will see these comments.
6. Upload Documents if needed

# Final Pay Request | Leave Detail

Earnings **Leave**

Transaction ID: NEW

Rennie Alarcon-Reverte EMP ID: 10339638 Empl Record: 0 Payroll Request: Final Pay Reason: Retirement  Off Cycle?  Payout Accruals?

Leave tab: Only enter sick or vacation leave that will not be recorded via Time & Attendance.

Check the Payout Accruals box to indicate to UCPC to calculate final payout of eligible amounts.

New Payroll Requests Find | View All First 1 of 1 Last

5 + -

2 \*Earnings Code: VAC Vacation Leave-Used Salaried

3 Hours: 8.000000

4 Earnings Begin: 03/20/2018 Earnings End: 03/20/2018

Earnings Begin and Earnings End dates must match. Each Earnings Code and day requires single row per entry. Only enter dates in current pay period.

6 Initiator Comment:

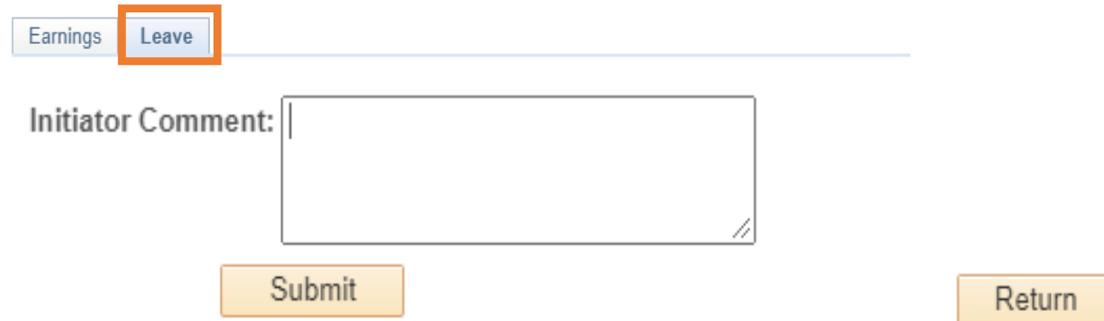
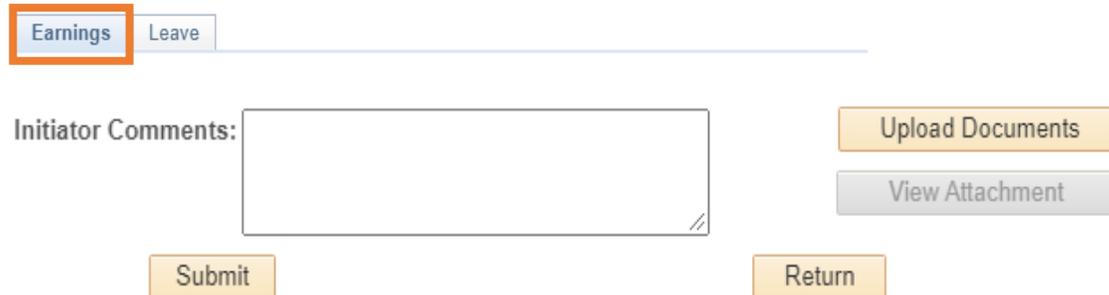
7 Submit

Return

Return discards entries and returns to Search page.

1. Check Payout Accruals if appropriate
2. Enter Earnings Code
3. Enter Leave earning Hours taken that day
4. Enter Earnings Begin and Earnings End dates (must match)
5. Add rows as needed to capture Leave earning hours taken within pay period
6. Add to Initiator Comments if needed
7. Click Submit

## Comments are critical in submission of payroll requests. For Final Pay, include:



- Retirement Template Transaction Number
- Last Day Worked (MM/DD/YYYY)
- Details of time worked outside of current pay period (days and hours worked)
- NEW outstanding balances (Only Emergency Pay or Instant Pay Card not yet paid through UCPath)
  - Deduction Code(s) (EEMGLN and/or PAYCRD), Dollar amount(s), PR Transaction Number(s)
  - Overpayments, PR Transaction Number (only include newly identified overpayments that have not yet been processed by UCPC)
- If employee earns Additional Pay, list **Earn Code(s)** and amount(s)
- Any issues with the **Calc Salary**, including reasoning/math
- Explicit statement that employee did not use any accruals, if applicable
- Instructions for any special handling

# Final Pay Monthly Employees

Type of Employee	Deadline for Local Approval	Off-Cycle/ On-Cycle	Earnings Tab	Leaves Tab	Initiator Comments	Timekeeper Action in Time & Attendance
<p><b>Monthly, non-represented or represented with no requirement for off-cycle final pay</b></p> <p>When processing the Final Pay, the <b>Off Cycle</b> checkbox will default to <u>not checked</u></p>	Local approval no later than <b>2:00 pm on 6/23/2022</b>	On-Cycle	Do not enter any earnings if all time worked is captured in Time and Attendance	Do not enter any Leaves if all time accrual usage is captured in Time and Attendance  Check the <b>Payout Accruals</b> box, if appropriate	<ul style="list-style-type: none"> <li>▪ Retirement template transaction number</li> <li>▪ Last Day Worked</li> <li>▪ Statement that employee did not use any accruals, if applicable</li> <li>▪ If employee earns <u>Addl Pay</u>: List <b>Earn Code</b>/type and amount; add "Please prorate based on Last Day Worked."</li> <li>▪ New outstanding balances:               <ul style="list-style-type: none"> <li><b>Deduction Code(s)</b></li> <li>Dollar amount</li> <li>PR Transaction Number</li> <li><b>Overpayments</b></li> <li>PR Transaction Number (only include newly identified overpayments that have not yet been processed by UCPC)</li> </ul> </li> </ul>	None
<p><b>Monthly, represented with requirement for off-cycle final pay</b></p> <p>When processing the Final Pay, the <b>Off Cycle</b> checkbox will default to <u>checked</u></p>	Local approval no later than <b>2:00 pm on 6/23/2022</b>	On-Cycle  The on-cycle check date meets the 48-hour rule	Do not enter any earnings if all time worked is captured in Time and Attendance	Do not enter any Leaves if all time accrual usage is captured in Time and Attendance  Check the <b>Payout Accruals</b> box, if appropriate	<ul style="list-style-type: none"> <li>▪ "PROCESS ON-CYCLE. ON-CYCLE PROCESSING MEETS CONTRACT REQUIREMENTS FOR FINAL PAY. EARNINGS/ LEAVE USAGE IN 1-181"*</li> <li>▪ Retirement template transaction number</li> <li>▪ Last Day Worked</li> <li>▪ Statement that employee did not use any accruals, if applicable</li> <li>▪ If employee earns <u>Addl Pay</u>: List <b>Earn Code</b>/type and amount; add "Please prorate based on Last Day Worked."</li> <li>▪ New outstanding balances:               <ul style="list-style-type: none"> <li><b>Deduction Code(s)</b></li> <li>Dollar amount</li> <li>PR Transaction Number</li> <li><b>Overpayments</b></li> <li>PR Transaction Number (only include newly identified overpayments that have not yet been processed by UCPC)</li> </ul> </li> </ul>	None

# Final Pay Biweekly Employees

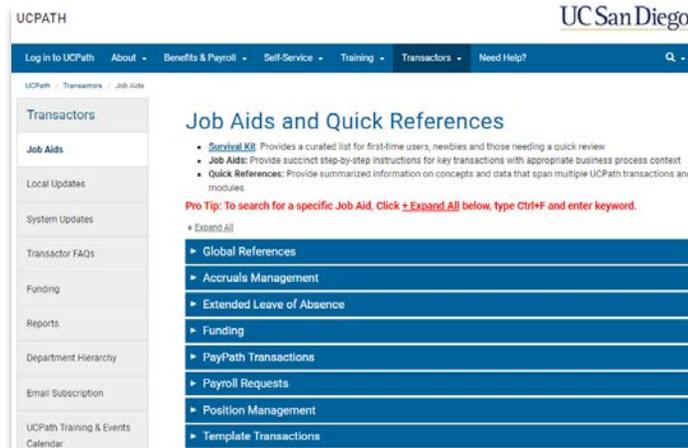
Type of Employee	Deadline for Local Approval	Off-Cycle/ On-Cycle	Earnings Tab	Leaves Tab	Initiator Comments	Timekeeper Action in Time & Attendance
<p><b>Biweekly, non-represented or represented with no requirement for off-cycle final pay</b></p> <p>When processing the Final Pay, the <b>Off Cycle</b> checkbox will default to <u>not checked</u></p>	Local approval no later than <b>2:00 pm on 7/13/2022</b>	On-Cycle	Do not enter any earnings if all time worked is captured in Time and Attendance	<p>Do not enter any Leaves if all time accrual usage is captured in Time and Attendance</p> <p>Check the <b>Payout Accruals</b> box, if appropriate</p>	<ul style="list-style-type: none"> <li>Retirement template transaction number</li> <li>Last Day Worked</li> <li>Statement that employee did not use any accruals, if applicable</li> <li>If employee earns <u>Addl Pay</u>, List <b>Earn Code</b>/type and amount; add "Please prorate based on Last Day Worked."</li> <li>New outstanding balances:               <ul style="list-style-type: none"> <li><b>Deduction Code(s)</b> Dollar amount PR Transaction Number</li> <li><b>Overpayments</b> PR Transaction Number (only include newly identified overpayments that have not yet been processed by UCPC)</li> </ul> </li> </ul>	None
<p><b>Biweekly, represented with requirement for off-cycle final pay</b></p> <p>When processing the Final Pay, the <b>Off-Cycle</b> checkbox will default to <u>checked</u></p>	Local approval no later than <b>2:00 pm on 6/29/2022</b>	Off-Cycle	<p>Enter earnings for 6/12/2022 – 6/25/2022 and earnings from 6/26/22-6/29/22, if applicable. In this case (any hours after 6/26), must be entered into the Comments Field and include Earn Codes and Begin and End Dates.</p> <p>This should be day-by-day entry for each <b>Earn Code</b></p>	<p>Enter accrual usage for 6/12/2022 – 6/25/2022</p> <p>Check the <b>Payout Accruals</b> box, if appropriate</p>	<ul style="list-style-type: none"> <li>Retirement template transaction number</li> <li>Last Day Worked</li> <li><b>Hours worked on 6/26, 6/27, 6/28 and/or 6/29, if applicable</b></li> <li><b>Accrual usage on 6/26, 6/27, 6/28 and/or 6/29, if applicable</b></li> <li>Statement that employee did not use any accruals, if applicable</li> <li>If employee earns <u>Addl Pay</u>: List <b>Earn Code</b>/type and amount; add "Please prorate based on Last Day Worked."</li> <li>New outstanding balances:               <ul style="list-style-type: none"> <li><b>Deduction Code(s)</b> Dollar amount PR Transaction Number</li> <li><b>Overpayments</b> PR Transaction Number (only include newly identified overpayments that have not yet been processed by UCPC)</li> </ul> </li> </ul>	<p><b>Timekeeper</b> should use/check the <b>DO NOT PAY</b> box in <u>EcoTime</u>, located in Employee Set-up/Employee Details screen, to ensure no Earnings or Leave usage included in the Final Pay Request is passed through to the I-181.</p>

# Retirement Template and Final Pay Deadlines



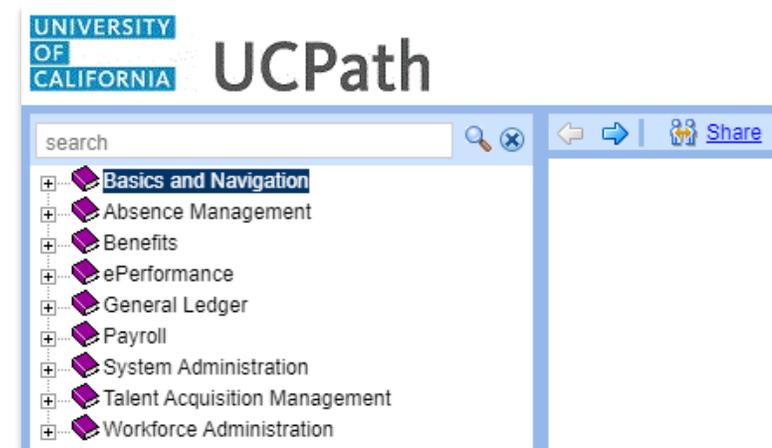
Type of Employee	Retirement Template Deadline	Final Pay Request Deadline	Date of Final Check
<b>Monthly</b> employee retiring effective 6/30, final pay <b>is not</b> required	Local approval no later than <b>3:00 pm</b> on <b>6/17/2022</b>	N/A	July 1, 2022 (includes PPE 6/30)
<b>Monthly</b> employee retiring effective 6/30, final pay is required	Local approval no later than <b>3:00 pm</b> on <b>6/17/2022</b>	Local approval no later than <b>2:00 pm</b> on <b>6/23/2022</b>	July 1, 2022 (includes PPE 6/30 plus any accruals)
<b>Biweekly</b> employee retiring effective 6/30, final pay <b>is not</b> required	Local approval no later than <b>3:00 pm</b> on <b>7/7/2022</b>	N/A	July 20, 2022 (will include PPE 7/9: 6/27, 6/28 and 6/29)
<b>Biweekly</b> employee retiring effective 6/30, On-Cycle Final Pay is required	Local approval no later than <b>3:00 pm</b> on <b>7/7/2022</b>	Local approval no later than <b>2:00 pm</b> on <b>7/13/2022</b>	July 20, 2022 (will include PPE 7/9: 6/27, 6/28 and 6/29, plus any accruals)
<b>Biweekly</b> employee retiring effective 6/30, Off-Cycle Pay is required	Local approval no later than <b>3:00 pm</b> on <b>6/23/2022</b>	Local approval no later than <b>2:00 pm</b> on <b>6/29/2022</b>	July 2, 2022 (will include PPE 6/26, 6/27, plus 6/28 & 6/29, plus any accruals)

## [UC San Diego Job Aids and Quick References](#)



- [How to Initiate a Retirement Template Transaction](#)
- [How to Process an Academic Retirement and Change to Emeritus Status](#)
- [Processing Final Pay for 7/1 Retirees](#)
- [How to Request Final Pay for Exempt Employees](#)
- [How to Request Final Pay for Non-Exempt Employees](#)

## [UCPath Help Site for Transactional Users](#)



- [Initiate Retirement Template Transaction](#)
- [Submit Final Pay Request](#)
- [Approve Final Pay Transaction](#)
- [Job Aid: Termination and Final Pay](#)



## Coordinate with other departments as needed

- If employee has multiple empl records, coordinate last day worked in other jobs
- When UCPC receives a Retirement Template they will retire the employee from all other UC jobs



## Retirement/Termination Templates must be submitted and locally approved before Final Pay Request

- If retirement/termination is not fully processed before submitting request for Final Pay, employee may receive final pay before retirement/termination is processed



## Off Cycle Final Pay: Check the DO NOT PAY box in Ecotime

- For off-cycle final pay, make sure you check the DO NOT PAY box in Ecotime so hours are not sent with the regular on-cycle I-181 file
- If the Final Pay is off-cycle, UCPC cannot refer to the regular time files, so you will need to enter all earnings on the final pay request



## Pay close attention to Effective Dates

- The Effective Date for a retirement is the first day the employee is inactive payroll status
- To qualify for the 2022 inactive COLA increase, employee needs to reflect as terminated for at least one business day prior to July 1st



## Do not forget to check the Payout Accruals box

- If the box is not checked and the employee has accruals to be paid out, it will be distributed on a separate check and there will be tax implications for the employee



## Additional Pay is calculated by UCPC

- Enter comments on Final Pay Request
- Review PayPath to confirm:
  - ✓ Prorate box is checked
  - ✓ The End Date is the Last Day Worked



## Review key resources as often as you need to

- How to Initiate a Retirement Template Transaction
- How to Process an Academic Retirement and Change to Emeritus Status
- Processing Final Pay for 7/1 Retirees
- How to Request Final Pay for Exempt Employees
- How to Request Final Pay for Non-Exempt Employees

The logo features the letters 'UC' in white on a yellow square background. To the right, the word 'Path' is written in a blue, italicized sans-serif font. The 'Path' text is enclosed in a blue rectangular frame with a white border. The top-right corner of the frame is open, with a blue trident symbol extending upwards and outwards.

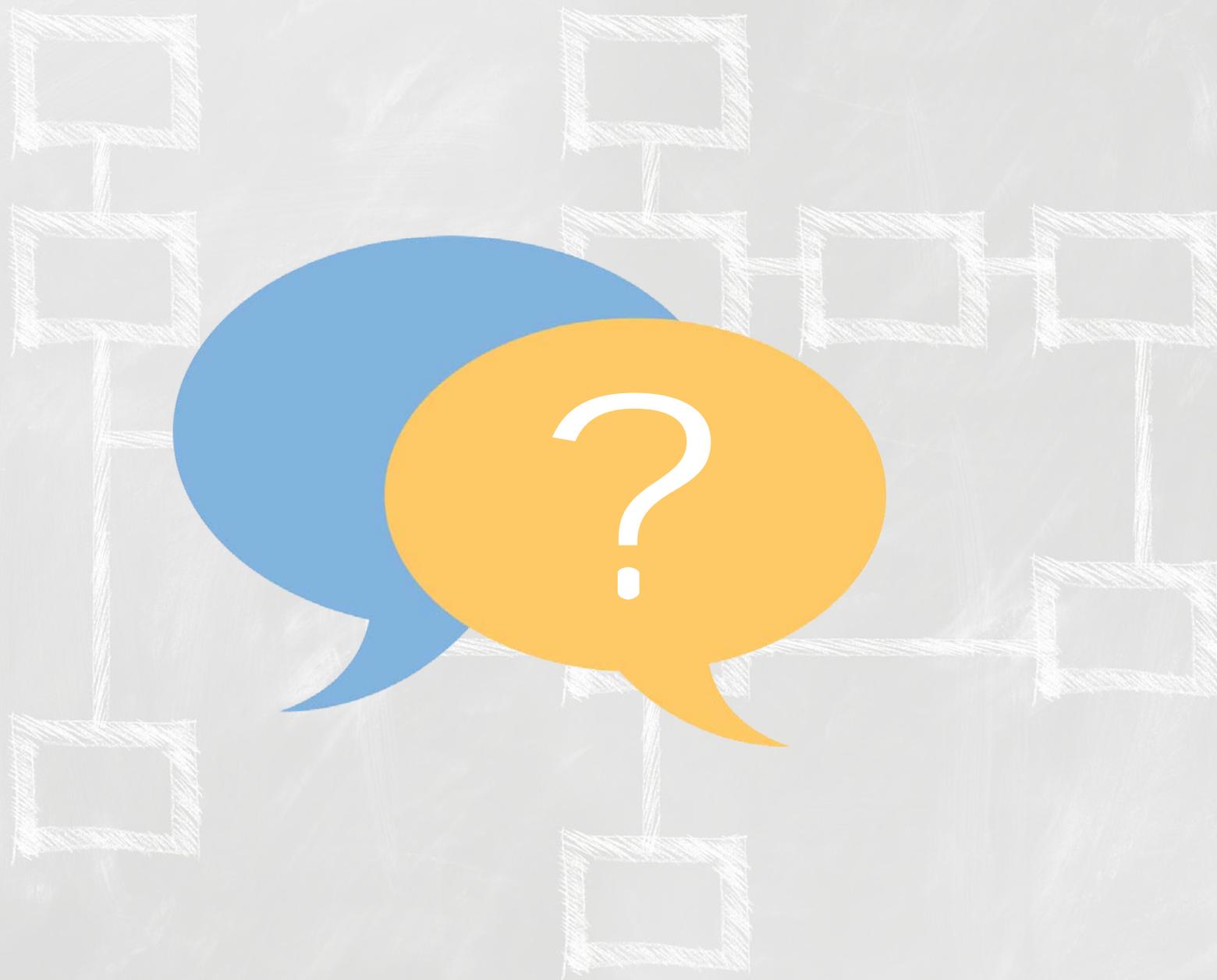
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- I thought once you retire any activity on Fidelity for retirement savings plan ends. **The deadlines for the 403b/457b are for if they want to make changes to their last paycheck.**
- If the last day work/pay is June 28, does it still count as 7/01 Retirement? **To qualify for inactive cola there just needs to be a minimum of 1 business day where the employee is inactive hr/payroll status. You can use 6/30 or earlier as the retirement template effective date. Effective date = the first day employee will be inactive status. Last day worked just needs to be before the retirement template effective date you can use 6/29 or earlier.**
- When do you recommend doing the transactions? [Quick Reference Guide: Processing Final Pay for 7/1 Retirees](#) has a matrix with deadlines and processing guidelines.
- Can you confirm the LOA end date should be the same date as the separation date? **If an employee on an unpaid leave needs to return from leave to issue final pay, AND they are eligible for the inactive COLA, then they will need to have an effective date 6/30/22 for the retirement template (remember effective date = first day the employee is inactive payroll status or "retired") the return from leave date should be entered for at least a day before the effective date of the retirement template.**
- For exempt, non-represented, is it better to have the REG and exceptions to be processed by EcoTime and then submit the final pay just for the accrual pay out? Or, is it safer to select the "do not pay" box and log all the REG, exceptions, and accrual payout on the final pay request? **For an employee that will receive on cycle final pay, it is less work for you to enter all time/exceptions through Timekeeping and just check the pay out accruals box on the final pay request.**
- Are the deadlines for the 403b and 457b available anywhere besides in your presentation? **Quick Links > Benefits Resources > Under the Location Users-Administrators section you will find the Savings Plan Enrollment/Change Effective Dates (403b/After Tax DC and 457b) that will take you to the schedule**
- you mentioned the retirement date is determined by RASC, but I was under the impression that the effective date HR initiators use needs to be \*one day before the retirement effective date the employee reports. If we processed a retirement with the last day worked 6/28, effective date 6/29, and the employee used a 7/1 retirement date with RASC, will this cause issues with RASC? Or should we process the LDW 6/28, and transaction effective 6/30, so it is implied there is a 7/1 retirement date? **Retirement Template effective date is a separate from RASC Retirement date. The Retirement template effective date is a date used in the system to determine termination/when employee becomes inactive hr and payroll status. RASC will be able to refer to the dates in the system to see if the employee qualifies for the inactive COLA increase etc.**

- Do we still need to note how many vacation hours a retiree uses in the comments even if the request is on-cycle and Ecotime will capture all of the leave usage? **For On Cycle final pay, UCPath will receive the time entered through Ecotime so you only need to submit a final pay request to check that pay out accruals box, if the employee has accruals that need to be paid out.**
- Just to clarify, since we are putting a 6/30 eff date to get the COLA that will mean that their final check will be short 1 day of pay for MO employees, correct? Does RASC communicate that to them? **Yes they will not get paid for that 1 day of inactive HR/Payroll status. RASC does not communicate that to employees. It is required for employees to have 1 day of no pay before 7/1 for them to qualify for the inactive COLA increase.**
- **General information provided by the RASC:**
- • Employees in the UCRP 1976 Tier or Safety classification may be eligible for the *Inactive* COLA if they have at least one business day where they are not on active pay status prior to July 1st, and have a termination date no later than June 29, 2022. The RASC will receive the termination date as the separation date.
- • All employees who elect UCRP monthly retirement income, regardless of their tier, are eligible for the retirement COLA after receiving retirement benefits for one year following July 1, 2022.
- • A UCRP eligible employee who previously retired and elected monthly retirement income are not eligible for an *Inactive* COLA and should not have a one business day break.
- For additional information, please refer to the 2022 COLA announcement for UCRP benefit recipients available on UCnet or contact RASC at (800) 888-8267, Monday-Friday, 8:30 a.m. to 4:30 p.m. (PT)  
<https://ucnet.universityofcalifornia.edu/news/2022/03/2022-cost-of-living-adjustments-announced.html>