



LUNCH & LEARN SESSION #4

WHO IS TO RECEIVE AN LOU?

- Provide to all new faculty (professorial and instructor titles)
 - Also for faculty changing site to CHS from affiliate
 - For faculty changing primary department
- Provide to other academics
 - If offering relocation
 - If offering compensation package
 - If expectation is they secure own funding by a certain period

WHAT IS COVERED IN AN LOU?

- Proposed title, step, department, and effective date
 - Include language that states “appointment is contingent upon final approval by ____.” (Dean or Vice Chancellor as appropriate)
- Duties
 - Include expectation in regard to generation of funding
 - Include criteria for advancement (e.g., provide link to The UCLA Call for applicable series)
- Mentoring paragraph for Assistant Professors

WHAT IS COVERED IN AN LOU?

➤ Compensation

- Provide breakdown of comp plan salary into components (X, X', Y, Z); include language that X & X' are considered covered compensation for UCRP retirement calculation and that Y & Z are not considered covered comp
- Provide links to comp plan policies & procedures if applicable

➤ Benefits

- Provide list of eligible insurances (health, dental, vision, legal, life, AD&D), plus eligibility to participate in 403b & 457b plans

➤ Commitments toward salary, research, staff, lab space, start-up costs, etc.

WHAT IS COVERED IN AN LOU?

- Relocation reimbursement
 - How much and at what %
 - Standard is 50% for household; 100% for laboratory
 - Include language on approved vendors and give departmental contact information
- Faculty Recruitment Allowance
 - For Academic Senate Faculty only
 - Can be issued once appointment is approved
- MOP Loan
 - Dr. Hiatt must approve any MOP loan language going into LOU

SEPARATIONS

- Our office:
 - Ensures we separated this person in our system
 - Purges our files
- APO:
 - Ensures they separated the person in their system
 - Purges their files
 - Reports to other offices:
 - Emeriti Office
 - Office of the President
 - Diversity

TYPES OF SEPARATIONS AND DOCUMENTS NEEDED

➤ Resignations

- Resignation letter signed by candidate or email from candidate with effective date of resignation
- Acceptance response from Chair/PI/Academic Supervisor TO candidate
- Where is the candidate going?
- AVOID THE DREADED AK code in EDB because we get asked for the reason ALL THE TIME!

TYPES OF SEPARATIONS AND DOCUMENTS NEEDED

- Appointment Expires/Contract Ends (Visiting appointments, visa holders, limited term appointments, fellows, etc.)
 - Our office requires nothing for these types of separations
- Layoffs/Non-Renewals/APM-137 (term appointment for other academics)
 - Requires appropriate letter issued to employee (ask Stephanie for template); send copy of said letter to our office
 - Be sure to prepare Unemployment Insurance Termination Request (http://www.ucop.edu/business-resource-center/_files/unemploy_termrpt.pdf)

TYPES OF SEPARATIONS AND DOCUMENTS NEEDED

➤ Retirement

- Document stating retirement and effective date (e.g., UC Pathways Agreement, E-mail from appointee to Chair, etc.)
- EDB CODES:
 - RF – for SENATE faculty members ONLY
 - RA – for all others

TYPES OF SEPARATIONS AND DOCUMENTS NEEDED

➤ Death

- Active academic appointees and Emeriti faculty
- Link to policy:
<http://www.adminpolicies.ucla.edu/app/Default.aspx?&id=160>
- Link to Notification Form:
- <http://www.adminpolicies.ucla.edu/pdf/160-A.pdf>

The bottom of the form provides you with the addresses where the notifications are to be sent.

TYPES OF SEPARATIONS AND DOCUMENTS NEEDED

➤ Department Responsibility:

- When advised of employee's death, immediately phones Chancellor's Office at (310) 825-2121 with the following information: Employee's name, age, sex, department, and position title and student status if the employee is a registered UCLA student;
 - Date, time and cause of death (if known);
 - Date employment began at University, and if applicable, date retired;
 - Name and address of surviving spouse, dependent, or beneficiary and relationship if other than surviving spouse or next of kin;
 - Date that flag should be flown at half-mast (if wanted).
- Contacts Campus Human Resources Benefits Office at (310) 794-0830 for campus employees, or the Healthcare Human Resources Benefits Office at (310) 794-0500 for Medical Enterprise employees and provides the following information:
 - Employee name, identification number, department name, and title;
 - Last day worked, last day on pay status;
 - Date and cause of death (if known); Name, address, and phone number of surviving spouse, dependent, or contact person.
- Contacts Payroll Services at (310) 794-8704 for the one-month salary death benefit
- Enters a separation action into Personnel/Payroll Employee Database (EDB) system
- Contact Parking Services for all parking-related materials

TYPES OF SEPARATIONS AND DOCUMENTS NEEDED

➤ HR Office Responsibilities

- Notifies Office of the President's retirement system and appropriate insurance carrier of death
- If there is insurance, writes letter of condolence to beneficiary describing processes and provides name and phone number of contact for additional information

➤ Payroll Services Responsibilities

- Upon receipt of death notice, determines eligibility of deceased for payment of one month's salary to a spouse or eligible dependent or beneficiary, and then determines amount of salary and accrued vacation earned but not paid prior to death. Takes all legal steps to make payment of this money to the proper survivor.

UC RECRUIT SEARCH WAIVERS

- Approval Checklist for Searches are updated and posted on the website
 - Waivers for appointments to In-Residence and Clinical X require approvals by your Chair, Academic Personnel Director (our office), Dean (Dr. Hiatt), EDI (VC Jerry Kang), and APO (VC Michael Levine)

	A	B	C	D	E	F	G	H	I	J	K
1			Okay to conduct Search? (FTE is available to the department)		Search Committee is formed and position announcement/ advertisement is drafted		UCLA Recruit Search Plan is complete and in compliance		Applicant pool is in compliance	Applicant shortlist is in compliance	Approves candidate selection in UCLA Academic Recruit
15	In-Residence & Clinical X	Search	N/A				Chair or Designee (can be staff member)		N/A	N/A	Chair or Academic Designee
16		No Search (appointee based at UCLA)	Search waiver required. Chair → Academic Personnel Director → Dean → Diversity Office → Academic Personnel								
17		No Search (paid affiliate appointee with a WOS UCLA appointment)	Search waiver required. Chair → Academic Personnel Director → Dean → Diversity Office → Academic Personnel								
18											
19	LEGEND for UC Recruit Roles:										
20	ACADEMIC PERSONNEL = Vice Chancellor for Academic Personnel (Michael Levine)				CHAIR = Department Chair (your chair)			DIVERSITY OFFICE = Vice Chancellor for Equity, Diversity, and Inclusion (Jerry Kang)			
21	ACADEMIC PERSONNEL DIRECTOR = SOM Academic Affairs (our office)					DEAN = Vice Dean for Faculty (Jonathan R. Hiatt)			EQUITY ADVISOR = Vice Dean for Academic Diversity (Lynn K. Gordon)		

ANNOUNCEMENTS

- When re-submitting a dossier that was returned to you for corrections, please address the envelope to the Dean's Office rep working on the case. Cases that are not addressed to the correct person are logged in by the student and placed at the back of the stack.
- When submitting dossiers to our office, please inform student workers/staff to put it in the LOG-IN bin, not in the "To Dean" by or "From Dean" bin and definitely not in our boxes to go to APO.

