

The UCPC UFIN301A Form allows the University of California to submit available personnel information between locations to ensure that the transferring employee will have continuous benefit coverage without any interruption in service. Click [here](#) to access form instructions and definitions.

SECTION 1. KEY INFORMATION - Required

Employee Last Name				Employee First Name				M.I.			
UCPath Employee ID # (8 Digits)				Employee Date of Birth (m/d/yyyy)				PPS Employee ID # (9 Digits)			
I-9 Date (m/d/yyyy)				Oath Date (m/d/yyyy)				Patent Date (m/d/yyyy)			
Work Authorization End Date (m/d/yyyy)				Visa Type		Citizenship Code		Last Day Worked (m/d/yyyy)			
Original Hire Date (m/d/yyyy)		Termination Date (m/d/yyyy)		Last Pay Date (m/d/yyyy)		Separation Code					
Transferring From				Transferring To				Effective Date of Transfer/Rehire			
Submitted By						Date Submitted (m/d/yyyy)					
Submitter's Phone				Submitter's Email							

SECTION 2. ENROLLED BENEFITS – This section only required for break in service of less than 120 days

Benefits Eligibility Date (m/d/yyyy)		MCB CUR/NXT \$				OASDI/MED					
						E M N					
State Domestic Partners Declaration		TIP		Retirement System						Vesting Start Date (m/d/yyyy)	
Yes No		Yes No		N H B U 1 P F S O W 6 A T D 7 8 C X							
Medical		Medical Plan Name		Coverage Code				Covered Through (m/d/yyyy)			
Dental		Dental Plan Name		Coverage Code				Covered Through (m/d/yyyy)			
Vision		Vision Plan Name		Coverage Code				Covered Through (m/d/yyyy)			
Legal		Yes No		Coverage Code				Covered Through (m/d/yyyy)			

SECTION 2. ENROLLED BENEFITS (continued)

Supplemental Life	Plan Code	Annual Salary		Effective Date (m/d/yyyy)
Dependent Life	Plan Code	Effective Date (m/d/yyyy)		
Supplemental Disability (Prior to 1/1/2017)	Plan Waiting Period	Monthly Salary	Effective Date (m/d/yyyy)	
Voluntary Disability	Voluntary Disability	Effective Date – Short-Term (m/d/yyyy)		Effective Date – Long-Term (m/d/yyyy)
	Short Term Long Term			
AD&D	Coverage Code	Principal Sum		Effective Date (m/d/yyyy)
DepCare FSA	Annual Amount	YTD Balance		
Health FSA	Annual Amount	YTD Balance		
Health HSA	Annual Amount	YTD Balance		
403(b) MAC Amount		457(b) MAC Amount		UCRP Buyback Deduction Amount
Estimated Vacation Balance	As of Date (m/d/yyyy)	Estimated Sick Leave Balance	As of Date (m/d/yyyy)	

SECTION 3. OTHER DEDUCTIONS - This section only required for break in service of less than 120 days

Description of Deduction	Monthly Deduction Amount

SECTION 4. ENROLLED DEPENDENT INFORMATION

This section only required for break in service of less than 120 days

(If more than six dependents, please attach an additional sheet to the back of this form.)

Dependent Name	Date of Birth	Relationship	Gender	Full SSN	Medical	Dental	Vision	Legal
			M F					
			M F					
			M F					
			M F					
			M F					
			M F					

SECTION 5. BENEFITS ELIGIBILITY DATA – This Section for PPS to PPS Transfer Only

Assigned BELI		Derived BELI		Effective Date (m/d/yyyy)	
BELI Status Qualifiers	Primary	Date (m/d/yyyy)	Secondary	Date (m/d/yyyy)	

SECTION 6. COMMENTS

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SECTION 7. INTERNAL USE ONLY (RECEIVING LOCATION)

Processed By			Completion Date
Title		Department	

Policy and Practice:

UC final earnings payment policy and practice mandates the payout of terminal vacation/PTO by the terminating location upon separation with a break in service prior to rehire at another UC location.

Disclaimers:

If current date is less than 30 days from the separation date, the displayed balances/accumulators/grosses may be incomplete. Mitigation strategies are recommended.

- Disclaimer: The Interlocation Transfer Application may need to be utilized again for this employee as a follow-up by the hiring location to ensure that all balances/accumulators/grosses, initially retrieved, are now finalized and have taken into consideration all final earnings payments, trailing severance payments and final leave usage/accrual/adjustments.
- Contact the Intercampus/Interlocation Transfer Coordinator with any questions.

If employee was in a pre-2016 UC retirement tier AND there has been a bona fide break in service, AND the start date at the new location is in a later month than the date of separation at the terminating location, then the retirement code values retrieved are for informational purposes and may no longer be germane.

Privacy Notifications:**STATE**

The State of California Information Practices Act of 1977 (effective July 1, 1978) requires the University to provide the following information to individuals who are asked to supply information about themselves. The principal purpose for requesting information on this form, including your Social Security number, is to verify your identity, and/or for benefits administration, and/or for federal and state income tax reporting. University policy and state and federal statutes authorize the maintenance of this information.

Furnishing all information requested on this form is mandatory. Failure to provide such information will delay or may even prevent completion of the action for which the form is being filled out. Information furnished on this form may be transmitted to the federal and state governments when required by law.

Individuals have the right to review their own records in accordance with University personnel policy and collective bargaining agreements. Information on applicable policies and agreements can be obtained from campus or Office of the President Staff and Academic Personnel Offices. The office responsible for maintaining the information contained on this form is the UCPath Center, 14350-1 Meridian Parkway, Riverside, CA 92518.

FEDERAL

Pursuant to the Federal Privacy Act of 1974, you are hereby notified that disclosure of your Social Security number is mandatory. The University's record keeping system was established prior to January 1, 1975 under the authority of The Regents of the University of California under Article IX, Section 9 of the California Constitution. The principal uses of your Social Security number shall be for state tax and federal income tax (under Internal Revenue Code sections 6011, 6051 and 6059) reporting, and/or for benefits administration, and/or to verify your identity.