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Policy and Approval Process for Rehired Retirees *into Staff Position*

*Updated with policy clarifications
provided by UCOP on 8/6/14*

Human Resources

November 2014

Objectives of this Presentation

- **To educate department hiring managers on the following:**
 - Updated policy guidelines for rehiring UC retirees, issued by UCOP effective 8/6/14.
 - The Rehired Retiree Approval Form in DocuSign, which is an online form that will allow electronic signatures and approval routings.
 - Steps following the approvals of the Rehired Retiree Approval Form.

Guidelines on Rehiring UC Retirees

- **Rehiring of a UC retiree into any appointment type requires approvals**
- **UC policy allows UC retirees, who continue to receive the monthly retirement income or received a lump sum cash out, to be rehired for a 12 month period at the maximum of 43% time (over a 12 month period).**
 - If there is a substantial business reason to continue the UC retiree's appointment after the initial 12 month appointment has concluded, the approval process must be completed again.
 - Policy allows for a UC retiree to be employed for 24 cumulative months.
 - Any further reemployment of the UC retiree, after the 24 cumulative months, will require approvals for an exception to policy.

Eligibility Based on University Need

- **In order to be eligible for rehire:**
 - The Retired Employee has skills that are critical to the University's mission and the University has not been able to find or is still searching for a suitable replacement.
 - The Retired Employee is needed to provide knowledge transfer or to train his/her replacement.
 - The Retired Employee is the Principal Investigator or lead researcher on a project that is not complete and his/her expertise is critical to complete the endeavor.
 - The University needs temporary services from a qualified professional who has experience with a unique facet of University operations.

Required Break In Service

- **A retired employee must not be reemployed by the University until there has been a break in service of at least 30 days, preferably 90 days, from his/her retirement date.**
- **Because this break in service has specific significance to UCRP, a break in service of at least 90 calendar days is strongly preferred. This break in service is only required after a Retired Employee's initial retirement.**

Rehiring a UC Retiree into a Career Appointment

- If a retiree, receiving monthly retirement income , chooses to suspend his/her retirement payments, he/she can be rehired into a career position without being subject to policy restrictions. Approvals are still required in this situation, but only at the initial point of rehire. Annual re-approvals are not required.
- A lump sum recipient cannot be rehired into a career appointment within policy.

Requests for Exception to Policy

- **Exceptions to the policy for rehiring UC retirees must be approved by the Chancellor*.**
- **Exceptions to policy include, but are not limited to:**
 - Reemploying a lump sum recipient into a career appointment
 - A rehire appointment percentage greater than 43% in 12 months
 - An initial reemployment period longer than 12 months
 - Reemployment for longer than 24 cumulative months

*pending delegation of authority to Senior Vice Chancellor, John Plotts

Rehiring Retirees – Process Overview

- **Hiring Manager consults with HR Generalist regarding rehire classification and pay rate**
- **Hiring Manager initiates the DocuSign Rehired Retiree Forms, via the following link:**
<https://www.docusign.net/member/PowerFormSigning.aspx?PowerFormId=94396ec1-4ffd-4a67-9f08-0b203aa1565b>
- **Retiree completes forms via DocuSign**
- **Approvals completed through electronic routing in DocuSign**
- **Hiring Manager receives completed approved forms from DocuSign via email.**
- **Hiring Manager completes SRS ticket, attaching approved Rehired Retiree Forms.**
- **HR Service Center facilitates rehire process, establishes rehire date.**
- **Retiree begins work**

Approval Process via DocuSign

- Prior to rehiring a retiree, the approval process must be completed.
- The department and retiree must complete 2 forms, UBEN 138 and UBEN 1039. *These forms are available at UCSF via DocuSign, which is an online approval system using e-signatures.*
- The *DocuSign* forms are available at the following link:
 - <https://www.docusign.net/member/PowerFormSignin.g.aspx?PowerFormId=94396ec1-4ffd-4a67-9f08-0b203aa1565b>
- The department manager should initiate the process using the UCSF retiree rehire online request link. After the manager completes and electronically signs the form it will be routed to the retiree via email for additional information and electronic signature.

Starting the Approval Process

PowerForm Signer Information

Please enter your name and email to begin the signing process.

Your Role:
Department Representative

Your Name:

Your Email:

Please provide information for any other signers needed for this document.

Role:
Retiree

Name:

Email:

Role:
Departmental Approver

Name:

Email:

[Begin Signing](#)

- ▶ Clicking on the DocuSign link will launch the first page to left.
- ▶ The Hiring Manager will enter their name and email address and also the name and email address of the Retiree and the Department Head (who will be required to approve the form)
- ▶ After entering this information, click “Begin Signing”

Completing the Forms

- DocuSign will walk the manager through each of the fields that require the manager to enter information.

Subject: Approval for Rehiring a UC Retiree

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RETIRED EMPLOYEE APPROVALS FORM
UBEN 138 (R4/09) University of California Human Resources and Benefits

Return completed form to your location's Human Resources Office.

The hiring manager must complete this form including obtaining necessary approvals, for Retired Employees reemployed into appointments in staff positions regardless of the nature of the new appointment.

1. PERSONAL INFORMATION (Please type or print clearly)

NAME (Last, First, Middle Initial) _____ EMPLOYMENT ID NUMBER _____
 CAMPUS ANATOMICAL CENTER _____ CAMPUS PHONE _____
 RETIREMENT ADDRESS _____

Retirement date _____ Retirement election: Lump Sum Cashout Monthly Retirement Income (Please fill out Election Form)
 Suspend monthly UCRP retirement: Yes No Date suspended _____

2. REHIREE APPOINTMENT INFORMATION

Accepted a career position via recruitment process Yes No Hiring manager name Jeffrey Chiu
 Hired into same position Yes No. If yes, was position posted for recruitment Yes No
 Appointment % time _____ Appointment begin date _____ Appointment end date _____
 Appointment title _____ Appointment type -- select --
 Does this appointment represent an Exception to Policy? Yes No Salary _____
 Is there a current appointment at another UC location? Yes No If yes, provide details: _____

Please describe University need

Justification for an Exception to Policy

Next

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Confirm Signing

The screenshot shows a web form titled "2. REHIREE APPOINTMENT INFORMATION". The form contains several fields and checkboxes. A yellow button labeled "Confirm Signing" is visible on the left side. A notification box in the center of the form reads: "All required fields complete. You will have an opportunity to save your copy on the next screen. Click 'Confirm Signing' when you are ready." The form fields include: "Accepted a career position via recruitment process" (Yes/No), "Hiring manager name" (Jeffrey Chiu), "Hired into same position" (Yes/No), "No. If yes, was position posted for recruitment" (Yes/No), "Appointment end date" (8/14/14), "Appointment type" (Limited), "Salary" (\$40/hour), and "Justification for an Exception to Policy" (requires the retiree's skills knowledge and abilities).

- When all the required fields are completed, a notification will pop up, and a yellow button “Confirm Signing” will appear.
- The Hiring Manager should click on the button and will be prompted to select a signature to complete the process.

Approval Process continued

- **After the hiring manager has electronically signed the document, the following sequential steps will occur:**
 - The Retiree will receive an email from Human Resources via DocuSign requesting additional information to be completed and signed.
 - The Department Head will receive an email from Human Resources via DocuSign requesting the review and signing of the completed Rehired Retiree Approval Forms.
 - Human Resources will receive the approved forms and route for the following approvals:
 - Director of Talent Acquisition
 - Associate Vice Chancellor of Human Resources

Final Steps

- After all approvals are completed, the Hiring Manager will receive an email from Human Resources via DocuSign with the completed rehired retiree forms.
- The Hiring Manager should create a rehire SRS ticket to rehire the Retiree and attach the approved both of the Rehire Retiree Approval forms to the SRS ticket.
- The HR Generalist will work with the hiring manager to complete the steps for rehiring the retiree.

Tracking the Status of the Form

- Hiring Managers are recommended to create a DocuSign account with a password login utilizing the email address entered at the beginning of the process
- When logging in at <https://www.docusign.net/member/Home.aspx>, Hiring Managers will be able to see the status of the form in regards to completion and approvals.

The screenshot shows a DocuSign web interface. At the top, there is a navigation bar with 'UCSF' logo and tabs for 'Home', 'Manage', 'Send', 'Dashboards', and 'Reports'. Below the navigation bar is a 'Create' button. The main area is divided into a left sidebar and a main content area. The sidebar contains folders like 'Inbox(8)', 'Sent', 'Draft', 'Deleted', and 'Arch Folders'. The main content area shows an email list with columns for 'From' and 'Subject'. One email is selected, and its details are shown below, including a 'Summary' tab and a 'Document' tab. The 'Summary' tab shows the envelope status as 'In Process' and a list of events.

From	Subject
Jill Cozen-Harel	Approval for Rehiring a UC Retiree
Jill Cozen-Harel	Approval for Rehiring a UC Retiree
Jill Cozen-Harel	Approval for Rehiring a UC Retiree
Jill Cozen-Harel	Approval for Rehiring a UC Retiree
Jeffrey Chiu	Please review & sign your document
Jill Cozen-Harel	Please review & sign your document
Jill Cozen-Harel	Please review & sign your document
Jill Cozen-Harel	Please review & sign your document

Summary | Document

Envelope Status: In Process Hide C

Envelope Subject: Approval for Rehiring a UC Retiree

Pages: 3

1. Sent by Jill Cozen-Harel (jill.cozen-harel@ucsf.edu) | 4/14/2014 4:20:52 PM PT
2. Signed by Jeffrey Chiu (jeffrey.chiu@ucsfmedctr.org) | 4/14/2014 4:28:00 PM PT
3. **Next to sign Test Retiree (jeffsc99@gmail.com)**
 4. Awaiting signature from Test Department Head (jeffsc_99@yahoo.com)
 5. Awaiting signature from Jeffrey Chiu (jeffrey.chiu@ucsfmedctr.org)
 6. Awaiting delivery to Alana Robinson (Alana.Robinson@ucsfmedctr.org)
 7. Awaiting signature from David Odato (David.Odato@ucsfmedctr.org)
 8. Awaiting delivery to Sharon Talbott (Sharon.Talbott@ucsfmedctr.org)
 9. Awaiting delivery to Lidziya Shakhnovich (Lidziya.Shakhnovich@ucsf.edu)

Support

- **For any issues or concerns in utilizing the DocuSign forms for Rehired Retirees, please contact the Recruitment/Talent Acquisition Team:**
 - Lidziya Shakhnovich – Recruitment Assistant
 - (p) 415.502.1214
 - Lidziya.Shakhnovich@ucsf.edu
 - Jessica Driessler – Talent Acquisition Supervisor
 - (p) 415.476.5358
 - Jessica.Driessler@ucsfmedctr.org
 - Jeffrey Chiu – Talent Acquisition Director
 - (p) 415.379.0301
 - Jeffrey.Chiu@ucsfmedctr.org



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