



File Name	Termination - Retirement.doc
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Termination - Retirement

Concept

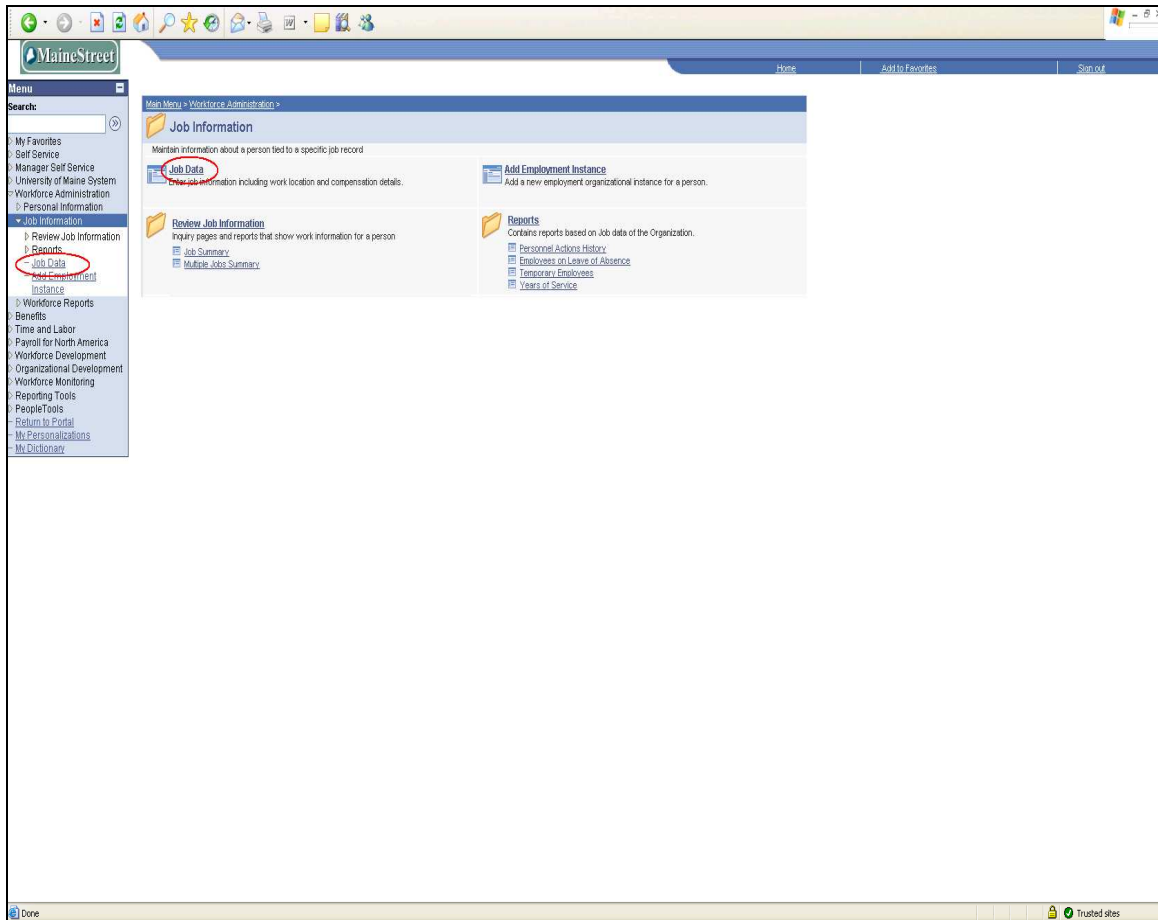
Entering a retirement record for an employee.

Termination Date and Last Date Worked fields will populate automatically.

Additional Information:

- If the employee has multiple Empl Rcds, repeat process for each Empl Rcd.
- If a faculty member is retiring and the balance of contract is being paid please refer to the Termination - Paying Balance of Contract process.

Navigation:



- | Step | Action |
|------|---|
| 1. | Click the Workforce Administration link. |
| 2. | Click the Job Information link. |
| 3. | Click the Job Data link. |



Procedure:

Job Data
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmpID: begins with [text input]
Empl Rcd Nbr: = [text input]
Name: begins with [text input]
Last Name: begins with [text input]
Second Name: begins with [text input]
Alternate Character Name: begins with [text input]
Middle Name: begins with [text input]

Include History Correct History Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

- | Step | Action |
|------|---------------------------------|
| 4. | Enter EMPLIID field. |
| 5. | Click the Search button. |

Process Document

HRMS: Termination - Retirement



The screenshot shows the HRMS interface for an employee named Harry Potter. The 'Benefits Program Participation' link is highlighted with a red box. The interface includes tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The 'Job Information' tab is active, displaying fields for HR Status (Inactive), Payroll Status (Retired), Effective Date (09/01/2008), Sequence (0), and Job Indicator (Primary Job). The 'Action/Reason' dropdown is set to Retirement, with Voluntary Retirement selected. Other fields include Last Start Date (04/17/2003), Termination Date (09/31/2008), Expected Job End Date (12/31/2009), Last Date Worked (08/31/2008), Position Number (00011022), and Position Entry Date (10/27/2004). The 'Benefits Program Participation' link is highlighted in red.

Step Action

6. Click the **Plus (+) key** to add a new job row.
7. Effective date should be the first day employee is not paid. Example: last day worked was 8/31/08, the effective date should be 09/01/2008.
8. **Sequence** defaults to '0'. If the effective date of the added row is the same as the prior row, the sequence must be changed to the next higher number. Otherwise, do not change.
9. Click the **Drop down arrow** to select from the Action list.
10. Click the **Retirement** list item.
11. Click the **Drop down arrow** to select from the Action/Reason list.

NOTE: When the 'Retirement' Action is selected:

- 1) HR Status changes to 'Inactive'
 - 2) Payroll Status changes to 'Retired'
 - 3) 'Termination Date' and 'Last Date Worked' fields are populated with date of day prior to effective date of job row.
12. Select appropriate code from list.
 13. Click the **Benefits Program Participation** link.



Process Document HRMS: Termination - Retirement

The screenshot displays the 'Benefit Program Participation' form for Harry Potter (EMP ID: 0099999, Empl Rcd #: 0). The form is titled 'Benefit Program Participation' and includes the following sections:

- Benefit Record Number:** 0
- Benefit Status:** Effective Date: 09/01/2008, Effective Sequence: 0, Action/Reason: Retirement, Voluntary Retirement, Current.
- Benefits System:** Benefits Administration, Benefits Employee Status: Retired, Annual Benefits Base Rate: 20,716.800 USD, Manual Override ABBR:
- ABBR Override Date:** (Empty field)
- Benefits Administration Eligibility:** BAS Group ID: 005, UM Employee Group, Part-Time Status: None, Eligible: No, Work Calendar: (Empty), PATFA Status: (Empty), Elig Fld 5: (Empty), Elig Fld 6: (Empty), Non-Contributory: (Empty), Elig Fld 8: (Empty), Cohort: (Empty).

At the bottom of the form, there is a 'Save' button highlighted with a red box, along with other buttons: Return to Search, Notify, Refresh, Update/Display, Include History, and Correct History.

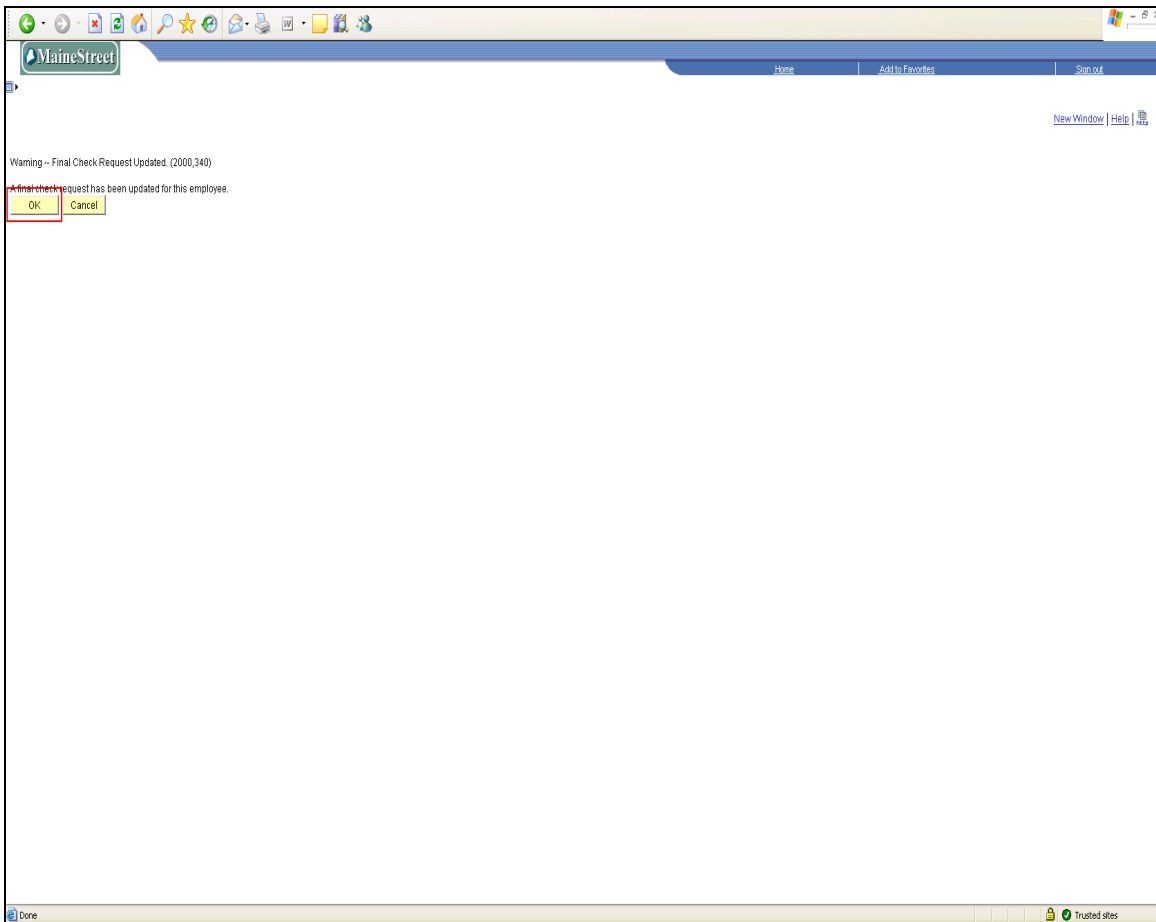
Step Action

14. If employee has the Manual Override ABBR box checked, this box must be 'unchecked' before saving.
15. Click the **Save** button.



Process Document

HRMS: Termination - Retirement



Step	Action
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16.	The Final Check process is a manual process.
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Click the **OK** button.

NOTE: If the employee has multiple employee records, go to the next employee record and repeat the process.

