Retirement Job Aid

The Retirement eForm is used for employees retiring from the university. This eForm will retire any and all employee records.

Navigation: Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request

1. Navigate to the eForms Action Request page and click on the Add a New Value tab.
2. The Initiate New eForms Request page is displayed. Select the Retirement option from the “Action” drop down menu.
3. The Retirement eForm is displayed. Use the Justification text box to explain or “justify” the reason for the new eForm action requested.
4. From the Employee Information section, enter or look up the employee’s ID in the Empl ID field.
5. Use the Termination Information section to provide details for the termination:
   a) Enter the Last Date Worked and the Job Data Eff Dt will update based on the date entered (this is the effective date that will update the employee’s Empl Record).
      Note: The Last Date Worked should be the last day the employee actually worked or time was entered for the employee.
   b) Select the Retirement option from the Action drop down menu.
6. The W2 Forwarding Information section displays the employee’s current mailing address. Select the Change Address checkbox if the employee has provided another mailing address to use for their W2.  
   Note: Use the Clean Address link if updating the address, to ensure a valid postal address is entered.
7. Once all the required fields have been completed, which is indicated by an asterisk, click the **Save** button. Notice a **Request ID** number has been assigned, with a **Status** of “Saved.”

8. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments.

9. After you’ve added attachments and comments, click the **Submit** button.

10. The eForm **Status** shows “Pending Approvals” and the current approval routing is displayed at the bottom of the page.