

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.

The screenshot shows the 'Action Request' page in the HRMS system. The breadcrumb trail is 'Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request'. There are two tabs: 'Employee Self-Service' and 'Training'. The main heading is 'Retirement'. Below it, there is an 'Action' section with a dropdown menu set to 'Retirement' and a 'Status' field. A large 'Justification' text box is present. On the right side, there are links for 'Request ID', 'Request Date', 'Processing Messages', and 'Request History'.

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.

The screenshot shows the 'Employee Information' section. It features a search field for '*Empl ID' with a magnifying glass icon. Below the search field is a table with the following columns: Empl RCD, Job Indicator, Company, HR Status, Payroll Status, Eff Date, Action, Reason, Dept ID, and Dept Name. The first row of the table contains the values: 1, 0, (blank), (blank), (blank), (blank), (blank), (blank), (blank), and (blank).

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.

The screenshot shows the 'Termination Information' section. It contains three fields: '*Last Day Worked' with a calendar icon, '*Job Data Eff Dt' with a calendar icon, and '*Action' with a dropdown menu.

- 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.

W2 Forwarding Information

Change Address

Address 1 [Clean Address](#)

Address 2

City

State

Zip

Country USA

Phone

Email ID

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.”

Retirement

Action

Actions Retirement **Status Saved**

Justification

Request ID 0000982
Request Date 11/13/2017
[Processing Messages](#)
[Request History](#)

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.

Attachments 11

Type	Note	Attached File	Attach Date/Time	By
1				

[Add/Delete](#)

Comments 11

Find First 1 of 1 Last

[Add/Edit](#)

Comment By DateTime

Contact Information 12

[Save](#) [Submit](#) [Approve](#) [Deny](#) [CallBack](#) [Sendback](#) [Cancel](#) [Copy...](#)

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

Retirement

Action

Actions Retirement **Status Pending Approvals**

Justification

Request ID 0000982
Request Date 11/13/2017
[Processing Messages](#)
[Request History](#)

▶ Contact Information

Department Approval

REQUEST_ID=0000982:Pending

Department Approval

Pending

Multiple Approvers
Department Head/Manager

Business Office Approvals

REQUEST_ID=0000982:Awaiting Further Approvals

POI, TER, RET, END

Not Routed

Multiple Approvers
HR Service Partners

Save Submit Approve Deny CallBack Sendback Cancel Copy...