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.

▶ Contact Information

Department Approval

▽ REQUEST_ID=00000982:Pending

Department Approval

Pending
  Multiple Approvers
  🕐 Department Head/Manager

Business Office Approvals

▽ REQUEST_ID=00000982:Awaiting Further Approvals

POI, TER, RET, END

Not Routed
  Multiple Approvers
  📥 HR Service Partners

| Save | Submit | Approve | Deny | CallBack | Sendback | Cancel | Copy... |