Retire Employee

Trigger:

Concept

Job Aid and Business Process

Purpose

This document provides the manager with a step-by-step process to retire an individual. When a manager receives notification from an employee of his/her intention to retire, the following steps must be taken in PeopleSoft to inform interested parties that the employee is retiring:

- Provide the effective date of the retirement;
- Identify the employee to be retired;
- Identify the retirement reason; and
- Submit the retirement.

The manager also has the responsibility to:

- Submit the employee's retirement request to the Department of Employment
- Complete all retirement separation activities (collect all University equipment including ID, keys, passwords, Department credit cards, access cards, uniforms, cell phones);
- Remind the employee to contact the Benefits Department for benefits advice;
- Retrieve any designated checks from Payroll (if required);
- Contact the employee to arrange for check pickup (if required).
Assumptions

- Employee reports to Manager in PeopleSoft.
- Employee has contacted the Benefits Department and is eligible for retirement.
- Employee has submitted a letter of retirement.
- The hiring manager has been in communications with the Benefits Department for the employee.
- The Benefits Department has given the hiring manager approval to submit the retirement action.

Responsibility/Role

- Managers

<table>
<thead>
<tr>
<th>Required Field(s)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>The Effective Date should be the first day of the employee’s retirement,</td>
</tr>
<tr>
<td>Reason for Retirement</td>
<td>not being employed by the University.</td>
</tr>
</tbody>
</table>

Output - Results

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request is forwarded to the Office of Employment</td>
</tr>
</tbody>
</table>
Procedure

Use the Retire Employee pages to notify Employment of an employee's request for retirement. Upon receiving written notification from an employee, initiate the retirement process.

*Note: A copy of the aforementioned notice must be received and approved by the Department of Employment prior to completing this action.*

Follow this 3-step process to retire an employee:

1. Enter the date the retirement will take effect. You will be able to process only those employees that report to you as of this date.
2. Select the employee to be retired.
3. Select the retirement reason and submit the retirement.

Let's retire an employee that is 65 years old.

Home > Manager Self Service > Job and Personal Information > Retire Employee
Step | Action
--- | ---
1. | Begin by navigating to the *Job and Personal Information* pages. Click the **Manager Self Service** link.

2. | The *Manager Self Service* menu will display. Click the **Job and Personal Information** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>The <em>Job and Personal Information</em> menu will display. Click the <strong>Retire Employee</strong> link.</td>
</tr>
</tbody>
</table>
The Retire Employee page will display. Verify the Effective Date is correct. **This date should be the first day of the employee's retirement.** If you want to change the date, either type the date or click the Calendar button and make a selection.

Click the Continue button.
Step | Action
--- | ---
5. | Click the **Name** button for the employee you want to retire. Choose **Etta James**
Step 6. Click the **Continue** button.
Step | Action
---|---
7. | Click the **Reason for Retirement** dropdown button to activate the menu.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Click the appropriate entry in the list.</td>
</tr>
<tr>
<td></td>
<td>Choose <strong>Retirement &gt; 65</strong></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Submit</strong> button.</td>
</tr>
</tbody>
</table>
10. A Confirmation page tells you that the retirement action has been successfully submitted. Click the OK button.
Step 11. Click the Return to Select Employees link.

Return to Select Employees
Step | Action
--- | ---
12. | Note: a copy of the aforementioned notice must be received and approved by the Department of Employment prior to completing this action.

Click the **Home** link to return to the **Home** menu.
Step | Action
--- | ---
13. | Congratulations! You have completed the Retire process. **End of Procedure.**