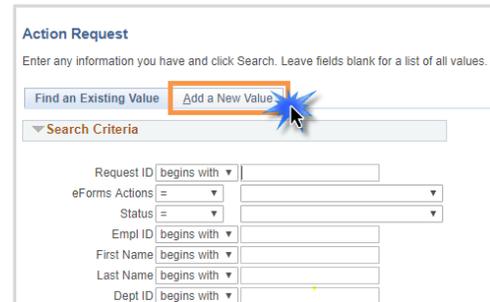


## Employee Retirement

The Employee Retirement form is used for employee's retiring from the University. If the employee has multiple positions, this form will retire all job records for the employee. To process a retirement form, complete the following steps:

- 1) In UT Share, navigate to the Action Request page

NavBar > Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request



**Action Request**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

▼ Search Criteria

Request ID begins with

eForms Actions =

Status =

Empl ID begins with

First Name begins with

Last Name begins with

Dept ID begins with

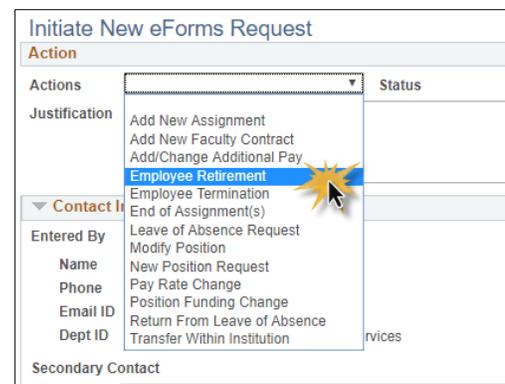
- 2) Click the Add a New Value tab

- 3) Select the Employee Retirement Request Form

The **Initiate New eForms Request** page is displayed. Select **Employee Retirement** from the **Actions** drop-down menu.

- 4) Enter a Justification

Use the **Justification** text box to explain or justify the reason for the request.



**Initiate New eForms Request**

**Action**

Actions  Status

Justification

▼ Contact Information

Entered By

Name

Phone

Email ID

Dept ID

Secondary Contact

▼ Actions

- Add New Assignment
- Add New Faculty Contract
- Add/Change Additional Pay
- Employee Retirement**
- Employee Termination
- End of Assignment(s)
- Leave of Absence Request
- Modify Position
- New Position Request
- Pay Rate Change
- Position Funding Change
- Return From Leave of Absence
- Transfer Within Institution

- 5) Complete the Employee Information Section

The **Employee Information** section is used to identify the employee retiring.

Enter or lookup  the employees **Empl ID**. The table below displays all the existing assignments for the employee.

**Employee Information**

\*Empl ID  

	Empl RCD	Job Indicator	Company	HR Status	Payroll Status
1		0 Primary	ARL	Active	Active

- 6) Complete the Termination Information Section

The **Termination Information** section is used to enter separation details:

The screenshot shows a web form with two main sections:

- Termination Information:**
  - \*Last Date Worked: A date input field with a calendar icon. Callout A points to this field.
  - Job Data Eff Dt: An empty text input field.
  - \*Retirement Reason: A dropdown menu. Callout B points to this menu.
- W2 Forwarding Information:**
  - Change Address: A checkbox. Callout C points to this checkbox.
  - Address 1: A text input field with a 'Clean Address' link to its right.
  - Address 2: A text input field.
  - City: A text input field.
  - State: A dropdown menu with 'TX' selected.
  - Zip: A text input field with '75088-4953' entered.
  - County: A text input field.
  - Country: A dropdown menu with 'USA' selected.
  - Phone: A text input field.
  - Email ID: A text input field.

- A. Enter the **Last Date Worked**. The **Job Data Eff Dt** will update based on the date entered in the Last Date Worked field.
- B. Select the **Retirement Reason**. The options are:
  - \*HR Only\* Benefit Eligible – not on UTS
  - \*HR Only\* Limited Retirement
  - \*HR Only\* Vol Separation Incentive Prg
  - Retire from RTW Status - used for individuals that have "returned to work", but are now leaving for full retirement.
  - Retirement
- C. The **W2 Forwarding Information** section displays the employee’s current mailing address. If the employee has provided a different mailing address, select the **Change Address** checkbox and make the necessary changes.

**Note:** If updating the address, use the **Clean Address** link to validate the postal address.

7) Click Save

Once the required fields (indicated with an \*asterisk) are completed, click Save. Notice, a Request ID number (e.g. 00002475) is assigned and the form status is displaying “Saved”.

The screenshot shows the bottom of a form section titled 'Contact Information'. Below the title is a row of buttons: 'Save' (highlighted with a mouse cursor), 'Submit', 'Approve', 'Deny', 'CallBack', 'Sendback', 'Cancel', and 'Copy...'.

8) Add Attachments and Comments

- A. Expand the Attachments section and click the Add/Delete button to upload relevant support documentation.
- B. Expand the Comments section and click the Add/Edit button to include any special remarks. (Optional)

Note: Attachments and Comments cannot be added unless you have clicked Save.



9) Complete the Form Procedures Section

The **Form Procedures** section is used as a checklist and to provide additional information about the request. Review and provide an answer to the question in this section.



10) Add a Secondary Contact (if needed) and Submit the Form to Workflow

- A. If applicable, expand the **Contact Information** section to add the name and telephone number of a secondary contact for the New Position Request form.
- B. After completing the eForm, click the **Submit** button to send the document for approval. The eForm **Status** changes to "Pending Approvals" and the current routing is displayed.

