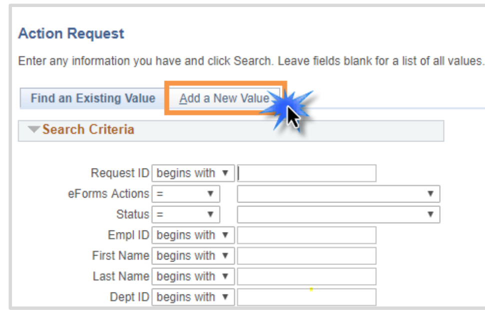
Employee Retirement

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



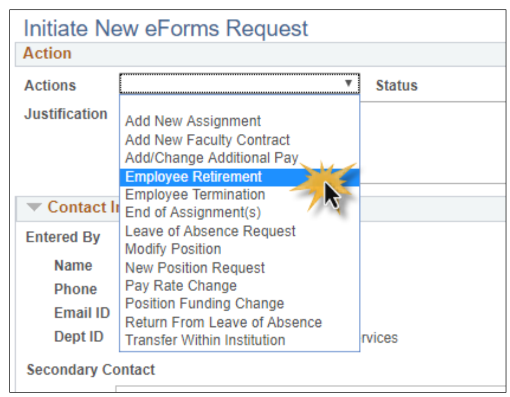
2) Click the Add a New Value tab

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

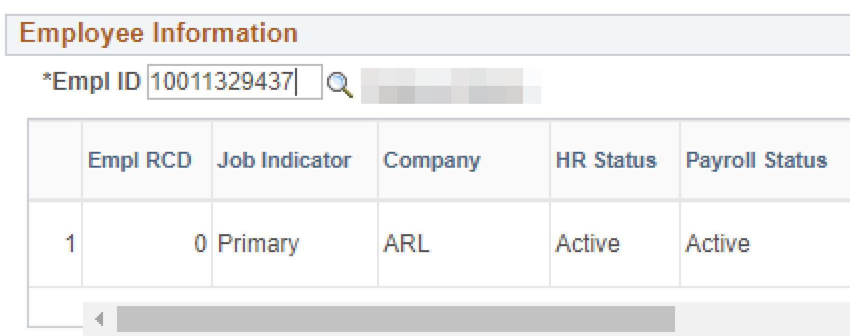
   Use the **Justification** text box to explain or justify the reason for the request.



5) Complete the Employee Information Section

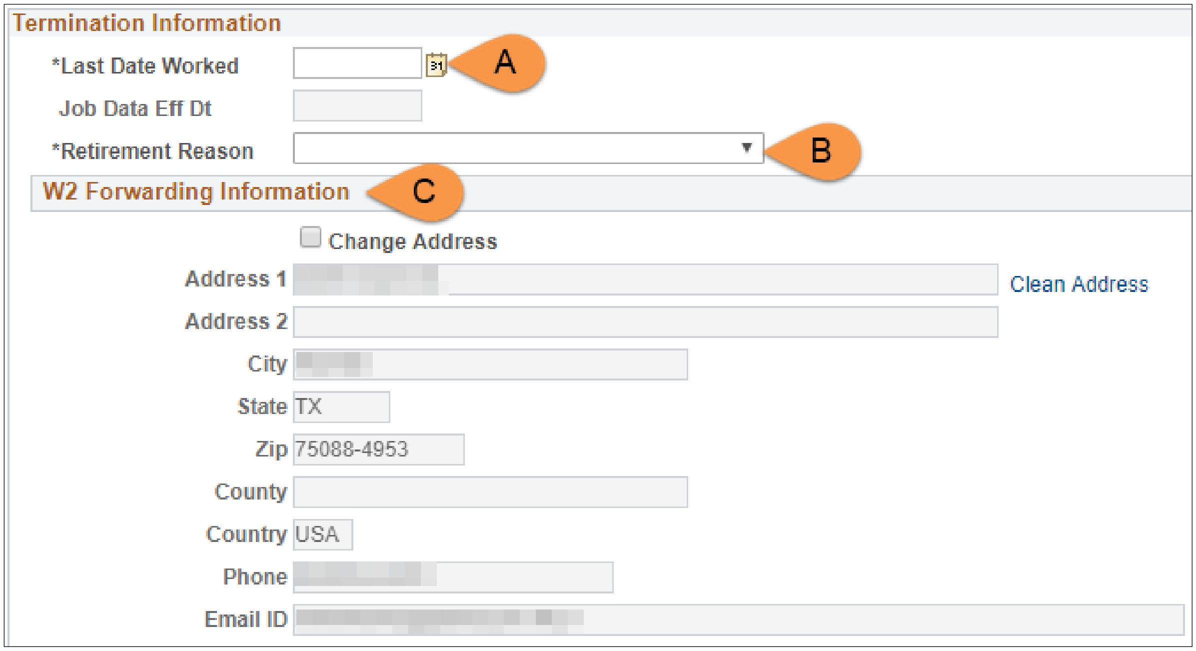
   The **Employee Information** section is used to identify the employee retiring.

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



6) Complete the Termination Information Section

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



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:

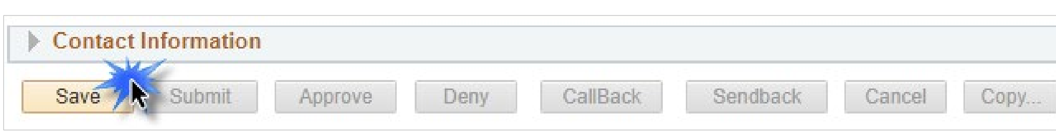
- *HR Only* Benefit Eligible – not on UTS
- *HR Only* Limited Retirement
- *HR Only* Vol Separation Incentive Prg
- Retire from RTW Status - used for individuals that have "returned to work", but are now leaving for full retirement.
- Retirement

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".

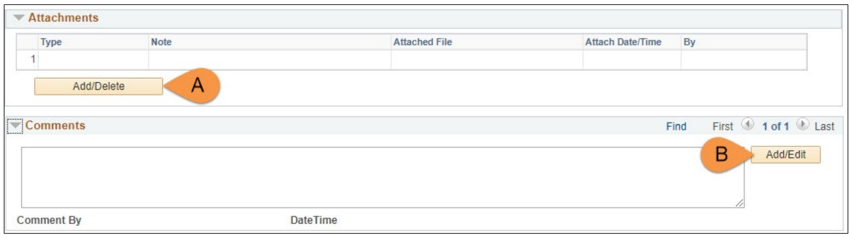


8) Add Attachments and Comments

   A. Expand the Attachments section and click the Add/Delete button to upload relevant support documentation.

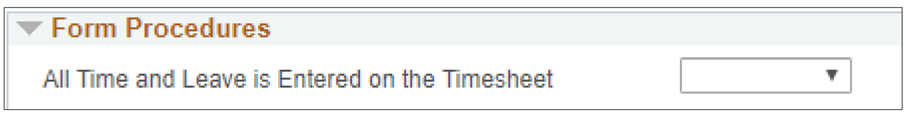
   B. Expand the Comments section and click the Add/Edit button to include any special remarks. (Optional)

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.