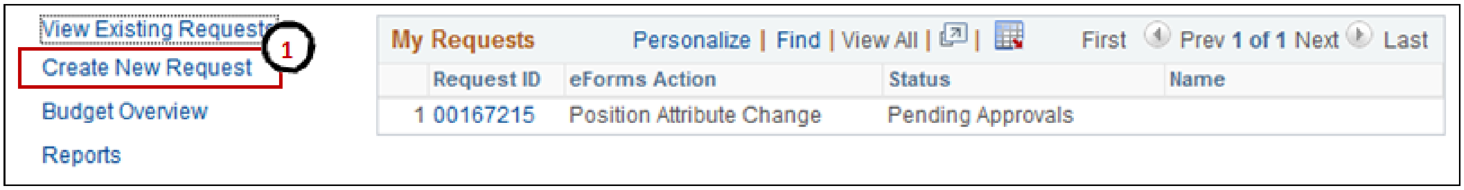
Retirement

The Retirement eForm is used for employees retiring from the university.

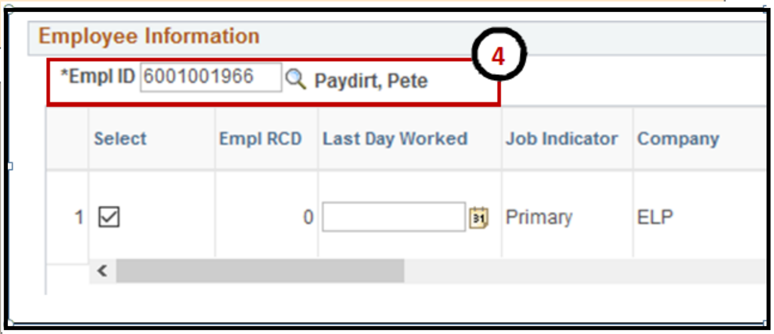
This eForm will retire all active employee records.

1. After logging into PeopleSoft, under **Employee Self Service (Homepage)** click the **eForms Tile**. From the "eForms Portal Pagelet" select the **Create New Request** link.



2. The **Initiate New eForms Request** page is displayed. From the "Action" drop down menu, select the **Retirement** option.
3. The **Retirement** eForm is displayed. Use the **Justification** text box to explain or "justify" the reason for the eForm action requested.

4. From the **Employee Information** section, enter or look up the employee's ID in the Empl ID field. All active employee records will display:



5. Use the **Termination Information** section to provide details for the termination:

   5a. Enter the **Last Date Worked**

   Note: The Last Date Worked should be the last day the employee actually worked or the last date time was entered for the employee.

6. **Reminder:** All time (sick, vacation, paid hours) must be entered before the completion of this form, check the "All Time and Leave Entered" box if you have entered the time. Otherwise, you will need to save the form, enter the time, and return to complete the Retirement form.

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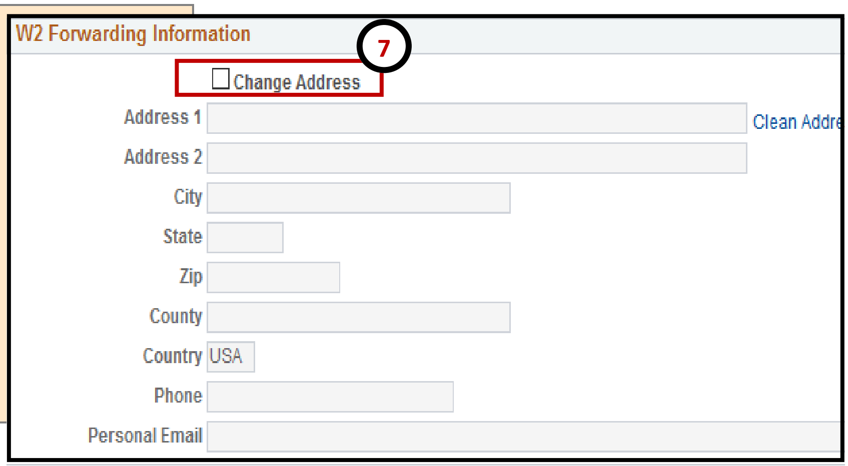
7. The **W2 Forwarding Information** section displays the employee's current mailing address. Select the **Change Address** checkbox if the employee has provided a different mailing address to use for their W2.

   Note: Use the **Clean Address** link if updating the address, to ensure a valid postal address is entered.

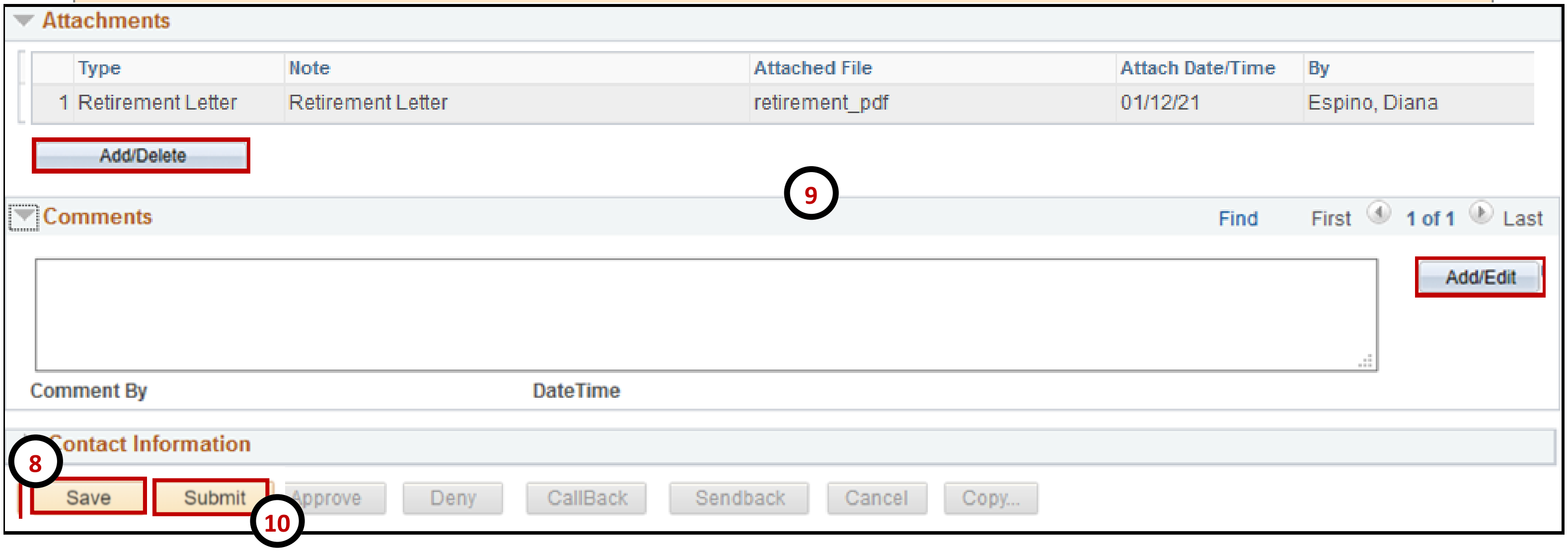


8. Once all the required fields have been completed, click the **Save** button.

   Notice: At the top of the form, the **Request ID** number has been assigned and the status of the form is now "**Saved**."

9. Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments. For the **Retirement** form, a **Retirement Letter** is required.

10. After adding any attachments and comments (if needed), click the **Submit** button.



11. Once the document is submitted, the status of the form will update and show "**Pending Approvals.**" The current approval routing is displayed at the bottom of the page.