

# 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.

The screenshot shows the PeopleSoft eForms Portal interface. On the left, there is a navigation menu with 'View Existing Request', 'Create New Request', 'Budget Overview', and 'Reports'. 'Create New Request' is highlighted with a red box and a circled '1'. In the center, there is a 'My Requests' section with a table. The table has columns for 'Request ID', 'eForms Action', 'Status', and 'Name'. One row is visible with '1 00167215', 'Position Attribute Change', and 'Pending Approvals'. Navigation buttons like 'Personalize', 'Find', 'View All', 'First', 'Prev 1 of 1 Next', and 'Last' are also visible.

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.

The screenshot shows the 'Retirement' eForm. At the top, there is a header 'Retirement' and an 'Action' dropdown menu. The dropdown is set to 'Retirement' and is highlighted with a red box and a circled '2'. To the right of the dropdown is a 'Status' field. Below the dropdown is a large text box labeled '\*Justification' which is empty and highlighted with a red box and a circled '3'.

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:

The screenshot shows the 'Employee Information' section. At the top, there is a search bar with '\*Empl ID' and the value '6001001966'. To the right of the search bar is a magnifying glass icon and the text 'Paydirt, Pete', which is circled with a '4'. Below the search bar is a table with columns: 'Select', 'Empl RCD', 'Last Day Worked', 'Job Indicator', and 'Company'. The table has one row with a checked checkbox in the 'Select' column, '0' in the 'Empl RCD' column, an empty date field in the 'Last Day Worked' column, 'Primary' in the 'Job Indicator' column, and 'ELP' in the 'Company' column.

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.

The screenshot shows the 'Termination Information' section. It has a field labeled '\*Last Date Worked' with a date picker icon, circled with a '5a'. Below this field is a checkbox labeled 'All Time and Leave Entered' which is checked and circled with a '6'.

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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- 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.

W2 Forwarding Information

Change Address

Address 1 [Clean Address](#)

Address 2

City

State

Zip

County

Country USA

Phone

Personal Email

- 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."

- Expand the **Attachments** or **Comments** section to attach required documentation and include any special comments. For the **Retirement** form, a **Retirement Letter** is required.
- After adding any attachments and comments (if needed), click the **Submit** button.

Attachments

Type	Note	Attached File	Attach Date/Time	By
1 Retirement Letter	Retirement Letter	retirement_pdf	01/12/21	Espino, Diana

Add/Delete

Comments

Find First 1 of 1 Last

Add/Edit

Comment By DateTime

Contact Information

Save Submit Approve Deny CallBack Sendback Cancel Copy...

- 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.

Business Office Approvals

REQUEST\_ID=00015920:Pending

Retirement

Pending

Multiple Approvers

EDM