



# EPAF RETIREMENT PROCESS - USER MANUAL

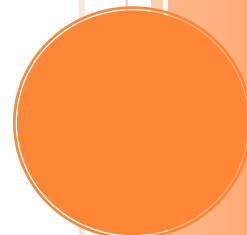
*Initiator User Manual for Change in Employment Status*

## *Retirement Process*

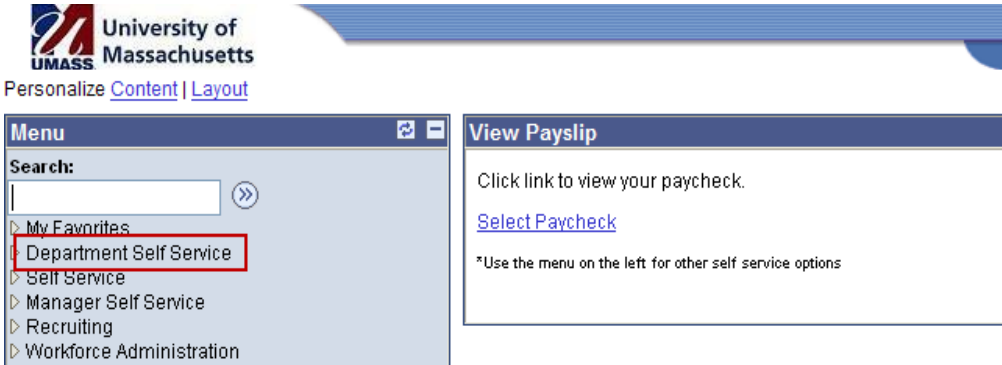
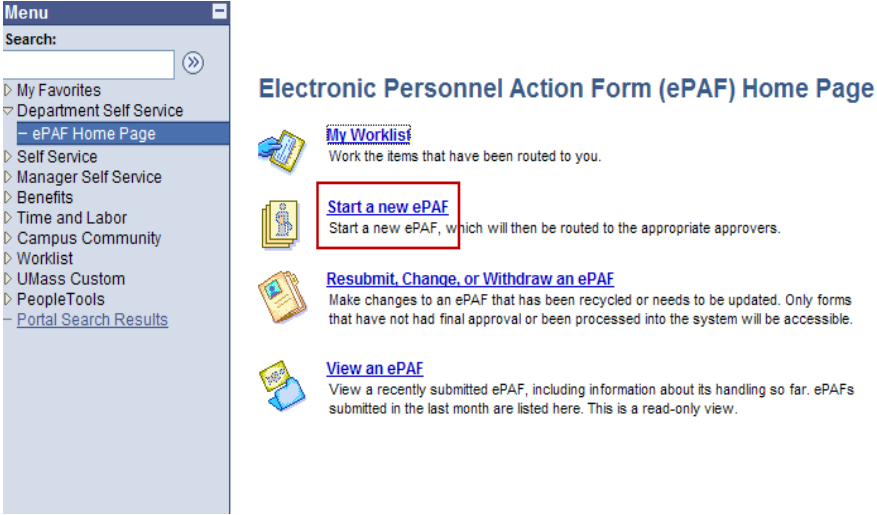
This manual provides step by step information on how to enter a retirement.


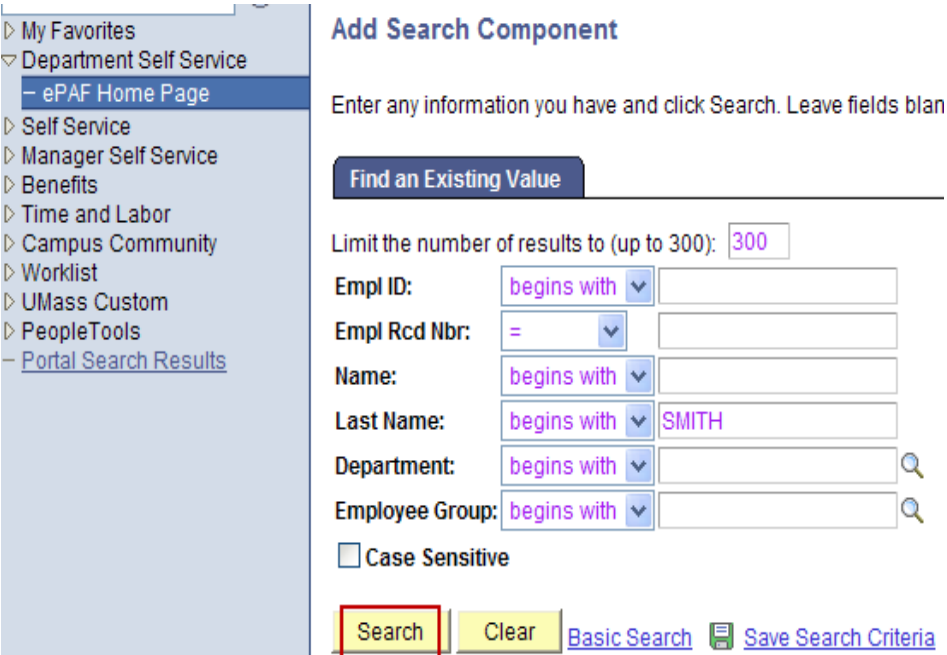
**Developed by:  
Learning & Development Group  
Human Resources Diversity & Inclusion**

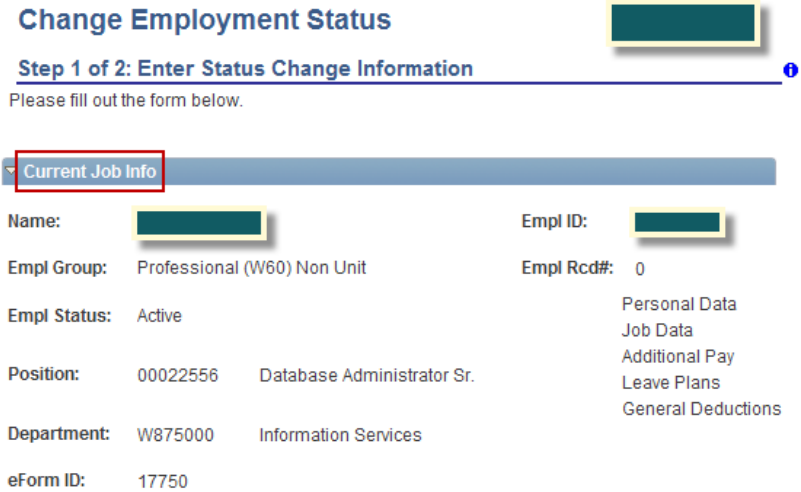
**11/13/2012**

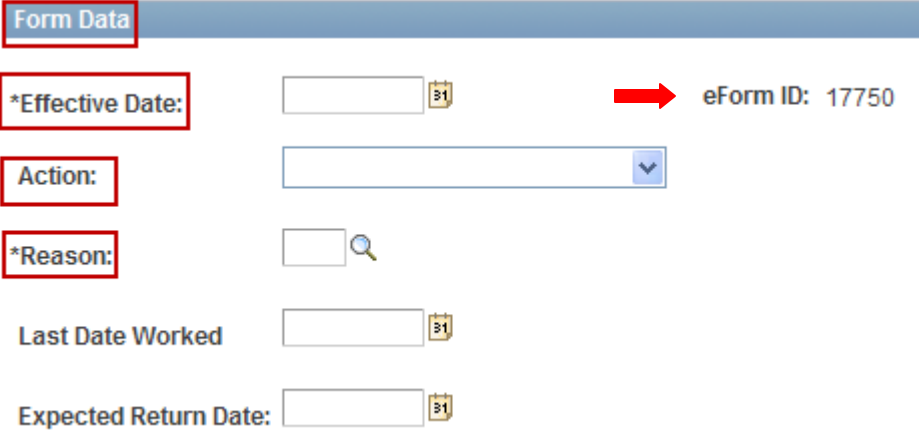


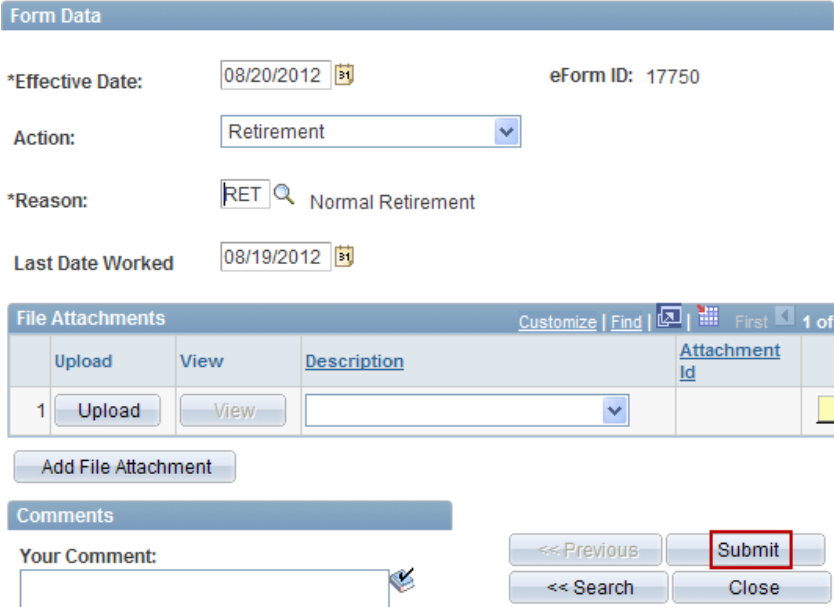
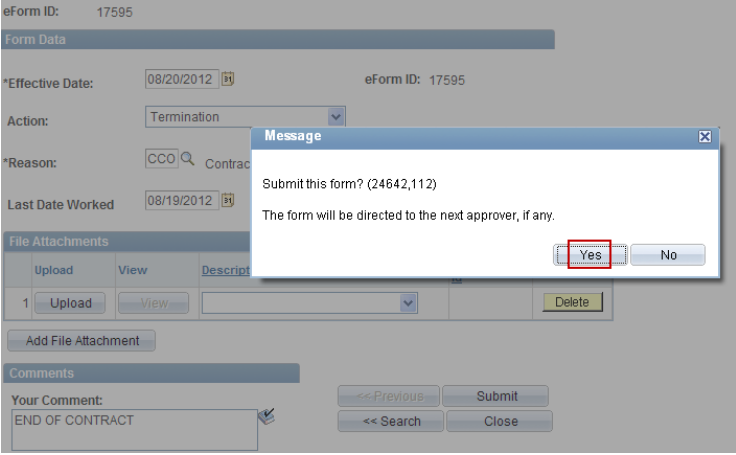
# EPAF Retirement Process - User Manual


Step	Action
1.	<p>After logging into PeopleSoft, click on the <b>Department Self Service</b> link.</p>  <p>The screenshot shows the University of Massachusetts PeopleSoft interface. On the left, a 'Menu' sidebar contains a search bar and a list of links: 'My Favorites', 'Department Self Service' (highlighted with a red box), 'Self Service', 'Manager Self Service', 'Recruiting', and 'Workforce Administration'. On the right, a 'View Payslip' section contains the text 'Click link to view your paycheck.' and a link 'Select Paycheck'. Below this link is a note: '*Use the menu on the left for other self service options'.</p>
2.	<p>Click the <b>ePAF Home Page</b> link.</p> <p>The <b>ePAF Home Page</b> is a useful area for managing PA Forms. Here you will see links to open your <u>worklist</u>, <u>start a new ePAF</u>, <u>resubmit</u>, <u>change or withdraw an ePAF</u>, or <u>view an ePAF</u>.</p> <p>Click the <b>Start a new ePAF</b> link.</p>  <p>The screenshot shows the 'Electronic Personnel Action Form (ePAF) Home Page'. On the left, a 'Menu' sidebar contains a search bar and a list of links: 'My Favorites', 'Department Self Service', 'ePAF Home Page' (highlighted with a red box), 'Self Service', 'Manager Self Service', 'Benefits', 'Time and Labor', 'Campus Community', 'Worklist', 'UMass Custom', 'PeopleTools', and 'Portal Search Results'. The main content area has the title 'Electronic Personnel Action Form (ePAF) Home Page' and four sections, each with an icon and a link: 'My Worklist' (with a document icon), 'Start a new ePAF' (with a document icon and highlighted by a red box), 'Resubmit, Change, or Withdraw an ePAF' (with a document icon), and 'View an ePAF' (with a document icon).</p>

3.	<p>To submit a <a href="#">Retirement</a>, click the <a href="#">Change Employment Status</a> link.</p> 
4.	<p>You can search by Empl ID, Name, Department or Employee Group. The example below shows a search by <a href="#">Last Name</a>. If employee has more than one job record, ensure you are selecting the correct record.</p> <p>Click the <a href="#">Search</a> button.</p> 

Step	Action
5.	<p>Click on the employee name link from the search results. The <b>Change Employment Status</b> page appears.</p> <p>The fields under the <b>Current Job Info</b> will populate.</p> 

Step	Action
6.	<p>In the <b>Form Data</b> section, enter the <b>Effective Date</b> and tab out of field. <b>Note the Form ID #.</b></p> <p>Click the <b>Action</b> list drop down menu and choose <b>Retirement</b>.</p> <p>In the <b>Reason</b> field, select appropriate <b>Reason</b>.</p>  <p><b>Note:</b> Once the action of retirement is selected, the system will calculate the <b>Last Date Worked</b> based on the effective date of the transaction. You have the ability to change this date. The <b>Expected Return Date</b> will be removed once you select the <b>Retirement</b> action.</p>

Step	Action
7.	<p><b>Note:</b> No comments or file attachments will be entered on EPAF retirement form.</p> <p>Click <b>Submit</b></p> 
Step	Action
15.	<p>Click <b>Yes</b> when the pop up shows up, to confirm that you are ready to submit this form.</p> 

Step	Action
16.	<p>The <b>Form Status</b> indicates that you have submitted this form.</p> <p><u>Step 2 of 2: Form Finalized</u></p> <hr/> <p><b>Current Job Info</b></p> <p>Name: [REDACTED] Empl ID: [REDACTED]</p> <p>Empl Group: Professional (W60) Non Unit Empl Rcd#: 0</p> <p>Empl Status: Active</p> <p>Position: 00022443 [REDACTED]</p> <p>Department: W875000 Information Services</p> <p>eForm ID: 17595</p> <p><b>Form Status</b></p> <p>You have just SUBMITTED this form. This action passed the form to HCMU_GT_HR_UPDATE for further processing.</p> <p><b>Process Visualizer</b></p>  <pre> graph LR     1[1: Sbrogna, Kimberly A (TESTGT10020876)] --&gt; 2[2: HCMU_GT_HR_REVIEWER]     2 --&gt; 3[3: HCMU_GT_HR_UPDATE]     3 --&gt; 4[4: HCMU_GT_HR_UPDATE_2]     4 --&gt; 5[5: Integrat Broker] </pre>
17.	<p>Congratulations! You have successfully submitted a <b>Retirement</b>.</p> <p><b>End of Procedure.</b></p>