



EPAF RETIREMENT PROCESS - USER MANUAL

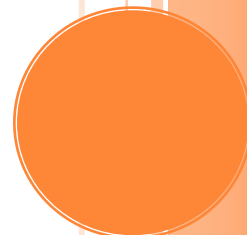
Initiator User Manual for Change in Employment Status

Retirement Process

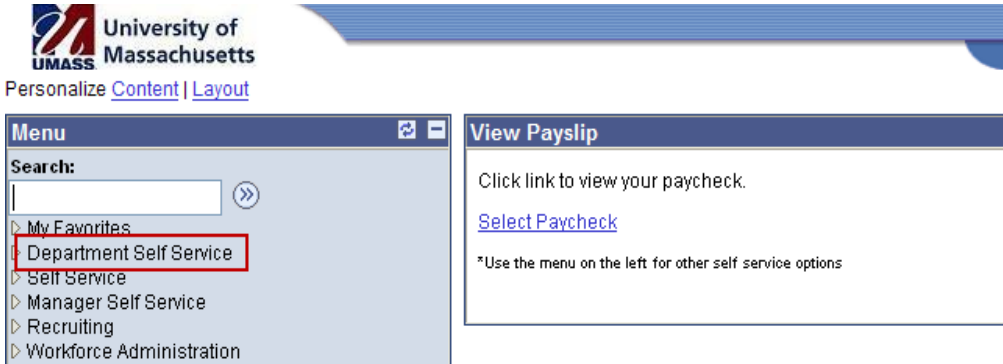
This manual provides step by step information on how to enter a retirement.

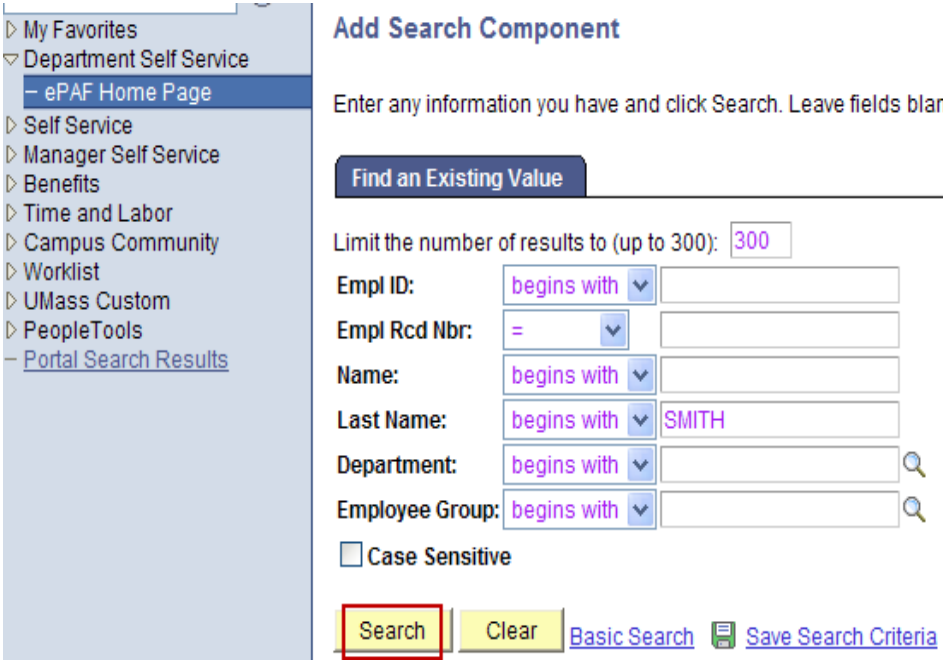
**Developed by:
Learning & Development Group
Human Resources Diversity & Inclusion**

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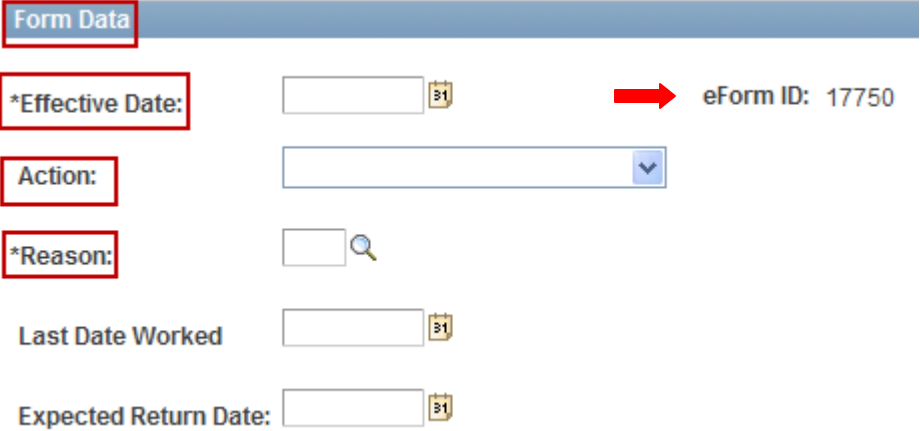


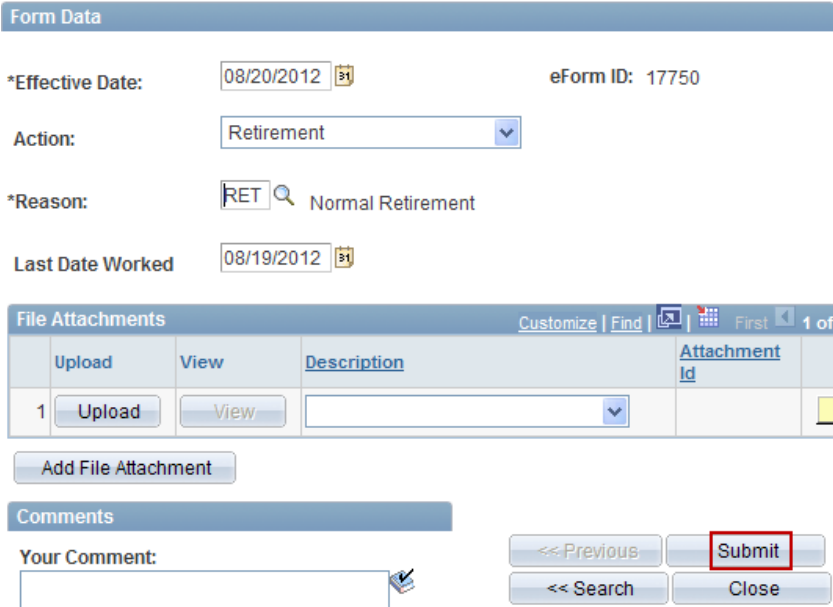
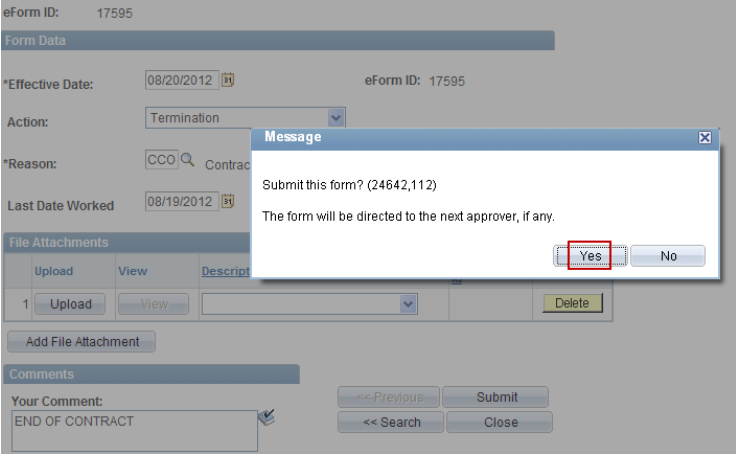
EPAF Retirement Process - User Manual

Step	Action
1.	After logging into PeopleSoft, click on the Department Self Service link.  The screenshot shows the University of Massachusetts PeopleSoft interface. In the left-hand menu, the 'Department Self Service' link is highlighted with a red rectangular box. To the right, under the 'View Payslip' section, there is a link labeled 'Select Paycheck'.
2.	Click the ePAF Home Page link. The ePAF Home Page 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>. Click the Start a new ePAF link.  The screenshot displays the 'Electronic Personnel Action Form (ePAF) Home Page'. In the left-hand menu, the 'Start a new ePAF' link is highlighted with a red rectangular box. The main content area features several links with corresponding icons: 'My Worklist' (with a document icon), 'Start a new ePAF' (with a document icon), 'Resubmit, Change, or Withdraw an ePAF' (with a document icon), and 'View an ePAF' (with a document icon).

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

Step	Action
5.	Click on the employee name link from the search results. The Change Employment Status page appears. The fields under the Current Job Info will populate. Change Employment Status Step 1 of 2: Enter Status Change Information Please fill out the form below. Current Job Info Name: [redacted] Empl ID: [redacted] Empl Group: Professional (W60) Non Unit Empl Rcd#: 0 Empl Status: Active Position: 00022556 Database Administrator Sr. Department: W875000 Information Services eForm ID: 17750 Personal Data Job Data Additional Pay Leave Plans General Deductions

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

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

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