

This Job Aid supports information for Academic Personnel

Overview

Academic employees who work during the 9-month academic year—from the start of the fall term through the end of the spring term—often receive their pay spread out over 12 months (9/12). Because their service period (when they actually work) does not match their pay period (when they receive pay), this can cause confusion when a 9/12 academic employee decides to retire in the middle of a quarter or a semester.

This job aid reflects the steps necessary to make the correct entries within both the UCPath and RASC systems.

- ▲ **Important:** *The date fields in UCPath do not activate retirement benefits.* The employee and the UC Retirement Administration Service Center (RASC) center should coordinate retirement dates and corresponding benefits. To avoid issues with employee retirement benefits, Locations must ensure the dates input into the Retirement transaction align with the dates the employee has agreed upon with RASC.
- ▲ **Note:** After classifying as Retired in UCPath, both **Payroll Status and HR Status are set to Terminated** and the Academic Appointee will have to use the Former Employee Portal to access UCPath data.
- ▲ **Note:** **Locations must follow local processes to provision systems access** during the service period that falls beyond the pay periods for fall and winter quarter retirements if the retiree does not have another active appointment in UCPath (e.g. Emeriti).

Academic Retirements:

- ▲ Academic year employees should only retire at the end of a quarter or semester pay period to avoid an under or overpayment.

At locations on a quarter system the dates for Retirement are:

Quarter	Effective Date	Last Day Worked
Fall quarter	November 1	October 31
Winter quarter	March 1	February 28/29
Spring quarter**	July 1	June 30

At locations on a semester system the dates for Retirement are:

Semester	Effective Date	Last Day Worked
Fall semester	January 1	December 31
Spring semester**	July 1	June 30

**For employees who retire at the end of the spring semester/quarter and qualify for the Inactive COLA, dates may vary by year. For detailed assistance in entering retirement actions for employees who qualify for the Inactive COLA, refer [Retirement Transaction Process for July 1 Retirement Date](#).

Important UCPath Terminology for Retirement Transactions

Effective Date: The **Effective Date** of Retirement is the *first day* the employee is no longer employed on Active HR/Payroll status.

Last Day Worked: This date reflects the last day the employee physically worked their last shift or completed their final tasks. This is typically one day prior to the **Effective Date** but may be earlier. (**The Last Day Worked** date defaults from the **Effective Date** as either the last weekday prior to the Effective Date if using Smart HR Templates; or the day prior to the Effective Date, if using Manage Job.) This field is editable and used in calculating final pay, benefits, and other payroll related items.

Note If an employee is on vacation, leave of absence, etc., you should override the **Last Day Worked** field to reflect the actual last day they were physically present at work.

Termination Date: This is a system generated field that defaults to one day prior to the **Effective Date** of Retirement and reflects the last day the employee is on active HR status. This field is visible in Manage Job transactions (it does not appear in Smart HR Templates) and appears in Job Data upon fulfillment of the Retirement transaction.

Separation Date: RASC uses this term to identify the last day the employee is active prior to Retirement. **Separation Date** does not appear in UCPath but aligns with the system-derived **Termination Date** that appears in Manage Job transaction and Job Data.

- ⚠ The **Effective Date** and **Last Date Worked** are the only dates needed to complete the retirement transactions in UCPath.
- ⚠ The **Termination Date** in UCPath *must* match the **Separation Date** that RASC uses to identify the last day an employee is active prior to retirement. If you need to change the **Termination Date** in UCPath to match the **Retirement Date** (RASC), you have to adjust the **Effective Date** in UCPath.

Retiring Academic Appointees

Follow the standard process to retire the employee. As well, ensure the **Effective Date** and **Last Day Worked** are accurate. There are two methods to accomplish this depending on your Location standard process:

Manage Job	Smart HR Templates
From the Workforce Administration page, navigate to Manage Job (tile) > Search Existing .	From the Workforce Administration page, navigate to HR Tasks ->Smart HR Templates > Smart HR Transactions
Find the individual's record using their Empl ID or the other search fields.	From the Select Template field, look up and select the UC_RETIREMENT list item.
Select the ">" icon at the far right to access the Job Actions Summary page.	Enter the Effective Date (the date no longer on active HR/Payroll) and select Create Transaction button.
Select the Create Job Action button. Enter the Effective Date of Retirement , (the date of no longer on active HR/Payroll). Choose RET as the Action and RET as the Reason and Continue .	In the Employee ID field, enter the employee's ID number and then use the lookup feature to search for and select the Employment Record Number . You'll see that the Action/Reason codes are set to Retirement . Select Continue .
<p>In the Work Location section of the Activity Guide, the Termination Date (uneditable) and the Last Day Worked defaults to one calendar day prior to the Effective Date.</p> <p>If you need to correct the Last Day Worked, select Override Last Day Worked and enter the last day worked in the Last Day Worked field. (The Last Day Worked field is inactive unless you select the Override Last Date Worked button/slider). (see image below)</p>	<p>The Enter Transaction Screen Appears.</p> <p>The Last Day Worked defaults to the last weekday prior to the Effective Date.</p> <p>If you need to correct the Last Day Worked, verify that you selected the 'Override Last Day Worked' and enter the last day worked in the Last Day Worked field. (see image below)</p>

Manage Job

Smart HR Templates

Select **Next** to proceed and review **Job Information, Labor Information, Salary and Compensation, Payroll, and UC Job Data** which are all informational pages.

At the **Attachments** screen, add any supporting documentation for this **Rehire**, then select **Next** to **Validate**, and **Next** again at the **Summary** screen. You can also use the **Comments** field.

Attach any documentation from the **Supporting Documents** link.

Select **Submit** to complete the Manage Job Retirement transaction and proceed to the **Final Pay** process

Select **Save and Submit** to complete the Smart HR Template Retirement transaction and Proceed to the Final Pay process

Additional Resources

- Find course - **Manage Human Resources - Hiring, Rehiring & Transferring Personnel** at the [UC Learning Center](#)
- Simulation: [WFAL260: Initiate Retirement Template Transaction](#)
- For specific steps on entering a payroll request, final pay or additional compensation refer to [PAYL200: Additional Compensation and Pay Adjustment Requests](#)
- For help on entering a Manage Job transaction, refer to [Manage Job Phase II](#) job aid, Create Job Action section, p. 9.
- For help in managing Terminations via Manage Job see [Manage Job Termination](#).

This process only addresses the actions in UCPath. Standard Retirement Administration Service Center (RASC) retirement business processes and Academic Personnel Manual ([APM-120](#)) policies must be followed.