

Job Aid: Emeriti Processing Following Retirement

Overview

This document reviews the process to enter a faculty member as an active Emerita/us in UCPath, associated with a WOS (without salary) position following a retirement.

There are two parts to this process:

- [Part 1](#): retiring the employee.
- [Part 2](#): hiring the employee back (activate) as an Emerita/us.

UCPath Terminology for Retirement Action

Term	Description
Effective Date	<p>This date is entered in the Effective Date field for use within the UC_RETIREMENT template transaction or Create Job Action within Manage Job. This date reflects the first day the employee is no longer on active HR status.</p> <ul style="list-style-type: none"> ○ Note: The effective date does <u>not</u> reflect the first day of retirement. The first retirement day should be coordinated with the employee's work Location and UC Retirement Administration Service Center (RASC).
Last Date Worked	<p>This date is entered in the Last Date Worked field for use within the UC_RETIREMENT template transaction.</p> <p>This date defaults to one day prior to the effective date in the Last Date Worked field with the Create Job Action within Manage Job.</p> <p>Note: This date reflects the last date the employee physically worked. This date must be at least one day prior to the Effective Date but could be earlier. If earlier, Override Last Date Worked should be changed to Yes to open the Last Date Worked field within the Create Job Action within Manage Job.</p>
Termination Date	<p>This date is system derived after the retirement action is processed and is located on the Work Location tab/ page within Job Data/ Manage Job. This field reflects the last day the employee was on active HR status.</p> <ul style="list-style-type: none"> ○ Note: The RASC will receive this as the separation date.

- ⚠ The **Effective Date** and **Last Date Worked** are the only dates needed to complete the retirement template in UCPath.
- ⚠ The **Effective Date**, **Action (RET)** and **Reason (RET)** are the only fields needed within the **Create Job Action** within **Manage Job**. The **Last Date Worked** will default to one day prior to effective date.

Job Aid: Emeriti Processing Following Retirement

Process Steps

Submit a [Smart HR Template](#) or [Create Job Action](#) within [Manage Job](#) to inactivate the employee prior to the last business day in June. For this example, 6/28/2024 is used as the effective date.

Part 1 Retirement Transaction:

1. Select the [UC_RETIREMENT](#) Smart HR Template
2. Enter [6/28/2024](#) in the [Effective Date](#) field.
3. Enter the [Employee ID](#) and select the [Employment Record Number](#)
4. Accept the default of [6/27/2024](#) in the [Last Date Worked](#) field, or enter the employee's actual last working date if prior to 6/27/2024.
5. In the [Comments](#) field, note that this employee will be rehired as Emerita/us, effective July 1st
6. Enter any additional [Comments](#) or [Supporting documents](#) as needed

Or you can use [Manage Job Action](#)

Part 1 Manage Job Action:

1. Enter the [Employee ID](#) and select the [Employment Record Number](#)
2. Select the [Create Job Action](#) within [Manage Job](#).
3. Enter [6/28/2024](#) in the [Effective Date](#) field.
4. Enter [RET](#) (Retirement) in the [Action](#) field.
5. Enter [RET](#) (Retirement) in the [Reason](#) field.
6. Accept the default of [6/27/2024](#) in the [Last Date Worked](#) field, or select [Yes](#) to [Override Last Date Worked](#) to enter the employee's actual last working date if prior to [6/27/2024](#).
7. Use the [Validate](#) button to verify the entered data.
8. In the [Comments](#) field, note that the employee will be rehired as Emerita/us, effective July 1st.
9. Enter any additional [Comments](#) or [Supporting documents](#) as needed.

Job Aid: Emeriti Processing Following Retirement

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

- For Location on a quarter system the dates for the **Retirement Action** are as follows:

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

- For Location on a semester system the dates for the **Retirement Action** are as follows:

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 to the [Job Aid: Retirement Transaction Process for July 1 Retirement Date](#).

Job Aid: Emeriti Processing Following Retirement

Part 2: Activate the Emerita/us employee

- Prior to initiating the template, make sure an Emeritus position has been created and is available for use. Refer to the [Initiate New Position Control](#) simulation for information on position setup.
1. Select the **UC_FULL_HIRE_AC** Smart HR Template, creating a new Empl Record for the Emeriti appointment. You do not have to wait for the retirement template to be processed by UCPATH to submit the full hire template. UCPATH will add the Emeriti appointment after the retirement template is fully processed and reflected in UCPATH.
 2. Enter the **Effective Date**
 3. Select **Emeritus Faculty** from the **Action Reason** list
 4. Select the appropriate **Emeritus WOS** position
 5. Enter **UCWOS** for the **Comp Rate Code**
 6. In the **Comments** field, note that the employee will be rehired as Emerita/us

Additional Resources

- Simulation: [WFAL260: Initiate Retirement Template Transaction](#)
- For specific steps on entering a payroll request or final pay, refer to the [PAYL200: Additional Compensation and Pay Adjustment Requests](#) course and applicable simulations.
- For steps on how to enter and submit a Manage Job transaction, refer to Job Aid: [Manage Job Phase II job](#), Create Job Action section, p. 9.

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.