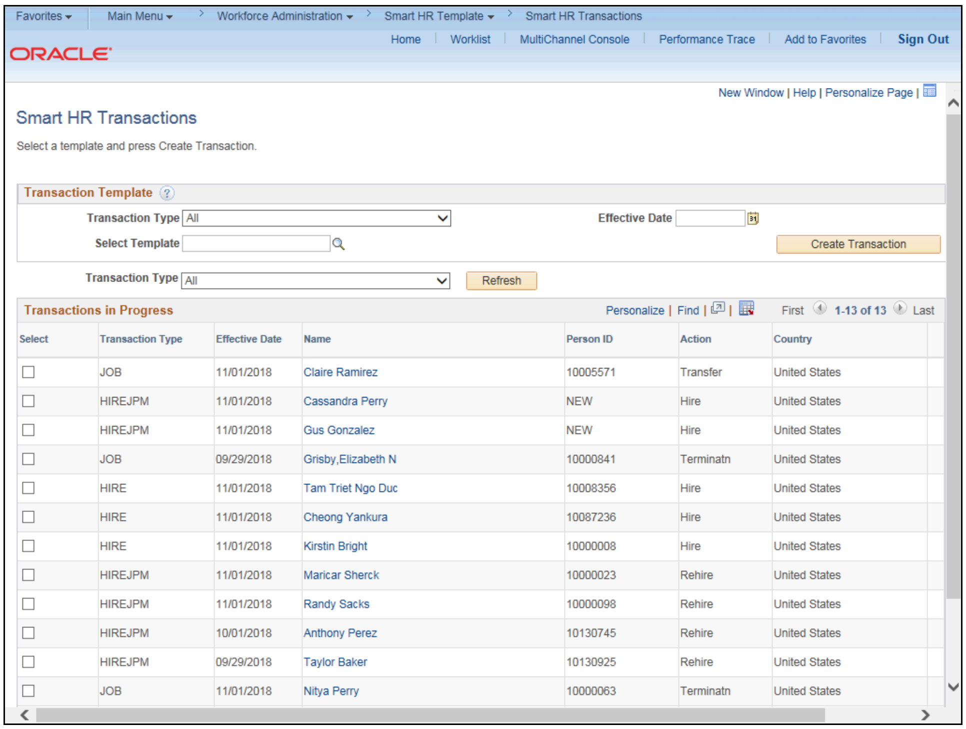
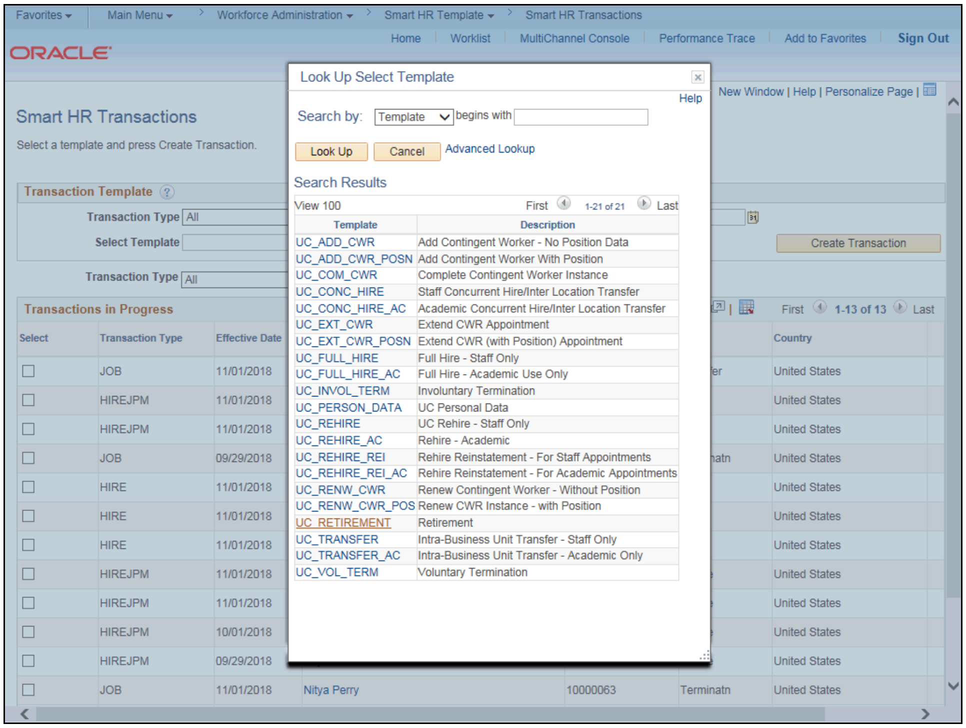
Use this task to initiate a retirement template transaction. This template can be used for academic or staff employees. UCPC WFA Production will retire the employee from all jobs after receiving the first retirement template.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

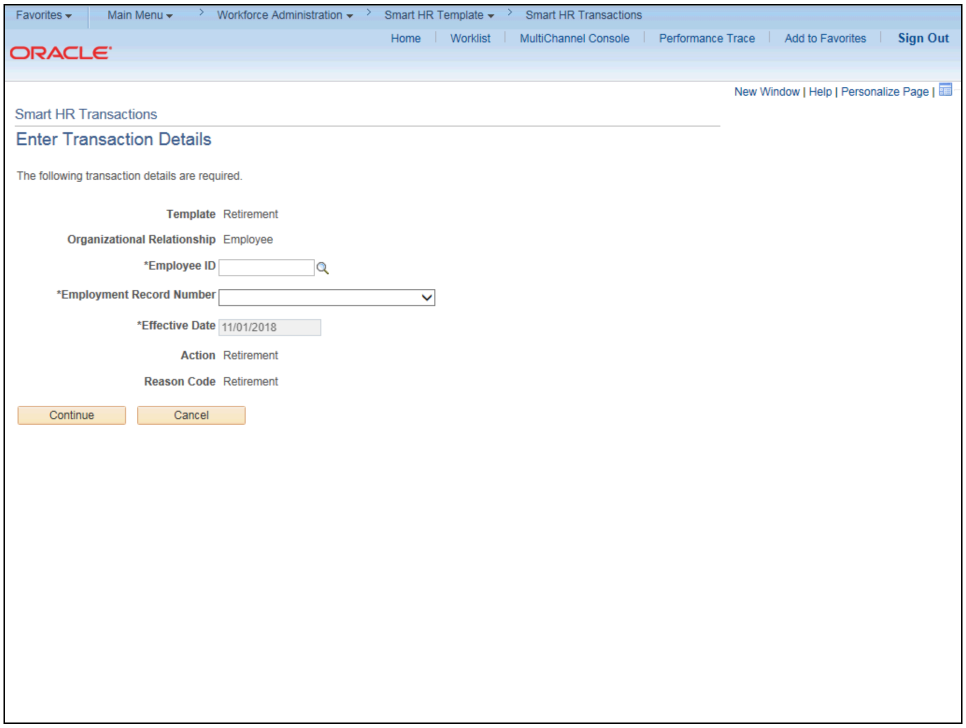
Note: This page also may be available in **Workcenter** depending on your security access.



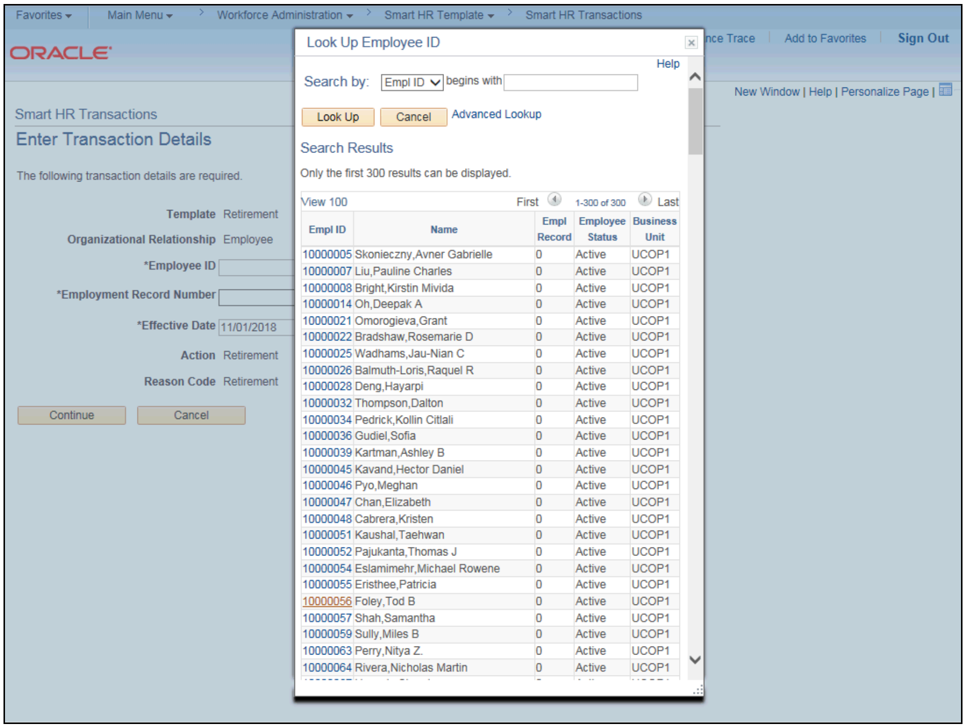
Step	Action
1.	Use the **Smart HR Transactions** page to select the appropriate template to begin the retirement process.
2.	**Note:** The **Transaction Type** field is not used by UC. Click the **Look up Select Template** button.



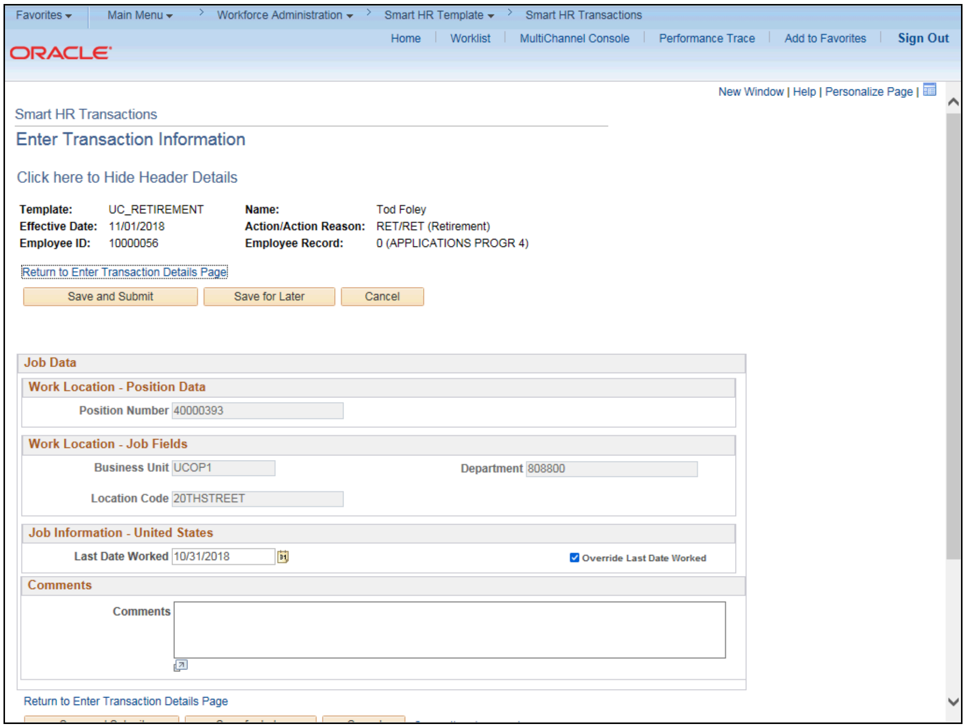
Step	Action
3.	Click the **UC_RETIREMENT** list item. UC_RETIREMENT
4.	The **Effective Date** field is the effective date of the selected template action. The date you enter in this field automatically populates the **Effective Date** field on the **Enter Transaction Details** page. **Note:** For information on retirement processing for employees who should qualify for the inactive Cost of Living Adjustment (COLA) with a July 1 retirement date, please see the *Job Aid: Retirement Transaction Process for July 1 Retirement Date*. Click in the **Effective Date** field.
5.	Enter the desired information into the **Effective Date** field. For this example, enter **11/1/18**.
6.	Click the **Create Transaction** button. Create Transaction



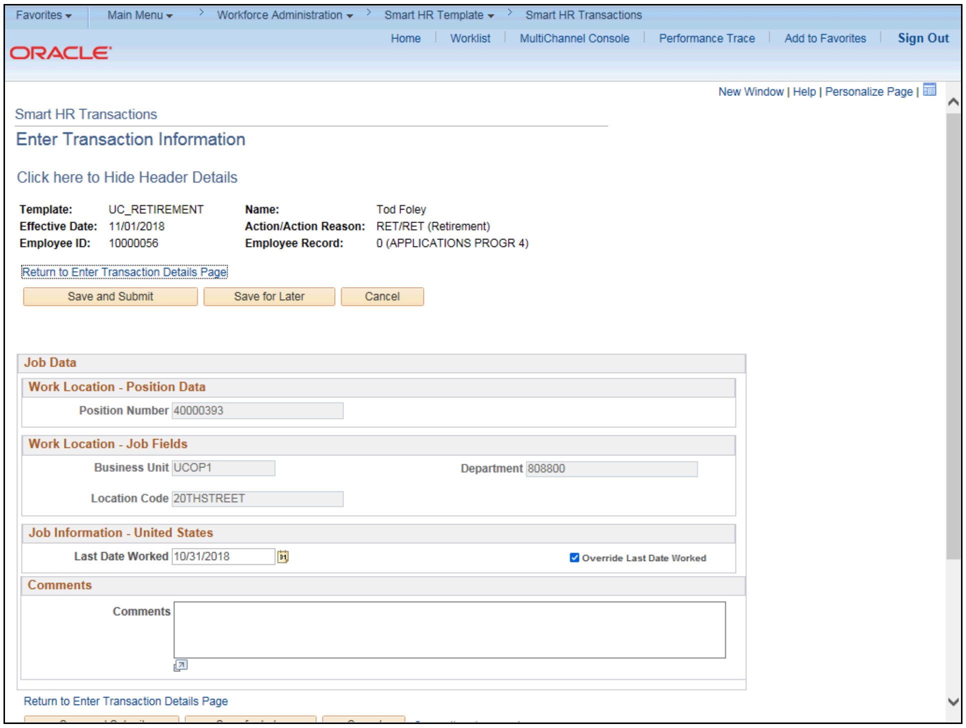
Step	Action
7.	In the **Employee ID** field, enter the employee's ID number or use the lookup to search for and select it. You have access only to employee records within your business unit. For this example, click the **Look up Employee ID** button.



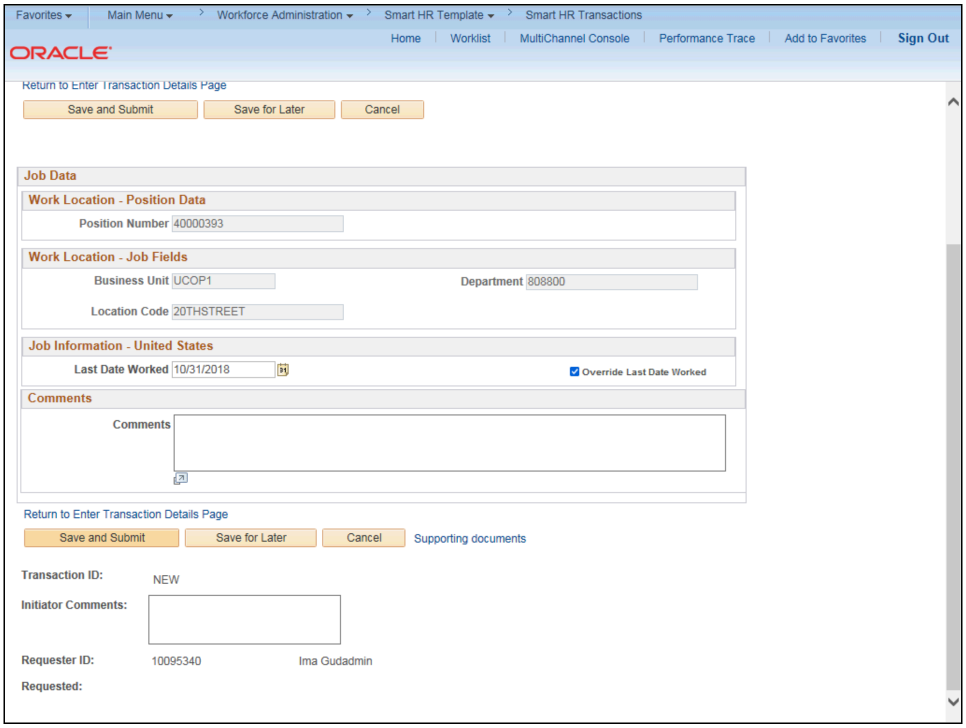
Step	Action
8.	Select the appropriate **Employee ID**. For this example, click the **10000056** list item. 10000056
9.	The **Employment Record Number** defaults to the first record number for which you have departmental access (in this example, **0**). Select the correct **Employment Record Number** for the job to terminate. If an employee has multiple jobs, you do not need to initiate a retirement template transaction for all jobs; UCPath Center's WFA Production will retire the employee from all jobs after receiving the first retirement template. For this example, accept the default.
10.	The **Effective Date** is populated based on your entry on the previous page. Ensure that you entered the correct date on which the employee's retirement is effective. This date should be one day after the employee's last day of work. If necessary, click the **Cancel** button to return to the previous page and correct the **Effective Date**.
11.	Click the **Continue** button. Continue



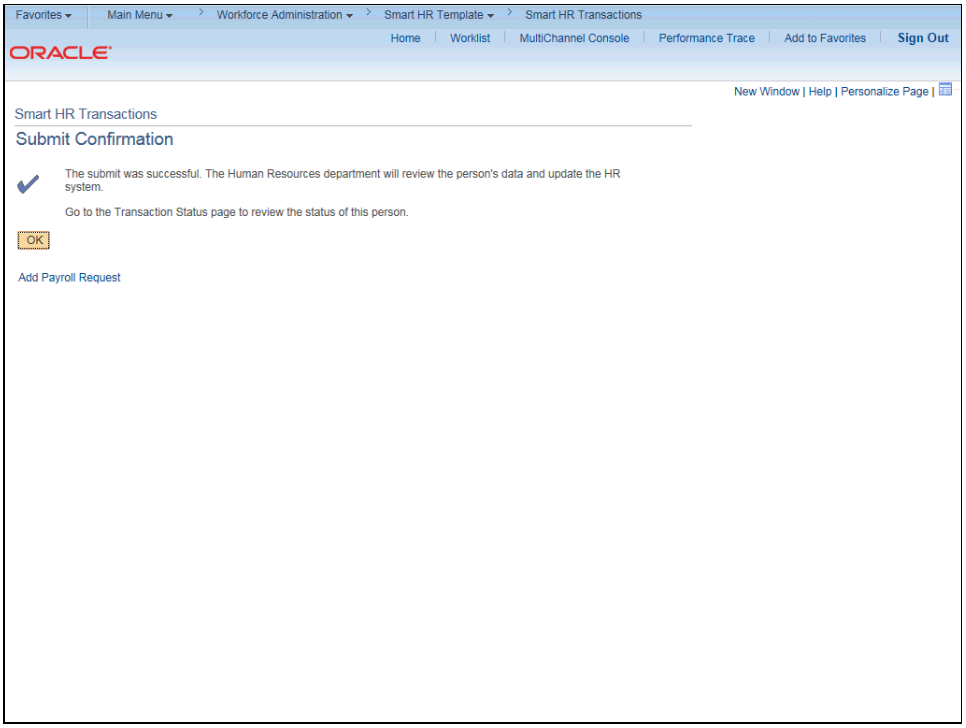
Step	Action
12.	The retirement template appears. The top of the page displays header data, which you can show/hide as needed.
13.	The employee's position number and work location data automatically populate for the selected employment record.
14.	The **Last Date Worked** field defaults to the work day prior to the **Job Effective Date**, but you can update it as necessary. If the **Effective Date** is a Monday, the **Last Date Worked** defaults to the previous Friday. This date should always be a date earlier than the **Effective Date** you entered on the previous page.



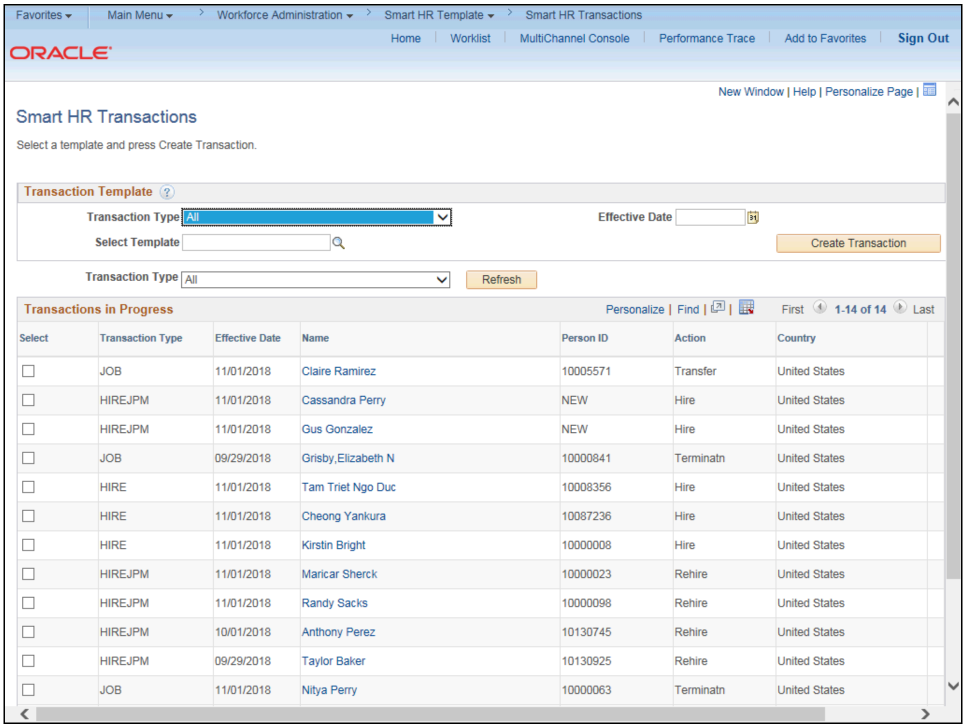
Step	Action
15.	The **Override Last Date Worked** check box defaults to selected. No action is needed in this field. The check box will ensure that when the template action is processed by UCPath, the **Last Date Worked** that was entered will be saved to the employee's **Job Data** record
16.	Click the scroll bar.



Step	Action
17.	Use the **Comments** field to enter specific details or explanation regarding the transaction. This field is referenced by UCPath Center's WFA Production to assist with the processing of the transaction.
18.	Use the **Supporting documents** link to attach supporting documents.
19.	Enter comments for the approver in the **Initiator Comments** field. Comments you enter here appear only with the request; they do not appear on the employee's record after the transaction is processed to completion.
20.	Click the **Save and Submit** button. Save and Submit



Step	Action
21.	Some Location's business process allows users to have the Template Initiator role as well as the Payroll Initiator role. In these cases, the **Add Payroll Request** link is available. This link allows direct access to the **Payroll Requests** page. For specific steps on entering a payroll request or final pay, refer to the *PHCMPAYL200: Additional Compensation and Pay Adjustment Requests* course and applicable simulations.
22.	Click the **OK** button. 



Step	Action
23.	The template transaction is routed for approval and appears in the **Transactions in Progress** section until it is processed.
24.	You have initiated a retirement template transaction. **End of Procedure.**