


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.

| Select | Transaction Type | Effective Date | Name | Person ID | Action | Country |
|--------------------------|------------------|----------------|---------------------|-----------|-----------|---------------|
| <input type="checkbox"/> | JOB | 11/01/2018 | Claire Ramirez | 10005571 | Transfer | United States |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 | Cassandra Perry | NEW | Hire | United States |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 | Gus Gonzalez | NEW | Hire | United States |
| <input type="checkbox"/> | JOB | 09/29/2018 | Grisby, Elizabeth N | 10000841 | Terminatn | United States |
| <input type="checkbox"/> | HIRE | 11/01/2018 | Tam Triet Ngo Duc | 10008356 | Hire | United States |
| <input type="checkbox"/> | HIRE | 11/01/2018 | Cheong Yankura | 10087236 | Hire | United States |
| <input type="checkbox"/> | HIRE | 11/01/2018 | Kirstin Bright | 10000008 | Hire | United States |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 | Maricar Sherck | 10000023 | Rehire | United States |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 | Randy Sacks | 10000098 | Rehire | United States |
| <input type="checkbox"/> | HIREJPM | 10/01/2018 | Anthony Perez | 10130745 | Rehire | United States |
| <input type="checkbox"/> | HIREJPM | 09/29/2018 | Taylor Baker | 10130925 | Rehire | United States |
| <input type="checkbox"/> | JOB | 11/01/2018 | Nitya Perry | 10000063 | Terminatn | United States |


| 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.  |

The screenshot shows the UCPath Smart HR Transactions interface. A 'Look Up Select Template' dialog box is open, displaying a list of templates. The 'UC_RETIREMENT' template is highlighted. The background shows a table of transactions in progress, with columns for 'Select', 'Transaction Type', and 'Effective Date'.

| Select | Transaction Type | Effective Date |
|--------------------------|------------------|----------------|
| <input type="checkbox"/> | JOB | 11/01/2018 |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 |
| <input type="checkbox"/> | JOB | 09/29/2018 |
| <input type="checkbox"/> | HIRE | 11/01/2018 |
| <input type="checkbox"/> | HIRE | 11/01/2018 |
| <input type="checkbox"/> | HIRE | 11/01/2018 |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 |
| <input type="checkbox"/> | HIREJPM | 10/01/2018 |
| <input type="checkbox"/> | HIREJPM | 09/29/2018 |
| <input type="checkbox"/> | JOB | 11/01/2018 |

| Step | Action |
|------|---|
| 3. | Click the UC_RETIREMENT list item. UC_RETIREMENT |
| 4. | <p>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.</p> <p>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 <i>Job Aid: Retirement Transaction Process for July 1 Retirement Date</i>.</p> <p>Click in the Effective Date field.</p> <input type="text"/> |
| 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 |

The screenshot shows the Oracle UCPath interface for initiating a retirement transaction. The breadcrumb trail at the top reads: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The page title is 'Smart HR Transactions' and the sub-header is 'Enter Transaction Details'. A message states: 'The following transaction details are required.' The form fields are as follows: 'Template' is set to 'Retirement'; 'Organizational Relationship' is set to 'Employee'; '*Employee ID' is a text field with a lookup icon; '*Employment Record Number' is a dropdown menu; '*Effective Date' is a date field set to '11/01/2018'; 'Action' is set to 'Retirement'; and 'Reason Code' is set to 'Retirement'. At the bottom are 'Continue' and 'Cancel' buttons.

| Step | Action |
|------|---|
| 7. | <p>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.</p> <p>For this example, click the Look up Employee ID button.</p>  |

Look Up Employee ID

Search by: begins with

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

| Empl ID | Name | Empl Record | Employee Status | Business Unit |
|-------------------------------------|------|-------------|-----------------|---------------|
| 10000005 Skonieczny,Avner Gabrielle | | 0 | Active | UCOP1 |
| 10000007 Liu,Pauline Charles | | 0 | Active | UCOP1 |
| 10000008 Bright,Kirstin Mivida | | 0 | Active | UCOP1 |
| 10000014 Oh,Deepak A | | 0 | Active | UCOP1 |
| 10000021 Omorogieva,Grant | | 0 | Active | UCOP1 |
| 10000022 Bradshaw,Rosemarie D | | 0 | Active | UCOP1 |
| 10000025 Wadhams,Jau-Nian C | | 0 | Active | UCOP1 |
| 10000026 Balmuth-Loris,Raquel R | | 0 | Active | UCOP1 |
| 10000028 Deng,Hayarpi | | 0 | Active | UCOP1 |
| 10000032 Thompson,Dalton | | 0 | Active | UCOP1 |
| 10000034 Pedrick,Kollin Citali | | 0 | Active | UCOP1 |
| 10000036 Gudiel,Sofia | | 0 | Active | UCOP1 |
| 10000039 Kartman,Ashley B | | 0 | Active | UCOP1 |
| 10000045 Kavand,Hector Daniel | | 0 | Active | UCOP1 |
| 10000046 Pyo,Meghan | | 0 | Active | UCOP1 |
| 10000047 Chan,Elizabeth | | 0 | Active | UCOP1 |
| 10000048 Cabrera,Kristen | | 0 | Active | UCOP1 |
| 10000051 Kauschal,Taehwan | | 0 | Active | UCOP1 |
| 10000052 Pajukanta,Thomas J | | 0 | Active | UCOP1 |
| 10000054 Eslamimehr,Michael Rowene | | 0 | Active | UCOP1 |
| 10000055 Ersthee,Patricia | | 0 | Active | UCOP1 |
| 10000056 Foley,Tod B | | 0 | Active | UCOP1 |
| 10000057 Shah,Samantha | | 0 | Active | UCOP1 |
| 10000059 Sully,Miles B | | 0 | Active | UCOP1 |
| 10000063 Perry,Nitya Z | | 0 | Active | UCOP1 |
| 10000064 Rivera,Nicholas Martin | | 0 | Active | UCOP1 |

| Step | Action |
|------|--|
| 8. | <p>Select the appropriate Employee ID.</p> <p>For this example, click the 10000056 list item.</p> <p>10000056</p> |
| 9. | <p>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.</p> <p>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.</p> <p>For this example, accept the default.</p> |
| 10. | <p>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.</p> <p>If necessary, click the Cancel button to return to the previous page and correct the Effective Date.</p> |
| 11. | <p>Click the Continue button.</p> <p>Continue</p> |

The screenshot shows the UCPath interface for 'Smart HR Transactions'. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The Oracle logo is in the top left. Navigation links include Home, Worklist, MultiChannel Console, Performance Trace, Add to Favorites, and Sign Out. A 'New Window | Help | Personalize Page' link is in the top right. The main heading is 'Smart HR Transactions' with a sub-heading 'Enter Transaction Information'. A link 'Click here to Hide Header Details' is present. The header data is as follows:

| | | | |
|-----------------|---------------|-----------------------|--------------------------|
| Template: | UC_RETIREMENT | Name: | Tod Foley |
| Effective Date: | 11/01/2018 | Action/Action Reason: | RET/RET (Retirement) |
| Employee ID: | 10000056 | Employee Record: | 0 (APPLICATIONS PROGR 4) |

Below the header data is a link 'Return to Enter Transaction Details Page' and three buttons: 'Save and Submit', 'Save for Later', and 'Cancel'.

The 'Job Data' section contains the following fields:

- Work Location - Position Data:** Position Number 40000393
- Work Location - Job Fields:** Business Unit UCOP1, Department 808800, Location Code 20THSTREET
- Job Information - United States:** Last Date Worked 10/31/2018, with an 'Override Last Date Worked' checkbox checked.
- Comments:** A text area for comments.

A 'Return to Enter Transaction Details Page' link is at the bottom of the form.

| 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. |

The screenshot shows the 'Enter Transaction Information' page in the UCPath system. The page header includes navigation links like 'Home', 'Worklist', and 'MultiChannel Console'. The main content area displays transaction details for a retirement action. Below the details are sections for 'Job Data' (Work Location - Position Data, Work Location - Job Fields) and 'Job Information - United States'. A 'Comments' section is at the bottom. The 'Override Last Date Worked' checkbox is checked.

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_RETIREMENT Name: Tod Foley
Effective Date: 11/01/2018 Action/Action Reason: RET/RET (Retirement)
Employee ID: 10000056 Employee Record: 0 (APPLICATIONS PROGR 4)

[Return to Enter Transaction Details Page](#)

Save and Submit Save for Later Cancel

Job Data

Work Location - Position Data
Position Number: 40000393

Work Location - Job Fields
Business Unit: UCOP1 Department: 808800
Location Code: 20THSTREET

Job Information - United States
Last Date Worked: 10/31/2018 ☒ Override Last Date Worked

Comments
Comments: [Text Area]

[Return to Enter Transaction Details Page](#)

| Step | Action |
|------|---|
| 15. | <p>The Override Last Date Worked check box defaults to selected. No action is needed in this field.</p> <p>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</p> |
| 16. | Click the scroll bar. |

Return to Enter Transaction Details Page

Save and Submit Save for Later Cancel

Job Data

Work Location - Position Data

Position Number 40000393

Work Location - Job Fields

Business Unit UCOP1 Department 808800

Location Code 20THSTREET

Job Information - United States

Last Date Worked 10/31/2018 ☒ Override Last Date Worked

Comments

Comments

Return to Enter Transaction Details Page

Save and Submit Save for Later Cancel Supporting documents

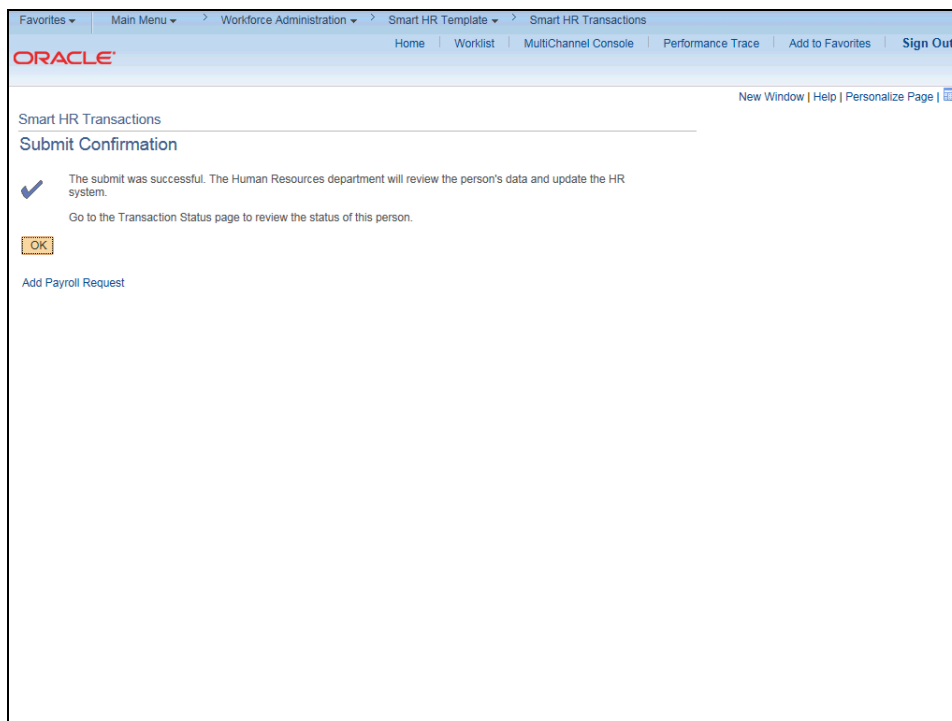
Transaction ID: NEW


Initiator Comments:

Requester ID: 10095340 Ima Gudadmin

Requested:

| 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. | <p>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.</p> <p>For specific steps on entering a payroll request or final pay, refer to the <i>PHCMPAYL200: Additional Compensation and Pay Adjustment Requests</i> course and applicable simulations.</p> |
| 22. | <p>Click the OK button.</p>  |

Oracle®

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template

Transaction Type: **All** Effective Date:

Select Template:

Create Transaction

Transaction Type: **All** Refresh

Transactions in Progress

| Select | Transaction Type | Effective Date | Name | Person ID | Action | Country |
|--------------------------|------------------|----------------|---------------------|-----------|-----------|---------------|
| <input type="checkbox"/> | JOB | 11/01/2018 | Claire Ramirez | 10005571 | Transfer | United States |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 | Cassandra Perry | NEW | Hire | United States |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 | Gus Gonzalez | NEW | Hire | United States |
| <input type="checkbox"/> | JOB | 09/29/2018 | Grisby, Elizabeth N | 10000841 | Terminatn | United States |
| <input type="checkbox"/> | HIRE | 11/01/2018 | Tam Triet Ngo Duc | 10008356 | Hire | United States |
| <input type="checkbox"/> | HIRE | 11/01/2018 | Cheong Yankura | 10087236 | Hire | United States |
| <input type="checkbox"/> | HIRE | 11/01/2018 | Kirstin Bright | 10000008 | Hire | United States |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 | Maricar Sherck | 10000023 | Rehire | United States |
| <input type="checkbox"/> | HIREJPM | 11/01/2018 | Randy Sacks | 10000098 | Rehire | United States |
| <input type="checkbox"/> | HIREJPM | 10/01/2018 | Anthony Perez | 10130745 | Rehire | United States |
| <input type="checkbox"/> | HIREJPM | 09/29/2018 | Taylor Baker | 10130925 | Rehire | United States |
| <input type="checkbox"/> | JOB | 11/01/2018 | Nitya Perry | 10000063 | Terminatn | United States |

| 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. |