

## Rescinding/Terminating Retirement

### INTRODUCTION

<b>Description</b>	This process describes the necessary steps to rescind/terminate retirement for USG retirees who are returning to full time active employment. This also covers the steps required to return retirees to retirement.
<b>Conditions</b>	<p>If a retiree chooses to rescind his/her benefit so he/she can work more than one-half time, the following will take place:</p> <ul style="list-style-type: none"> <li>• All retirement payments will stop and the Retiree will become an active employee</li> <li>• Employee and employer contributions will be made to the retirement plan based on the employee's earnable compensation</li> <li>• The employee will accrue additional service credit</li> <li>• Changes may be made to the plan of retirement and beneficiary upon re-retirement</li> <li>• No cost-of-living adjustments (COLA) will be attributed to the benefit during recension</li> <li>• The member's benefit will be recalculated based on additional service credit accrual and salary upon re-retirement</li> <li>• The employee must work a minimum of 4 service months in the active position</li> </ul> <p>A member may choose to rescind/terminate retirement if it is to the member's advantage to accrue additional service credit and salary in an effort to increase his or her benefit upon re-retirement. The member must apply for re-retirement benefits through their online account. The new retirement benefit will be calculated using the beneficiary designation and the plan of retirement selected at re-retirement, which applies to all periods of employment. If the member is considering terminating retirement, they will need to contact the retirement plan to determine more thoroughly how the retirement benefit may be affected.</p> <p>The position should be setup with a normal job code that matches the employee's new duties and responsibilities. A job code with a subcat of Z should <b>NOT</b> be used as this will prevent the active employee from flowing to Aight.</p>



<b>Notes:</b>	If the retirement was not rescinded but needs to be changed, contact SSC before making any changes in OneUSG.
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## PROCEDURES

SECTION I	Returning Retiree to Active Full Time Employment
<b>PATH</b>	Navigator > Workforce Administration > Job Data
<b>STEP 1a</b>	<b>Search for Retirement Record (Retired from another institution)</b>
<b>Notes:</b>	<ul style="list-style-type: none"> <li>If the employee retired from the <b>same</b> institution, proceed to step 1b.</li> <li>If the employee does not have a retiree record with the institution, submit a ticket to <a href="mailto:oneusgsupport@usg.edu">oneusgsupport@usg.edu</a> for assistance with terminating the retiree record.</li> <li><b>Do not</b> change existing retirement data. Once a retirement is entered, additional actions entered on top of a retirement will not flow to Alight.</li> </ul>
	<ul style="list-style-type: none"> <li>Enter the <b>Employee ID (EMPLID)</b>:</li> <li>Click <b>Search</b></li> </ul>

### Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Keyword Search

▼ **Search Criteria**

Empl ID	begins with ▼	<input style="width: 95%;" type="text" value=""/>
Empl Record	= ▼	<input style="width: 95%;" type="text"/>
Name	begins with ▼	<input style="width: 95%;" type="text"/>
Last Name	begins with ▼	<input style="width: 95%;" type="text"/>
Second Last Name	begins with ▼	<input style="width: 95%;" type="text"/>
Alternate Character Name	begins with ▼	<input style="width: 95%;" type="text"/>
Middle Name	begins with ▼	<input style="width: 95%;" type="text"/>

Include History  
  Correct History  
  Case Sensitive

Search
Clear
Basic Search 
Save Search Criteria



<p><b>STEP 1b.1</b></p>	<p><b>Search for Retirement Record (Retired from same institution)</b></p>
	<ul style="list-style-type: none"> <li>• Enter the <b>Employee ID (EMPLID)</b>:</li> <li>• Click <b>Search</b></li> </ul> <p>If the employee has multiple job records, select the retiree record.</p>
<p><b>Job Data</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <input type="button" value="Find an Existing Value"/> <input type="button" value="Keyword Search"/> </p> <p>▼ <b>Search Criteria</b></p> <p>             Empl ID <input type="text" value="begins with"/> <input type="text" value=""/> </p> <p>             Empl Record <input type="text" value="="/> <input type="text" value=""/> </p> <p>             Name <input type="text" value="begins with"/> <input type="text" value=""/> </p> <p>             Last Name <input type="text" value="begins with"/> <input type="text" value=""/> </p> <p>             Second Last Name <input type="text" value="begins with"/> <input type="text" value=""/> </p> <p>             Alternate Character Name <input type="text" value="begins with"/> <input type="text" value=""/> </p> <p>             Middle Name <input type="text" value="begins with"/> <input type="text" value=""/> </p> <p> <input type="checkbox"/> Include History             <input type="checkbox"/> Correct History             <input type="checkbox"/> Case Sensitive         </p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> <a href="#">Basic Search</a> <input type="button" value="Save Search Criteria"/> </p>	
<p><b>STEP 1b.2</b></p>	<p><b>Work Location Tab</b></p>
	<ul style="list-style-type: none"> <li>• Click the <b>(+)</b> sign to insert a new row</li> <li>• Enter the following data:                     <ul style="list-style-type: none"> <li>- <b>Effective Date:</b> Enter the date the retiree will return to work</li> <li>- <b>Action:</b> Termination</li> <li>- <b>Reason:</b> Rescind Retirement</li> <li>- <b>Job Indicator:</b> Secondary</li> </ul> </li> </ul>



<b>STEP 1b.3</b>	<b>Save the Record</b>
	You may receive the following message:
<p>Message</p> <hr/> <p>You are entering a transaction (2013-07-01) prior to the current pay period begin date(2018-10-01). (20000,218)</p> <p>You are entering a transaction prior to the current pay period begin date. Auto enrollment to TL will not update. Manually review and update or create the Maintain Time Reporter Panel</p> <p><input type="button" value="OK"/></p>	
	Click <b>OK</b> to continue saving.
<b>STEP 2.1</b>	<b>Add New Employee Instance</b>
<b>PATH</b>	Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance
	<ul style="list-style-type: none"> <li>• Enter the <b>Empl ID</b></li> <li>• Click <b>Add Relationship</b></li> </ul>
<p><b>New Employment Instance</b></p> <p>Empl ID <input type="text" value="022"/> <input type="button" value="🔍"/></p> <p>Empl Record <input type="text" value="2"/></p> <p><input type="button" value="Add Relationship"/></p>	
<b>STEP 2.2</b>	<b>Work Location Tab</b>
	<p>Enter the following data:</p> <ul style="list-style-type: none"> <li>• <b>Effective Date:</b> Enter the new hire date</li> <li>• <b>Action:</b> Hire</li> <li>• <b>Reason:</b> New Employee Instance</li> <li>• <b>Job Indicator:</b> Primary</li> <li>• <b>Company:</b> Enter the new company code</li> <li>• <b>Position Number:</b> Enter the new position</li> </ul>
<b>STEP 2.3</b>	<b>Job Information Tab</b>
	<ul style="list-style-type: none"> <li>• Verify <b>Reports To</b> information</li> <li>• Enter an <b>Supervisor ID</b> if the Reports To field is empty</li> </ul>



<b>STEP 2.4</b>	<b>Payroll Tab</b>
	Ensure the following fields are populated correctly: <ul style="list-style-type: none"> <li>• <b>Pay Group</b></li> <li>• <b>Employee Type</b></li> <li>• <b>Tax Location Code</b></li> <li>• <b>Holiday Schedule</b></li> <li>• <b>FICA Status</b></li> </ul>
<b>STEP 2.5</b>	<b>Salary Tab</b>
	Ensure the <b>Salary Admin Plan</b> is populated correctly, if this is utilized by your institution.
<b>STEP 2.6</b>	<b>Compensation Tab</b>
	Enter the following data: <ul style="list-style-type: none"> <li>• <b>Frequency</b></li> <li>• Open <b>Pay Components</b> and enter the following data:                         <ul style="list-style-type: none"> <li>- <b>Rate Code</b></li> <li>- <b>Comp Rate</b></li> <li>- <b>Frequency</b></li> </ul> </li> <li>• Click <b>Calculate Compensation</b></li> <li>• Open <b>Pay Rates</b> and verify the salary/pay rate is correct</li> </ul>

Compensation ? Find First 1 of 1 Last

Effective Date 10/12/2018 Go To Row

Effective Sequence 0 Action Hire

HR Status Active Reason New Employment Instance

Payroll Status Active Job Indicator Primary Job

Current

Compensation Rate 30.00 USD \*Frequency H Hourly

Comparative Information ?

Pay Rates ?					
Annual	62,400.000000	USD	Daily	240.000000	USD
Monthly	5,200.000000	USD	Hourly	30.000000	USD

Default Pay Components

Pay Components ? Personalize | Find | First 1 of 1 Last


Amounts	Controls	Changes	Conversion				
*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 NAHRLY	0	30.000000	USD	H			

Calculate Compensation



<b>STEP 2.7</b>	<b>Benefits Program Participation Link</b>
	<p>Enter the following data:</p> <ul style="list-style-type: none"> <li>• <b>Annual Benefits Base Rate (ABBR):</b> Enter the annual base compensation amount</li> <li>• In the <b>Benefits Program Participation</b> area, click the <b>(+)</b> sign to add a new row</li> <li>• <b>Effective Date:</b> Use the new hire date</li> <li>• <b>Benefits Program:</b> USG</li> </ul>
<p>Job Data      Employment Data      Earnings Distribution      <b>Benefits Program Participation</b></p>	
<b>STEP 2.8</b>	<b>Employment Data Link</b>
	<ul style="list-style-type: none"> <li>• Click the <b>Override</b> box</li> <li>• Enter the new hire date for the following fields                         <ul style="list-style-type: none"> <li>- <b>USG Service Date</b></li> <li>- <b>Institution Seniority Date</b></li> <li>- <b>Benefits Service Date</b></li> </ul> </li> </ul>
<b>STEP 2.9</b>	<b>Save the Record</b>
	<p>You may receive a warning message regarding the primary job. Click <b>OK</b> to continue saving and then be sure to verify the primary job indicator is setup correctly.</p>
<b>Notes:</b>	<ul style="list-style-type: none"> <li>• If the employee rescinded retirement before they received a retirement benefit payment and there was no break in service, you would use the original dates for USG Service Date, Institution Seniority Date and Benefits Service Date.</li> <li>• When the new hire data is entered and the primary job indicator is moved to the active record, the information will flow to Alight. Alight will then terminate retiree benefits and open a new election window for active employee benefits (if there was a break in service).</li> <li>• Again, the employee should <b>not</b> have the Ret-Rehire box checked or have a job code with a subcat of Z. These should only be used for USG Retirees who are receiving retirement benefit payments and working less than half time.</li> <li>• The job code should match the employee's job duties and responsibilities.</li> </ul>



<b>STEP 3.0</b>	<b>Review Maintain Time Reporter panel</b>
<b>PATH</b>	Navigator > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data
	<ul style="list-style-type: none"> <li>• Enter the <b>Empl ID</b></li> <li>• Click <b>Search</b></li> </ul>
<p><b>Maintain Time Reporter Data</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value <input type="text"/></p> <p>▼ Search Criteria</p> <p>Empl ID <input type="text" value="begins with"/> <input type="text" value=""/></p> <p>Empl Record <input type="text" value="="/> <input type="text" value=""/></p> <p>Name <input type="text" value="begins with"/> <input type="text" value=""/></p> <p>Last Name <input type="text" value="begins with"/> <input type="text" value=""/></p> <p>Business Unit <input type="text" value="begins with"/> <input type="text" value=""/></p> <p>Department <input type="text" value="begins with"/> <input type="text" value=""/></p> <p>Workgroup <input type="text" value="begins with"/> <input type="text" value=""/></p> <p>Organizational Relationship <input type="text" value="="/> <input type="text" value=""/></p> <p><input type="checkbox"/> Include History <input type="checkbox"/> Correct History <input type="checkbox"/> Case Sensitive</p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/> <a href="#">Basic Search</a>  <a href="#">Save Search Criteria</a></p>	
<b>STEP 3.1</b>	<b>Time Reporter Data</b>
	<ul style="list-style-type: none"> <li>• Compare data in new row to historical row and ensure current data is accurate.</li> </ul>



SECTION II	Returning Retiree to Retirement
PATH	Navigator > Workforce Administration > Job Data
Note:	When you receive notification that an employee is going back into retirement, you will need to enter the <b>Intent to Rehire Date</b> on the active record.
STEP 1.1	<b>Search for Employee</b>
	<ul style="list-style-type: none"> <li>• Enter the <b>Employee ID (EMPLID)</b>:</li> <li>• Click <b>Search</b></li> </ul>
<p><b>Job Data</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value    Keyword Search</p> <p>▼ Search Criteria</p> <p>Empl ID begins with ▼ [ ]</p> <p>Empl Record = ▼ [ ]</p> <p>Name begins with ▼ [ ]</p> <p>Last Name begins with ▼ [ ]</p> <p>Second Last Name begins with ▼ [ ]</p> <p>Alternate Character Name begins with ▼ [ ]</p> <p>Middle Name begins with ▼ [ ]</p> <p><input type="checkbox"/> Include History    <input type="checkbox"/> Correct History    <input type="checkbox"/> Case Sensitive</p> <p>Search    Clear    Basic Search    Save Search Criteria</p>	
STEP 1.2	<b>Work Location Tab</b>
	<ul style="list-style-type: none"> <li>• Click the <b>(+)</b> sign to insert a new row</li> <li>• Enter the following data:                         <ul style="list-style-type: none"> <li>- <b>Effective Date:</b> Use <b>today's</b> date</li> <li>- <b>Action:</b> Data Change</li> <li>- <b>Reason:</b> Update Data</li> </ul> </li> </ul>





<b>STEP 1.3</b>	<b>Employment Data Link</b>
	<b>Intent to Retire Date:</b> Date employee plans to return to retirement
<b>STEP 1.4</b>	<b>Save the Record</b>
<b>STEP 2.1</b>	<b>Enter New Retirement</b>
	On the active record, click the <b>(+)</b> sign to add a new row
<b>STEP 2.2</b>	<b>Work Location Tab</b>
	Enter the following data: <ul style="list-style-type: none"> <li>• <b>Effective Date:</b> Enter the new retirement date</li> <li>• <b>Action:</b> Retirement</li> <li>• <b>Reason:</b> Enter appropriate action (<b>Normal Retirement</b> is most frequently used)</li> <li>• <b>Job Indicator:</b> Primary</li> <li>• <b>Position Number:</b> Enter the retiree position number established by your institution</li> </ul>
<b>STEP 2.7</b>	<b>Benefits Program Participation Link</b>
	Enter the following data: <ul style="list-style-type: none"> <li>• In the <b>Benefits Program Participation</b> area, click the <b>(+)</b> sign to add a new row</li> <li>• Enter the following data:                     <ul style="list-style-type: none"> <li>- <b>Effective Date:</b> Use the new retirement date</li> <li>- <b>Benefits Program:</b> RET</li> </ul> </li> </ul>
<b>STEP 2.8</b>	<b>Save the Record</b>
<p><b>Useful TRS of Georgia Links</b></p> <p>Suspending or Terminating Retirement  <a href="https://www.trsga.com/employer/hiring-trs-retirees/suspending-or-terminating-retirement">https://www.trsga.com/employer/hiring-trs-retirees/suspending-or-terminating-retirement</a></p> <p>Suspending or Terminating Benefit Payment  <a href="https://www.trsga.com/retiree/working-after-retirement/suspending-or-terminating-benefit-payment">https://www.trsga.com/retiree/working-after-retirement/suspending-or-terminating-benefit-payment</a></p> <p>Retirees Suspending or Terminating Benefits Form  <a href="https://www.trsga.com/downloadForms/retirees_suspending_or_terminating_benefits.pdf">https://www.trsga.com/downloadForms/retirees_suspending_or_terminating_benefits.pdf</a></p> <p>2016 Employer Reference Guide  <a href="https://www.trsga.com/uploads/Employer-Reference-Guide-2016-web.pdf">https://www.trsga.com/uploads/Employer-Reference-Guide-2016-web.pdf</a></p>	

