Overview/Description
This job aid describes the steps necessary to retire a USG employee in Job Data into OneUSG Connect.

Prerequisite(s)
Employee meets the definition for USG retiree benefits. See USG policy for additional details https://www.usg.edu/policymanual/section8/C224/#p8.2.8_retirement.

Instructions
1. Enter Intent to Retire in Job Data.

   Navigation
   NavBar > Navigator > Workforce Administration > Job Information > Job Data

   ! Important
   The Intent to Retire should be entered as soon as the HR office receives notification of the retirement. This is required for every employee.

   Note: Most times this is entered before the official personnel action request is received to retire the employee. This action does not actually retire the employee. It provides a notice to Alight that the employee will potentially be retiring soon.

1.1. Search for and select the employee.

   Enter the employee’s Empl ID and click Search.
   If the employee has multiple records, make certain you select their primary job record for your institution.
1.2. Insert “Data Change” row.

a. Click “+” to insert a new row.

b. Enter the following data on the Work Location tab:
   - **Effective Date**: Enter the current date.
   - **Effective Sequence**: Enter the appropriate sequence.
   - **Action**: “Data Change”
   - **Reason**: “Update Data”
   - **Job Indicator**: “Primary Job”

![Work Location Tab](image)

c. On the Employment Data Link:
   - **Intent to Retire Date**: Enter the retirement date.
   - **Save** the record.

![Employment Data Link](image)
2. Enter Retirement in Job Data.

Navigation

Navbar > Navigator > Workforce Administration > Job Information > Job Data

2.1. Search for and select the employee.

Enter the employee's Empl ID and click Search. If the employee has multiple records, make certain you select their primary job record for your institution.

2.2. Insert "Retirement" row.

a. Click "+" to insert a new row.
b. Enter the following data on the Work Location tab.
   - Effective Date: Enter the retirement date.
   - Effective Sequence: Enter the appropriate sequence.
   - Action: "Retirement"
   - Reason: Enter the appropriate reason.
   - Job Indicator: "Primary Job"
   - Position Number: Leave the current number in the field.

Note: The designated Retiree position number will be entered at a later date to prevent payroll and funding issues when processing the Vacation Payout (VPO).
c. On the **Job Information** tab, if the **Reports To** field is empty, you will need to enter “0000002” in the **Supervisor ID** field.

![Job Information Tab Example](image1)

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d. On the **Payroll** tab:

- **Absence System**: “Absence Management”
- **Pay Group**: Keep the employee in the current pay group.

![Payroll Tab Example](image2)

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e. On the **Compensation** tab:

- **Comp Rate**: Leave the current compensation rate.

  ! **Important**: The compensation rate must be left in place to prevent encumbrance issues.

![Compensation Tab Example](image3)

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f. On the **Benefits Program Participation** link, leave the current **Annual Benefits Base Rate** amount.

![Benefits Program Participation Link Example](image4)
g. Under **Benefit Program Participation Details**, leave the current **Benefit Program** in place. A new row will be inserted, and the program updated when the retiree position number is added.

![Benefit Program Participation Details](image)

h. On the Earnings Distribution link:
   - **Earnings Distribution Type**: “None”
   - **Save** the record.

![Earnings Distribution](image)
3. Inactivating the Maintain Time Reporter panel.

After saving the Retirement entry, the system will automatically insert a future dated row to make the Maintain Time Reporter **inactive**.

You can verify this action by navigating back to the search screen and then re-entering the Job Data panel. From here you will navigate to the Employment Data screen.

**Note:** You must navigate out of the Job Data panel and then re-enter it to verify the action took place.

a. From this panel, you will click the Time Reporter Data link.

b. When you open this link, you will see an "Inactive" status and an effective date that is one pay period greater than the retirement date. The future inactive date will allow time for the VPO to be paid out.
4. Submitting a Vacation Payout (VPO).

The payment of the accrued vacation leave should be disbursed separately from, and after the payment of the final work-hours payment, with limited exceptions. For more information on VPOs, refer to Section 5.1.3 of the Business Procedures Manual (BPM), https://www.usg.edu/business_procedures_manual/section5/C1223/#p5.1.3_vacation_payout.

4.1. Enter VPO hours on the employee’s timesheet.

After the final paycheck has been processed, go back and enter VPO hours on the employee’s timesheet for the date of or prior to the employee’s last day worked. This will be an adjusted timesheet that will process the following pay period.

4.2. Time Administration Process.

Submit a OneUSG Support ticket to oneusgsupport@usg.edu requesting the Time Administration process be run for each impacted employee individually.
4.3. Complete the **VPO Requests** tab of the **OneUSG Payroll Workbook**.

- A copy of the OneUSG Payroll Workbook is available on the OneUSG Connect website, [https://www.usg.edu/oneusg_connect](https://www.usg.edu/oneusg_connect), Practitioner Services > Payroll > Payroll Resources.

- Include the following information on the OneUSG Payroll Workbook to ensure manual pay sheets are created for the retired employee:
  - Company
  - Pay Group (the one prior to retirement)
  - Employee ID
  - Record Number
  - Employee Name
  - Number of VPO hours
  - Hours Reported Date
  - Employee Retirement Date
  - TRC Used
  - Payable Status
  - Comments/Special Processing Instructions

- Submit with your payroll to your SSC payroll processor.

5. **Updating Position Number to Designated Retiree Position In Job Data.**

**Navigation**

NavBar > Navigator > Workforce Administration > Job Information > Job Data

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**Important**

Retirees are placed in a designated “Retiree” position with an unallocated budget after they retire. **It is imperative that all pay including final paycheck, VPO and adjustments are processed before moving the employee into the Retiree position to avoid issues with payroll and funding.** After the Retiree position is entered, the system is locked so that no other adjustments can be made.
5.1. Search for and select the employee.

Enter the employee’s Empl ID and click Search. If the employee has multiple records, make certain you select their primary job record for your institution.

5.2. Insert “Data Change” row.

a. Click “+” to insert a new row.
b. Enter the following data on the Work Location tab:
   - Effective Date: Enter the retirement date.
   - Effective Sequence: Enter the next available sequence.
   - Action: “Data Change”
   - Reason: “Update”
   - Job Indicator: “Primary Job”
   - Position Number: Enter the designated Retiree position for your institution.
c. On the **Job Information** tab, if the **Reports To** field is empty, you will need to enter “0000002” in the **Supervisor ID** field.

![Job Information Tab](image1)

**Payroll Tab:**
- **Absence System:** “Other”
- **Pay Group:** Verify the pay group is “XXB.”

![Payroll Tab](image2)

e. On the **Compensation** tab, ensure the **Comp Rate** has been left in place.

![Compensation Tab](image3)

f. On the **Benefits Program Participation** link, leave the current **Annual Benefits Base Rate**.

![Benefits Program Participation](image4)
g. Under **Benefit Program Participation Details**:
   - Click “+” to insert a new row.
   - **Effective Date**: Enter the retirement date.
   - **Benefit Program**: Select “RET.”

![Benefit Program Participation Details](image1)

h. On the **Earnings Distribution** link:
   - **Earnings Distribution Type**: Select “None.”
   - **Save** the record.

![Earnings Distribution](image2)

Important

Alight will send a PIF file after the retirement action is received that will end health and welfare deductions. The institution is responsible for ending institution specific deductions. The Auto Termination Process will end the employee’s retirement plan. The institution is responsible for ending other savings plans (i.e. 403b, 457b).

Be sure to verify that the PIF and Auto Termination Process ran to success and ended the appropriate deductions. If the deductions were not stopped, please manually update the data as needed.

6.1. General Deductions.

Navigation

NavBar > Navigator > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions

Under the appropriate General Deduction, in the Deduction Details area:

a. Click “+” to insert a new row and update the following fields:
   - Effective Date: Enter the retirement date.
   - Deduction End Date: Enter the retirement date.
   - Deduction Rate or %: Remove
   - Flat/Addl Amount: Remove
   - Goal Amount: Remove
   - Current Goal Balance: Remove

b. Save the record.
6.2. Savings Plans

**Navigation**

NavBar > Navigator > Benefits > Enroll in Benefits > Savings Plans

Under the appropriate Plan Type, in the **Coverage** area:

a. Click “+” to insert a row and update the following fields:
   - **Coverage Begin Date**: Enter the retirement date.
   - **Deduction Begin Date**: Enter the retirement date.
   - **Coverage Election**: Select “Termination.”

b. **Save** the record.