UC San Diego

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Health Sciences

Micro Learning:
July 1 Retirements
5/17/22

UC Path

Retirement Pre Process

UC*Path*

Review **Person Org Summary**	Determine if employee is eligible for **COLA**	Have **information ready** to complete template	Determine if **Final Pay Request** is necessary
1	**2**	**3**	**4**

- Active Empl Records in other Depts?

- UCRP benefit recipients who are eligible to receive the Inactive COLA need to reflect as terminated for at least one business day prior to July 1st

- Empl ID
- Empl Record Number
- Effective Date (first day of inactive HR status)
- Last day worked

- Retirement template must be submitted and locally approved before Final Pay is requested

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Retirement Template

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1 Select the **UC_RETIREMENT** Smart HR Template

2 Enter **6/30/2022** in the **Effective Date** field

3 Enter the **Employee ID** and select the **Employment Record Number**

4 Accept the default of **6/29/22** in the **Last Date Worked** field, or enter the employee's actual last working date if prior to 6/29/22

5 Enter any **Comments** or **Supporting documents** as needed

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Final Pay Request

1   Select Payroll Request type: **Final Pay**

2   Select Termination Type: **Retirement**

3   Enter the **Employee ID** and select the **Employment Record Number**

4   Enter data in the **Earnings Tab**, **Leaves Tab** and check the **Pay Out Accruals** box, if applicable

**5**   Enter **Comments** and click **Submit**

- Retirement Template Transaction Number
- Last Day Worked (MM/DD/YYYY)
- Details of time worked outside of current pay period (days and hours worked)
- New outstanding balances

- If employee earns Additional Pay, list Earn Code(s) and amount(s)
- Any issues with the Calc Salary, including reasoning/math
- Explicit statement that employee did not use any accruals, if applicable
- Instructions for any special handling

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Resources

UC San Diego Job Aids and Quick References
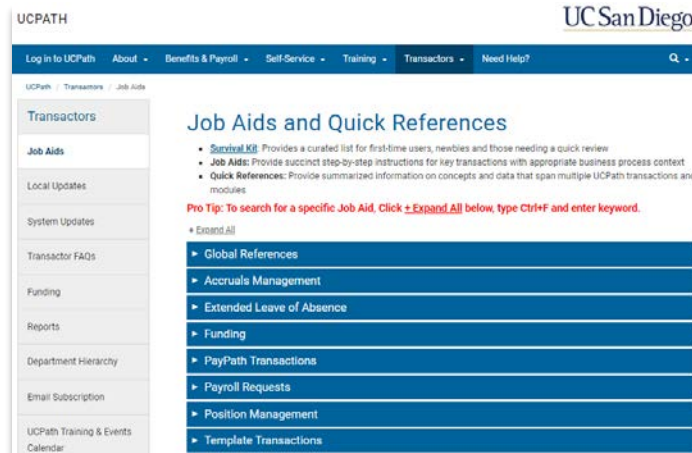
- How to Initiate a Retirement Template Transaction
- How to Process an Academic Retirement and Change to Emeritus Status
- Processing Final Pay for 7/1 Retirees
- How to Request Final Pay for Exempt Employees
- How to Request Final Pay for Non-Exempt Employees

UCPath Help Site for Transactional Users
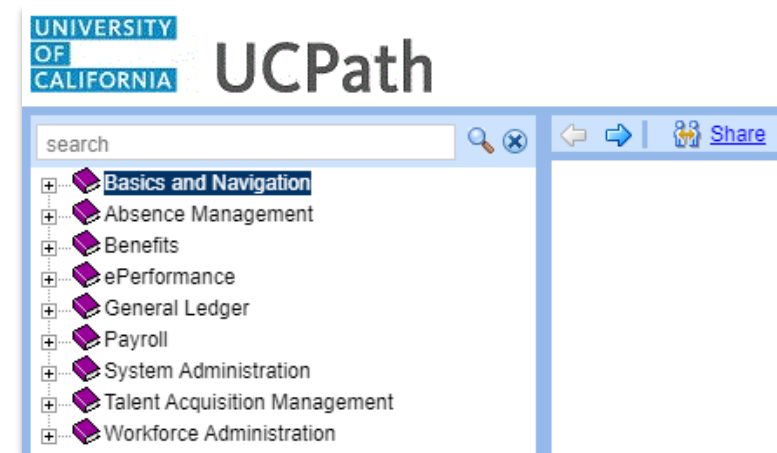
- Initiate Retirement Template Transaction
- Submit Final Pay Request
- Approve Final Pay Transaction
- Job Aid: Termination and Final Pay