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|  | LINK Human Resources and PayrollHUMAN RESOURCES |  |
| P62 T03 EDC Separation Process **Retirement** Date Issued/Rev: 6/22/2011 | | |

**General Description:** This procedure explains how to process a separation due to retirement from the University of New Mexico.

**Responsible Manager:** Director of Human Resources

**Related Policies:**

1. Separation of Employment <http://www.unm.edu/~ubppm/ubppmanual/3225.htm>

3625 Retirement <http://www.unm.edu/~ubppm/ubppmanual/3625.htm>

**Definitions:**

Retiree: Voluntary separation from employment in accordance with UNM Policy.

*Note: Retiree from UNM means that the employee (staff or faculty) has been approved and processed from ERB, or, IF applicable is taking out the minimum contribution from the Alternative Retirement Plans.*

Separation: Separation from UNM indicates that **ALL** job records are terminated, all active benefit deductions are ended, and annual leave balance is paid out if applicable.

**Related Forms:**

NBAJOBS Employee Jobs Form

**Related Procedures:**

P89 T05 Job End

P62 T04 Payroll Separation Process

P89 T02 Add Additional

**IMPORTANT NOTES:**

This process consists of two parts:

1. Employee Data Centers (EDCs) verify that the separation form is a true separation from UNM by reviewing their Banner record.
2. Payroll ends all other records, including deductions and the employee record, and other tasks, as needed, if separation is a retirement. This part is addressed in the Payroll Separation Procedure.

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| **Step#** | **Action / Field Name** | **Comments / Options** |
| 1 | **Go to:** TypeNBAJOBS and press ENTER. |  |
| 2 | **ID:** Enter the employee’s UNM ID. If unknown, search by name and locate correct employee. |  |
| 3 | **Query Date:** Tab to query date. Adjust the query date to a date prior to the current date, otherwise all job records will not display. | **NOTE:** Use format: dd/mm/yyyy |
| 4 | Select “Next Block” or hit Enter |  |
| 5 | Click on down arrow next to the Positions box to view positions. | **NOTE:**  If the employee is not truly separating from UNM as described above, but rather moving to another job, department, or is changing to another eClass, the separation form is null and void. Refer to P89 T05 “Job End.” |
| 6 | Click on “List of Employee’s jobs (NBIJLST)” |  |
| 7 | Select “Next Block” or hit Enter |  |
| 8 | Select the job position number that you will be updating |  |
| 9 | Click on Base job tab – if contract end date is populated, enter “**End Date”** to match “**Separation Date.”** |  |
| 10 | Next, click on Job Detail tab |  |
| 11 | Select “Options” then click on “Add or Change with a New Effective Date.” | **NOTE:** If the Job is ending before the last paid date (top right corner), the Effective date is the day of the last paid date, and the Personnel date is the actual separation date. The effective date cannot be less than the new effective date, but the personnel date can be used to reflect the separation date if the transaction is received after the last paid date. |
| 12 | **Effective Date:** Required. Enter the date (mm/dd/yyyy), press Enter or click on calendar to select the appropriate pay date. |  |
| 13 | Click “OK.” |  |
| 14 | **Status:** Click on the arrow and select “Terminated.” |  |
| 15 | **Job Change Reason:**  Select “SEP06” |  |
| 16 | Select “Save.”  Make a copy of the transaction for files, and send transaction to Payroll for final processing | **Note:** Write down annual salary on ePan if not listed, you’ll need it for #25. |
| 17 | **Go To: Position:** box (upper left-hand side) | **NOTE:** Always check query date to check recent for jobs. Recommend using beginning of FY. |
| 18 | **Position:** Type NBRETR in position for retired employee  Review separation from previous job (job detail tab) | **NOTE:**  Faculty may use emeriti titles as applicable. |
| 19 | Select “Options” then Add or Change with a New Effective Date.” |  |
| 20 | **Suffix:** Type 00. |  |
| 21 | Select “Next Block.” |  |
| 22 | See the pop up window display. Enter begin date, enter as secondary and enter annual salary, click OK and Save. |  |
| 23 | **Begin Date:** Enter the date the separation begins. | **Note:** First day of the month after resignation date |
| 24 | **Job type: select Primary** | **NOTE:** retiree “NB” job can be primary as long as it does not begin dates do not overlap with other jobs. |
| 25 | **Annual Salary: Enter their ending FULL TIME annual salary** | **Note:** Full-time salary is taken from the job employee separated from. |
| 26 | Click “OK.” |  |
| 27 | **Hours Per Day:** 1.00 | **NOTE:** Amount will default in effective 1/1/11 |
| 28 | **Hours Per Pay:** 1.00 | **NOTE:** Amount will default in effective 1/1/11 |
| 29 | **Job Change Reason:** Type ADDJB. and Save |  |
| 30 | Tab to **Payroll Default** and verify Time Sheet Org. Change, if necessary. Save if change is made | **NOTE:** The org code will default form PEAEMPL |
| 31 | Tab to **Default Earnings** and verify Earnings Code shows **999 (unless Full VA)**  and Hours or Units shows **1.0** | **Amount will default in Effective 1/1/11**  **NOTE:** Rate and assigned salary should match monthly rate |
| 31 | Tab to **Labor Distribution** and verify that the index is **475039**, if not change it.  Save | **NOTE**: the Labor defaults in from the NB% job and is used to process retiree benefits. |
| 32 | Select “Save.” |  |
| 33 | More Retiree Separations to process:   1. If yes, return to step 1. 2. If not, select “Exit.” |  |

**Common Error Messages:**

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| **Error Messages** | **How to fix or correct:** |
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