

How to initiate a retirement action in HCM:

This job aid outlines how to initiate a retirement action.

Navigation: Employee Self Service > My Homepage > ePAF Homepage

Information

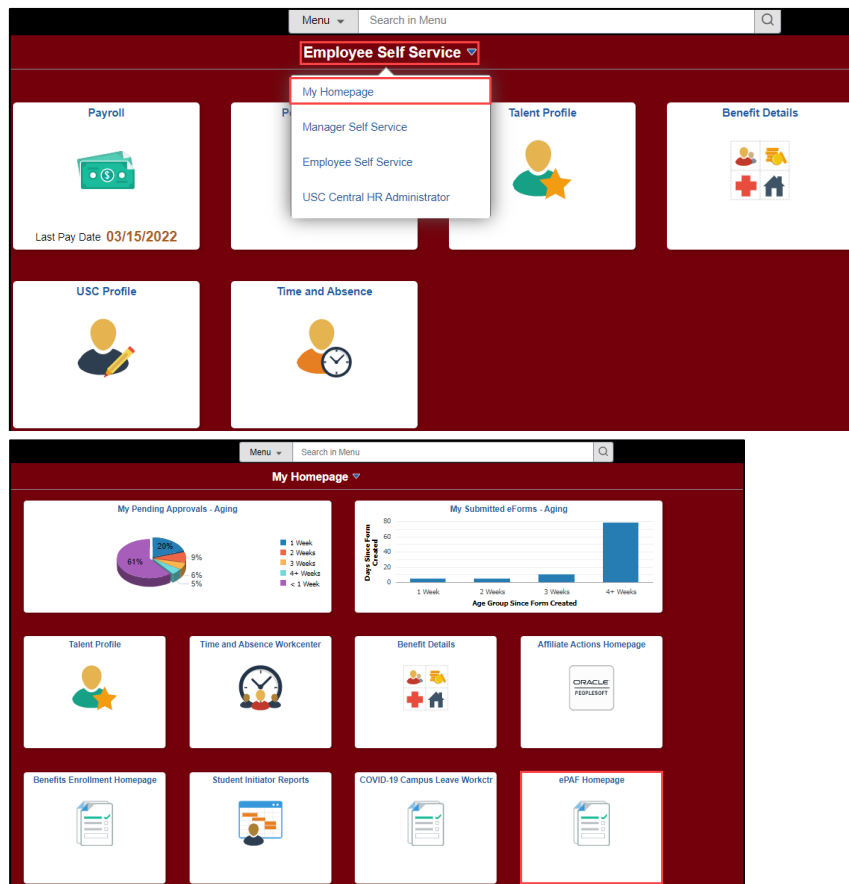
Those with HR Initiator access can take this action for employees within their security scope.

An employee on suspension remains in that status until you initiate a **Retirement** action on the Status Change eForm.

Initiating a retirement action: In order to initiate a retirement action one of your employees, take the following steps:

1. Click the **Employee Self-Service** drop-down menu button.
2. Click the **My Homepage** option in the drop-down.
3. Click the **ePAF Homepage** tile.

Screenshots

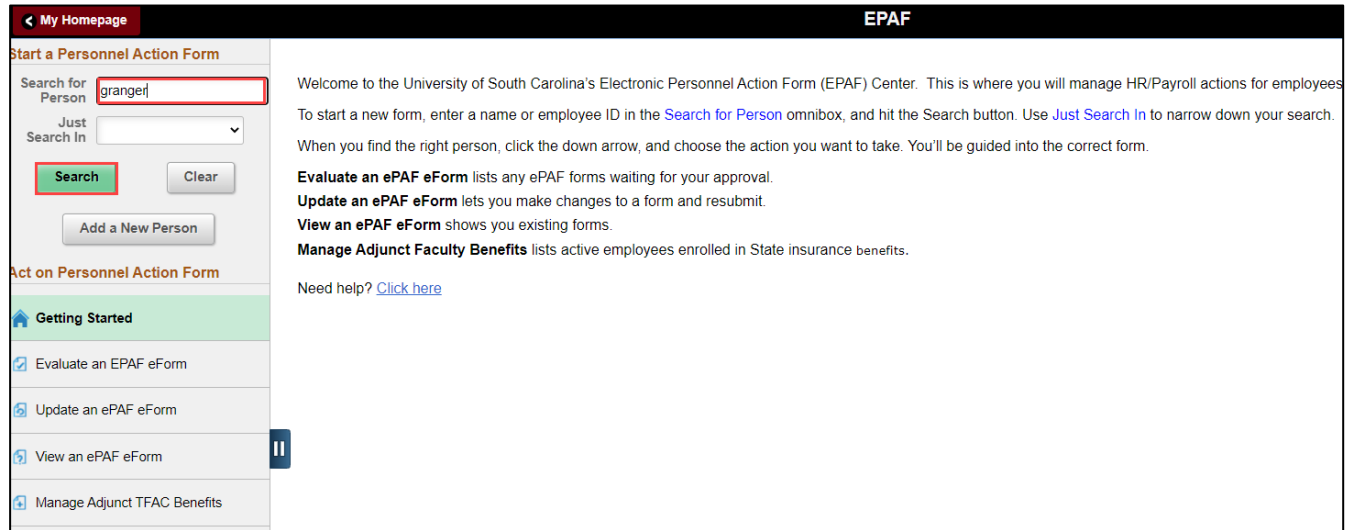


University of South Carolina HCM HR Contact Resources Status Change eForm: Retirement

On the ePAF homepage enter your employee's name or USC ID in the **Search for Person** field, then click the **Search** button.

The results that appear are referred to as **Search Cards**. Determine the appropriate Search Card by reviewing the EMPL ID (aka USC ID), EMPL record, Department, EMPL Class, and other data presented.

On the appropriate Search Card, click the **Related Actions Menu** button.



< My Homepage EPAF

Start a Personnel Action Form

Search for Person:

Just Search In:

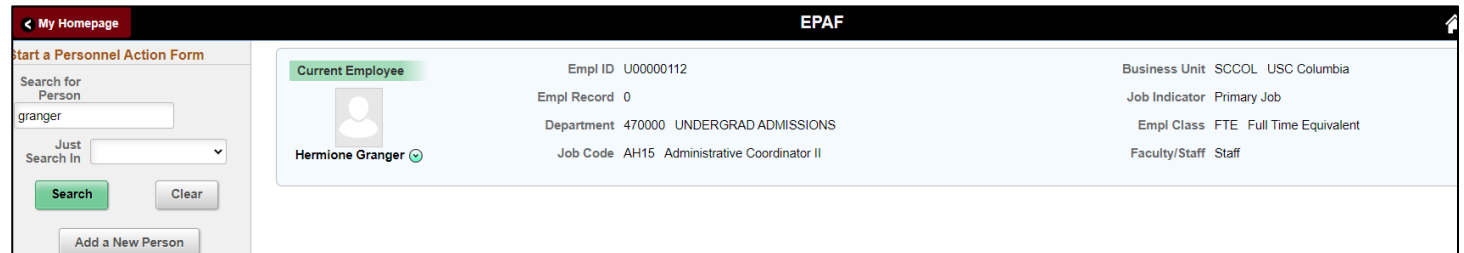
Act on Personnel Action Form

- Getting Started
- Evaluate an ePAF eForm
- Update an ePAF eForm
- View an ePAF eForm
- Manage Adjunct TFAC Benefits

Welcome to the University of South Carolina's Electronic Personnel Action Form (EPAF) Center. This is where you will manage HR/Payroll actions for employees. To start a new form, enter a name or employee ID in the **Search for Person** omnibox, and hit the Search button. Use **Just Search In** to narrow down your search. When you find the right person, click the down arrow, and choose the action you want to take. You'll be guided into the correct form.

Evaluate an ePAF eForm lists any ePAF forms waiting for your approval.
Update an ePAF eForm lets you make changes to a form and resubmit.
View an ePAF eForm shows you existing forms.
Manage Adjunct Faculty Benefits lists active employees enrolled in State insurance benefits.

Need help? [Click here](#)



< My Homepage EPAF


Start a Personnel Action Form

Search for Person:

Just Search In:

Current Employee

| | | | |
|-------------|------------------------------------|---------------|--------------------------|
| Empl ID | U00000112 | Business Unit | SCCOL USC Columbia |
| Empl Record | 0 | Job Indicator | Primary Job |
| Department | 470000 UNDERGRAD ADMISSIONS | Empl Class | FTE Full Time Equivalent |
| Job Code | AH15 Administrative Coordinator II | Faculty/Staff | Staff |

 **Hermione Granger**

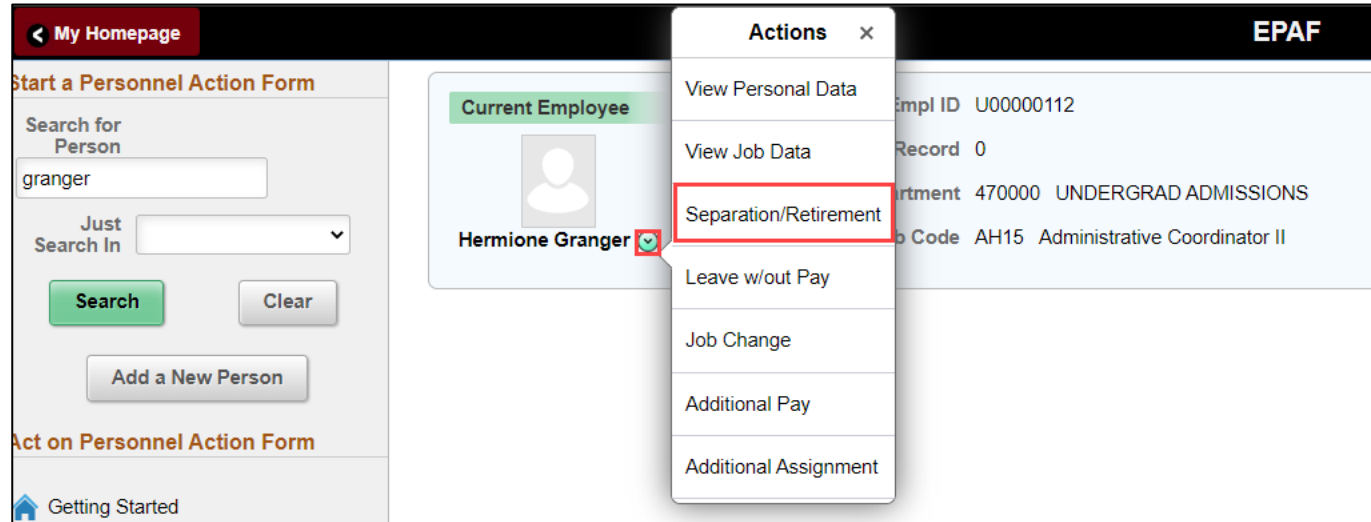
The **Related Actions Menu** shows all of the actions/eForms which the user has authority to initiate on this specific employee's EMPL record.

The **Status Change eForm** is used to change the HR and/or Payroll status of an employee from 'Active' to something else and vice versa. Note the **Status Change eForm** does not appear in the **Related Actions Menu** by name, rather there are actions listed that take you into the eForm.

- a. For staff, the options are:
 - i. Separation/Retirement
 - ii. Leave w/out Pay

- b. For faculty, the options are:
 - i. Separation/Retirement
 - ii. Leave w/out Pay
 - iii. Paid Leave

From the Related Actions Menu, click the **Separation/Retirement** option.

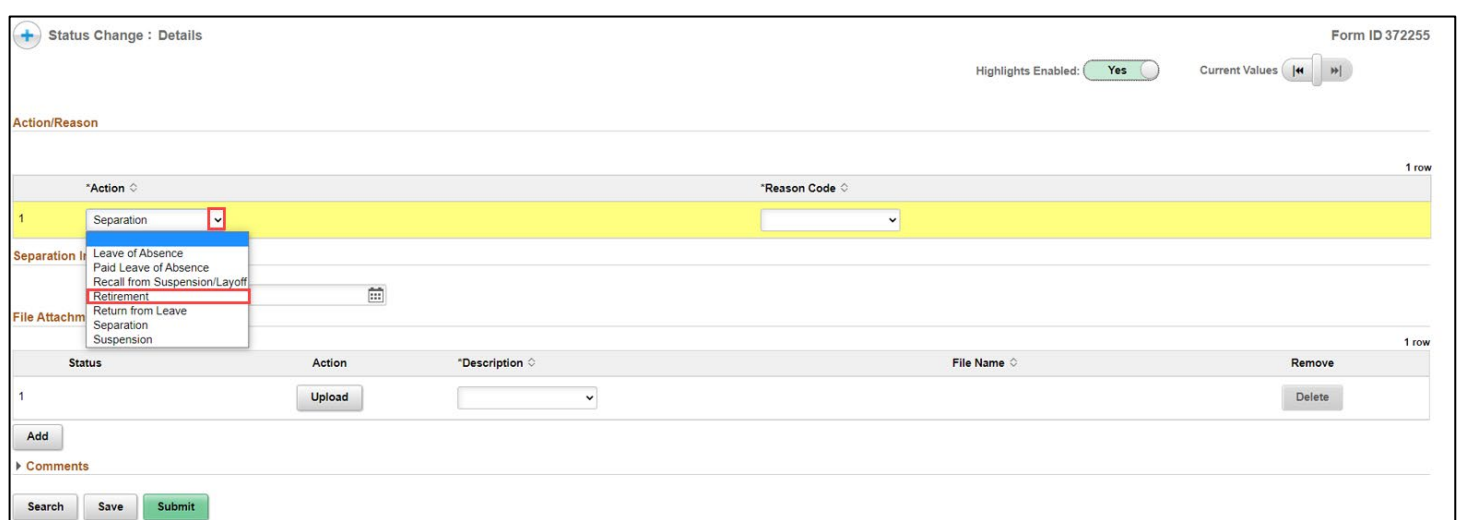


The screenshot shows the 'My Homepage' interface for the 'EPAF' system. On the left, there is a search section for 'Personnel Action Form' with a search box containing 'granger' and a dropdown menu for 'Just Search In'. Below this are 'Search' and 'Clear' buttons, and an 'Add a New Person' button. In the center, a 'Current Employee' card for 'Hermione Granger' is displayed with a checkmark icon. An 'Actions' dropdown menu is open over the employee card, listing several options: 'View Personal Data', 'View Job Data', 'Separation/Retirement' (highlighted with a red box), 'Leave w/out Pay', 'Job Change', 'Additional Pay', and 'Additional Assignment'. On the right, a portion of the employee's record is visible, showing 'empl ID U00000112', 'Record 0', 'Department 470000 UNDERGRAD ADMISSIONS', and 'Job Code AH15 Administrative Coordinator II'.

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Status Change eForm: Retirement

Completing the Status Change eForm:

1. The **Action** of **Separation** is the default. However, this action needs to be changed to Retirement. Click the **Action** drop-down menu button and select the **Retirement** option.
2. Click the **Reason Code** drop-down menu button and select the appropriate **Retirement** reason.



Status Change : Details Form ID 372255

Highlights Enabled: Yes Current Values

Action/Reason

| *Action | *Reason Code |
|--------------|--------------|
| 1 Separation | |

Separation Information

*Last Date Employed

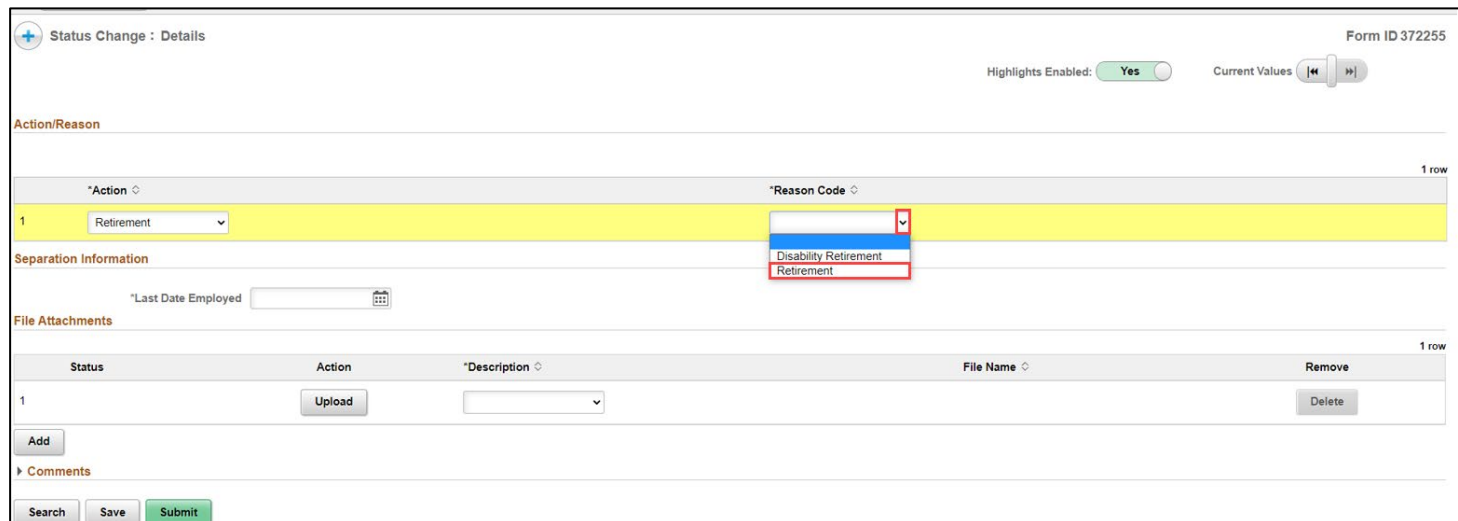
File Attachments

| Status | Action | *Description | File Name | Remove |
|--------|--------|--------------|-----------|--------|
| 1 | Upload | | | Delete |

Add

Comments

Search Save Submit



Status Change : Details Form ID 372255

Highlights Enabled: Yes Current Values

Action/Reason

| *Action | *Reason Code |
|--------------|--------------|
| 1 Retirement | Retirement |

Separation Information

*Last Date Employed

File Attachments

| Status | Action | *Description | File Name | Remove |
|--------|--------|--------------|-----------|--------|
| 1 | Upload | | | Delete |

Add

Comments

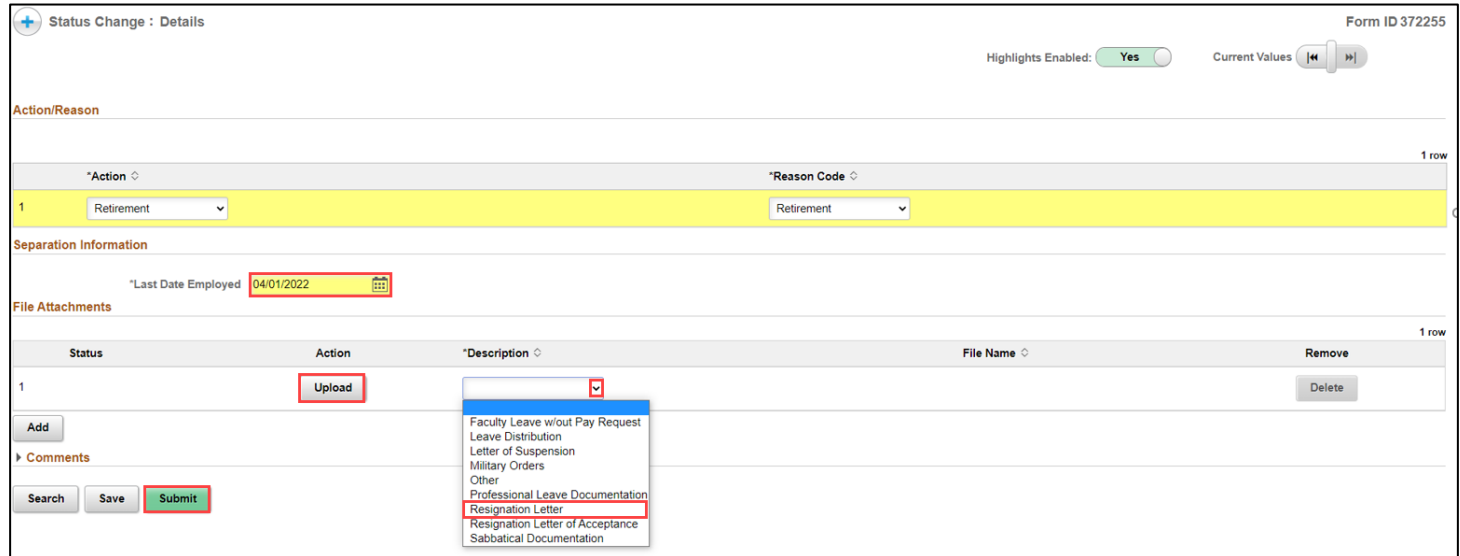
Search Save Submit

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HCM HR Contact Resources
Status Change eForm: Retirement**

3. Enter the **Last Date Employed** for the employee. This is the last day the individual is in an 'active' employment status with UofSC.
 - a. If an employee has elected to utilize accrued leave prior to their separation, ensure the Last Date Employed encompasses these dates.

Retirement actions should be submitted accompanied by the employee's **Resignation Letter**. We cannot require a letter, but we can request one.

4. Click the **Upload** button and follow the on-screen prompts to upload the letter from your device.
5. Review your work on the eForm. Once you've confirmed the data click the **Submit** button.



Status Change : Details Form ID 372255

Highlights Enabled: Yes Current Values

Action/Reason

| *Action | *Reason Code |
|--------------|--------------|
| 1 Retirement | Retirement |

Separation Information

*Last Date Employed: 04/01/2022

File Attachments

| Status | Action | *Description | File Name | Remove |
|--------|--------|--------------|-----------|--------|
| 1 | Upload | | | Delete |

File Attachments Description Dropdown:

- Faculty Leave w/out Pay Request
- Leave Distribution
- Letter of Suspension
- Military Orders
- Other
- Professional Leave Documentation
- Resignation Letter**
- Resignation Letter of Acceptance
- Sabbatical Documentation

Buttons: Add, Search, Save, **Submit**

1. The eForm has successfully submitted! Always click the **View Approval Route** button to see the workflow steps for the action.
2. The Approval Route shows the workflow steps for the specific action you submitted. All HR eForms route to Approver 1 and Approver 2 (internal to your Department, College/Division, or Campus) and the applicable central HR office.
 - a. Payroll is not in the workflow for any HR eForm, rather they have view access to all eForms. This workflow step will always say **Not Routed**.
3. Upon review of the workflow, click the **Done** button.

You have successfully initiated a **Retirement** action!

+ Status Change : Results

You have successfully submitted your eForm.
The eForm has been routed to the next approval step.
[multiple approvers.](#)

View Approval Route

▶ **Signature/Action Logs**

Approval

Cancel **Done**

Review/Edit Approvers

Basic Stage

▼ **G3FORM_ID=372217** **Pending**

Basic Path

Pending

[Multiple Approvers](#)
Dept_Approver_1

Not Routed

[Multiple Approvers](#)
Dept_Approver_2

Not Routed

[Multiple Approvers](#)
HR Operations

Not Routed

[Multiple Approvers](#)
Payroll Acct