

[Processing a Termination or Retirement]

Use the Change Employment Status ePAF form to process a termination or retirement for an employee. Reasons for termination include end of appointment, resignation, non-renewal, or end of a time limited job. For processing retirement, use this form to enter retirement for reasons such as disability retirement, normal retirement or **end** of DROP. Do not use this form to initiate DROP; the employee should contact a university retirement specialist at University Benefits and Retirement, at 392-4941, 622-4941 (SC), or retirement@ufl.edu.

Use this instruction guide

- If an employee is leaving the University of Florida or there is going to be a gap between two University of Florida jobs
- If an employee is leaving the University of Florida as a result of retirement (use Retirement as the action)

Do not use this instruction guide if

- An employee is leaving your department to accept another job on campus – with no gap in employment dates
- An employee in your area has been offered and has accepted another position in your department after a recruitment process
- An employee is moving from one job to another job in your department with no gap in employment dates

Security Roles

You will need the following security roles to perform the actions described in this guide:

- UF_EPAF_Department Admin
- UF_HR View/Inquiry
- or
- UF_EPAF_Level 1 Approver
- UF_HR View/Inquiry

To obtain these roles:

- Employees must attend the Hiring & Additional Pay class before their DSA can request security for ePAF (UF_EPAF_Department Admin role and UF_HR View/Inquiry role)
- The DSA must also state in the comment section of the role request the date the person attended the Hiring & Additional Pay class
- Employees must attend the Job/Position Actions class within 60 days of receiving their security, or they risk losing the roles (Bridges will do a quarterly query to compare employees with these roles with the classes they have taken).

Before You Begin

- Have the employee's first and last name as well as the UFID ready
- Ensure the employee has been in contact with a University Retirement specialist concerning retirement options and procedures at least 90 days before the retirement date.
- Please refer to the Office of Human Resources website links listed at the end of this guide for

Let's Get Started!

If the employee is exempt and the termination occurs during the current pay period, this step is required. You, or the payroll processor, will need to go to Weekly Elapsed Time and delete any hours that have been applied to the employee's schedule for days after her or his last day

In the case of non-exempt employees, it is still a good idea to go into Weekly Elapsed Time as well as into Weekly Punch Time to make sure that the employee hasn't entered leave or projected hours for time after his or her termination date

Navigate to the Weekly Elapsed Time Page

1. Log in to myUFL (<http://my.ufl.edu>) using your GatorLink username and password.
2. Navigate to **Manager Self Service > Time Management > Time Management Home > Report Time**

Report Time Page

3. On the Report Time page,
 - a. For **Reporting Method**, use the drop down to select **Manage Weekly Elapsed Time**
 - b. Enter **date** and check the **EmplID box** and enter the **UFID** of the employee
 - c. Click the **Get Employees** button
 - d. Select the correct employee by clicking on their name

Weekly Elapsed Time page:

4. To remove time/leave, at the **Weekly Elapsed Time** page,
 - a. For non-exempt employees,
 1. Go into Weekly Elapsed Time and into Weekly Punch Time to make sure that the employee hasn't entered time/leave or projected hours for time after his or her leave begins.
 - b. For exempt employees,
 1. On the current row, change hours to "0" for any days after the employee's last day worked
 2. Use the dropdown to change **Time Reporting Code** for current row to **Regular TEAMS**
 3. Add a row, enter hours appropriate for employee (8 for full-time, 4 for .5 FTE, etc.) for any days in pay period after the last day worked
 4. Use drop down to select **Time Reporting Code** of NOPAY (No Pay Status)
 5. Click the **Save** button

Note: If the leave begins in the first week of a pay period, use the above process for the following week as well. If the employee is exempt and the leave begins during the current pay period, this step is required.

Place on Retirement or Termination Using the Change Employment Status ePAF Form

1. Log into myUFL (<http://my.ufl.edu>) using your GatorLink account.
2. Navigate to **UF Departmental Administration > ePAF Home Page** on the menu.
3. On the Electronic Personnel Action Form (ePAF) Home Page, click the **Start a New ePAF** link.
4. Click the **Change Employment Status** link to start the process.

Select an Employee

5. Search for the employee by entering:
 - a. The last name in the **Last Name** field, or
 - b. UFID in the **EmplID** field
 - c. Click on the **Search** button
 - d. This will take you to the **Change Employment Status** form

Personal Info Section

6. On the **Change Employment Status** page, check the **Personal Info** section at the top
 - a. Make sure all the information displayed is correct and you have selected the right employee.
 - b. If you do not see anything displayed, click on the ► next to the words Personal Info in the blue stripe at the top to display that section.

Form Data Section

7. In the **Form Data** section,
 - a. For the **Effective Date** field, enter the day **after** the last day worked.
 - b. In the **Action** field, click on the dropdown to view a list of actions. Select "Terminatn" for Termination or Retirement.
 - c. Click on the magnifying glass next to the **Reason** field. The list will display reasons depending on whether you selected Termination or Retirement. Select the appropriate reason.
 - d. Enter a brief explanation in the **Comment** field.
 - e. Click the **Submit** button.
 - f. At the confirmation screen, click the **Yes** button to begin workflow to the approver.
 - g. Make a note of the **eForm ID** number. This will make it easier to find later if needed.

Submit paperwork

1. A Termination or Resignation Letter for terminations is still required.
2. For TEAMS and USPS, send the Termination or Resignation Letter to the Processing area of Employment and Classification (Processing and Records at 392-4621)
3. For Faculty, send the Academic Personnel Transaction Form to Academic Personnel. The form is available at <http://www.aa.ufl.edu/aa/forms/AAForm250.pdf>

Submit a Leave Cash-Out Form After Approval

1. Only after the job action has been approved, use the **Cashing Out Leave** instruction guide to submit a Leave Cash Out for the employee using the ePAF Leave Cash Out form.

Additional Help

Please refer to the Office of Human Resources website for procedures on termination <http://www.hr.ufl.edu/managers/termination.htm> and retirement at <http://www.hr.ufl.edu/benefits/retirement.htm>

Contact the following for additional help:

UF Help Desk: 392-HELP
Central Leave Administration: 392-5732
University Retirement Office: 392-4941
Academic Personnel: 392-1251
Employment and Classification: 392-4621
Student Employment: 392-0296