



## State Employee Retiree Guide

Specific steps are required to ensure the quick and efficient processing of Retirees of State Service.

Please review the following steps.

### Agency HR

When an employee is retiring from State Service, the Agency HR Initiator or Approver needs to complete the following steps.

- Process a Personnel Action using:
  - XP52.1, Action Nbr. Separation
  - Reason: Reason code indicating Retirement
  - Effective date of Retirement
  - Status Code: R1
  - Termination Date: date of Retirement.
- Verify the Employee/Retiree doesn't have any pending one time deductions. (This can be verified on the drill around record). If he/she does, assure that these will be processed on the final payment. The employee cannot be placed in the final terminated/retired status with an active one time deduction.
- Process an additional Personnel Action using:
  - XP52.1, Action Nbr. Separation,
  - Reason: Reason code indicating Retirement
  - Effective date of action must be at least the day after the Termination Date.
  - DO NOT process this Action until the employee has received final payment.
  - Status Code: R2,
  - Termination Date: (do not change the termination date).
- Notify Benefits that the Employee is/has retired so they can end the benefit deductions.
- These actions need to be processed as soon as possible, because the employee's record needs to be added to Company 7 in order for them to access their retiree benefits. In addition, if the Retiree applies for Retiree Accumulated Sick Leave (RASL) there is a time line for completing their request and issuing the 1st payment.

- If applicable, RASL will need to complete the Inter-Agency Transfer Request Form and send to ADOA/HRD/Employment to transfer the employee to the RASL Process Level.

## **Agency PR**

When an employee is retiring the Agency PR Initiator or Approver needs to complete the following steps.

- Verify the Employee/Retiree doesn't have any pending one time deductions (this can be verified on his/her drill around record). If so, assure that these will be processed on the final payment. The employee cannot be placed in the final terminated/retired status with an active one time deduction.
- Assure the Employee/Retiree is in R2 Status. If not, contact your Agency HR office and request the action be completed.
- Place a stop date on all deductions and taxes (with the exception of the benefits deductions) (date will be the day after final pay will be issued).
- Go to the PR14.1 input the Employee's EIN click Inquire, Click Next, place an end date on the deduction, Click Change, Click Next again and continue the process until a stop date has been placed on all deductions.
- If the Employee/Retiree has a Bus Card Deduction an amount will be required. In order to obtain the correct \$ amount the General Accounting Office (GAO) at 602-542-2098.
- If the Employee/Retiree has an XR30 Individual Standard Time Record, PR must put an end date on the Stipend.
- If an Employee/Retiree completes a RASL application, do not forward to the RASL Administrator until HR and PR have completed the above steps.

## **RASL Administrator**

- If a Retiree applies and qualifies for RASL complete the following steps.
- Check the ZH11 Social Security Look-Up screen to see if the Employee/Retiree has been placed in an R2 Status.

- If the Retiree has not been placed in a R2 Status, contact the agency HR office and request that the action be completed as required.
- Submit the Retiree Accumulated Sick Leave Program Election and Certification Form (GAL SL 50 - 05/06 version) and check list.

## **ADOA Central HR Inter-Agency Transfer Processor**

**\*\*Agency Transfer Form must be completed by RASL or the gaining agency and sent to ADOA Central HR Inter-Agency Transfer Processor**

When the Processor receives an Agency Transfer Request Form, complete the following steps:

- If the Employee/Retiree is in an R2 Status, process the transfer.
- You may receive a request from either RASL or another agency (if the employee decides to return to work).
- If the Retiree is still in R1 status, contact the last agency prior to retirement, to request that they complete the process.