

10. Retirement and FERP Processing

This chapter describes how to process faculty retirement and FERP transactions.

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10.1. What is Retirement and FERP Processing

Retirement transactions for faculty are very similar whether retirement is for temporary faculty, permanent/probationary or FERP (Faculty Early Retirement Program). The following instructions will guide you through retirement actions, including retirement and appointment transactions for FERP.

All FERP related transactions occur through the Employee Change module.

10.2. Requesting a full service retirement for faculty (including FERP)

1 Navigate to the E-TRAC home page: **SFO Self Service > E-TRAC > E-TRAC Transactions > Employee Change**.

2 Click the **Add a New Value** tab.

The Employee Change Request page appears.

3 In Employee Change Information box, enter the Effective Date of the retirement.

4 Click **Select Employee**. The Find an Employee page will appear.

5 Type the first name, last name, or both and click **Search**. The Search Results page will appear.

6 Click the link for the faculty member you will retire. The Employee Change Request page will appear with the Employee Change fields populated.

Now that you've verified that you've selected the proper employee, you must select the appropriate action-reason combination.

- 7 From the **Action** drop down menu, select **Retirement**.
- 8 From the **Reason** drop down menu, select **Service**.
- 9 Determine whether or not the faculty member is retiring with FERP status. If it is a FERP retirement, proceed to step 10. If it is a non-FERP retirement, skip to step 12.
- 10 If the faculty is retiring as a **FERP**, in the Proposed Values box, in the **Empl Class** drop down menu, select **FERP**.
- 11 If the employee is not a FERP, leave the **Empl Class** field blank, and in the **Appt End** field, enter the same date as the retirement effective date.
- 12 Click **Submit**.

10.3. **Appointing FERP Faculty for active teaching semester(s)**

For this process, the user should first run and/or obtain the FERP faculty report that indicates employee status, FERP teaching semester and time base. In addition, there are two different processes in appointing FERP faculty into their teaching semester:

- FERP Teaching Appointments: First teaching appointment following retirement (new FERPs)
- FERP Teaching Appointments: Subsequent Appointment (returning FERPs).

10.4. **FERP Teaching Appointments: First teaching appointment following retirement (new FERPs)**

Use the following process to appoint new FERP faculty for their first teaching semester following retirement. On the FERP faculty report, these faculty should be identified as having a employment status of **Retired**.

- 1 Navigate to the E-TRAC home page: **SFO Self Service > E-TRAC > E-TRAC Transactions > Employee Change**.
- 2 Click the **Add a New Value** tab.

The Employee Change Request page appears.
- 3 In Employee Change Information box, enter the Effective Date of the Appointment. (In most cases, this date would be the first day of the semester for which the FERP employee is scheduled to teach.)
- 4 Click **Select Employee**. The Find an Employee page will appear.
- 5 Type the first name, last name, or both and click **Search**. The Search Results page will appear.

- 6 Click the link for the faculty member you will appoint. The EmplID will display in the **EmplID** field.
- 7 Verify that you've selected the proper employee. The Status indicator should be **Retired**.
- 8 From the **Action** drop down menu, select **Rehire**
- 9 From the **Reason** drop down menu, select **Rehire**.
- 10 Use the data in the Reference Information and Current Values boxes to determine whether or not the faculty member is retaining the same position number.
- 11 In the Proposed Values box, enter the position number, if applicable.
- 12 In the **FTE** or **WTU** fields, enter the appropriate time base or WTU.
- 13 In the **Appt End** field, enter the end date of the FERP teaching assignment. In most cases, this date would be the last day of the semester for which the FERP employee is scheduled to teach.
- 14 Review the Salary Grade and Comp Rate in the Current Values boxes. If these are correct, leave these fields blank; otherwise, adjust the Salary Grade and Comp Rate, if necessary
- 15 Click **Save Work**. If you are ready to submit your transaction click **OK** on the confirmation page, then click **Submit** to submit your transaction.

10.5. FERP Teaching Appointments: Subsequent Appointment (returning FERPs)

Use the following process to appoint returning FERP faculty for their regularly scheduled teaching period. On the FERP faculty report, the faculty should be identified as having an employment status as **Work Break**.

- 1 Navigate to the E-TRAC home page: **SFO Self Service > E-TRAC > E-TRAC Transactions > Employee Change**.

- 2 Click the **Add a New Value** tab.

The Employee Change Request page appears.

- 3 In Employee Change Information box, enter the Effective Date of the Appointment. In most cases, this date would be the first day of the semester for which the FERP employee is scheduled to teach.
- 4 Click **Select Employee**. The Find an Employee page will appear.

- 5 Type the first name, last name, or both and click **Search**. The Search Results page will appear.
- 6 Click the link for the faculty member you will appoint. The EmplID will display in the **EmplID** field.
- 7 Verify that you've selected the proper employee. The status indicator should be **Work Break**.
- 8 From the **Action** drop down menu, select **Return From Wrk Break**
- 9 From the **Reason** drop down menu, select **Return Off Work Temp or FERP**.
- 10 In the **FTE** or **WTU** fields, enter the appropriate time base or WTU. If it is not changing from what is indicated in the Current Values box, leave blank.
- 11 In the **Appt End** field, enter the end date of the FERP teaching assignment. In most cases, this date would be the last day of the semester for which the FERP employee is scheduled to teach.
- 12 Review the Comp Rate in the Current Values boxes. If it is not changing, leave this field blank otherwise, adjust the Comp Rate, if necessary
- 13 Click **Save Work**. If you are ready to submit your transaction click **OK** on the confirmation page, then click **Submit** to submit your transaction.