



Processing a Phased Retirement Action (EHRA Faculty) in the HR System

What you need before proceeding with action: The signed retirement letter from employee and/or benefits. All leave earning EHRA faculty will be paid out for eligible annual and bonus leave upon entry into the Phased Retirement program. The Phased Retirement Program (PRP) is intended to facilitate retirement decisions by allowing eligible faculty the option to continue participation in academic life and mentoring of students while preparing for the future. PRP was first introduced in 1988 to allow eligible tenured faculty to receive retirement benefits and work part-time for NC State on a three-year academic contract. Tenured faculty who qualify will receive a letter from the Provost extending an opportunity to participate in the Phased Retirement Program. Additional resources for departments can be found on the [Benefits website](#).

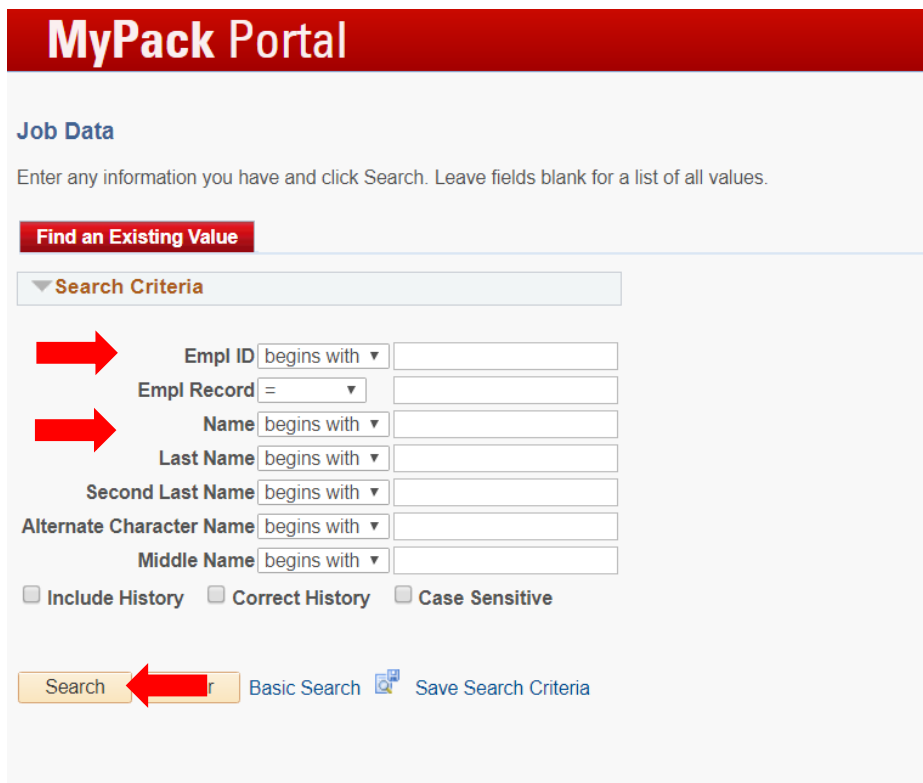
Click on the NavBar  in the top right hand corner of the MyPack Home screen.

Click on the NavBar Navigator icon  .

Then follow this navigation through the menu options.

Human Resources Systems > Workforce Administration > Job Information > Job Data

Once the **Job Data** panel appears then type in the employee ID number (Empl ID) or name then click Search.



The screenshot shows the MyPack Portal Job Data search interface. At the top is a red header with 'MyPack Portal' in white. Below it is the 'Job Data' section with a sub-header 'Job Data' and a prompt: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a red button labeled 'Find an Existing Value'. Below that is a 'Search Criteria' section with several input fields: 'Empl ID' (with a dropdown 'begins with'), 'Empl Record' (with a dropdown '='), 'Name' (with a dropdown 'begins with'), 'Last Name' (with a dropdown 'begins with'), 'Second Last Name' (with a dropdown 'begins with'), 'Alternate Character Name' (with a dropdown 'begins with'), and 'Middle Name' (with a dropdown 'begins with'). There are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom is a 'Search' button, a 'Basic Search' link, and a 'Save Search Criteria' link. Red arrows point to the 'Empl ID' field, the 'Name' field, and the 'Search' button.

Note: The Empl ID number is 9 digits in length. To search by NAME type in the full first and last name then click Search.

Once the employee's information has been located in Job Data, you can now proceed with processing the action.

Work Location | Job Information | Payroll | Salary Plan | Compensation | Appointment Info | Rank/Tenure Info

Harold Potter
Employee

Empl ID 00000934
Empl Record 0

Work Location ?

*Effective Date 07/01/2018

Effective Sequence 0

HR Status Active

Payroll Status Active

*Action Job Change

*Reason ? Start Phased Retirement

*Job Indicator Primary Job

Position Number 00012345 Professor

Override Position Data

Position Entry Date 07/01/2009

Position Management Record

Regulatory Region USA United States

Company NCS NC State University

Business Unit NCSU1 NC State Univ Business Unit

Department 140401 Electrical & Computer Engr.

Department Entry Date 07/01/2009

Location 024 Elec & Comp Engineering

Establishment ID 001 NC State University

Date Created 01/25/2018

Last Start Date 07/01/2009

Expected Job End Date

End Job Automatically

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Distribution Set Up

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

Step 1

Step 2

Step 3

Step 4

Step 5

Note: To review the entire list of Action/Reasons with definitions click on the question mark "?"

Step 1: click on the plus sign in the top right hand corner to add a row to Job Data

Step 2: the **Effective Date** will default to the current date, update this with the confirmed effective date (for phased retirement this will always be 7/1)

Step 3: in the **Action** field, select Job Change from the drop down box

Step 4: in the **Reason** field, select Start Phased Retirement from the drop down box

Step 5: click the **Override Position Data** button. This will open all fields on the job record and allow you to make necessary adjustments to the employee's FTE on the job information panel

Work Location | **Job Information** | Payroll | Salary Plan | Compensation | Appointment Info | Rank/Tenure Info

Harold Potter
Employee
Empl ID 00000934
Empl Record 0

Job Information Find First 1 of 13 Last Go To Row

Effective Date 07/01/2018
Effective Sequence 0
HR Status Active
Payroll Status Active
Action Job Change
Reason Start Phased Retirement
Job Indicator Primary Job
Future

*Job Code F011 Professor
Entry Date 02/01/2013 JCAT
Supervisor Level
Supervisor ID
Reports To 00000567
*Empl Class EHRA Faculty
*Regular Shift Not Applicable

Standard Hours
Standard Hours 20.00 Weekly
FTE 0.500000
 Adds to FTE Actual Count? Encumbrance Override

Contract Number
Contract Type APT Next Contract Number

USA

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Distribution Set Up

Save | Return to Search | Notify | Refresh | Update/Display | Include History

Step 6

Step 7

Step 6: click on the Job Information tab

Step 7: reduce the Standard Hours to 20 per/wk. The Full-Time Equivalent (FTE) will automatically adjust to .50

MyPack Portal

Work Location | Job Information | Payroll | Salary Plan | **Compensation** | Appointment Info | Rank/Tenure Info

Harold Potter
Employee
Empl ID 00000934
Empl Record 0

Compensation

Effective Date 07/01/2018
Effective Sequence 0
HR Status Active
Payroll Status Active

Action Job Change
Reason Start Phased Retirement
Job Indicator Primary Job

Compensation Rate 50,000.00 USD *Frequency Annual

Pay Rates

Default Pay Components

Pay Components

*Rate Code	Help Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 BASE		0	50,000.000000	USD	A		

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Distribution Set Up

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

Step 8: click on the Compensation tab

Step 9: reduce the compensation by half of the original salary to be commensurate with the reduction of FTE to .50

Step 10: click on **Calculate Compensation**

Step 11: verify total Comp Rate amount match the Compensation Rate

Work Location | Job Information | Payroll | Salary Plan | Compensation | **Appointment Info** | Rank/Tenure Info

Harold Potter
Employee

Empl ID 00000934
Empl Record 0

NCSU Additional Data Find | View All First 1 of 3 Last

Effective Date 07/01/2018
Effective Sequence 0
Appointment Basis 9 Month
GRD Appointment End Date
Posting Number
Time Keeping Location

Time Limited
 SPA Probationary
 Encumber to Appt End

Contract Data

Appointment Begin Date 07/01/2018
Appointment End Date 06/20/2021
Comments Begin Phased Retirement 07/01/2018 - 6/30/2021
207 characters remaining

? Anticipated Appt Length 3-4 Years

Vacation/Sick Leave Balances

Vacation Leave Balance Hours
Minutes
Sick Leave Hours Balance
Minutes

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Distribution Set Up

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

Step 12: click on the Appointment Info tab

Step 13: update the Appointment Begin and End date with the length/duration of the phased retirement (7/1/XX – 6/30/XX)

Step 14: update the Anticipated Appointment Length to 3-4 years

Step 15: update the Comments box with the appropriate phased retirement information

MyPack Portal

Work Location | Job Information | Payroll | Salary Plan | Compensation | Appointment Info | **Rank/Tenure Info**

Harold Potter
Employee

Empl ID 00000934
Empl Record 0

Step 16

Tenure Data Find | View All First 1 of 13 Last

Effective Date 07/01/2018 Effective Sequence 0

Tenure Status Faculty, Retired **Step 17**

Associate Status Dept Primary

Associate Status Dept Second

Tenure Type

Acad. Home Dept. 140401 Electrical & Computer Engr.

Academic Rank 011 Professor

Date of Current Rank 08/16/2009

Orig Tenure Track Date 08/16/2009

Mandatory Review Date

Tenure Granted Date 08/16/2009

Change Reason Retirement **Step 18**

Tenure Clock Comments

254 characters remaining

Named/Distinguished Professorship

254 characters remaining

Faculty Senate

Vote Assignment ENG

Vote Assignment Date

Step 19

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Distribution Set Up

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

Step 16: click on the Rank/Tenure tab

Step 17: update the Tenure status to Faculty/Retired

Step 18: update the Change Reason to Retirement

Step 19: Save the action

Once saved, the action is complete.

NOTES:

Occasionally an EHRA employee on phased retirement will decide to retire before completing the three year program. If that occurs a separation/retirement action will need to be submitted following the steps in the Job Data/Separation Action guide. Please contact the central office Benefit Leave consultant and notify them of the early retirement before entering the job action.