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](https://hr.unc.edu/

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.

![MyPack Portal](image)

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.
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

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