

PA40 Phased Retirement



Process: Use transaction PA40 to process a Change of Status Action for an employee who has opted for Phased Retirement.

****Prior to processing this transaction, all required approvals must be obtained and the necessary change(s) to the position’s master data made** (HR Compensation maintains regular staff positions; departmental HR personnel maintain student, faculty and some temporary positions). In particular, the Personnel Subarea value should be changed to Phased Retiree (0014).

Role: Authorized Users

Frequency: When Needed

Beginning

Enter the transaction code

PA40

Personnel Actions

Person ID

Enter the employee’s Person ID or use the **Possible Entries** icon  to search

Start

Enter the first day in which the change in status is to take effect

Click on the **Select** button to the left of the

Change in Status Action Type



Click on the **Execute** icon



Copy Actions (0000)

Click on the **Possible Entries** icon in the **Reason for Action** field, then double-click on **07 Phased Retirement**

Ac...	Name of reason for acti...
01	Increase FTE
02	Reduce FTE
03	Position Update
04	BW to MO
05	MO to BW
06	Retirement
07	Phased Retirement

Delete the **Position** number and press **Enter** to completely clear out that value



Read the delimit message and press **Enter** to accept – For example:



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<p>Re-enter the exact same Position number and press Enter</p>	
<p>Click on the Save icon</p>	
<p>Create Organizational Assignment (0001)</p>	
<p>Press Enter – The system populates the fields in this infotype. Ensure that the (Personnel) Subarea field is 0014 (Phased Retiree)!</p>	
<p>Read the delimit message and press Enter to accept – For example: </p>	
<p>Click on the Save icon</p>	
<p>Create Planned Working Time (0007)</p>	
<p>Change the Employment percent to the appropriate value – Generally, this is 50%! </p>	
<p>Press Enter</p>	
<p>Read the system messages and press Enter to accept – For example: </p>	
<p></p>	
<p>Click on the Save icon</p>	
<p>Create Basic Pay (0008)</p>	
<p>The update on this infotype depends on whether the employee is paid a salary or an hourly wage.</p> <ul style="list-style-type: none"> • If the employee is paid a salary, you must change the salary to reflect the reduction in the FTE percentage. For example, prior to the change to Phased Retirement the employee had a monthly salary of \$5,000. The Employment percent was changed to 50.00. Thus, the monthly salary for Phased Retirement should be changed to \$2,500. • If the employee is paid an hourly rate, enter the same hourly rate. The adjustment in pay will occur with Time Entry, when fewer hours are entered. 	

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Enter the appropriate pay rate for the employee in the **Amount** field

This is an hourly example:

Wa...	Wage Type Long Text	O. Amount	Curr...	I.
1005	Hourly Rate	17.00	JSD	JSD

Press **Enter** to populate the **Annual Salary** field

Read the delimit message and press **Enter** to accept – For example:

 Record valid from 11/27/2005 to 12/31/9999 delimited at end

Click on the **Save** icon



Personnel Actions

The system should now return you to the initial **Personnel Actions** window; the Action is completed. Now use transaction **ZHR_PAR** to generate and print the required Payroll Authorization Record (PAR). Refer to the **ZHR_PAR Generating a PAR** QRC on the IRIS myHelp web site for the complete instructions:

http://myhelp.uky.edu/rwd/HTML/HR/QRC_ZHR_PAR_Generating_a_PAR.pdf.