

Employment Action Retirement

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Overview

This document reviews the steps on how to submit and approve a Retirement Employment Action through the OPEN tab on the SAP Portal. The objective is for the user to access the Employee Request tile, navigate the Dashboard, initiate or approve an Employment Action and view Reports.

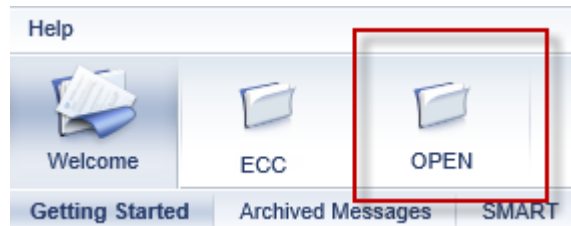
The Employment Action is an electronic action designed to be submitted by a manager or designee. Based on structural authorization the approver(s) reject or approve the action. After the approval process is completed the action is entered into SAP. The Employment Action follows an automated workflow to transport the action to the departmental or enterprise approvers

Questions about Employment Actions can be answered on the HR Shared Services website <https://ssc.jhmi.edu> or by calling HRSS directly at 443-997-5828.

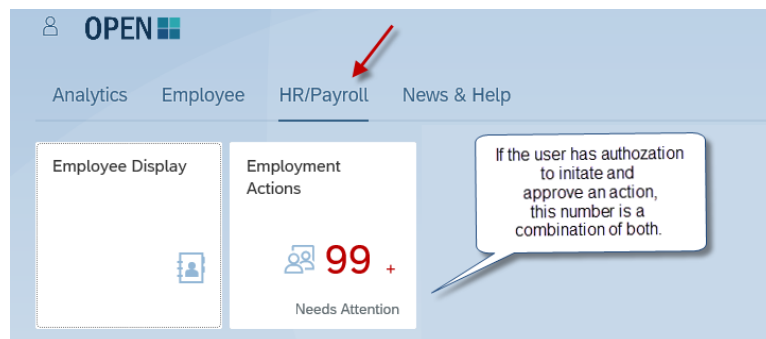
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Accessing the Employment Action

Log into SAP and click on the “Open” icon

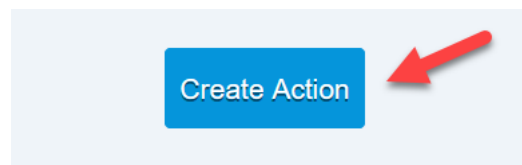


Click on the HR/Payroll Tab, then the Employment Actions tile to open the Dashboard



Submitting an Employee Action

4. To start an action, click the “New Action” icon



5. In the “Employee” field type the name or pernr of the employee. A drop down appears with results. To select the employee, click on their name.



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Employee Changes



Employee
joa



NAME	PERNR	POSITION	DEPARTMENT
Joanne [REDACTED]	187737	NUREDU-CS	[REDACTED]
Joanne [REDACTED]	187823	TCHCRTMED-CS	[REDACTED]
Joaquin [REDACTED]	187883	REP-ADM-SUP	[REDACTED]
Joachim [REDACTED]	187938	PHYS-CS	[REDACTED]
Joanna [REDACTED]	187986	ADMASSTS-ADM	[REDACTED]
Joanne [REDACTED]	188206	COORADSU-ADM	[REDACTED]
Joanna [REDACTED]	188317	NURPC-CS	[REDACTED]
Joan [REDACTED]	188346	NUR-CS	[REDACTED]



6. An information box at the top of the screen provides information about the employee

Name	PERNR	Position	Org Unit	Pay	Status	Recent Actions
 Tester, Joan	99999	ASSOCIATE PROFESSOR	SOM Pat Molecular Diagnostics Lab	Semi-Monthly, Exempt	Active	0 


7. Use the drop down in the “Action” field to select Retirement

Name	PERNR	Position	Org Unit	Pay	Status	Recent Actions
 Tester, Joan	99999	ASSOCIATE PROFESSOR	SOM Pat Molecular Diagnostics Lab	Semi-Monthly, Exempt	Active	0 


Action  Effective Date 

Retirement  10/1/2021 

Why



- Retirement
- RIF Retirement
- RIF Retirement COVID19



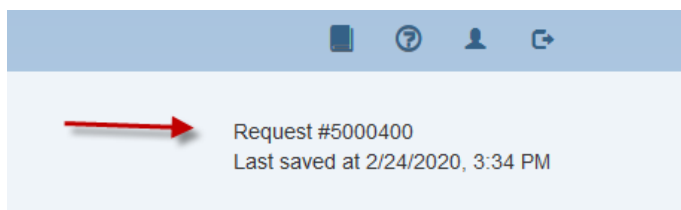
Submit Save as Draft and Exit Delete

8. Enter “Effective Date” by using the calendar icon
- For the Retirement Action: The effective date is not last day the employee worked but the actual date the employee is no longer working**
 - Example: ***The employees last day worked was 5/15/2021. The effective date to enter is 5/16/2021.*** The 5/16/2021 is true date when the employee is no longer working
9. Use the drop down in the “Why” field to select the reason and click on the “Create” button to

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move forward to the next screen

10. The next screen produces the request number. Continue following the steps below until you get a confirmation the action has been submitted.
 - a. Located at the top right corner of the screen for reference



11. The "Edit" icon can be used to update the "Action", "Effective Date" and "Why" fields.

 A screenshot of a form for editing a retirement action. It features three main sections: "Available Action" with a dropdown menu set to "Retirement", "Effective Date" with a date field set to "10/1/2021" and a calendar icon, and "Why" with a dropdown menu set to "Retirement". At the bottom left, there is a blue "Edit" button with a pencil icon. A red arrow points from the right towards the "Edit" button.

12. Message boxes display reminders or items that may need additional attention. These messages can be general or specific to the employee and entity.
 - a. For University Only - messages contain what code to use for closing out E210 and details regarding sick and leave payout. Sick and Leave plan payouts are not entered in the retirement action.

 A screenshot of a message box with a light orange background. It contains four messages, each with a warning icon (yellow triangle with an exclamation mark) on the left and a "Done" link on the right. The messages are:

- "Remind the employee to update the following information:" followed by two bullet points: "* Home address through Employee Self Service or email HR Shared Services for international Addresses." and "* Their Personal Email Address by going to my.JH and then my.Profile. Terminated/Retired employees will need their personal email to access their W-2 or receive communication through Johns Hopkins."
- "Employee will receive eligible leave plan payout(s) up to two pay periods after the Action has been completed. Payouts are dependent on accurate and timely submission of timesheets."
- "Report E210 closeout time using code RET for accurate vacation and sick payout"
- "For information regarding Retirement Policy: [Retirement Policy](#)
To review Employment History: [Employment History](#)"

 A red box labeled "University Only" is positioned to the right of the second and third messages, with two red arrows pointing from the box to the second and third messages.

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13. Summary box displays employee's hire date, EE group and age/birthday to check retirement eligibility. Always confirm the employee is eligible for retirement by reviewing the employee in Employment History prior to starting the retirement action.

Summary [?](#)

Hire Date	04-01-2005
Employee Group	Full Time
Age / Birth Date	62 years / 08-05-1959

14. Reusing Position

- Selecting "No" indicates the position will automatically be removed from available positions to use for future hires using effective date of the retirement
- Selecting "Yes" means this position is going to be reused in the near future
- Positions that are direct reports cannot be ended

Reusing Position

Yes
 No
 [?](#)

15. Two documents can be attached in the format of jpg/jpeg, png, msg, doc/docx, or pdf.

16. Enter comments for your approver in the Workflow tab.

Workflow		Change History		
Role	Name	Date	Comments	Status
Initiator	Jane Doe		<input type="text"/>	

17. Click the blue "Submit" button to forward the action to the next stage of approval(s)

Submit

Save as Draft and Exit

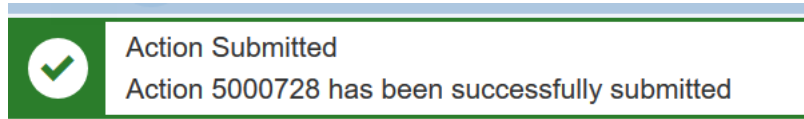
Delete

18. Once the action has been submitted a pop up will appear at the top of the screen.

- Green Message "Action 12345678" has been successfully submitted", means the action is moving to the next stage in the process for approvals
- Green Message "Action 12345678" has been successfully posted to SAP", the action was successfully submitted by the last approver and has been entered into SAP

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- c. Orange Warning “Action 123345678” will automatically be completed after payroll has been finalized”, the action has been successfully submitted by the last approver and will be entered into SAP once payroll has finalized



Approving an Employment Action

Once an Employment Action has been successfully submitted it flows through the appropriate approval(s) based on structural authorization. Approvers can approve, reject, edit or delete an action. Depending on established workflow for your area, there may be one or two approvers required for your action. Actions are loaded directly into SAP after an action has been successfully approved by the required approvals

1. The “Approvals” tab presents action(s) that have been submitted and are awaiting approval. The circle next to the tab indicates the number of actions that need attention. If the circle is grey with a “0” it means no action(s) are pending. Users who have authorization to approve and initiate have both the “Employee Changes” and “Approvals” tab.
2. Click on a row to select and open an action

The screenshot shows the SAP interface for the 'Approvals' tab. At the top, the 'Approvals' tab is selected, with a red circle containing the number '2' and a red arrow pointing to it. Below the tab are search filters for Status (set to 'All'), Change Type (set to 'All'), Action ID (with a placeholder 'Enter Action ID for Search'), and Name/Pernr (with a placeholder 'Enter Name or Pernr'). A table below displays a list of actions with columns: Name, Action #, Position, Change Type, Submitted, Effective, Status, and Current Owner. Two rows are visible. The first row is for 'Tester, Joan (99999)' with Action # 5002815, Position 'Sr. Development Retirement Coordinator', Submitted '9/8/2021', Effective '10/1/2021', Status 'Ready', and Current Owner 'Approver'. The second row is for a redacted name with Action # 5002781, Position 'Curriculum Writer', Submitted '8/17/2021', Effective '5/1/2021', Status 'Ready', and Current Owner 'Approver'. A red arrow points to the first row of the table.

Name	Action #	Position	Change Type	Submitted	Effective	Status	Current Owner
Tester, Joan (99999)	5002815	Sr. Development Retirement Coordinator		9/8/2021	10/1/2021	Ready	Approver
[Redacted]	5002781	Curriculum Writer	Retirement	8/17/2021	5/1/2021	Ready	Approver

3. An information box at the top of the screen provides the below information about the employee
 - a. Name, PERNR, Position and Org Unit
 - b. Pay: The pay cycle and exemption status
 - c. Status: Displays the employee’s current status of Active or Withdrawn in SAP

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- d. Recent Actions: Displays the user who currently working the action. It also displays any action(s) for this employee that have already submitted or completed

JOAN TESTER						
Type	Action #	Submitted Date	Effective Date	Status	Current Owner	
Retirement	5002815	9/8/2021	10/1/2021	In Progress	Approver	

Close

4. The “Action”, “Effective Date” and “Why” can be edited by using clicking on the blue “Edit” button.



- a. **For the Retirement: The effective date is not last day the employee worked but the actual date the employee is no longer working**

Available Action ? Effective Date ?

Retirement ▼ 10/1/2021 📅

Why

Retirement ▼

 Edit 

5. Message boxes display reminders or items that may need additional attention. Clicking on the blue “Done” icon will remove the warning

6. Reusing Position

- Selecting “No” indicates the position will automatically end using effective date of the retirement and will no longer be available to use going forward
- Selecting “Yes” means this position is going to be reused in the near future
- Positions that are direct reports cannot be ended
- The highlighted blue box is what initiator selected. To change the selection, click on the adjacent button. The new selection will be highlighted in blue

Reusing Position

Yes No ?

7. View attachments from the initiator by hovering over the document. A pop up will appear with instructions on how to open the file

8. The Workflow indicates the status and comments entered by the initiator, approvers or HR

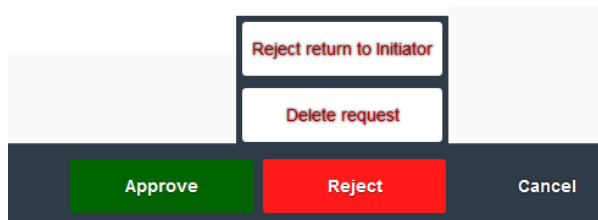
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Shared Services

- a. Comments can be entered in the open field box
9. Change History is a record of changes made throughout the workflow process.
 - a. There will be no change history recorded until the initiator hits the submit button

Workflow		Change History	
Role	Name	Date	Change
Initiator	Jane Doe	3/3/2020	Document 1.docx uploaded to request
Initiator	Jane Doe	3/3/2020	Document 2.docx uploaded to request

10. Once the form is ready for approval click on the green “Approve” button
 - a. The action will forward to the next approval stage or be entered in SAP
11. The red “Reject” button
 - a. Clicking on “Reject return to Initiator” returns the action back to initiator
 - i. Enterprise approvers have the option to reject back to the initiator or approver
 - b. Clicking on “Delete Request” will delete the action
 - i. The initiator will see the status deleted status on their dashboard. After an action is deleted no other steps can be taken. The initiator must submit a new action for the employee
12. Clicking the “Cancel” button returns the user to the Dashboard



13. Once the action is approved a pop up box appears at the top of the screen with information regarding the action