

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.

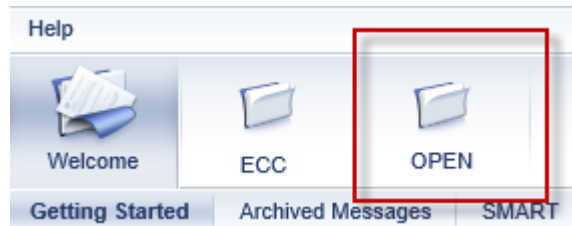
The Employment Action is an electronic action designed to be submitted by a manager or designee. Based on structural authorization the approver(s) reject or approve the action. After the approval process is completed the action is entered into SAP. The Employment Action follows an automated workflow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

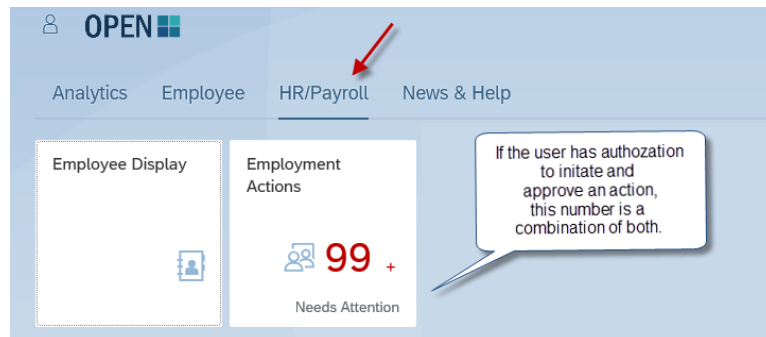
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Accessing the Employment Action

Log into SAP and click on the “Open” icon

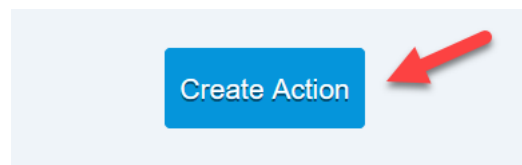


Click on the HR/Payroll Tab, then the Employment Actions tile to open the Dashboard



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]	18077307	NUREDUCS	[REDACTED]
Joanne [REDACTED]	18078203	TCHCRTMED-CS	[REDACTED]
Joaquin [REDACTED]	18078803	REP-ADM-SUP	[REDACTED]
Joachim [REDACTED]	18079303	PHYS-CS	[REDACTED]
Joanna [REDACTED]	18079906	ADMASSTS-ADM	[REDACTED]
Joanne [REDACTED]	18082106	COORADSU-ADM	[REDACTED]
Joanna [REDACTED]	18083307	NURPC-CS	[REDACTED]
Joan [REDACTED]	18083906	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

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

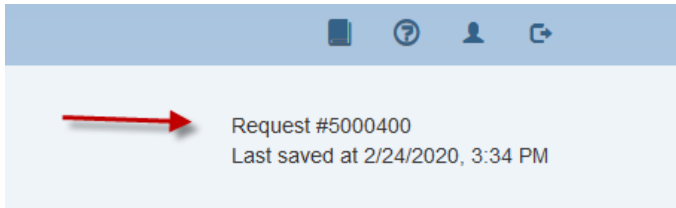
1.Example: ***The employees last day worked was 5/15/2021. The effective date to enter is 5/16/2021.*** The 5/16/2021 is true date when the employee is no longer working

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 the "Retirement" action. It includes fields for "Available Action" (set to "Retirement"), "Effective Date" (set to "10/1/2021"), and "Why" (set to "Retirement"). Each field has a question mark icon. Below the fields is a blue "Edit" icon with a pencil, which is highlighted by a red arrow.

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 list of message boxes. The first box says "Remind the employee to update the following information:" with a "Done" button. The second box says "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." The third box says "Report E210 closeout time using code RET for accurate vacation and sick payout" with a "Done" button. The fourth box says "For information regarding Retirement Policy: Retirement Policy To review Employment History: Employment History". A red box labeled "University Only" with two red arrows points to the second and third message boxes.

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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

?

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			

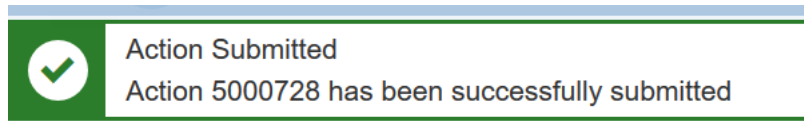
17. Click the blue "Submit" button to forward the action to the next stage of approval(s)

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 'Approvals' tab interface. 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 four filter boxes: 'Status' (set to 'All'), 'Change Type' (set to 'All'), 'Action ID' (with placeholder text 'Enter Action ID for Search'), and 'Name/Pernr' (with placeholder text 'Enter Name or Pernr'). Below these filters is a table with the following columns: Name, Action #, Position, Change Type, Submitted, Effective, Status, and Current Owner. The table contains two rows of data. 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

Recent Actions

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

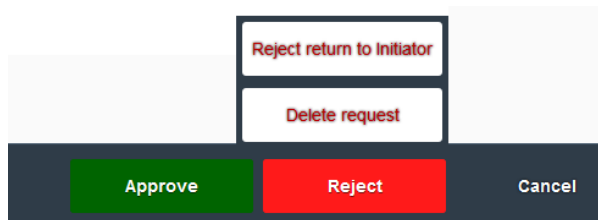
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Shared Services

- 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