quick reference guide

Processing retirements

Introduction

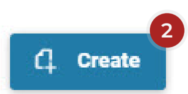
After the retiring Executive Branch employee submits their last timesheet and the agency retirement specialist has completed the current HB 213 EE Est Workhst (for Tier 1) or HB HB 213 EE Est Workhst T2 (for Tier 2), the ERIC team will process the retirement in Vantage HR as follows.

Creating a Retirement Worksheet

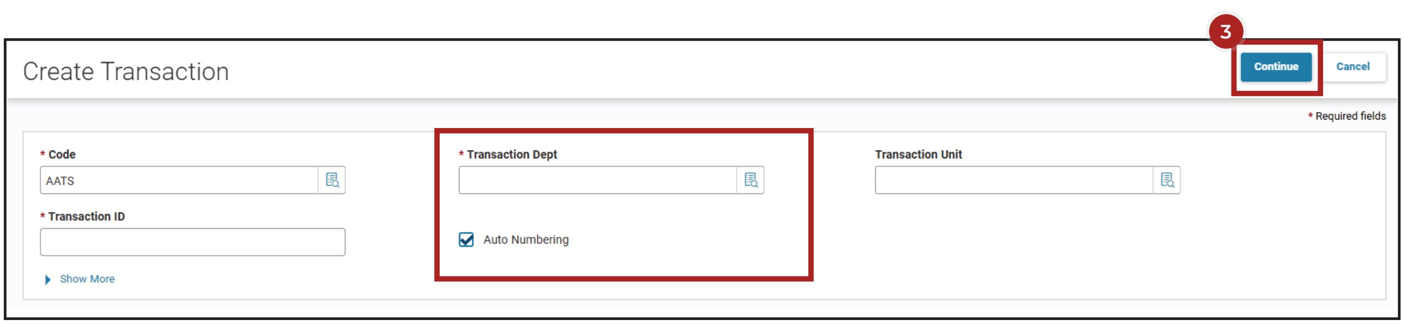
Note: The ERIC team does not create retirement worksheets for Utah Department of Transportation employees. UDOT's retirement specialist creates retirement worksheets for UDOT's employees.

1. From the **Global Navigation** search bar type AATS, and select **AATS Additional Employee Attributes- Small**.

2. Click **Create** in the top right corner of the screen.



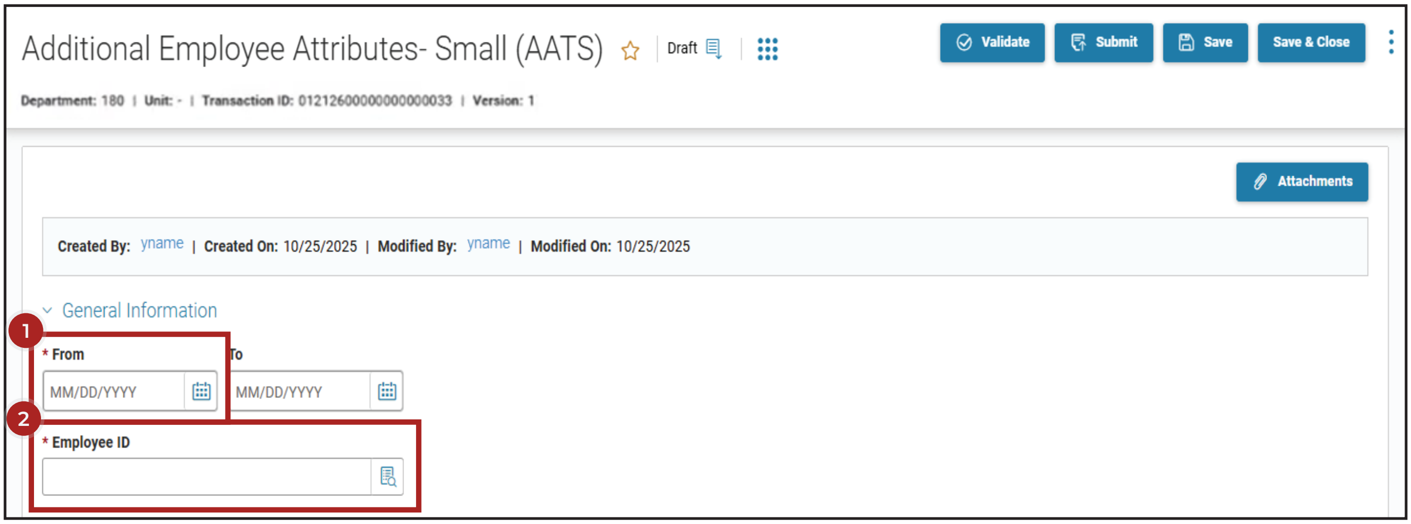
3. Enter the retiree's 3-digit department number in **Transaction Dept**, check the **Auto Numbering** box and click **Continue**.



The Additional Employee Attributes - Small **(AATS)** page will load.

1. Under the **General Information** section, enter the retiree's retirement date in **From**.

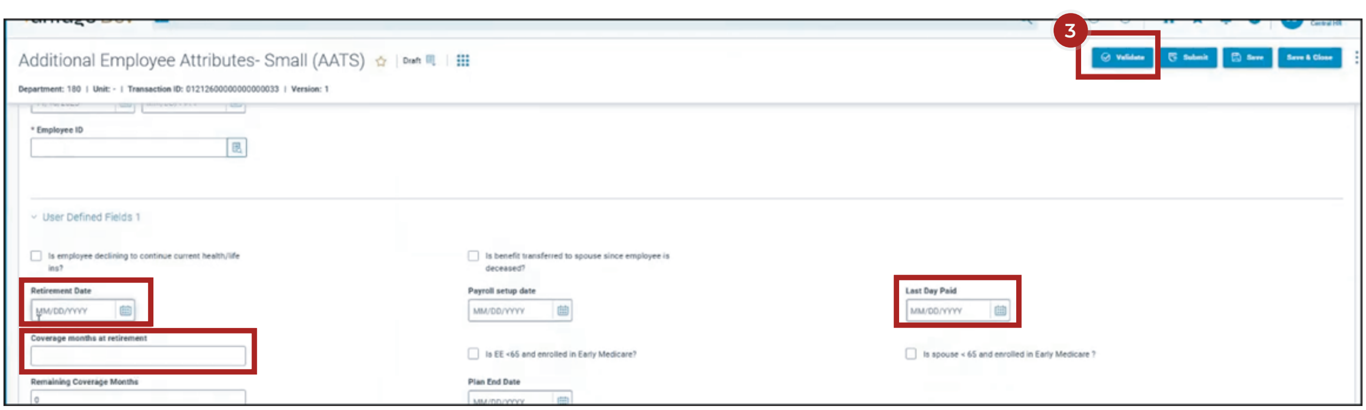
2. Enter the retiree's EIN in **Employee ID**.



3. Enter the retiree's retirement date in **Retirement Date**, last day working in **Last Day Paid** and **Coverage months at retirement**, and click **Validate**. The **Employee's Birth Date**, and **Employee turns 65 on** fields will automatically populate

Note: The coverage months at retirement can be found in cell K11 of the completed *HB 213 EE Est Worksht*

Estimated Sick Leave Benefit Summary	Estimated Amounts
Employer 401(k) Contribution	#DIV/0!
Employer Health Reimbursement Account Contribution	#DIV/0!
Additional Months Paid-up Health & or Medicare Supplement	#DIV/0!



4. If the retiree is under the age of 65 and enrolled in Medicare check the **Is EE < 65 and enrolled in Early Medicare?** box. If not, leave blank.

5. If the retiree's spouse is under the age of 65 and enrolled in Medicare check the **Is spouse < 65 and enrolled in Early Medicare?** box. If not, leave blank.

6. The **Plan End Date** is determined based on the age of the employee and their hire date:

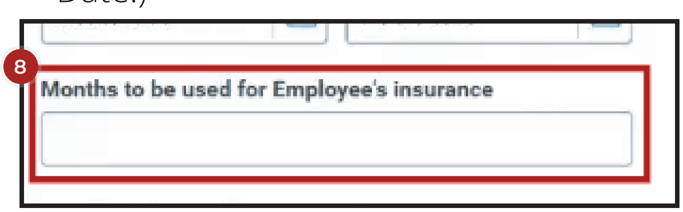
For the table below:

- Paid time includes work, leave, or FMLA
- The pay period for this example is 11/08/2025 - 11/21/2025
- The pay day for this example is 12/05/2025

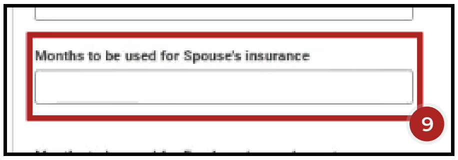
Age of the retiree	Younger than 65	65 or older
Hired before 02/15/2003	Insurance plan end date is the **final pay day** for paid time. *Example: Last day worked 11/21/2025 insurance ends on 12/05/2025.*	Insurance plan end date is the **last business day of the month** that ncludes the **final pay day** for paid time. *Example: Last day worked 11/21/2025 insurance ends on Wednesday, 12/31/2025.*
Hired on or after 02/15/2003	Insurance plan end date is the **last day of the pay period** for paid time. *Example: Last day worked 11/21/2025 insurance ends on 11/21/2025.*	Insurance plan end date is the **last business day of the month** that includes the **last day of the pay period** for paid time. *Example: Last day worked 11/21/2025 insurance ends on Friday, 11/28/2025.*

7. If the retiree is married, enter the date the retiree's spouse was born in **Spouse Birth Date**. Click **Validate**. The **Spouse's 65th Birth Date** field will automatically populate.

8. If the retiree is younger than 65, use Calculate Months - Hours for Retirement, to determine, in months, how long it will be until the retiree is 65. Enter that number of months in **Months to be used for Employee's insurance** or the number of months entered in **Coverage months at retirement**, whichever is less. Click **Validate**. The **Begin Date Emp Medical** and **End Date Emp Medical** fields will automatically populate. (Notice that the **Begin Date Emp Medical** is the day after the Plan End Date.)



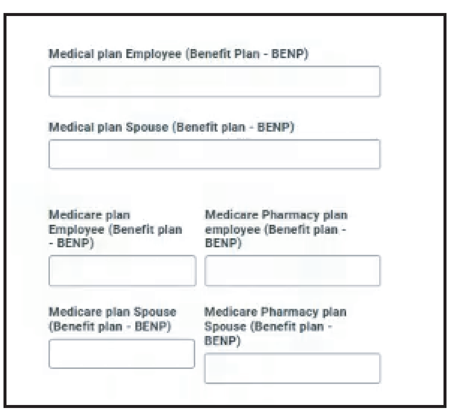
9. If the retiree is married, and the spouse turns 65 after the retiree, calculate the number of months between the **Spouse's 65th Birth Date** and the **End Date Emp Medical**. Enter that number in **Months to be used for Spouse's insurance** or the difference between the **Months to be used for Employee's insurance** and the **Coverage months at retirement**, whichever is less. Click **Validate**. The **Begin Date Spouse Medical** and **End Date Spouse Medical** fields will automatically populate. (Notice that the **Begin Date Spouse Medical** is the day after the **End Date Emp Medical**.)

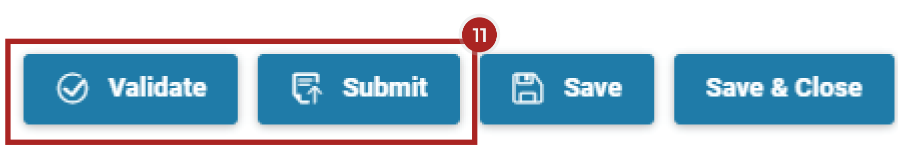


10. If the retiree is younger than 65 and the sum of the **Months to be used for Employee's insurance** and the **Months to be used for Spouse's insurance** does not exceed the **Coverage months at retirement**, consult with the retiree to determine entries for the **Months to be used for Employee's supplement** and **Months to be used for Spouse's supplement** fields. Click **Validate**. The **Begin Date Emp Medicare**, **End Date Employee Medicare**, **Begin Date Spouse Medicare**, and **End Date Spouse Medicare** fields will automatically populate.

Note: Retirees often like to allocate those months so that their insurance, and their spouse's insurance end at the same time.

11. Use the Retiree_plans_Crosswalk_AATS spreadsheet to determine and enter the appropriate **Medical plan Employee (Benefit Plan - BENP)**, **Medical plan Spouse (Benefit plan - BENP)**, **Medicare plan Employee (Benefit plan - BENP)**, **Medicare plan Spouse (Benefit plan - BENP)**, **(Medicare Pharmacy plan employee (Benefit plan - BENP)**, and **Medicare Pharmacy plan Spouse (Benefit plan - BENP)** codes. Click **Validate**, then **Submit**.

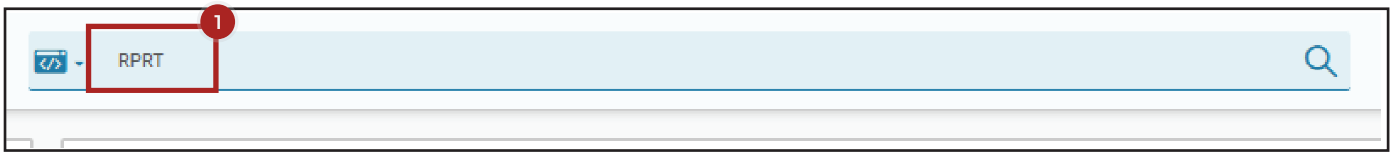




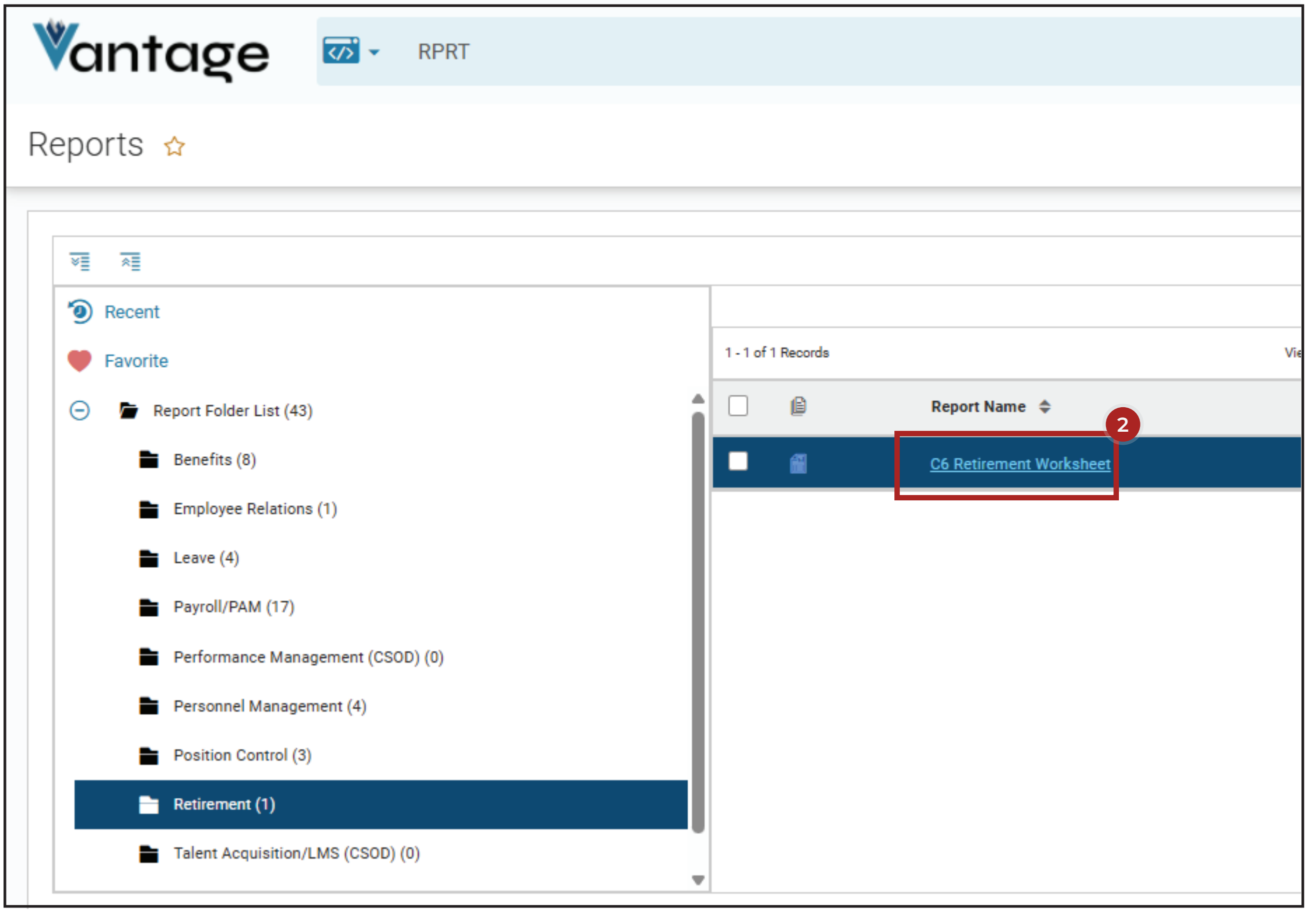
Generating and Printing the Retirement Worksheet Report

After the ERIC team has created the retirement worksheet, they will generate and print the report.

1. From the **Global Navigation** search bar type RPRT, and select **RPRTLST Report Listing**.

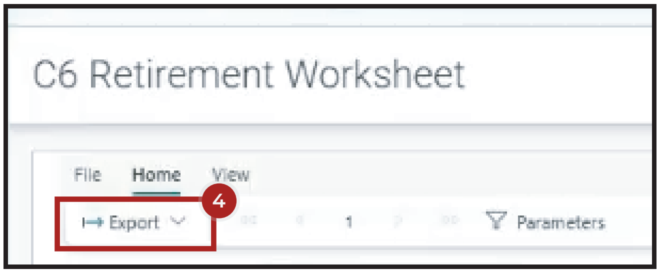


2. In the Recent tab select the **Retirement** folder and click **C6 Retirement Worksheet**.



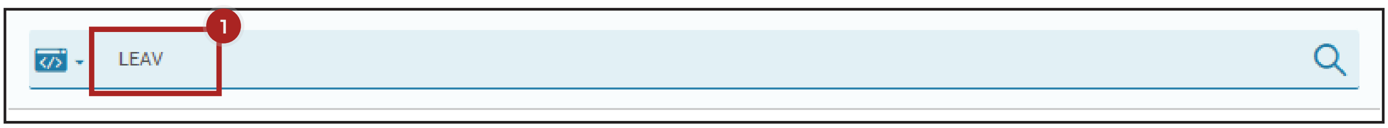
3. Click the drop-down to enter the **Employee ID**, click **View Report**.

4. Click **Export**, then **Print**.

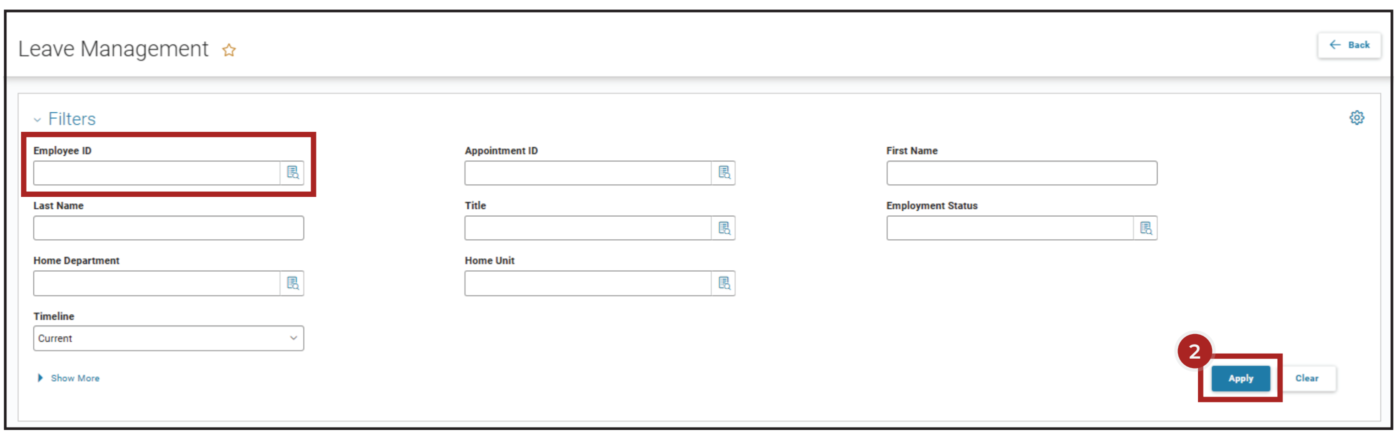


Validating Leave Balances

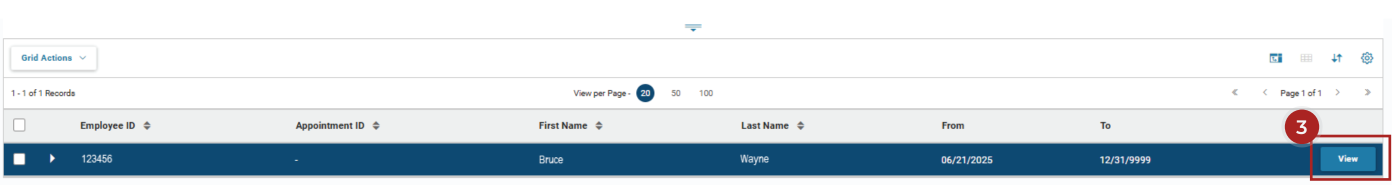
1. From the **Global Navigation** search bar type LEAVM, and select **LEAVM Leave Management**.



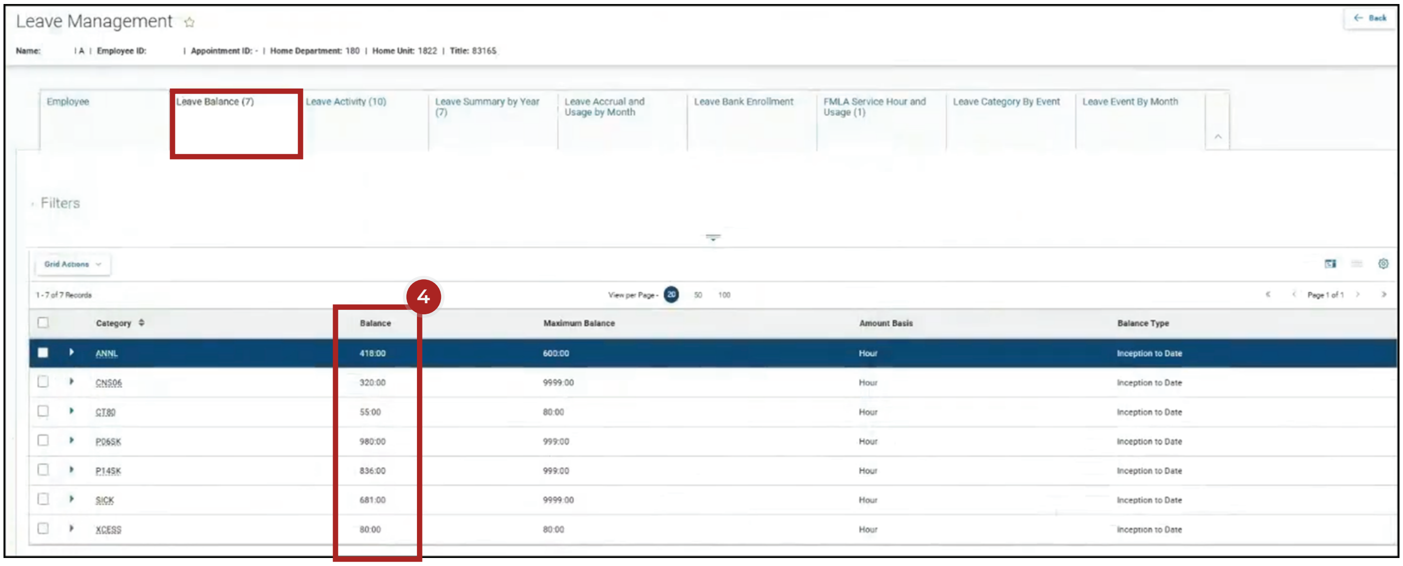
2. Enter the **Employee ID**, click **Apply**.



3. Click **View** on the corresponding row in the Results table.



4. Review the **Balance** column of the **Leave Balance** tab to ensure that the entries match the **Current YTD Amount** entries in the **Leave Balances** section of the *HB 213 EE Est Workst.*

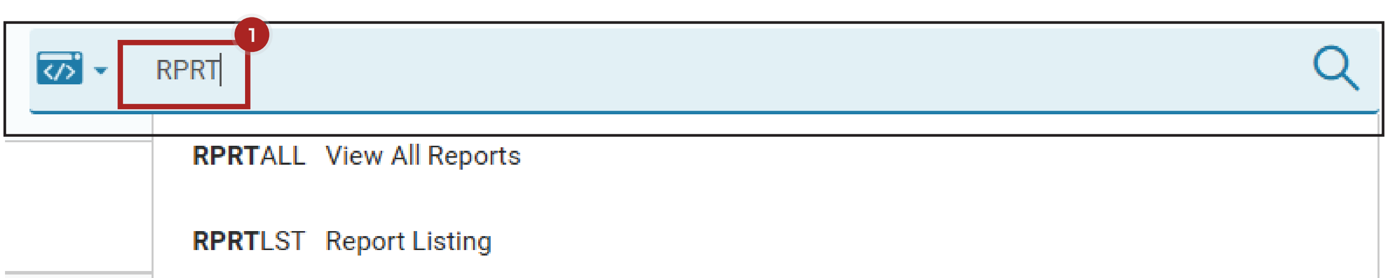


Leave Balances	Current YTD Amount	Estimated Future Earned	Estimated Future Used	Estimated Ending Balance	Estimated Pay Out Value
91 Annual				-	$ -
96 Excess				-	$ -
95 Comp Time#				-	$ -
Estimated Leave Pay Out					$ -
72 Pre 2014 Sick (Prog II)				-	
93 Converted Sick (Prog II)				-	
82 Pre 2006 Sick (Prog I)				-	
83 Pre 2006 Conv Sick (Prog I)				-	

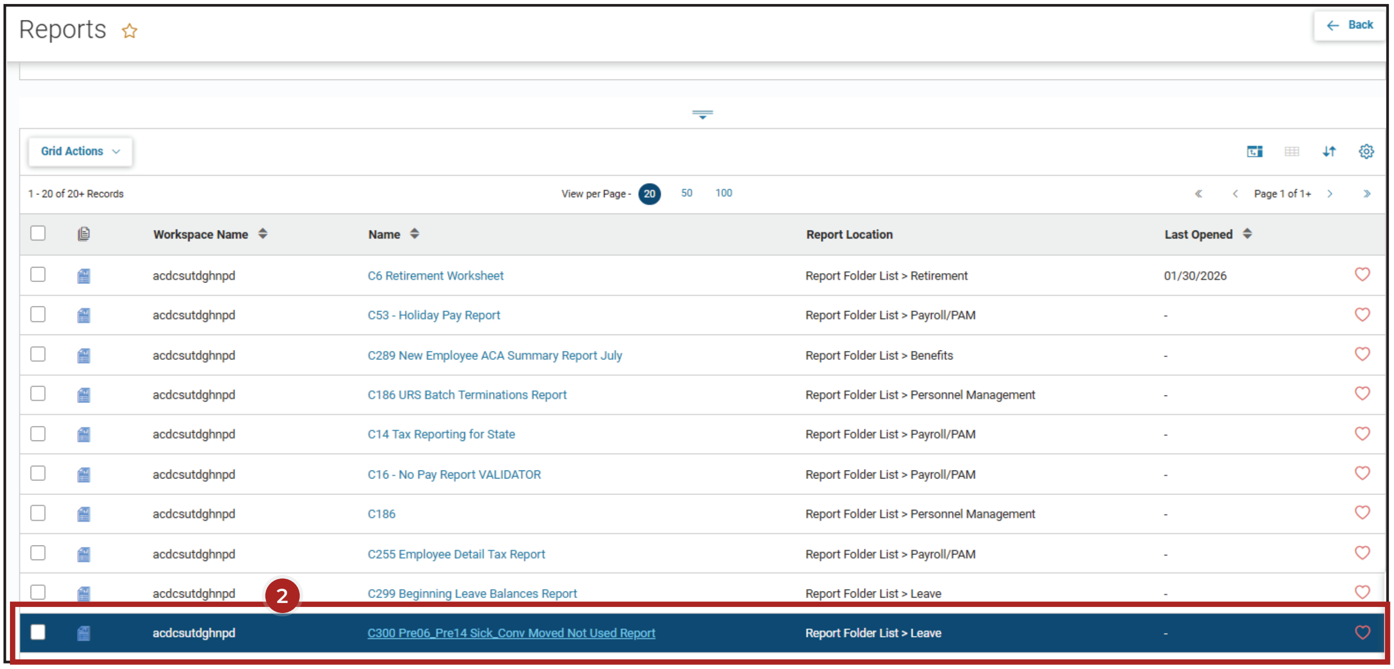
5. If the entries don't match . . .

Check for Unused Pre-2006 or Pre-2014 Sick Leave

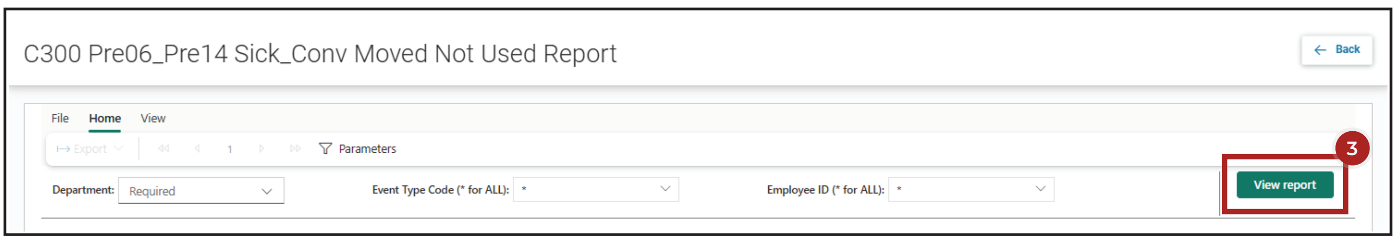
1. From the **Global Navigation** search bar type RPRT, and select **RPRTALL View All Reports**.



2. Click **50** View per Page and select **C300 Pre06_Pre14 Sick_Conv Moved Not Used Report**.



3. Select the appropriate **Department**, click the drop-down arrow and delete the asterisk to enter the **Employee ID**, and click **View Report**.

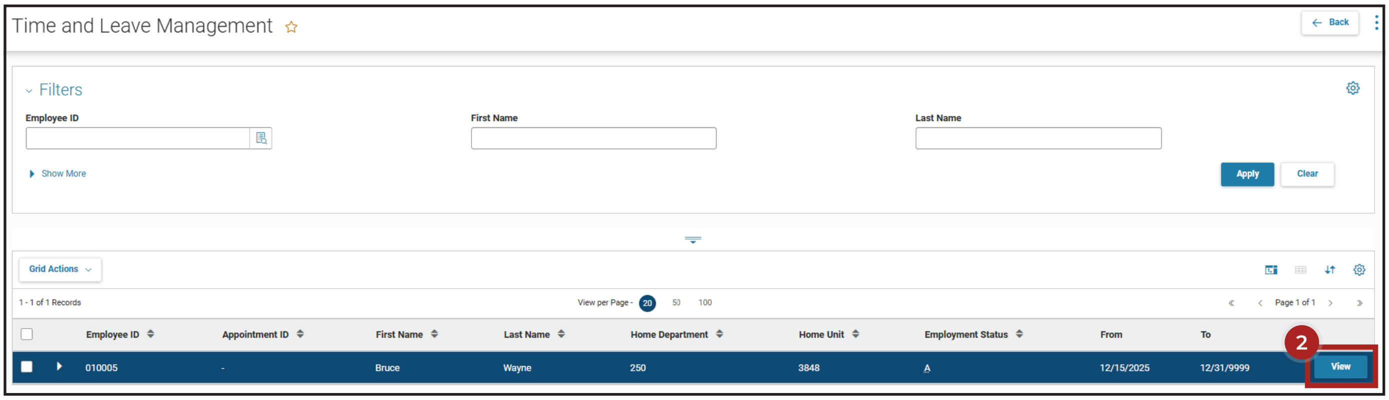


4. Note whether the **Event Type Description** column shows any Pre06 or Pre14 Hours. If there are, use that information to complete the "Move Back Unused Pre-2006 or Pre-2014 Sick Leave, if applicable" procedures.

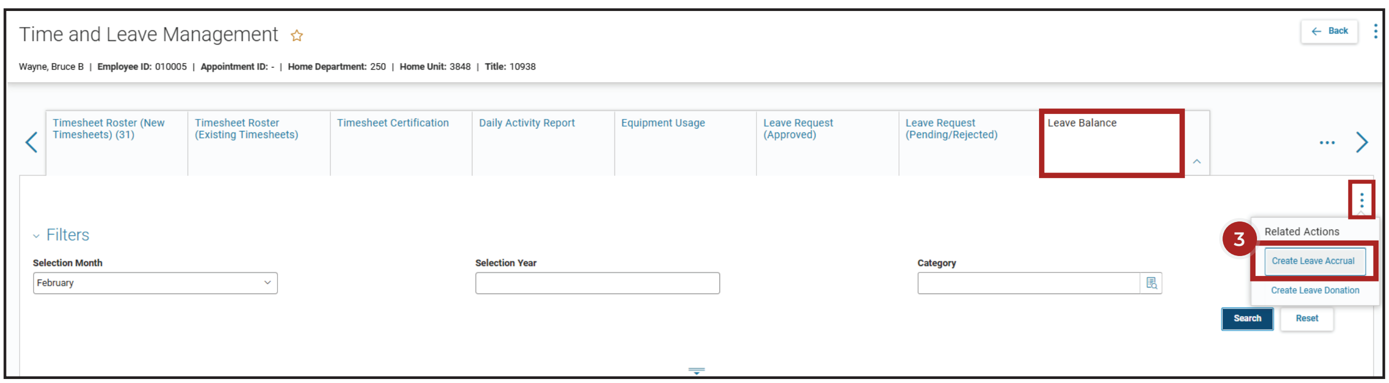
Validating Leave Balances

1. From the **Global Navigation** search bar type ALTM, and select **ATLM Time And Leave Management**.

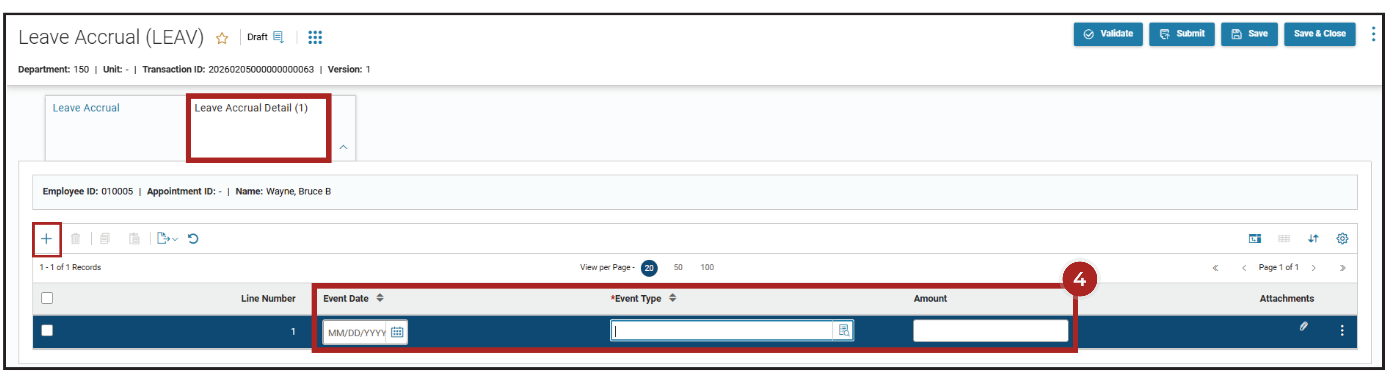
2. The relevant employee may already be listed in the Records results. If so, click **View**. Otherwise enter the **Employee ID**, click **Apply**, then click **View** on the relevant row.



3. Navigate to the **Leave Balance** tab, click the **3-dot menu** ⋮ and select **Create Leave Accrual**.



4. Click **+**, enter a date the employee was active in **Event Date**, enter **SICAC** in **Event Type**, and enter the negative **Amount** of hours to be moved back to Pre-2006 and Pre-2014 sick leave.



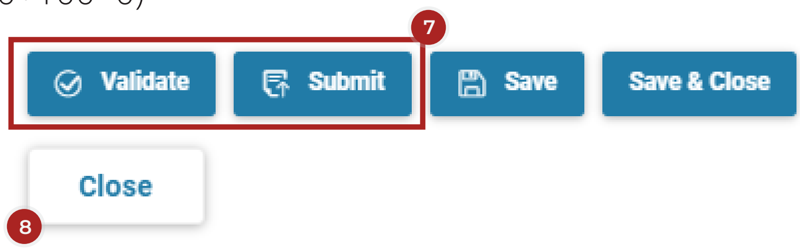
5. Click **+**, enter the same **Event Date**, enter **P06AC** in **Event Type**, and enter the (positive) **Amount** of hours to be moved back to Pre-2006 sick leave.

6. Click **+**, enter the same **Event Date**, enter **P14AC** in **Event Type**, and enter the (positive) **Amount** of hours to be moved back to Pre-2014 sick leave.

Note: The sum of the hours in the three rows should equal zero, for instance -150 hours, 50 hours, and 100 hours (-150 + 50+100=0)

7. Click **Validate**, then **Submit**.

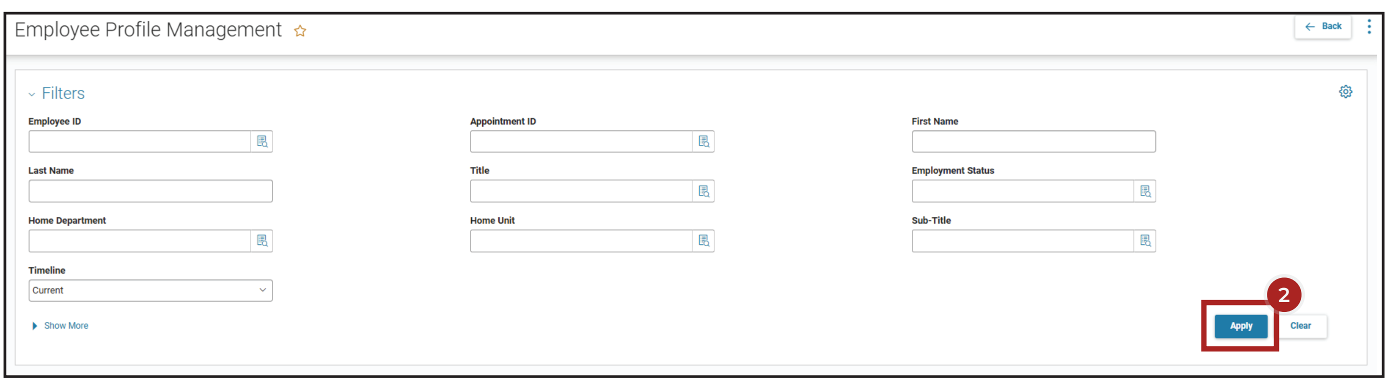
8. Click **Close**.



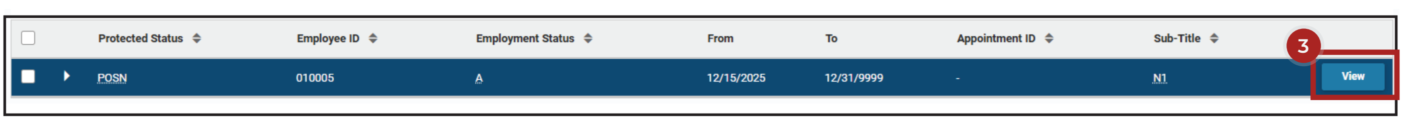
Remove the Supervisor

1. From the **Global Navigation** search bar type EPM, and select **EPM Employee Profile Management**.

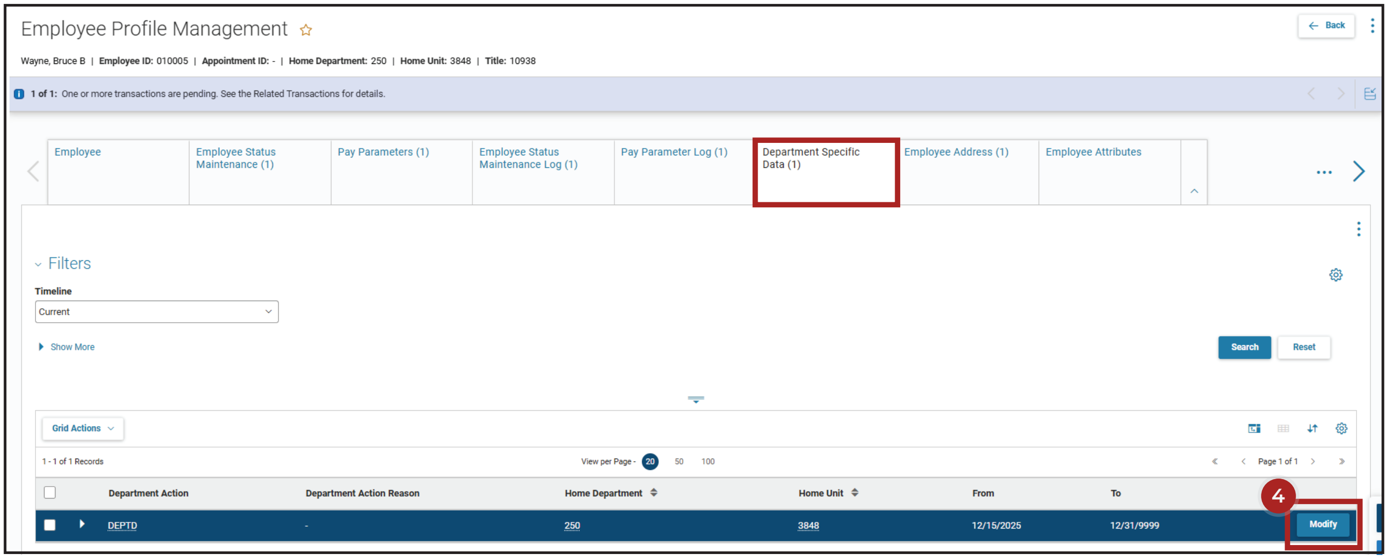
2. Enter the **Employee ID**, click **Apply**.



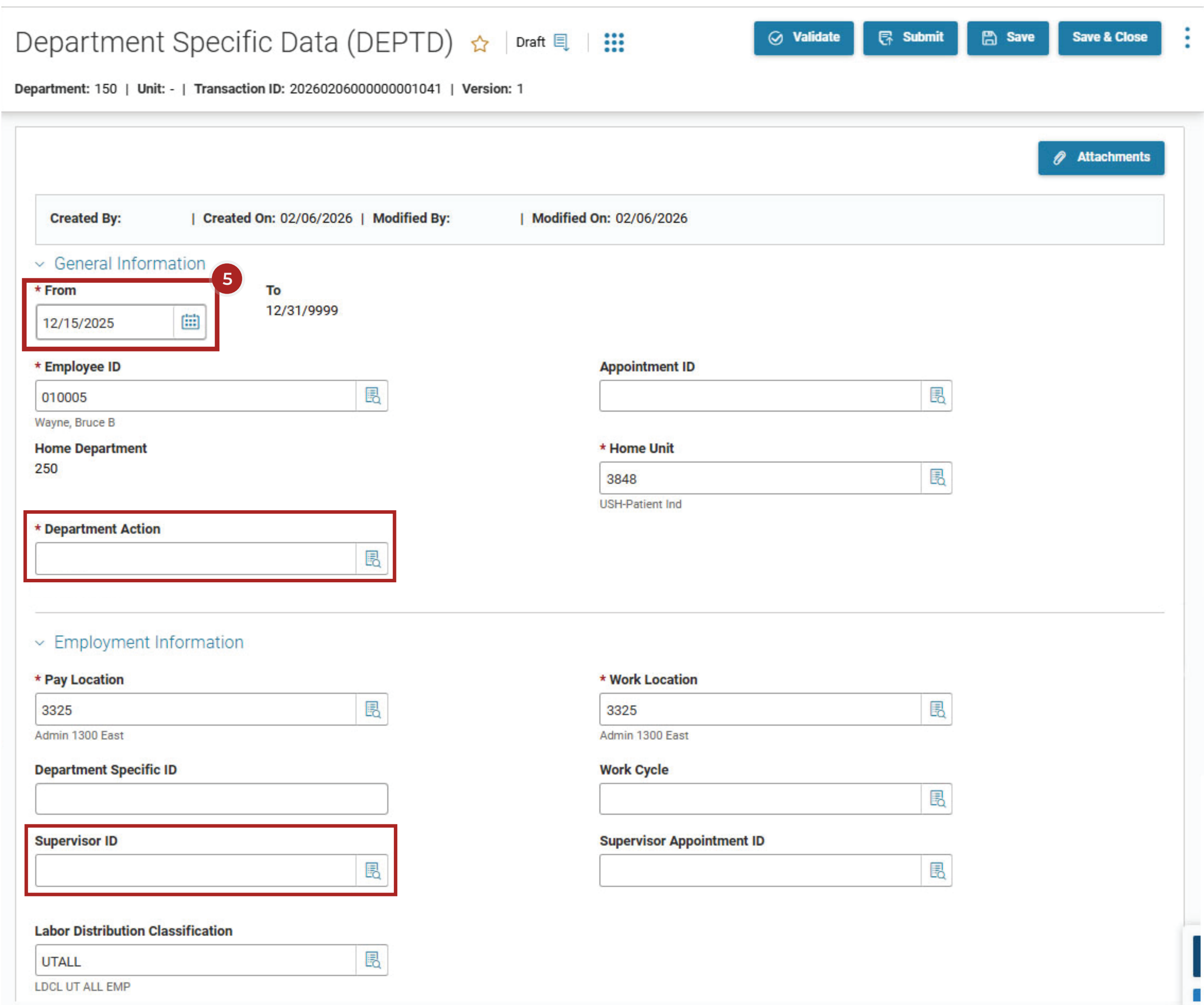
3. Click **View** on the corresponding row in the Results table.



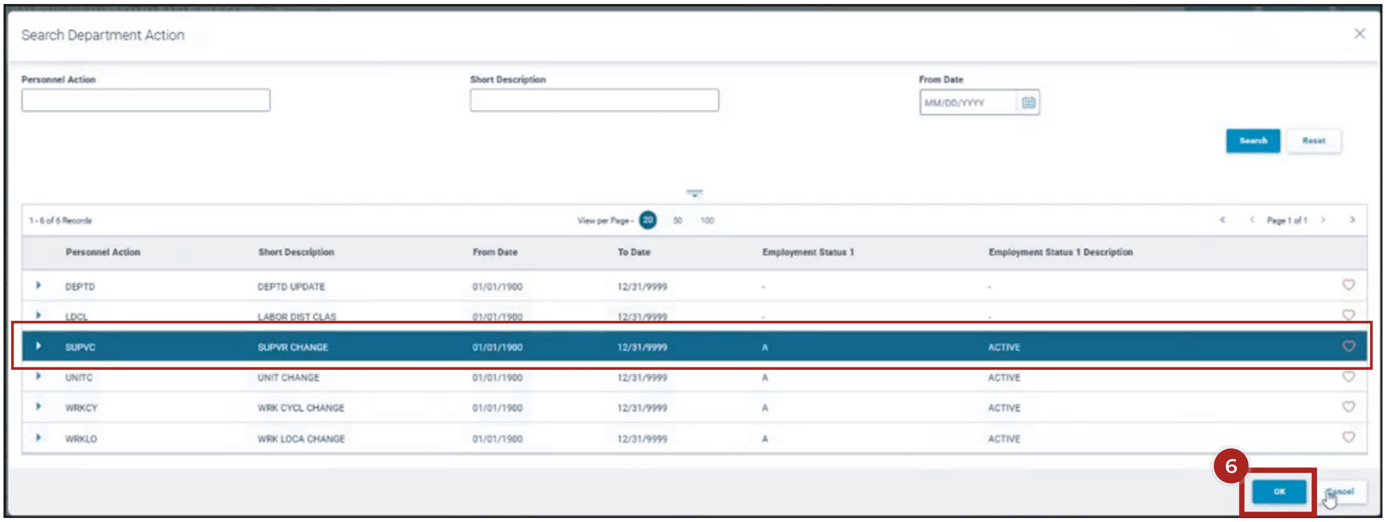
4. Select the **Department Specific Data** tab, click **Modify**.



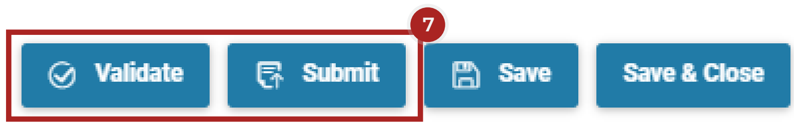
5. Delete the data in the **Supervisor ID** field, change the **From** date to the term effective date, delete the data in the **Department Action** field and click pick-list.



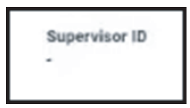
6. In the Search Department Action pop-up, select **SUPVC**, click **OK**.



7. Click **Validate**, then **Submit**.

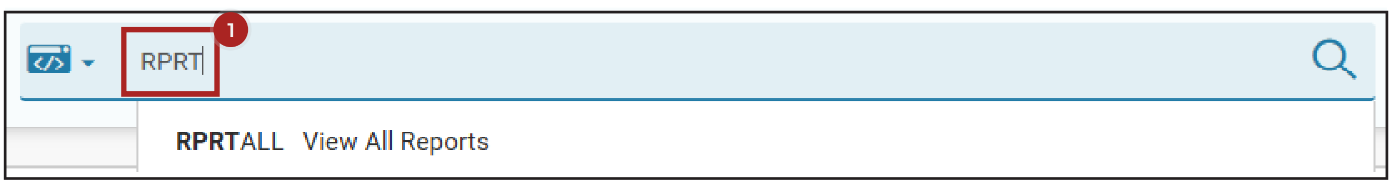


Note: the Supervisor ID field is empty

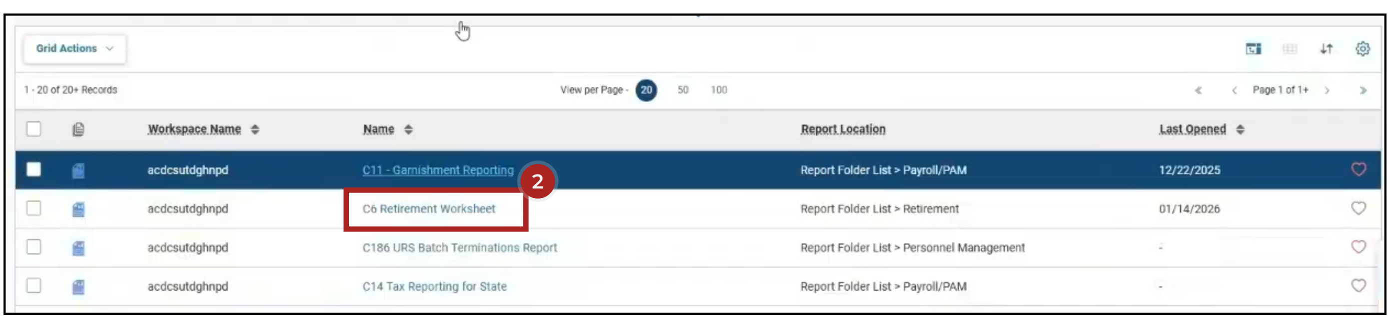


Manage Dependent Profile

1. From the **Global Navigation** search bar type RPRTALL, and select **RPRTALL View All Reports**.



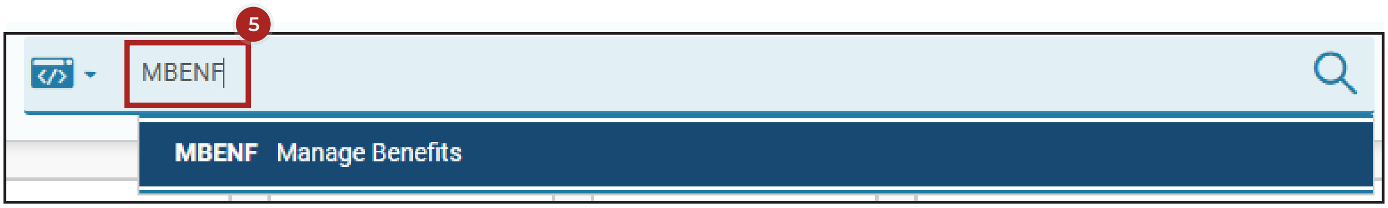
2. Find the relevant row and click **C6 Retirement Worksheet**.



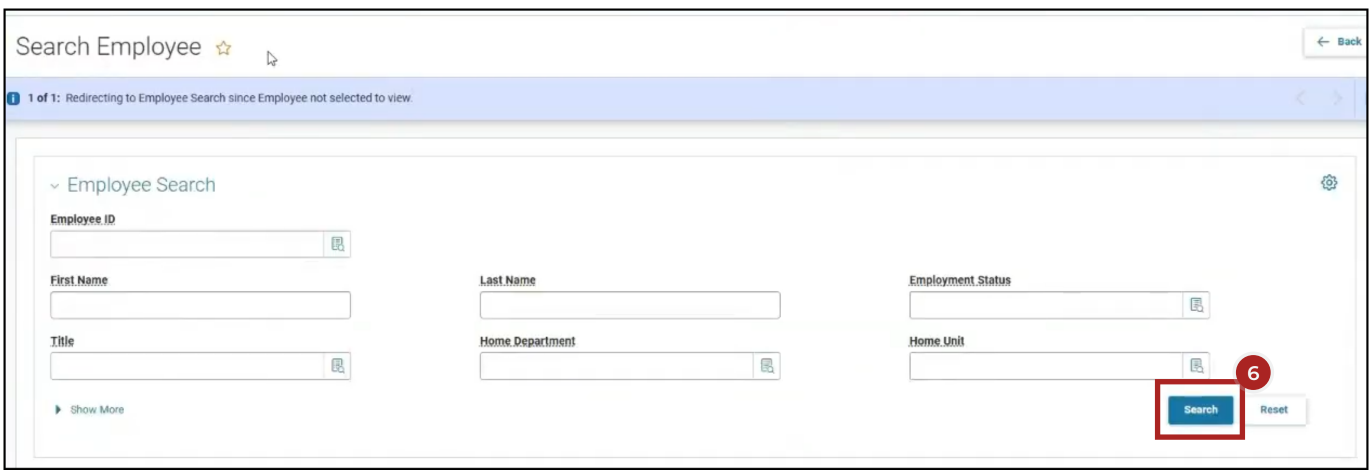
3. In the **Employee IDs** field, click the drop-down menu and type the employee ID, then click **View Report**.

4. Make note of the medical plan displayed in the report.

5. From the **Global Navigation** search bar type MBENF, and select **MBENF Manage Benefits**.

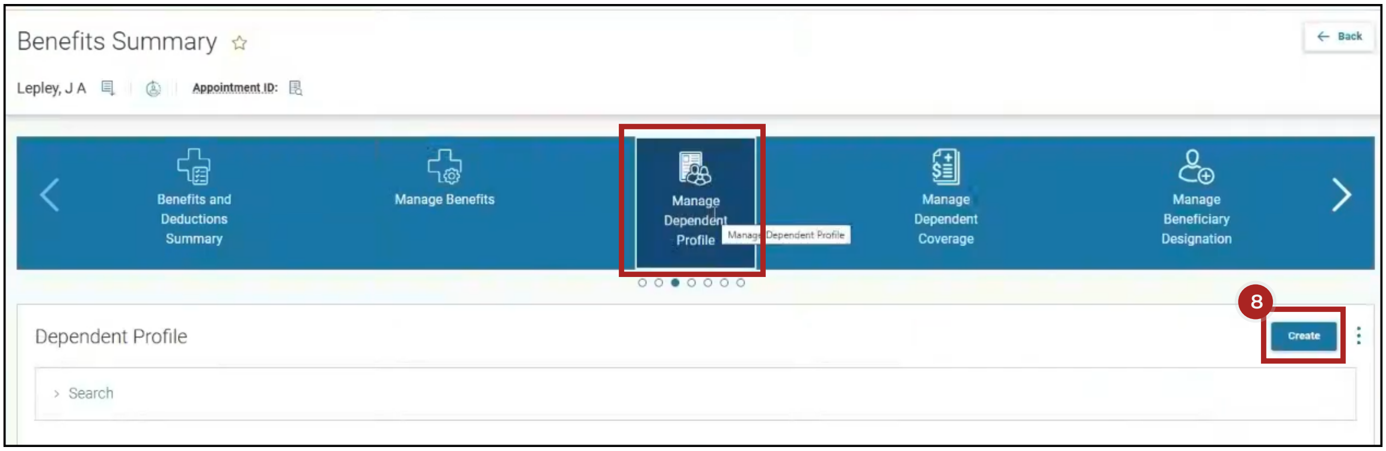


6. Enter the **Employee ID** and click **Search**.



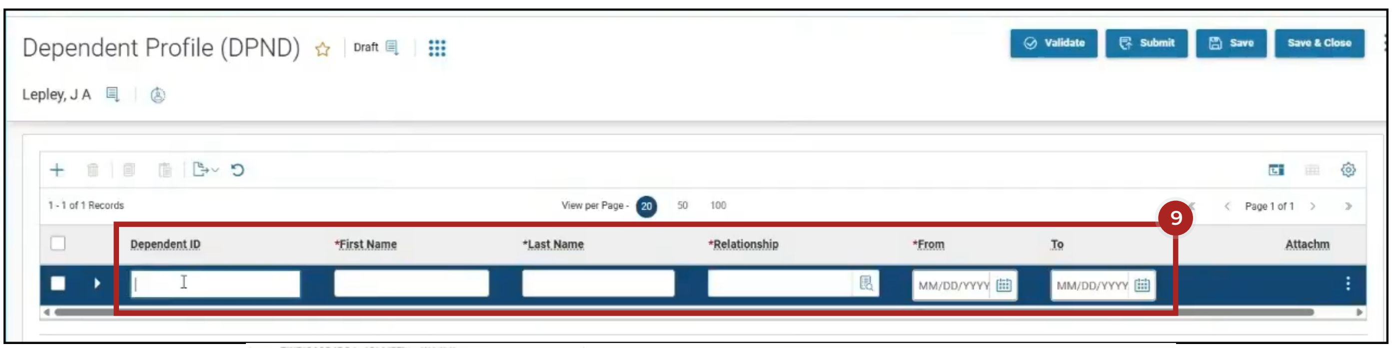
7. Click **Select** on the relevant row.

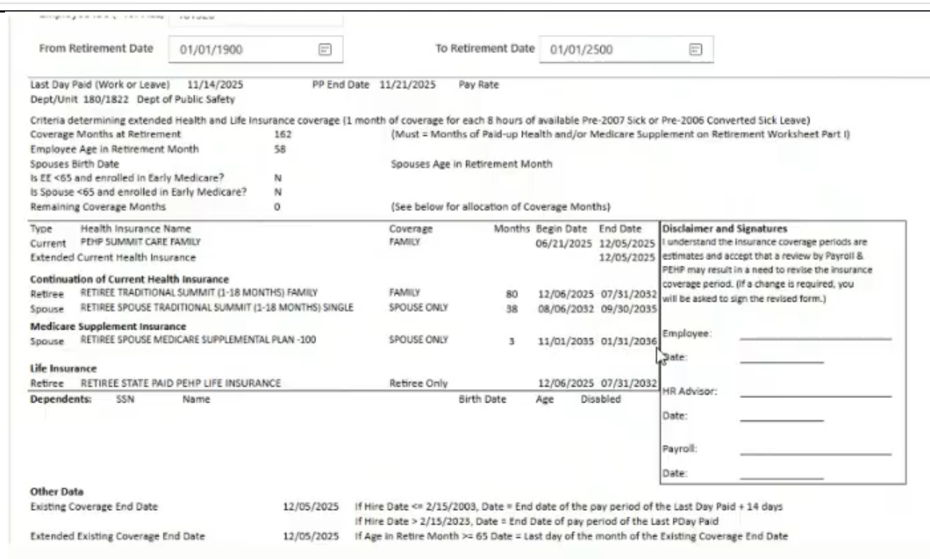
8. Click the **Manage Dependent Profile** heading, click **Create**.



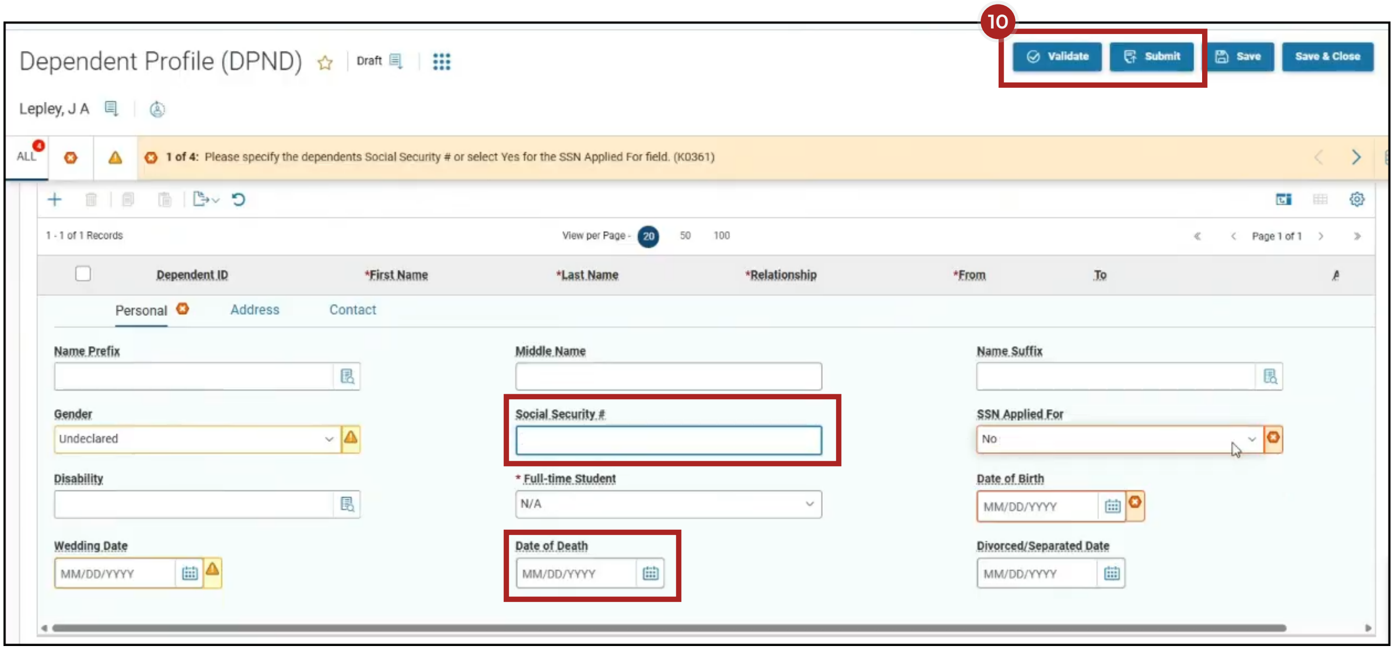
9. Click **+** and enter the following:

- **Dependent ID** - 1 for partner/spouse and 2 through . . . for however many children they have
- **First Name**
- **Last Name**
- **Relationship** - click pick-list and select the relevant relationship
- **From** - the Begin Date of the Retiree's Continuation of Current Health Insurance (found on the snip from step 4)
- **To** - the End Date of the Spouse's Continuation of Current Health Insurance or Medi care Supplement Insurance, whichever is later (found on the snip from step 4)





10. Click the drop-down menu and enter the following:
- **Social Security #**
- **Date of Birth**
- Click **Validate** > **Submit** > **Close**.



11. Repeat steps 1-3 to see both pages of the report.

Enter the Termination (PACTW)