

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 Worksht](#) (for Tier 1) or [HB 213 EE Est Worksht 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**.

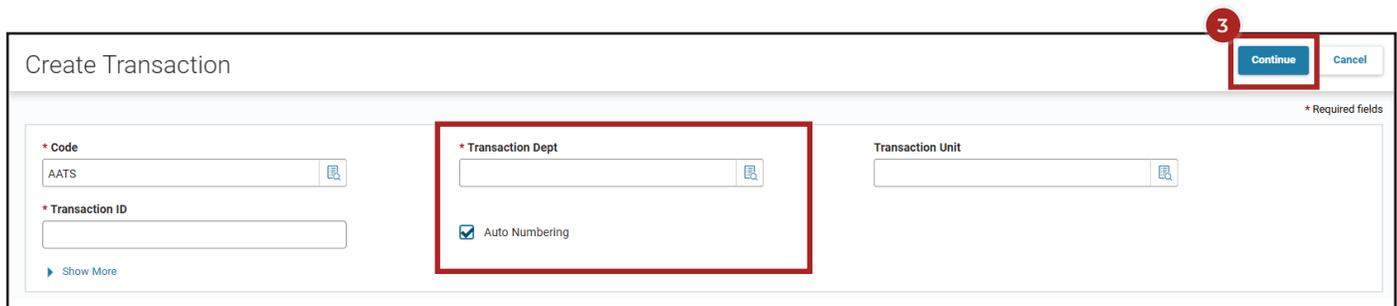


A screenshot of the Vantage HR Global Navigation search bar. The search bar contains the text 'AATS' and a magnifying glass icon on the right. Below the search bar, a dropdown menu is open, showing the option 'AATS Additional Employee Attributes- Small'. A red circle with the number '1' is positioned above the search bar.

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**.



A screenshot of the 'Create Transaction' form. The form has a title 'Create Transaction' and a 'Continue' button in the top right corner. Below the title, there are three input fields: '* Code' (containing 'AATS'), '* Transaction Dept', and 'Transaction Unit'. The '* Transaction Dept' field and the 'Auto Numbering' checkbox (which is checked) are highlighted with a red box. A red circle with the number '3' is positioned above the 'Continue' button. A small asterisk and the text '* Required fields' are visible in the top right corner of the form area.

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**.

Additional Employee Attributes- Small (AATS) ☆ Draft

Validate Submit Save Save & Close

Department: 180 | Unit: - | Transaction ID: 0121260000000000033 | Version: 1

Attachments

Created By: yname | Created On: 10/25/2025 | Modified By: yname | Modified On: 10/25/2025

General Information

1 * From To
 2 * 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!

Additional Employee Attributes- Small (AATS) ☆ Draft

Department: 180 | Unit: - | Transaction ID: 0121260000000000033 | Version: 1

3 Validate Submit Save Save & Close

* Employee ID

User Defined Fields 1

Is employee declining to continue current health/life ins? Is benefit transferred to spouse since employee is deceased?

Is EE < 65 and enrolled in Early Medicare? Is spouse < 65 and enrolled in Early Medicare?

Retirement Date

Coverage months at retirement

Payroll setup date

Last Day Paid

Plan End Date

Remaining Coverage Months

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. <i>Example: Last day worked 11/21/2025 insurance ends on 12/05/2025.</i>	Insurance plan end date is the last business day of the month that includes the final pay day for paid time. <i>Example: Last day worked 11/21/2025 insurance ends on Wednesday, 12/31/2025.</i>
Hired on or after 02/15/2003	Insurance plan end date is the last day of the pay period for paid time. <i>Example: Last day worked 11/21/2025 insurance ends on 11/21/2025.</i>	Insurance plan end date is the last business day of the month that includes the last day of the pay period for paid time. <i>Example: Last day worked 11/21/2025 insurance ends on Friday, 11/28/2025.</i>

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.

The screenshot shows two date input fields. The first field is labeled 'Spouse Birth Date' and has a placeholder 'MM/DD/YYYY'. A red box highlights this field, and a red circle with the number 7 is positioned to its left. The second field is labeled 'Spouse's 65th Birth Date' and also has a placeholder 'MM/DD/YYYY'. Below these fields, the labels 'Begin Date Emp Medical' and 'End Date Emp Medical' are partially visible.

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.)

The screenshot shows a single text input field with the label 'Months to be used for Employee's insurance'. A red box highlights the entire field, and a red circle with the number 8 is positioned to its left.

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**.

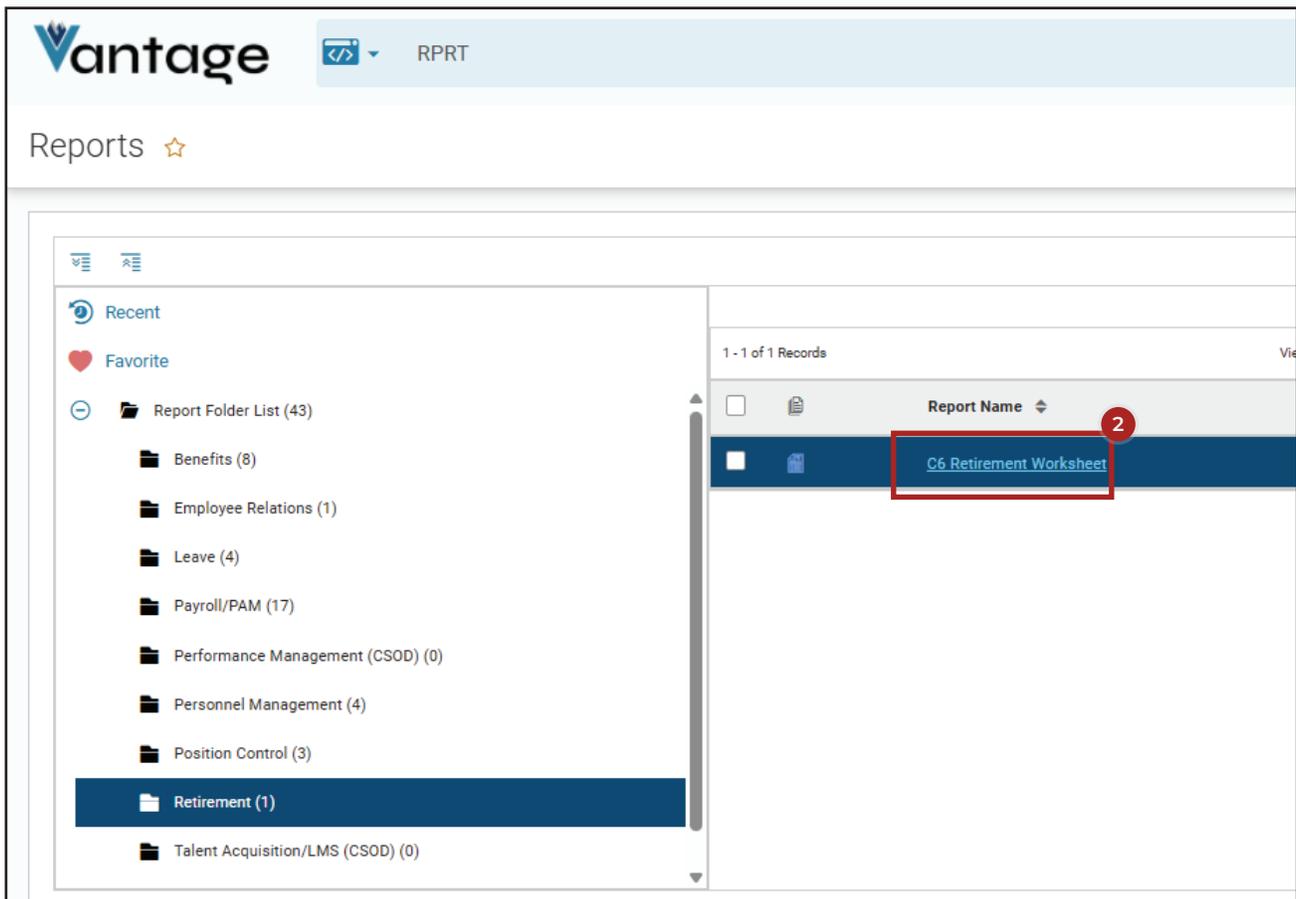
Generating and Printing the Retirement Worksheet Report

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**.



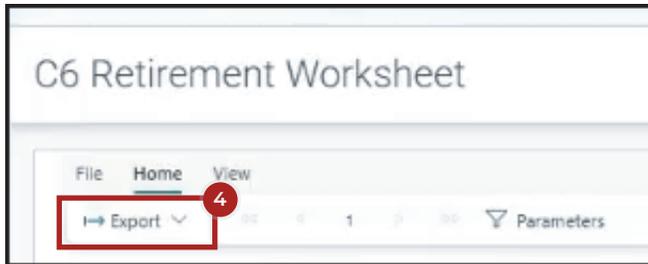
2. In the Recent tab select the **Retirement** folder and click **C6 Retirement Worksheet**.



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



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

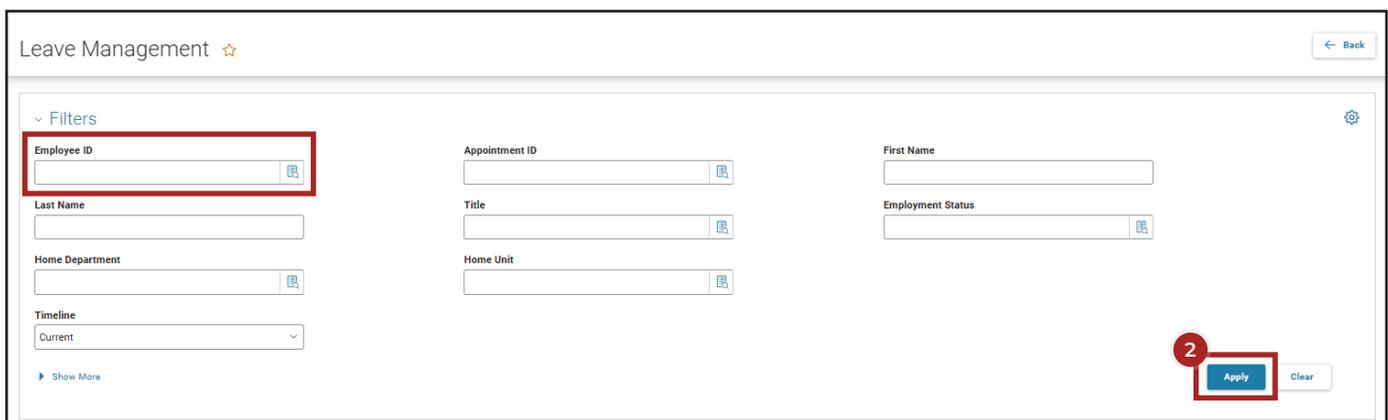


Validating Leave Balances

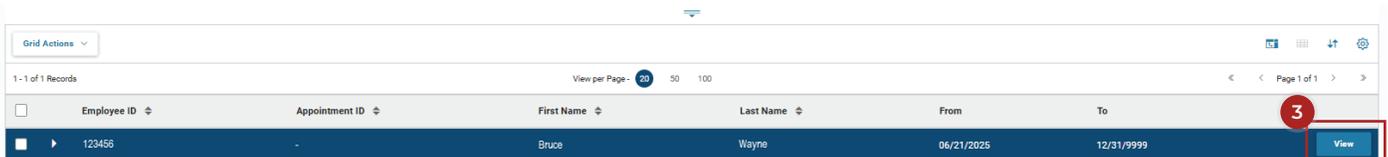
1. From the **Global Navigation** search bar type LEAVM, and select **LEAVM Leave Management**.



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 Worksht*.

Leave Management ← Back

Name: | A | Employee ID: | Appointment ID: | Home Department: 180 | Home Unit: 1822 | Title: 83165

Employee | **Leave Balance (7)** | Leave Activity (10) | Leave Summary by Year (7) | Leave Accrual and Usage by Month | Leave Bank Enrollment | FMLA Service Hour and Usage (1) | Leave Category By Event | Leave Event By Month

Filters

Grid Actions

1-7 of 7 Records | View per Page: 50 100 | Page 1 of 1

Category	Balance	Maximum Balance	Amount Basis	Balance Type
ANNL	419.00	600.00	Hour	Inception to Date
CNS06	320.00	999.00	Hour	Inception to Date
GT&D	55.00	80.00	Hour	Inception to Date
POSSK	980.00	999.00	Hour	Inception to Date
PI4SK	836.00	999.00	Hour	Inception to Date
SICK	681.00	999.00	Hour	Inception to Date
XCESS	80.00	80.00	Hour	Inception to Date

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**.

Search bar: RPRT

- RPRTALL View All Reports
- RPRTLST Report Listing

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

Grid Actions ▾

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1 - 20 of 20+ Records

View per Page - 20 50 100

< < Page 1 of 1+ > >

<input type="checkbox"/>		Workspace Name	Name	Report Location	Last Opened	
<input type="checkbox"/>		acdcсутdghnpd	C6 Retirement Worksheet	Report Folder List > Retirement	01/30/2026	
<input type="checkbox"/>		acdcсутdghnpd	C53 - Holiday Pay Report	Report Folder List > Payroll/PAM	-	
<input type="checkbox"/>		acdcсутdghnpd	C289 New Employee ACA Summary Report July	Report Folder List > Benefits	-	
<input type="checkbox"/>		acdcсутdghnpd	C186 URS Batch Terminations Report	Report Folder List > Personnel Management	-	
<input type="checkbox"/>		acdcсутdghnpd	C14 Tax Reporting for State	Report Folder List > Payroll/PAM	-	
<input type="checkbox"/>		acdcсутdghnpd	C16 - No Pay Report VALIDATOR	Report Folder List > Payroll/PAM	-	
<input type="checkbox"/>		acdcсутdghnpd	C186	Report Folder List > Personnel Management	-	
<input type="checkbox"/>		acdcсутdghnpd	C255 Employee Detail Tax Report	Report Folder List > Payroll/PAM	-	
<input type="checkbox"/>		acdcсутdghnpd	C299 Beginning Leave Balances Report	Report Folder List > Leave	-	
<input checked="" type="checkbox"/>		acdcсутdghnpd	C300 Pre06_Pre14 Sick_Conv Moved Not Used Report	Report Folder List > Leave	-	

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

C300 Pre06_Pre14 Sick_Conv Moved Not Used Report

File Home View

Export Parameters

Department: Required ▾

Event Type Code (* for ALL): * ▾

Employee ID (* for ALL): * ▾

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.

REPORT ID: C300

RUN DATE: 01/21/2026

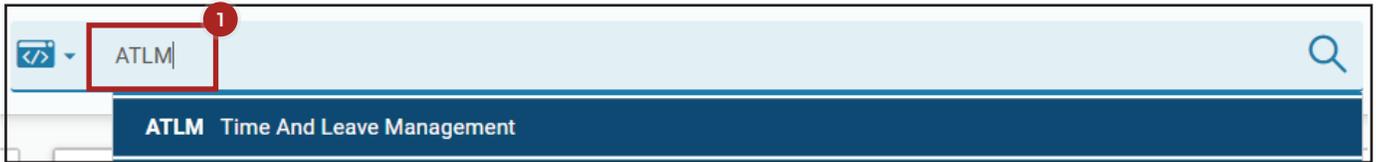
RUN TIME: 2:22 PM

State Of Utah Pre06/Pre14 Sick/Conv Moved Not Used

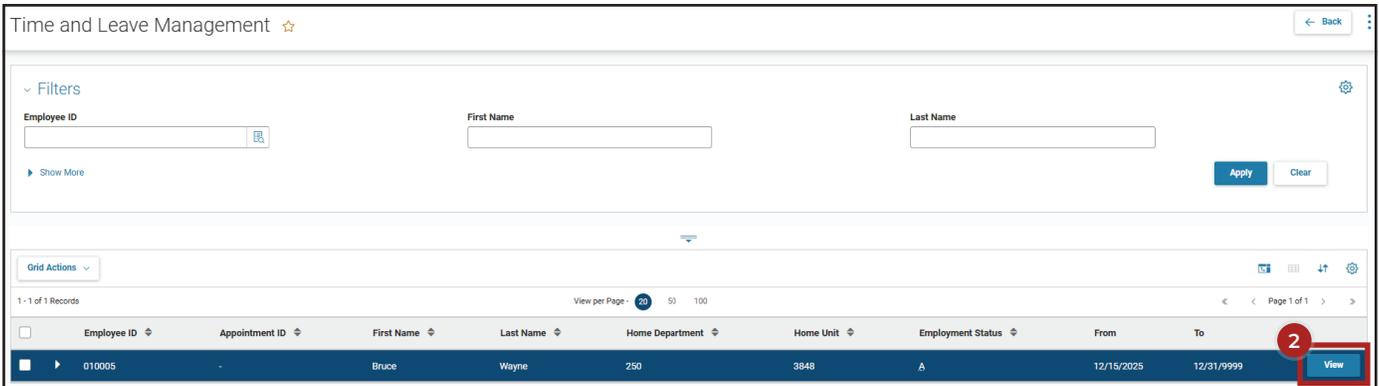
Department	Unit	Employee ID	Employee Name	Event Type	Event Type Description	Effective Date	Hours
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Validating Leave Balances

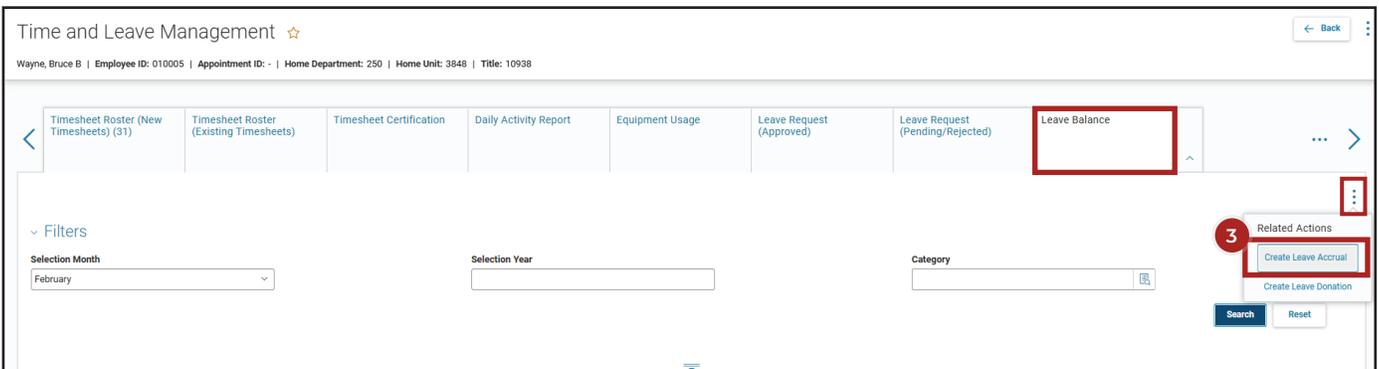
1. From the **Global Navigation** search bar type **ALTM**, and select **ATLM Time And Leave Management**.



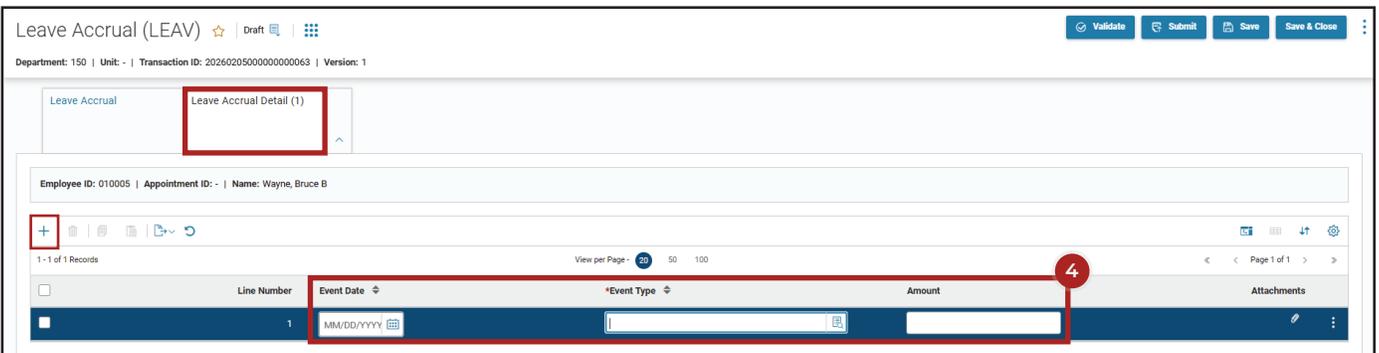
2. The relevant employee may already be listed in the Records results. If so, click **View**. Otherwise enter the **Employee ID**, click **Apply**, then click **View** on the relevant row.



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



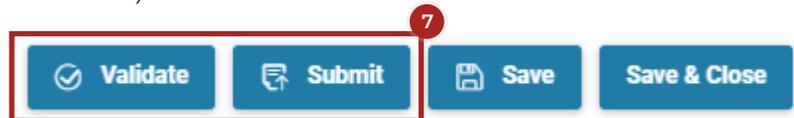
4. Click **+**, enter a date the employee was active in **Event Date**, enter **SICAC** in **Event Type**, and enter the negative **Amount** of hours to be moved back to Pre-2006 and Pre-2014 sick leave.



- 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.
- 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)

- Click **Validate**, then **Submit**.

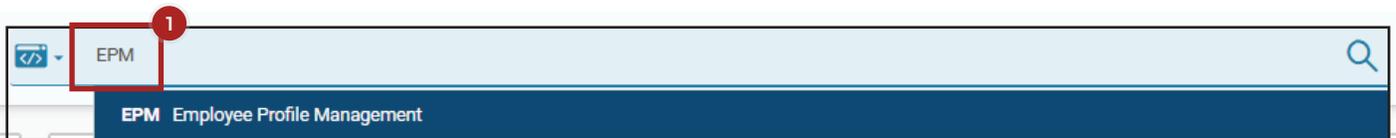


- Click **Close**.

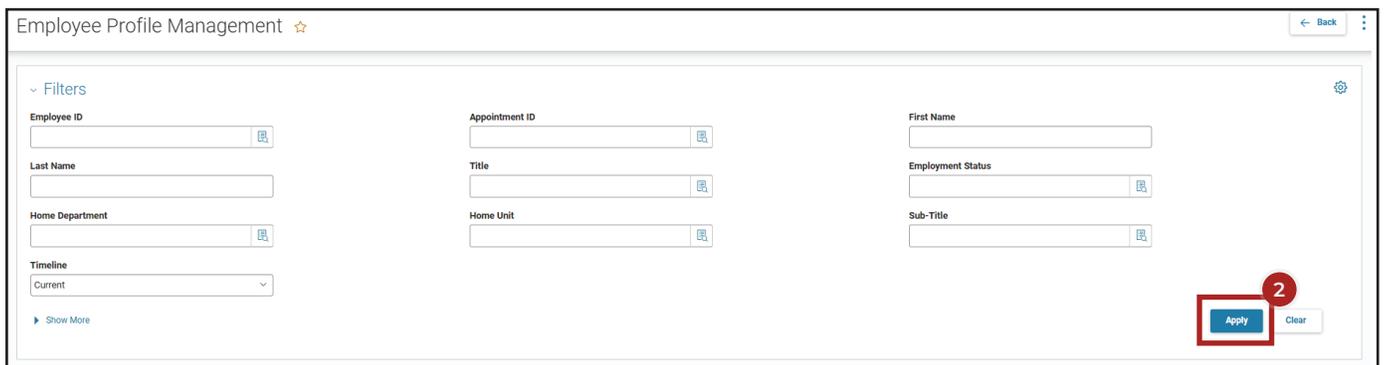


Remove the Supervisor

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



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



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

Protected Status	Employee ID	Employment Status	From	To	Appointment ID	Sub-Title
POSN	010005	A	12/15/2025	12/31/9999	-	N1

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

Employee Profile Management

Wayne, Bruce B | Employee ID: 010005 | Appointment ID: - | Home Department: 250 | Home Unit: 3848 | Title: 10938

1 of 1: One or more transactions are pending. See the Related Transactions for details.

Employee	Employee Status Maintenance (1)	Pay Parameters (1)	Employee Status Maintenance Log (1)	Pay Parameter Log (1)	Department Specific Data (1)	Employee Address (1)	Employee Attributes												
<p>Filters</p> <p>Timeline: Current</p> <p>Show More</p> <p>Search Reset</p> <p>Grid Actions</p> <p>1 - 1 of 1 Records</p> <p>View per Page: 20 50 100</p> <table border="1"><thead><tr><th>Department Action</th><th>Department Action Reason</th><th>Home Department</th><th>Home Unit</th><th>From</th><th>To</th></tr></thead><tbody><tr><td>DEPTD</td><td></td><td>250</td><td>3848</td><td>12/15/2025</td><td>12/31/9999</td></tr></tbody></table> <p>Modify</p>								Department Action	Department Action Reason	Home Department	Home Unit	From	To	DEPTD		250	3848	12/15/2025	12/31/9999
Department Action	Department Action Reason	Home Department	Home Unit	From	To														
DEPTD		250	3848	12/15/2025	12/31/9999														

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.

Department Specific Data (DEPTD)

Validate Submit Save Save & Close

Department: 150 | Unit: - | Transaction ID: 2026020600000001041 | Version: 1

Attachments

Created By: | Created On: 02/06/2026 | Modified By: | Modified On: 02/06/2026

General Information

* From: 12/15/2025 To: 12/31/9999

* Employee ID: 010005 Wayne, Bruce B

Appointment ID:

* Home Department: 250

* Home Unit: 3848 USH-Patient Ind

* Department Action:

Employment Information

* Pay Location: 3325 Admin 1300 East

* Work Location: 3325 Admin 1300 East

Department Specific ID:

Work Cycle:

Supervisor ID:

Supervisor Appointment ID:

Labor Distribution Classification: UTALL LDCL UT ALL EMP

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

Personnel Action	Short Description	From Date	To Date	Employment Status 1	Employment Status 1 Description
DEPTD	DEPTD UPDATE	01/01/1900	12/31/9999	-	-
LDCL	LABOR DIST CLAS	01/01/1900	12/31/9999	-	-
SUPVC	SUPVR CHANGE	01/01/1900	12/31/9999	A	ACTIVE
UNITC	UNIT CHANGE	01/01/1900	12/31/9999	A	ACTIVE
WRKCY	WRK CYCL CHANGE	01/01/1900	12/31/9999	A	ACTIVE
WRKLO	WRK LOCA CHANGE	01/01/1900	12/31/9999	A	ACTIVE

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

Note: the Supervisor ID field is empty

Supervisor ID

Manage Dependent Profile

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

RPRTALL View All Reports

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

Workspace Name	Name	Report Location	Last Opened
acdcstgdghnpg	C6 Retirement Worksheet	Report Folder List > Retirement	01/14/2026
acdcstgdghnpg	C11 - Garnishment Reporting	Report Folder List > Payroll/PAM	12/22/2025
acdcstgdghnpg	C186 URS Batch Terminations Report	Report Folder List > Personnel Management	-
acdcstgdghnpg	C14 Tax Reporting for State	Report Folder List > Payroll/PAM	-

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

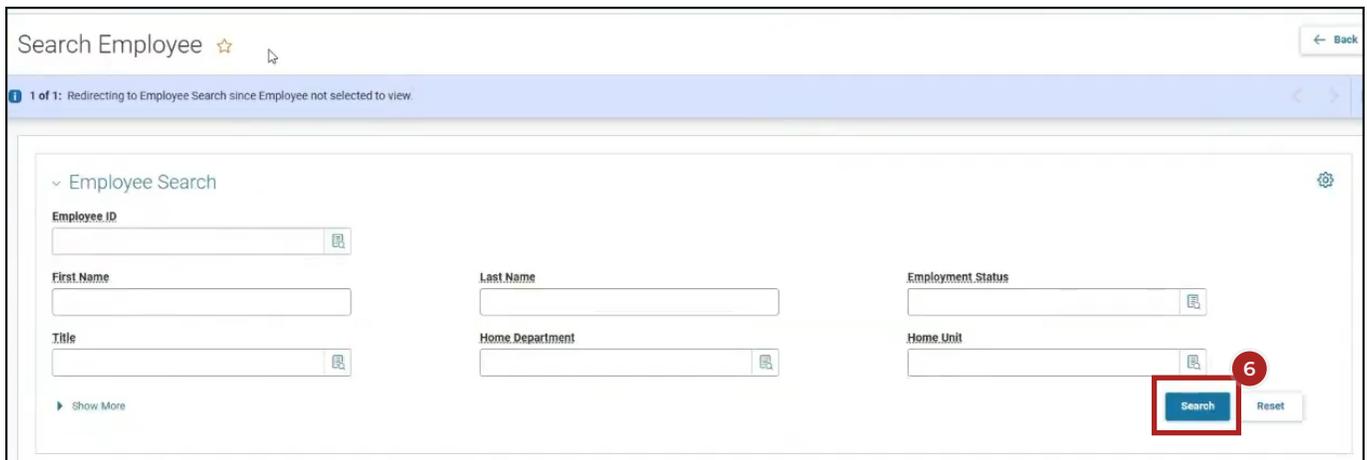


4. Make note of the medical plan displayed in the report.

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



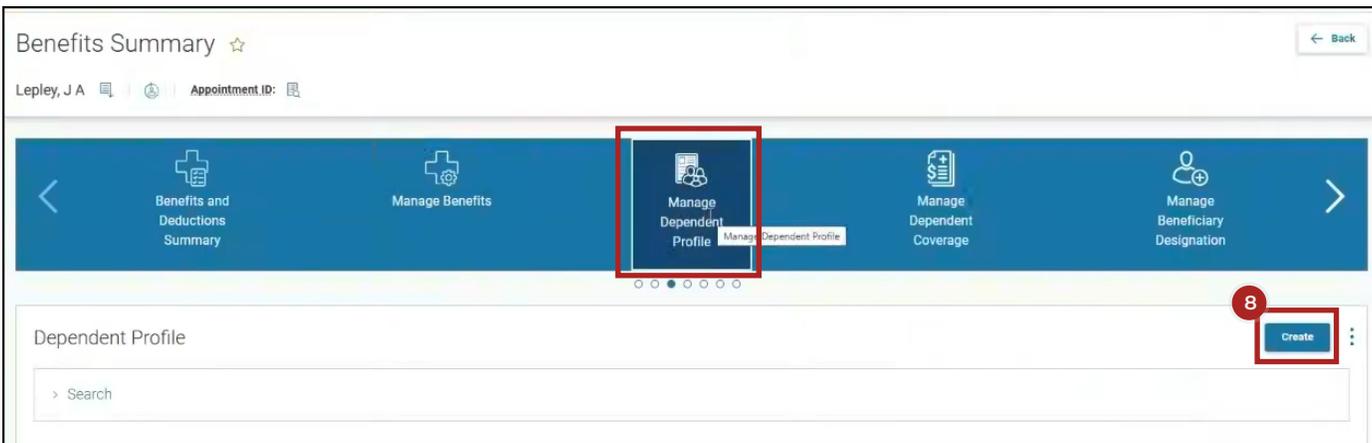
6. Enter the **Employee ID** and click **Search**.



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 Medicare Supplement Insurance, whichever is later (found on the snip from step 4)



From Retirement Date: 01/01/1900 To Retirement Date: 01/01/2500

Last Day Paid (Work or Leave): 11/14/2025 PP End Date: 11/21/2025 Pay Rate: _____
 Dept/Unit: 180/1822 Dept of Public Safety

Criteria determining extended Health and Life Insurance coverage (1 month of coverage for each 8 hours of available Pre-2007 Sick or Pre-2006 Converted Sick Leave)
 Coverage Months at Retirement: 162 (Must = Months of Paid-up Health and/or Medicare Supplement on Retirement Worksheet Part I)

Employee Age in Retirement Month: 58 Spouses Age in Retirement Month: _____
 Spouses Birth Date: _____
 Is EE <65 and enrolled in Early Medicare? N
 Is Spouse <65 and enrolled in Early Medicare? N
 Remaining Coverage Months: 0 (See below for allocation of Coverage Months)

Type	Health Insurance Name	Coverage	Months	Begin Date	End Date
Current	PEHP SUMMIT CARE FAMILY	FAMILY		06/21/2025	12/05/2025
Extended Current Health Insurance					12/05/2025
Continuation of Current Health Insurance					
Retiree	RETIREE TRADITIONAL SUMMIT (1-18 MONTHS) FAMILY	FAMILY	80	12/06/2025	07/31/2032
Spouse	RETIREE SPOUSE TRADITIONAL SUMMIT (1-18 MONTHS) SINGLE	SPOUSE ONLY	38	08/06/2032	09/30/2035
Medicare Supplement Insurance					
Spouse	RETIREE SPOUSE MEDICARE SUPPLEMENTAL PLAN -100	SPOUSE ONLY	3	11/01/2035	01/31/2036
Life Insurance					
Retiree	RETIREE STATE PAID PEHP LIFE INSURANCE	Retiree Only		12/06/2025	07/31/2032

Dependents: SSN Name Birth Date Age Disabled

Other Data

Existing Coverage End Date: 12/05/2025 If Hire Date <= 2/15/2003, Date = End date of the pay period of the Last Day Paid + 14 days
 Extended Existing Coverage End Date: 12/05/2025 If Hire Date > 2/15/2003, Date = End Date of pay period of the Last Day Paid
 If Age in Retire Month >= 65 Date = Last day of the month of the Existing Coverage End Date

Disclaimer and Signatures
 I understand the insurance coverage periods are estimates and accept that a review by Payroll & PEHP may result in a need to revise the insurance coverage period. (If a change is required, you will be asked to sign the revised form.)

Employee: _____
 Date: _____
 HR Advisor: _____
 Date: _____
 Payroll: _____
 Date: _____

10. Click the drop-down menu and enter the following:

- **Social Security #**
- **Date of Birth**
- Click **Validate** > **Submit** > **Close**.

Dependent Profile (DPND) ☆ Draft

Lepley, J A

ALL 1 of 4: Please specify the dependents Social Security # or select Yes for the SSN Applied For field. (K0361)

1 - 1 of 1 Records View per Page 20 50 100 Page 1 of 1

Dependent ID	*First Name	*Last Name	*Relationship	*From	To

Personal Address Contact

Name Prefix
Middle Name
Name Suffix

Gender: Undeclared
Social Security #
SSN Applied For: No

Disability
* Full-time Student: N/A
Date of Birth: MM/DD/YYYY
Date of Death: MM/DD/YYYY
Divorced/Separated Date: MM/DD/YYYY

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

Enter the Termination (PACTW)