

PAF Instructions for Early Retirement Incentive Program Participants

This resource provides instructions on the Personnel Action Forms (PAFs) needed for those employees who have selected to participate in the Early Retirement Incentive Program (ERIP).

Preparers will have to create the following PAF(s) for those who have been approved for Early Retirement:

- **End Appointment PAF.**
- **Reappointment/Change Assignment PAF:** If the employee is retiring between 01-JUL-2009 and 31-DEC-2009 AND is being paid through the General Educational Fund a PAF will need to be created to adjust their LD.

Preparer Good-to-Know Information: If the ERIP participant is currently being paid by the General Educational Fund, the first year costs (includes all salary/fringe/vacation/sick leave/TIAA-CREF from July 01) will be paid from the ARRA (Federal Stimulus) Funds However, the ERIP Health and Dental portion for all ERIP participants will be paid from a new Termination Benefits account.

1. LD Adjustment: Employees Retiring Between 01-JUL-2009 and 31-DEC-2009

Special Note: This only pertains to General Educational Fund employees.

- 1.1. Access the **Personnel Action Form (PAF)** system (*Transaction MW04*).
- 1.2. Type the ERIP participant's UID in the **UID field** next to **Reappointment/Change Assignment**.
- 1.3. Click once on the **SUBMIT** button.
- 1.4. In the **Effective Date** field type 01-JUL-2009.
- 1.5. Click once on the **Create PAF** button.
- 1.6. Click once on the **LD** tab.
- 1.7. Click once on the **Create Alternate LD Section** button.
- 1.8. In the Alternate LD fields use the following example to guide your work:

Labor Distribution Tab

MENU	NAME	ORG/JOB CAT	TITLE	ASSIGN INFO	ASSIGN STATUS	SPECIFIC	LD	FOUND	EDUC	FINISH	
PAF Effective Change Date: 01-JUL-2009											
Alternate Labor Distribution											
Account Code											
FUND	AY	ORG	OBJECT	PROG	FUNC	ACTIV	OPEN	BDGT LINE	Percent of Salary	Start Date	End Date
0013	00	Division Org*	Object	1545	61	0100	000		100.00	01-JUL-2009	<i>Not Needed Leave Blank</i>
<i>Account Code Description (ARRA Stimulus Fund...)</i>											
<p>* Not Department Organization, instead the Division Organization code. President's Office – 10011; Executive VP and Provost – 20011; VP for Student Affairs – 30011; VP for Administration and Financial Services – 40011</p>											
<p>Alternate LD: <i>Tips</i></p> <ul style="list-style-type: none"> • Do not proceed if the Alternate LD account is INVALID. 											

- 1.9. Click once on the **Add** button next to the newly typed LD account. The **Total** should be **200%**. To correct or change the percent, complete the next step.
- 1.10. Carefully locate the *General Education Fund* (i.e., Gnl Educ Fund) above the newly created LD account (above the red bar). Click once on the **Delete** button next to the *General Education Fund* (i.e., Gnl Educ Fund) account code. The **Total** should now be 100%.
- 1.11. Click three times on the **SAVE, Go to Next >** button until the **Finish** tab appears.
- 1.12. Complete the **FINISH** tab and click once on the **SAVE** button.
- 1.13. **Please Print the PAF and process immediately.**

2. End Appointment PAF

- 2.1. Access the **Personnel Action Form** (PAF) system (*Transaction MW04*).
- 2.2. Type the ERIP participant's UID in the **UID** field next to **End Appointment**.
- 2.3. Click once on the **SUBMIT** button.
- 2.4. In the **Effective Date** field type the employee's retirement date.
Special Note: Typically this is also their last day worked.
- 2.5. Click once on the **Create PAF** button.
- 2.6. Click once on the **TERMINATE** tab.
- 2.7. In the **Termination Reason** pull-down menu select "Early Retirement."
- 2.8. In the **Last Day Worked** date field type the employee's last day worked.
Special Note: The last day worked cannot be a vacation day.
- 2.9. Click once on the **SAVE, Go to Next >** button. The **Finish** tab should appear.
- 2.10. Complete the **FINISH** tab and click once on the **SAVE** button.
- 2.11. **Please Print the PAF and process immediately or no later than the month prior to retirement.**

For questions regarding PAF preparation, send a message to paf-support@uni.edu

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