

Job Aid

Employee Self Service Retirement

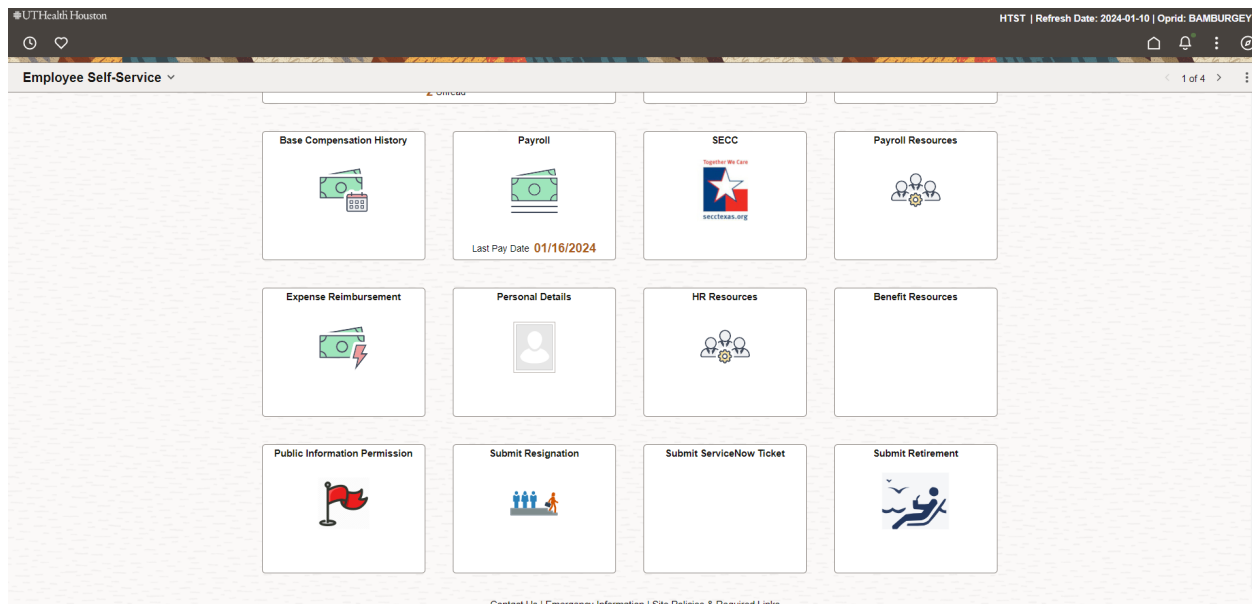


Objective:

This aid is intended to help end users understand how to complete an Employee Self Service (ESS) Retirement action in HCM. This feature will allow timely and efficient retirement transactions for current employees.

Logging into HCM Manager Self Service

Step	Action
1.	Go to https://selfservice.uth.tmc.edu/psp/hrss/ from your web browser.
2.	 In the User ID field, enter your UTHealth LDAP ID. In the Password field, enter your UTHealth Password.
3.	Click  You will be directed to the HCM Employee Self Service homepage.



4.

Click on the **Submit Retirement** tile.



You will be routed to the Retirement screen.

Employee Self Service Retirement should **not** be used for the following scenarios:

- Employee that has not met with a UTHealth Houston Retirement Specialist
- Those not eligible to receive retirement benefits from UT System.
- Employees terminating due to resignation.
- Employees terminating due to a discontinuation of grant funding.
- Transferring to another position within UT Health.

If you are separating employment (not retiring) from UTHealth Houston, please consult the ESS Resignation job aid for guidance.

5.	On the Retirement screen, the employee’s current Job Information will be displayed. Please confirm the information on the screen prior to proceeding with resignation submission. • Job Title • Department Name • Department Location • Reports To
----	---

You will now be asked a series of **Retirement Questions**.

Retirement

6.	Have you worked with Benefits department prior to electing retirement? ☐ Yes ☒ No If you select No, you will receive the following error message: Please Contact Benefits Office first OK You must inform and meet with a representative from the benefits office regarding your retirement before submitting your retirement request. Contact the Benefits Office at 713-500-3935 or benefits@uth.tmc.edu to begin the process. We recommend you begin the retirement process at least 3-6 months in advance.
7.	Click  . If you selected No to the retirement question in error, please change your answer to Yes. If Yes, please add your retirement specialist as the Benefit Contact. You will be prompted to the next question: Do you plan on returning to work at UT Health-Houston? If Yes, please proceed to Step 8, if No, please proceed to Step 9.

8.	Please confirm your Return-to-work date, last official work year and month. Once completed, click on Submit located at the top right of the screen. Have you worked with Benefits department prior to electing retirement? ☒ Yes ☐ No Benefit Contacts Do you plan on returning to work at UT Health - Houston? ☒ Yes ☐ No Return Date Last Official Work Year Last Official Work Month Reason Retirement with Benefits Comments
----	--

***IMPORTANT:** TRS Retirees who want to return are advised to consult with TRS (1-800-223-8778) regarding Employment After Retirement (EAR) rules and restrictions before formalizing any agreement to return to work. **TRS may impose severe penalties for non-compliance with TRS EAR rules.** The retiree must follow up with the benefits team for additional guidance.

ORP Retirees may discuss their intent with their department and follow-up with the benefits office for additional guidance.

9.	Please confirm your last official work year and month. Once completed click Submit located at the top right of the screen. Have you worked with Benefits department prior to electing retirement? ☒ Yes ☐ No Benefit Contacts Do you plan on returning to work at UT Health - Houston? ☐ Yes ☒ No Last Official Work Year v Last Official Work Month v Reason Retirement with Benefits Comments
----	---

Example: if the retirement date is 4/1/2024 - the last official work year would be 2024 and last official work month would be March.

Note: Comments will be visible to the Benefits Team and SDR.

10.

You are about to submit your retirement request. Do you want to continue?

- ☐ Yes
☒ No

If you select **No**, you will return to the previous screen.

If you select **Yes**, you will be directed to the **Offboarding** screen.

OffBoarding

Ericia Bryant
Benefits Analyst

Acknowledgement of Employee Checklist

● Visited

Verify Contact Details
☐ Not Started

Emergency Contacts
☐ Not Started

Verify addresses
☐ Not Started

State Agency
☐ Not Started

Direct Deposits/Payroll
☐ Not Started

Final Pay Acknowledgement
☐ Not Started

Final Employee Expense Reimbursement
☐ Not Started

Expense Reimbursement
☐ Not Started

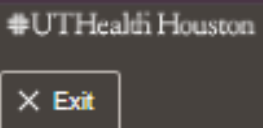
Download/Upload Document
☐ Not Started

Sick Leave Donation
☐ Not Started

Thank you
☐ Not Started

Acknowledgement of Employee Checklist

EMPLOYEE CHECKLIST	
To Do In Advance Of Separation Date:	Notes:
Benefit Inquiries	- For benefit questions, please call 713-500-3935 or email benefits@uth.tmc.edu. Benefits Website. - To donate your unused sick time to the Sick Leave Pool, complete this form and turn in to your department administrator and address any inquiries directly to benefits.
Submit Final Timesheet	For questions, please contact your manager
Return UTHealth assets	Turn in keys, badge, and all UTHealth issued property (keys, tools, computer, laptop, phone, USB, wireless devices, etc.)
Return or Destroy PHI	Certify that you have returned or destroyed any protected health information in your possession either in physical form or electronic.
Direct Transfers to Another Texas State Agency	For those employees transferring to another Texas state agency, vacation and sick leave accruals will transfer. Coordinate with your new state agency and UTHealth Employee Services .
Update Contact Information in Self Service	Update mailing address, telephone and personal email in Self Service to ensure receipt of communications such as Final Pay, W-2 Annual Statement of Earnings, Benefits and Exit Interview Survey.
Cancel Parking and Mobility Program	- For contact information regarding UTHealth Parking garages, please visit their site or email them at parking@uth.tmc.edu. Parking Cancellation Form. - To cancel TMC Parking, please contact your department representative. If you set up your own TMC Parking contract, please visit the TMC parking site. - To cancel Auxiliary Enterprise, Mobility Program, visit the Mobility website or email Mobility@uth.tmc.edu for contact information.
Complete Exit Interview Survey:	As you leave your position at UTHealth, we recognize you have a unique perspective on the UTHealth work environment here. We value your opinion and encourage you to participate in the UTHealth Exit Interview survey. You will receive a personalized link to an exit interview survey from UTHealth Houston. Your individual response will remain confidential and anonymous and will not be shared with supervisors, managers, or departments. The results of your survey will be pooled for analysis with those of other departing UTHealth employees. To speak to someone regarding your experience at UTHealth, please answer yes at the end of the survey or send an email to employeerelations@uth.tmc.edu. A summary of your survey will be sent to Employee Relations.

11.	Please read, review, and update as needed, all sections of the Offboarding tasks, some sections will require you to click the acknowledgment button at the bottom of the section. Once you have reviewed the section, you will have the option to either click Save or Mark Complete at the top right. It will change the status of the tasks from Visited to Complete with a green check mark.  The screenshot shows a checklist titled "Acknowledgement of Employee Checklist" with a green checkmark and the word "Complete". Below the title is a list of tasks, each with a green dot and the word "Visited": - Verify Contact Details - Emergency Contacts - Verify addresses - State Agency - Direct Deposits/Payroll - Final Pay Acknowledgement - Final Employee Expense Reimbursement - Expense Reimbursement - Download/Upload Document - Sick Leave Donation - Thank you
12.	Once all sections have been completed, Click Exit located at the top left to Exit screen to end the process.  Direct questions to the Benefits Office at 713-500-3935 or benefits@uth.tmc.edu