

Process – Faculty Update to Emeritus Status

When a faculty employee is retiring and has been awarded the rank of Emeritus, the process to update them in SAP is outlined below along with the following:

- Quick Tips & Emeritus JOB Codes/Titles
- Detailed Processing Steps
- CE (Additional) Assignments &
- Important Things to Remember

Quick Tips:

Current employment status is active in SAP, then: [note: detailed steps for all are below]

- A. If paid and not remaining in current position (i.e.: position budget needs to remain on current position for next holder) then:
 1. OM Create Position form
 2. PA Position Change form with Reason of 'Move to Non-Comp Retired'
- B. If paid or unpaid and remaining in current position, then:
 1. OM Maintain Position form
 2. PA Employee Position Update (EPU) form with Reason of 'Move to Non-Comp Retired'

Employee had a break in service and current employment status is Retired in SAP, then:

- C. If Retirement was effective and processed in SAP after 2015, then:
 1. OM Create Position form
 2. Hire Faculty Non-Comp (form will automatically turn into 'Rehire' form)
- D. If Retirement was effective and processed in SAP prior to 2015, then:
 1. OM Create Position form, and upon completion
 2. Email 'hrs@bu.edu' to move employee out of 'Retired Group'
 3. Once notified, Hire Faculty Non-Comp (form will automatically turn into 'Rehire' form)

Employee had no break in service; however, Retirement form was erroneously processed:

- E. If payroll hasn't run since move:
 1. OM Create Position form, and upon completion
 2. Email 'hrs@bu.edu' to move employee out of 'Retired Group'
 3. Once notified Hire Faculty Non-Comp (form will automatically turn into 'Rehire' form).
- F. If payroll has run since being retired:
 1. OM Create Position form, and upon completion
 2. Hire Faculty Non-Comp (form will automatically turn into 'Rehire' form) effective the 1st day of the following month before next payroll deadline. [The actual effective date of Emeritus will be stored in the Faculty Data (IT9001) record in the Position Rank Effective Date field.]

Emeritus JOB Codes for OM forms:

JOB #	JOB Short Text	Position Short	Position Medium Text
20001519	EMPROF	EMPROF	Emeritus Professor
20001521	EMASCP	EMASCP	Emeritus Associate Professor
20001520	EMASTP	EMASTP	Emeritus Assistant Professor
20004206	EPROFPP	EPROFPP	Emeritus Professor of the Practice
20004207	EASCPPP	EASCPPP	Emeritus Associate Professor of the Practice
20002304	ECPROF	ECPROF	Emeritus Clinical Professor
20002305	ECASCP	ECASCP	Emeritus Clinical Associate Professor
20002302	ERPROF	ERPROF	Emeritus Research Professor
20002303	ERASCP	ERASCP	Emeritus Research Associate Professor

Detailed Steps for processing - A: If paid and not remaining in current position

1. **OM Create Position form:**

- **Effective:** (Since this is a Create form) The date of retirement or up to 6 months prior.
- **JOB*:** select or enter the JOB # related to the approved Emeritus Rank [i.e.: 20001519-EMPROF]
- **Position Long Name*:** Rank + School/Dept/Section [i.e.: Emeritus Professor of Psychiatry]
- **Mark Position Open to Hire:** Must be the date that the employee is retiring [NOTE: if going from paid to unpaid, it is rare not to be effective on the 1st of the month]
- **Assignment Duration:** (always) 12 months
- **%Time:** _____ (enter from 10% to 100%)
- **Work Schedule:** (always) '8hr-5day'
- **Comments:** " _____ emp name _____ retiring and moving to Faculty Non-Comp Volunteer Emeritus status effective _____ date _____.
- **Attachments:** Emeritus approval doc and email with intent to retire from employee or letter from the school to the employee.

**NOTE: if Emeritus rank is still pending, then the JOB and Position Long Name will remain as their last rank. Once the Emeritus rank is approved, the position would then be Maintained to Emeritus using the outline in process 'B' (below).*

2. **PA Position Change form:** upon completion of the OM**

** The data sync between the OM and PA forms runs every 2 hours. Be sure you can see the OM updates in the 'Bar' (information section at the top of the PA form: Employee Group = Faculty Non-Comp, Employee SubGroup = Volunteer & the Correct JOB/Position titles). If the updates are not displaying then close out of the form. If they have pulled through then continue with the following:

- **Effective:** Must be the date that the employee is retiring [NOTE: if going from paid to unpaid, it is rare for a faculty employee not to be effective on the 1st of the month]
- **Reason:** 'Move to Non-Comp Retired' (always since Retirement is a criteria for Emeritus)
- **Assignment Duration:** 12 months (always)
- **%Time:** _____ (enter from 10% to 100%)
- **Work Schedule:** '8hr-5day' (always)
- **Comments:** " _____ emp name _____ retiring and moving to Faculty Non-Comp Volunteer Emeritus status effective _____ date _____.
- **Attachments:** Emeritus approval doc and email with intent to retire from employee or letter from the school to the employee.

Detailed Steps for processing - B: If paid or unpaid and remaining in current position, then:

1. **OM Maintain Position form:**

- **Effective Date:** Must be the date that the employee is retiring [NOTE: if going from paid to unpaid, it is rare for a faculty employee not to be effective on the 1st of the month]
- **JOB*:** select or enter the JOB # related to the approved Emeritus Rank [i.e.: 20001519-EMPROF]
- **Position Long Name*:** Rank + School/Dept/Section [i.e.: Emeritus Professor of Psychiatry]
- **Select:** 'No/Remove recruitment or hire selection
- **Assignment Duration:** (always) 12 months
- **%Time:** _____ (enter from 10% to 100%)
- **Work Schedule:** (always) '8hr-5day'
- **Comments:** "____emp name____ retiring and moving to Faculty Non-Comp Volunteer Emeritus status effective ____date____.
- **Attachments:** Emeritus approval doc and email with intent to retire from employee or letter from the school to the employee.

**NOTE: if Emeritus rank is still pending, then the JOB and Position Long Name will remain as their last rank. Once the Emeritus rank is approved the position would then be Maintained to Emeritus*

2. **PA Employee Position Update form (EPU):** upon completion of the OM**

** The data sync between the OM and PA forms runs every 2 hours. Be sure you can see the OM updates in the 'Bar' (information section at the top of the PA form: Employee Group = Faculty Non-Comp, Employee SubGroup = Volunteer & the Correct JOB/Position titles). If the updates are not displaying then close out of the form. If they have pulled through then continue with the following:

- **Effective:** Must be the date that the employee is retiring [NOTE: if going from paid to unpaid, it is rare for a faculty employee not to be effective on the 1st of the month]
- **Reason:** 'Move to Non-Comp Retired' (always since Retirement is a criteria for Emeritus)
- **Assignment Duration:** 12 months (always)
- **%Time:** _____ (enter from 10% to 100%)
- **Work Schedule:** '8hr-5day' (always)
- **Comments:** "____emp name____ retiring and moving to Faculty Non-Comp Volunteer Emeritus status effective ____date____.
- **Attachments:** Emeritus approval doc and email with intent to retire from employee or letter from the school to the employee.

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CE Assignments:

If a faculty employee has more than one assignment and their MAIN is changing to Emeritus status, the remaining CE (Additional Assignments) must be terminated (as only MAIN assignments are 'retired') individually by the FAM (Faculty Actions Manager) of the school/college where they obtained their appointment(s). The Termination form(s) should be processed as follows:

- **Effective Date:** same 'Last Day Worked' as the date the employee becomes 'retired'. [i.e.: Retiring and becoming Emeritus effective 7/1/xx; then, all CE's should have the 'Last Day Worked' of 6/30/xx.]
- **Reason:** Main Assignment Retired

Important Things to Remember:

- ✓ For CRC: If a faculty employee who is about to retire in the upcoming fiscal year is on accrual, then remove him/her from accrual pay status to deter any possible overpayments by July 1st. For example: if employee is retiring with Last Day Worked of 12/31/2020 and has been granted Emeritus as of 1/1/2021, then remove from accrual as of 7/1/2020:
 1. OM Maintain Position (effective 7/1/20 and comments of 'Remove from accrual received notification of retirement')
 2. PA EPU with the reason of 'Change to Employee SubGroup', Effective 7/1/20 and comments of 'Remove from Accrual'
- ✓ If it is determined that the position formerly held by the faculty employee will not be refilled and is no longer needed, then initiate the Delimit Position form to remove it from the org structure.
- ✓ Termination/Retirement forms should only be processed on a MAIN assignment when an employee is leaving/ending their relationship/employment with the university.