

CH27 - Recording and maintaining EJRA data

You must create an EJRA record (UDF) in CoreHR for all employees who **request** to work beyond the EJRA, regardless of the outcome of their application. Please refer to the Personnel Services guidance on the EJRA principles and procedures on the Personnel Services website.


What's changed?

Note added about running PERDEP07 - Retirement Planning report.

Feb18

Data from this UDF is incorporated into the PERDEP07_Retirement Planning report.

Navigate to: Personnel > Maintenance > Personal Profile

1. Search for the employee record and go to **Select Detail box > Other Person Details**. The *Select User Defined Field* screen opens.
2. Select **Retirement-EJRA** from the drop-down menu.
3. Click . The *EJRA* screen opens:

4. Complete the fields as below:

Field Name (*mandatory)	Description
Date From*	Enter the date the application to work beyond the EJRA was submitted.
Date To	Leave blank
Current EJRA date*	Enter either the default University retirement date e.g. 30 September 20XX, or the latest extended retirement date (where the employee already has an agreed extension in place), whichever date is the latest.
Notification sent	Enter the date that the EJRA ML1 or ML2 letter (two and a half year notification of retirement outlining the available options) was sent to the employee.


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EJRA application*	Select / enter the date the application to work beyond the EJRA was submitted for consideration to the HR Director.
Application outcome*	Select from the menu the initial outcome of the application e.g. Approved.
Appeal submitted	If the initial application has been declined indicate whether an appeal has been submitted, by selecting 'Yes' or 'No' from the menu. Otherwise, leave blank.
Appeal outcome	If an appeal was submitted, select the outcome of the appeal, e.g. Successful. Otherwise, leave blank.
New retirement date*	If the application (or the appeal) was successful, enter the extended retirement date, as agreed by the EJRA Panel/Committee. Otherwise, leave blank.
Comments	Enter any comments relevant to the individual circumstances; for example, any terms of the approved extension.
Appointment ID*	Enter the Appointment ID of the post in which the employee was employed at the time of making the request to work beyond the EJRA. This information can be found on the 'Appointment Details' screen in CorePersonnel.

5. Click , then  and .



Note: You may need to update the EJRA record to reflect the next step in the process, e.g. application outcome. Where you return to make further updates, navigate to the EJRA screen previously created and click

 to update it.



Note: If an employee submits a subsequent request to extend employment beyond their already deferred retirement date, you must create a new EJRA UDF record by following the steps outlined in this QRG. Please **do not end** the previous EJRA UDF record, i.e. do not enter a date into the "Date To" field of the previous record. If a date is entered into the "Date To" field, this record will not be returned in any of the reports.



See **QRG: CH25_Extension Of Employment Beyond EJRA** for guidance on moving the employee to a new fixed term appointment where their request to work beyond the EJRA is granted.

Useful Reports



2	+2,000
0	+5,000
1	+1,500
0	+1,125

To help track retirement dates and monitor EJRA cases, don't forget to regularly run (e.g. every six months) the 'PERDEP07 Retirement Planning' report, which incorporates any data recorded in the EJRA UDF. Please remember that the 'Retirement Date' field in the personal details screen should be ignored, as this field does not reflect current legislation and the University's EJRA.