

E-Mail ALSPO J/07

Subj: RETIREMENT PROCESSING

Introduction PSC is working on implementation of PeopleSoft's Global Payroll System for retired pay. We are in the parallel testing phase of this transformation with a scheduled 'go live' date of December 2007.

Transfer of Retirees from Direct Access to Global Pay Retirees are transferred electronically from Direct Access to Global Pay. The electronic transfer eliminates a manual data entry step and the potential consequences of dual entry. The electronic transfer process is run monthly for the previous month's retirement transactions. The process can also be executed ad-hoc for a specified range of dates.

Retirees are identified by a process in Direct Access. The process searches for job rows that contain an action/reason of "RWP/RWP".

- The necessary job row is not created in Direct Access until the SPO approves the retirement separation transaction.
 - **Parallel testing revealed that nearly one-third of the separation transactions for two hundred August 2007 retirements were not entered or approved by the responsible SPOs as of 7 September 2007.**
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SPO action SPOs must prepare and approve retirement separation transactions in a **timely fashion**. Separation transactions may be approved in Direct Access 14 days prior to their effective date. PSC (RAS) technicians cannot begin establishing a retiree's pay account until the member's data is transferred from Direct Access. The data transfer will not occur if the responsible SPO has not entered and approved the member's retirement separation by the effective date of the separation (for non-disability retirements this is the last day of the month or the date the member departs on terminal leave, whichever is earlier). Guidance for separation transactions can be found in the Direct Access Online Manual:

<http://www.uscg.mil/hq/psc/ps/separations/retirement/overview.htm>

SPOs shall verify and correct/update as needed, the retiree's personal data, dependency data, beneficiary data and other data elements which transfer from Direct Access to Global Pay as described on the next page.

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**Data elements
transferred
from Direct
Access to
Global Pay**

The following data are transferred from Direct Access to Global Payroll for retirees:

- Personal Data
 - Employee ID, Instance Number (Record Number)
 - Name: First Name, Middle Name, Last Name, Suffix, Prefix
 - Mailing Address: Address1, Address2, City, State, Country, Zip Code
 - National ID (SSN)
 - Basic Personal Information: Gender, Marital Status, Marital Status Date, Birth date, Highest Education Level,
 - Home Phone
- Job Data (retirement row)
 - Effective Date, Effective Sequence
 - Department, Job Code, Action, Action Reason, Status, Employee Class
- Separation Data
 - SPD Code
 - Retirement Authority
 - Disability Percent
 - Good Conduct
 - Highest Job Code
- JUMPS Data
 - Active Duty Base Date, DIEMS Date, Pay Base Date, Reserve Letter Date
 - High 36 Compensation
 - Total Reserve Points, Total IDT Points
 - Career Status Bonus
 - Total Qual Service

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**Data elements
transferred
from Direct
Access to
Global Pay
(cont'd)**

- Federal Tax Data
 - Federal Withholding Marital Status, Allowances, Additional Amount/Percent
- Payment Option Election
 - Account Number, Account Type, Bank Code, Deposit Type
- Dependents/Beneficiaries (all)
 - Dependent/Beneficiary ID
 - Name: First Name, Last Name, Middle Name, Suffix, Prefix
 - Address: Same As Employee, or Address1, Address2, City, State, Country, Zip Code
 - Relationship, Birth date, Marital Status, Marital Status Date, Gender, Student, Disabled
 - National ID (SSN)
- Allotments
 - Allotment type, includes:
 - Loan repayment to Coast Guard Mutual Assistance
 - Repayment of debt to US government
 - Support of Dependents
 - Repayment of home loans, mortgages
 - Commercial Insurance
 - Navy Mutual Aid Insurance
 - USGLI/NSLI
 - Dues to Coast Guard associations
 - Start Date
 - Amount
 - Recipient
 - Recipient Bank Account information

Note: Savings Bond allotments must be manually entered into Global Pay for each payee. Direct Access does not store the amount contributed towards each bond's purchase; PSC (RAS) technicians find this information in the JUMPS payroll system and record it in Global Payroll.

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Questions Questions regarding the content of this E-Mail ALSPO may be directed to PSC Customer Care at:



(785) 339-2200



<http://www.uscg.mil/hq/psc/customerservice.shtm> or
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Released by Internet release authorized.

/s/
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Executive Director