Retirement - Faculty

Retirement categories

- **Full retirement**: A retiree is any tenured faculty member who voluntarily terminates employment with the university and who meets the service requirements for retirement under the Teacher Retirement System or the Optional Retirement Program. TRS & ORP Overview PDF provides a comparison of the two plans. See COE: Separation and Retirement for additional information about retirement.

- **Phased retirement**: Phased retirement refers to reduced appointments in teaching, service, and/or scholarship to assist an individual in preparing for full retirement. A post-retirement contract is entered into for up to three years. A tenured faculty member who officially retires maintains a part-time (50% or 25%) term appointment without tenure until the expiration of the contract.

- **Modified service**: The Board of Regents may appoint a faculty member who has retired to modified service. Recommendation for and appointment to modified service shall be made only if the individual’s service will significantly benefit the university. Appointment to modified service is without tenure, limited to half-time, and spans no more than one academic year.

Retirement process for faculty

See EVPP: Faculty Retirement for guidance and Workday processing instructions.

Before initiating the retirement process in Workday, the retiring faculty member must review all steps in the HR Pre-Retirement Checklist and submit all required documentation. The "Retirement" reason code will not become available in the Workday Termination business process until HR has received and processed the pre-retirement paperwork and entered the faculty member’s expected retirement date.

Note that the official retirement date is always effective on the first day of the month following their termination effective date. See "Important Note on Retirement Dates" on page 1 of EVPP: Faculty Retirement for more information and examples.

If applicable, review additional information on the "Phased Retirement" tab on this page.

For general information about retiring from UT Austin, see COE: Separation and Retirement.

Emeritus titles

See EVPP: Faculty Retirement, page 6, "Emeritus Requests".

The emeritus title confers a lifetime academic appointment and may only be conferred upon retired faculty members who, during their period of active service at the University, held one of the following titles:

- Professor
- Associate Professor
- Research Professor
- Distinguished Senior Lecturer
- Clinical Professor
- Professor of Practice
- Professor of Instruction
- Medical titles: Professor of Clinical Nursing, Professor of Medicine (Clinical Researcher), Professor of Medicine (Clinical Educator), Professor of Medicine (Clinical Scholar)

The emeritus title may also include a named professorship, chair, or fellowship held by the faculty member prior to retirement, if approved by the Dean and department chair, and if not prohibited by the conditions of the professorship, chair, or fellowship.

Review HOP 2-2430: Emeritus Titles for additional information.

Emeritus status is not automatically granted upon retirement, but must be requested following the steps listed below.
Process - emeritus requests

1) The department should assemble an emeritus nomination packet consisting of the following:
   - A memo from the department chair supporting the nomination, including the following information:
     - The faculty member's accomplishments, individual distinction, and quality of contribution and service to the University
     - The breakdown of votes by the department Budget Council or Executive Committee
     - The effective date of the emeritus award (may not be earlier than the faculty member's first day of retirement)
     - Any honorific titles (Named Professorship, Chair, or Fellowship; Distinguished Teacher Award) to be included in the emeritus title
   - An up-to-date CV for the faculty member

2) Department forwards nomination packet to the Office of the Dean EA. Dean's memo is drafted and added to the nomination packet.

3) Office of the Dean EA forwards the emeritus nomination packet to evpp-aps@utexas.edu. Once received, Academic Personnel Services (APS) will process an Interim Emeritus Academic Appointment in Workday for the faculty member to ensure they retain privileges, i.e., network and library access, while their nomination goes through the approval process.

4) APS will review the nomination packet and forward it to the Office of the President for approval.

5) After the nomination is reviewed by the President, APS will notify the faculty member and CSU of the decision. If approved, APS will process the necessary transactions to establish the faculty member's emeritus status in Workday.

Emeritus privileges and perquisites

Holders of emeritus titles will be granted the following privileges and perquisites, per HOP 2-2430: Emeritus Titles, section VII.A.4:

   - Membership (without vote) in the General Faculty and in the college and department faculties in which membership was held at the time of retirement
   - Eligibility to serve on graduate committees, subject to the approval of the senior vice provost and dean of graduate studies
   - Listing in the faculty directory and in the appropriate college catalog
   - Use of the campus mail service consistent with HOP 4-1140: University Mail Services.
   - Office space, when available and with the approval of the chair of the department, the Dean, and the President
   - Membership, without vote, in the General Faculty and in the college and department faculties in which membership was held at the time of retirement

Resources

   - HOP 2-2430: Emeritus Titles
   - EVPP: Faculty Retirement
   - EVPP: Seminar on Retirement

Modified Service

TRS retirees must have service break of at least one month from Workday retirement date before returning to work under Modified Service or a Phased Retirement Contract. Texas ORP retirees may return to work at any time without restrictions on employment. The retiree is responsible for checking with their retirement program provider about any possible restrictions or ramifications before returning to service.

See HR: Employment After Retirement for additional information.

See EVPP: Faculty Retirement, pages 3-5, "Modified Service".

The Board of Regents may appoint a faculty member who has retired to modified service. Recommendation for and appointment to modified service shall be made only if it has been determined that there is both justifiable instructional need, and that the individual's service will significantly benefit the university. Appointment to modified service is without tenure, limited to half-time, and spans no more than one academic year.

A faculty member who wishes to be considered for appointment to Modified Service should submit a request in writing to the department chair during the fiscal year in which they have decided to retire, before the budget is prepared for the following year. Requests for renewals of modified service appointments should be submitted to the chairman each successive year. Review HOP 2-2420: Modified Service for prior approval procedures and additional information.

Modified Service appointments must meet the following criteria:

   - Without tenure
   - No more than 50% time
   - Do not exceed one academic year
   - Must include compensation

Appointment to modified service may be renewed in writing for successive terms of one academic year if the University determines that it is of significant benefit.
Faculty should not be considered for appointment to modified service to teach during a summer session. If no other qualified, active faculty member is available, APS may consider an exception.

See HR: Employment After Retirement for additional information.

Process - Modified Service

1) Process the faculty member's retirement in Workday.

2) Rehire the faculty member in Workday, keeping in mind any needed service breaks. A PAR (Prior Approval Request) is never used for retirees.
   - Faculty retirees are considered non-tenure track, and should always be hired into a JM supervisory organization, with a fixed term and end date. Their Job Profile will default from the one they held at time of retirement.
   - Do not skip the "Maintain Employee Contract" sub-process, as this is the only indicator in Workday that the employee is on Modified Service.
   - Use contract reason "Modified Service".
   - Attach a copy of the contract/signed offer letter into the Contract step.

See detailed Workday instructions at Box: Modified Service process (PDF).

Note: If processing a Change Job to extend the Modified Service contract and/or change the Scheduled Weekly Hours, attach a new signed contract/offer letter to the business process showing the updated information.

Resources

- HOP 2-2420: Modified Service
- EVPP: Faculty Retirement
- EVPP: Seminar on Retirement

Phased Retirement policy

TRS retirees must have service break of at least one month from Workday retirement date before returning to work under Modified Service or a Phased Retirement Contract. Texas ORP retirees may return to work at any time without restrictions on employment. The retiree is responsible for checking with their retirement program provider about any possible ramifications before returning to service.

See HR: Employment After Retirement for additional information.

See EVPP: Faculty Retirement, page 2, "Phased Retirement".

Phased retirement refers to reduced appointments in teaching, service, and/or scholarship to assist an individual in preparing for full retirement. A post-retirement contract is entered into for up to three years. A tenured faculty member who officially retires maintains a part-time (50% or 25%) term appointment without tenure until the expiration of the contract.

In Workday, use termination reason "End of Assignment" for phased retirements.
Process

1) Initiate and obtain approvals for a Phased Retirement Agreement letter according to the steps below:

   a. Faculty member should discuss phased retirement with department chair.
   b. Department EA completes Phased Retirement Agreement - COE Template.
   c. The departmental Budget/Executive Council reviews and decides whether to approve the agreement.
   d. If approved by the department Budget/Executive Council, department chair signs the agreement.
   e. Department EA forwards the agreement to the Office of the Dean EA at COE-HR@austin.utexas.edu.
   f. Office of the Dean EA sends the agreement to the Assistant Dean for Financial Affairs for non-signature approval.
   g. If approved, Assistant Dean for Financial Affairs returns agreement to Office of the Dean EA.
   h. Office of the Dean EA forwards the agreement to the Associate Dean for Academic and Faculty Affairs for review. If approved, Associate Dean signs the agreement on behalf of the Dean.
   i. Office of the Dean EA forwards the signed agreement to the Provost’s Office.
   j. If approved, agreement is returned to by the Provost’s Office and forwarded to the department chair and EA, and copied to the Associate Dean for Academic and Faculty Affairs, the Assistant Dean for Financial Affairs, and COE-HR@austin.utexas.edu.
   k. The Office of the Dean EA saves a copy of the approved agreement to the Dean's Office faculty files.

2) Process Termination business process in Workday according to the Termination - Academic W.I.G. Use reason "Retirement" and the Effective Date of their last day of employment under their regular faculty position. Attach a copy of the final-approved Phased Retirement Agreement to the business process.

   Reminder: For TRS retirees, a service break of at least month is required before adding a new job. For ORP retirees, no service break is necessary.

3) Academic Personnel Services (APS) will process the Non-Tenure Track Additional Job in Workday for the period described in the Phased Retirement Agreement, based on existing costing allocations.

4) After the NTT position has been final-approved, the home unit Cost Center Manager should make any needed changes to costing, such as moving the appointment to a Non-Tenure Track subaccount. The home unit is also responsible for processing any required Background Check associated with the new NTT position.

5) Once the service period described in the Phase Retirement Agreement has been completed, the home unit should end the additional NTT job according to the End Additional Job for Faculty W.I.G., using the reason "End Assignment."

Resources

- HOP 2-2410: Phased Retirement for Tenured Faculty
- COE: Phased Retirement Agreement Template
- COE: Separation and Retirement
- EVPP: Faculty Retirement
- EVPP: Seminar on Retirement

Amending a Phased Retirement Agreement

If the faculty member chooses to amend the Phased Retirement Agreement:

1) Email APS a PDF document of the amendment request initiated by the faculty member and approved by the department chair and Dean.

2) APS will route the PDF and create a memo to the Senior Vice Provost for approval.

3) Once approved by the Senior Vice Provost, the unit will receive a copy of the signed memo. This memo should be attached to the termination business process for the End of Assignment.

4) In Workday:
   - Use business process Job Change > Transfer, Promote, or Change Job
   - Change Effective Date
   - Why are you making this change? Change Job Details > Administrative > Revise FTE or End Employment Date
   - Change Organization Assignments - make any needed updates
   - Propose Compensation Change > Salary > Additional Details > Revise Actual End Date
   - Assign Costing Allocation for Change Job > Costing Allocation Level - select as appropriate
   - Maintain Employee Contract > Contract End Date > Revised Contract End Date

5) Process Update Academic Appointment business process to update end date.
   - Search for faculty member. Go to "Academic" tab in left-hand blue bar.
   - Review current information on "Current Appointments" tab.
   - Click magnifying glass icon in "Appointment" column on the row to be updated, to go to "View Academic Appointment" page.
   - On top line of View Academic Appointment page, "Academic Appointee", click three-dot "twinkie" to the right of the faculty member's name, and go to Academic Faculty > Update Academic Appointment.
   - On the first page of the Update Academic Appointment business process, "Start Date" is the effective date of the change, and should be either:
     - a) the date the amendment memo was approved by APS, if prior to the new contract end date, or
b) if the amendment memo was approved after the new contract end date, retroactively, use a Start Date prior to the end of the new contract end date. Example: new contract end date is 8/31/2020, APS approved amendment memo 9/2/2020, use a start date prior to 8/31 such as 8/1/2020.

- Note that "Track Date" is the effective date of the faculty member's current track, i.e., the date their original Phased Retirement Agreement started. (See more info on Tracks.) This date will default in to the business process.
- Reason: Update Academic Appointment > Administrative Change
- End Date: new contract end date
- Additional Data section - Phased Retirement Data: Add new contract end date (same as "End Date" above)

6) Process Termination business process with reason "End of Assignment". Upload the approved amendment memo as documentation. DO NOT skip the "Maintain Employee Contract" step.

**Employment after retirement**

TRS retirees must have service break of at least one month from Workday retirement date before returning to work under Modified Service or a Phased Retirement Contract. Texas ORP retirees may return to work at any time without restrictions on employment. The retiree is responsible for checking with their retirement program provider about any possible ramifications before returning to service.

Note that once a tenured faculty member retires, they forfeit tenure. Any post-retirement employment is considered Non-Tenure Track, Fixed Term, should be in a JM supervisory organization, and should be funded accordingly.

A copy of the signed contract/offer letter must always be uploaded at the contract step to the Workday Hire business process.

See HR: Employment After Retirement for additional information.

*Please send suggested additions to this page and notifications about broken links to COE-HR@austin.utexas.edu.*