

City of Minneapolis Human Resources Department

Phased Retirement Request and Job Change Form

This form must be completed by the supervisor/manager of an employee requesting the PERA Phased Retirement option. The supervisor/manager should work with department management including the department's HR Generalist to determine whether the City will grant the employee's request. The City of Minneapolis has the sole authority to determine whether a Phased Retirement request will be approved.

Employee ID Number	Employee Name	
Date of Birth	Date of Hire	Supervisor's Name
Funding String (Current position)		Funding String (New position)
Job Code and Job Title (Position Number – if they keep the same position but change it from full time to part time)		
Initial Phased Retirement Date		End of Initial Period (up to 1 year following Phased Retirement Date)
Phased Retirement Renewal Date		End of Renewal Period (up to 1 year following renewal date)
Hours Currently Working Per Week		Hours Per Week During Phased Retirement (Hours must be reduced by at least 25% and no more than 1044 hrs/yr or 20 hrs/wk)

Department must determine if the employee's request for Phased Retirement meets a business need, such as:

- Due to department reorganization, the employee's job will be reduced to part time and the job will be eliminated at the end of the phased retirement period
- The retiring employee will be replaced and in order to train a replacement a job overlap is required for a limited period of time
- Other, please explain

Note: If request is approved, a PERA Phased Retirement Agreement and an Application for PERA Retirement Benefits must also be completed and returned to PERA.

Deny

Employee Signature	
_____	_____
	Date
Approved By	_____
(Signature of Supervisor/Manager)	_____
	Date
Approved By	_____
(Signature of Department Head)	_____
	Date
Submitted By	_____
(Signature of Human Resources Generalist)	_____
	Date
Entered into COMET by:	_____
	Date

PERA PHASED RETIREMENT PROCEDURES

- 1) PERA's **Phased Retirement Option** allows eligible Coordinated Plan members to receive a pension while working on a reduced hour schedule. An employee interested in, and eligible for, the PERA Phased Retirement option should meet with his/her supervisor and/or HR Generalist. The supervisor or HR Generalist will work with department management to determine if the Phased Retirement option will be offered.
- 2) The City of Minneapolis has the sole authority to determine whether an employee's request for Phased Retirement will be approved. Examples of situations where a department could approve such a request are as follows:
 - Due to department reorganization, an employee's job will be reduced to part time and the job will be eliminated at the end of the phased retirement period.
 - The retiring employee will be replaced and in order to train a replacement, a job overlap is required for a limited period of time
- 3) The supervisor/manager must verify that an employee requesting Phased Retirement meets the following criteria:
 - a. Is a participant in PERA's Coordinated Plan,
 - b. Has been employed for at least 1,044 hours per year for the five years immediately preceding participation in the phased retirement program, and
 - c. Is age 62 or older
- 4) The HRG and/or supervisor should meet with the employee to review:
 - a. Requirements relating to Phased Retirement, and
 - b. The effect that a transfer from full time to part time status has on the City's group insurance, paid time off and optional benefit plans.
- 5) If the employee's request is approved and the Phased Retirement date and part time schedule are determined, the City's Phased Retirement Request and Job Change Form must be completed with copies distributed as appropriate. **Note: Central Payroll and HRTS must receive copies of the form as soon as the request is approved. Send scanned copies to centralpayroll@minneapolismn.gov and hrtts@minneapolismn.gov.**

Important: The employee must be advised to contact PERA to request a PERA Phased Retirement Agreement and an Application for PERA Retirement Benefits. These forms are also available at www.mnpera.org (click on Members, then Phased Retirement Option). Part A of PERA's Phased Retirement Agreement form is to be completed by the employee's supervisor or Human Resource Generalist.

PERA must receive their agreement and application forms before the employee begins their Phased Retirement assignment.

- 6) The *initial* Phased Retirement period cannot exceed one year. The City may extend the individual's employment for additional periods of up to one year each. The total period of Phased Retirement may not exceed five years.

A new City Phased Retirement Request and Job Change Form and a new PERA Phased Retirement Agreement must be completed to extend the employees Phased Retirement status beyond the initial term.

Distribution: Original: Department Personnel File

Copies: Employee, HR/Benefits (hrtts@minneapolismn.gov) , Central Payroll (centralpayroll@minneapolismn.gov), Department HRTS Rep

Last Updated: 4/2016