

The University has a policy on flexible retirement; refer to the Personnel Services website for more information:

<http://www.admin.ox.ac.uk/personnel/end/retirement/flexible/retire/>.

Approval for flexible retirement should be sought from the relevant body before processing changes in CoreHR.

What's Changed?

Note added about running PERDEP07 - Retirement Planning report.

Feb18



Note: Employment beyond the Employer Justified Retirement Age (EJRA) for academic and related staff has a specific procedure. Refer to **QRG: CH25_Extension of employment beyond the EJRA.**

This guide covers the following process steps:

- A. Change in hours only 1
- B. Change in grade 1

A. Change in hours only

Follow **QRG: CH3_Change: Hours**. Use the following action and reason codes:

Field Name (* mandatory)	Description
Action *	Select Hours Decreased .
Reason Code *	Select Flexible Retirement .
Comments *	Enter any relevant comments, e.g. details of approval.

B. Change in grade

1. Raise a staff request against the existing post. See **QRG: RQ1b_Create Staff Request (Existing Post)**. Specifically:

Field Name (* mandatory)	Description
Position type *	Select Replacement/refill new grade
Additional information *	Enter details and context i.e. flexible retirement, the name of the individual, approval details, and details of previous grading authorisation for the existing post.

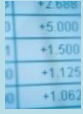
2. Transfer the individual into the new appointment. See **QRG: PA2f_Appoint Transfer – within same department**. Use the following action and reason codes:

Field Name (* mandatory)	Description
Action *	Select Change in Grade .
Reason Code *	Select Flexible Retirement .
Comments *	Enter any relevant comments, e.g. details of approval.

Useful Reports:

PERDEP07 Retirement Planning

To identify employees approaching the University's Employer Justified Retirement Age (EJRA). 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.



7	72.0000
0	+5.000
3	+1.500
0	+1.125
0	+1.062