

Phased Retirement Option Request & Job Change Form

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

Employee Name _____	Employee ID # _____
Date of Birth _____	Date of Hire _____
Supervisor's Name _____	Department _____
Funding String (current position) _____	Funding String (new position) _____
Initial PR Date _____	Maximum Five-year End Date _____
Hours currently working per week _____ <i>(Max hours employee worked in pay period prior to PRO)</i>	Hours per week expected during PR: _____ <i>(see hour stipulations on PERA PRO form)</i>

Department must determine if the participant's request for PR meets a business need, such as:

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

Employee Signature _____	Date _____
Approved by _____ <i>(Supervisor/Manager)</i>	Date _____
Approved by _____ <i>(Department Head)</i>	Date _____
Submitted by _____ <i>(Signature of HR Business Partner)</i>	Date _____

Review date 1: _____	Reviewed by _____	Extension approved Extension denied
Review date 2: _____	Reviewed by _____	Extension approved Extension denied
Review date 3: _____	Reviewed by _____	Extension approved Extension denied

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

Date entered into COMET _____ Date entered into Service Center _____

PERA Phased Retirement Information & Procedures

- 1) In addition to the following, please refer to the PERA Phased Retirement Option (PRO) Agreement you signed as part of your PRO PERA application.
- 2) PERA's **Phased Retirement Option (PRO)** allows eligible Coordinated Plan members to receive a pension while working on a reduced hour schedule. A participant interested in, and eligible for, the PERA Phased Retirement option should meet with his/her supervisor and/or HR Business Partner. The supervisor or HR Business Partner will work with department management to determine if the PRO request will be approved by the City of Minneapolis.
- 3) The City of Minneapolis has the sole authority to determine whether a participant's request for phased retirement will be approved. Examples of situations where a department could approve such a request are on the Phased Retirement Option Request and Job Change form.
- 4) The supervisor/manager must verify that a participant requesting PRO meets the following criteria:
 - a. is a participant in PERA's Coordinated Plan;
 - b. understand that if the allowed hours in a pay period or the maximum hours per year are exceeded, the PERA monthly benefit will be suspended. The benefit will not be reinstated until all public employment has been terminated and a continuous separation for 30 days has occurred;
 - c. is an active member of the Plan as an employee, not an elective official;
 - d. is age 62 or older;
 - e. is not eligible for the state employee Post-Retirement Option under MN Stat §43A.346;
 - f. participant reduces work schedule by 25 percent in each pay period and not to exceed 1,044 hours in a year of PRO employment. Under the law, the City is responsible for reporting the earnings and compensated hours of each PRO participant to PERA each pay period. PERA will use the salary and hours data reported to monitor the work schedule and PRO eligibility of each participating member.
- 5) The HR Business Partner and/or supervisor should meet with the participant to review:
 - a. requirements relating to PRO, 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.
- 6) Formerly, the PRO agreement had an annual renewal; however, the recent legislation eliminated the annual renewal process. Currently, once the revised Agreement is filed with PERA for an eligible employee, it will be in effect until the five-year maximum is reached, termination of all public service (with a 30-day break in service), or if the City denies renewal during the five years, whichever occurs first.
- 5) If the participant'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 on the reverse side must be completed and distributed as follows:
 - a. original copy to Department Personnel File
 - b. one copy to participant
 - c. scan and send copy to Central Payroll (centralpayroll@minneapolismn.gov)
 - d. submit a "General Inquiry" ticket in CityLife. Attach the PRO form to the ticket. *(CityLife will include the PRO ticket with Job Changes in HRTS.)*

Important: The participant must be advised to contact PERA to request a PERA PRO and an Application for PERA Retirement Benefits. These forms are also available at www.mnpera.org. (*Members, Phased Retirement Option*). Part A of PERA's Phased Retirement Agreement form is to be completed by the participant's supervisor or HR Business Partner. PERA must receive the agreement and application forms before the participant begins the PRO assignment.