

Philosophy

Legislative, economic and business related reasons created the need to revise existing guidelines affecting returning retirees. These reasons include:

- 1.Revision of re-employment restrictions for the Ohio Public Employees Retirement System (OPERS) and the State Teachers Retirement System of Ohio (STRS-OH);
- 2.Increased need for departmental hiring flexibility;
- 3.A larger number of retirees interested in returning to work after retirement; and
- 4.The potential desirability of recruiting from this applicant pool for positions where previous Ohio State experience is required or preferred.

Guidelines

The following guidelines are designed to assist departments/units when recruiting and hiring individuals who previously retired from Ohio State. These guidelines replace all existing policies and guidelines relating to returning retirees (including the Early Retirement Incentive (ERI) Policies). Therefore, these guidelines apply to all faculty and staff who retire from the university regardless of whether their retirement was through an ERI program or regular retirement.

Departments have the option to employ retirees as returning retirees under the following guidelines or through the normal employment process with a regular faculty/staff title.

I. Eligibility

- A. This applies to individuals who have retired from Ohio State.
- B. For OPERS/STRS-OH retirees only, two months must elapse from date of retirement; this applies regardless of whether individuals are hired as returning retirees or in regular faculty/staff titles.
- C. Ohio State retirees cannot return to the university as independent contractors while receiving benefits from OPERS/STRS-OH.

II. Hiring Procedures:

- A. The employing unit is responsible for:
 - Completing the required steps to create a position and appoint an individual through the University's Human Resources Information System.
 - Completing the *Checklist for Retirees Appointed to a Returning Retiree Position* to ensure all required information is completed accurately.
- B. The Office of Human Resources is responsible for:
 - Consulting with colleges and units regarding the re-employment of retirees.
- C. The individual is responsible for completing the required forms upon re-employment.

Refer to the following chart to determine the appropriate form to complete:

System Retired From	System Returning To	Name of Form
STRS-OH	STRS-OH	<i>Notice of Employment as a Teacher of a Retiree of an Ohio Public Retirement System</i>
OPERS	OPERS	<i>Notice of Re-Employment of an OPERS Retirant</i>
STRS-OH or Alternative Retirement Plan (ARP)	OPERS	<i>OPERS Personal History Record</i>
OPERS or ARP	STRS-OH	<i>STRS Membership Record</i>

Forms must be returned to the Office of Human Resources (OHR) within thirty (30) days of the re-employment date. These forms are available online at <http://hr.osu.edu/hrpubs/forms.htm> or from the Office of Human Resources Customer Service Center, 2130 Neil Avenue, Columbus, OH, 43210-1156, service@hr.osu.edu, (614) 292-1050, (800) 678-6010, or Fax (614) 292-6235.

III. Additional Hiring Procedures for some OPERS, STRS-OH, and ARP Retirees

- A. Additional hiring procedures are required **only** for individuals who meet **both** of the following conditions (skip to Section IV of this document if these conditions are not met):
1. Name appears on the Board agenda for hiring approval (Principal Administrative Officials).
This may include:
 - The President
 - Provosts
 - Vice-Provosts
 - Vice presidents
 - Deans
 - Directors of Centers
 - Chaired Professorships
 2. Retired through OPERS, STRS-OH, or ARP and is re-employed in the same position.
 - a. The following information defines same position:
 - Title
 - Level of responsibility (job duties)
 - Location
 - Benefit eligibility
 - FTE %
 - Salary
 - b. The salary assigned should be based on the essential job duties performed.
 - c. A new or different job should have reduced, changed, or expanded essential job duties.

- B. The Vice Provost for Academic Policy and Human Resources and the employing unit are responsible to work in conjunction to apply the following procedures when an individual is rehired to the same position and meets the qualifications as described in Section III(A):
1. Provide public notice that the person is seeking to retire, draw a pension, and return to work in the same position on the Board of Trustees agenda at least 60 days prior to the intended date of hire. (See appropriate “Checklist for Returning Retirees” section of this document)
 2. Thirty days after the position appears on the Board of Trustees agenda a public hearing should be conducted.
 - The Vice Provost for Academic Policy and Human Resources and a department official from the employing unit are responsible to take relevant information learned back to the decision makers.
 - The employing unit is responsible to record, in the personnel file, that the hearing occurred.
 3. The hiring process will continue after taking into account information from the public hearing.

IV. Re-employment Status

- A. Individuals should be appointed to one of the following four job classifications:
- Retiree-Staff NE (individuals returning to a non-exempt OPERS-eligible position)
 - Retiree-Staff E (individuals returning to an exempt OPERS-eligible position)
 - Retiree-Faculty (individuals returning to a STRS-eligible position)
 - Retiree-Faculty Emeritus (emeritus faculty returning to a STRS-eligible position)
- B. Salary will be renegotiated at the time of re-employment and based on the services to be performed.
- C. The time of re-employment, individuals must have a reduction to their salary, which may not exceed 75% of the salary earned immediately prior to retirement.
- D. Individuals may return to the same FTE held immediately prior to retirement. FTE may not exceed 100%
- E. The following information determines benefits eligibility:
- Job Code
 - Regular or Temporary Status
 - FTE %
 - Appointment Length (e.g. 9/12, 11/12, 12/12, 52/52, etc.)

V. Benefits Eligibility (Refer to the Attachment *Benefit Programs for Returning Retirees* and the Benefits Eligibility Booklet for detailed benefit coverage information):

- A. Individuals hired in a regular retiree position of 50% or greater FTE are eligible for:
- Medical (*refer to the chart below to determine medical plan enrollment requirements*):

Retirement System Retired From	System Returning	Requirement	Enroll?
OPERS	OPERS or STRS-OH	Individual must enroll in a university-sponsored medical plan unless enrolled in other comparable non-OPERS medical coverage (e.g. spouse's employer plan)	Faculty/Staff member only; dependents may maintain primary coverage with OPERS
STRS-OH	OPERS or STRS	No requirement. Individual may enroll for medical coverage with the university or the applicable retirement system	N/A
ARP	ARP, OPERS or STRS-OH	No requirement. Individual may enroll for medical coverage with the university or other plan	N/A

- Flexible Spending Accounts (FSA)
 - Retirement Contributions (including Supplemental Retirement Accounts)
 - Holidays
 - Sick Leave
 - Vacation Leave (at the level of a newly hired A&P Unclassified Staff or Faculty member with no prior years of service)
 - FML (eligibility in accordance with the FML policy)
 - Workers' Compensation
 - Unemployment
- B. Individuals are not eligible for:
- Dental
 - Vision
 - Disability
 - Life Insurance (university sponsored and voluntary programs)
 - Leaves of Absence (personal and medical if non-FML)
 - Tuition Assistance (faculty/staff and dependent assistance) (except as eligible through retirement status)
- C. Individuals will be notified of benefits eligibility through the standard eligibility notification process and will also be eligible to make changes during annual open enrollment period.
- D. Departments will be charged the appropriate benefit composite rate.

VI. Termination of Service:

- Returning retirees serve at the discretion of their appointing authority.
- Individuals should receive two weeks advance written notice by the unit appointing authority, unless the termination is a result of actions that necessitate termination without advance notice.
- Accrued but unused sick leave will not be paid when employee terminates from service.
- Accrued but unused vacation leave may be paid out according to the vacation accrual schedule when employee terminates from service.
- Individuals should contact the appropriate retirement system to discuss how their change in employment status may impact their pension and benefit options.

I. The following benefit programs are available to returning retiree appointments:

Medical Plans and Flexible Spending Accounts (FSA):

Returning retirees with a non-temporary retiree appointment of at least 50% FTE are eligible for medical and FSA benefits. OPERS retirees must follow OPERS guidelines regarding medical enrollment.

Retirement Contributions:

Returning retirees are required to pay retirement contributions to OPERS, STRS-OH, or ARP. If elected, OPERS/STRS contributions will be applied to an additional annuity benefit (this election is made with the retirement system). The annuity benefit is payable by OPERS/STRS upon the later of:

- 1) the last day of re-employment; or
- 2) attainment of age 65. Contributions for individuals participating in the ARP will be applied to their ARP account.

Supplemental Retirement Accounts (SRAs):

Returning retirees are eligible to participate in supplemental retirement account programs (403(b) and 457 plans).

Holidays:

The returning retiree will be eligible for paid holidays. This benefit is pro-rated based on the individual's FTE.

Sick Leave:

The returning retiree will accrue sick leave based on the accrual rates for other active employees. This benefit is pro-rated based on the individual's FTE. Accrued, but unused sick leave will not be paid when the individual terminates from service.

Vacation Leave:

The returning retiree will accrue vacation leave based on the accrual rates for other active employees. The accrual rate will be based on the returning retiree's date of rehire in a regular status returning retiree job code, with an FTE of 50% or greater. This benefit is pro-rated based on the individual's FTE. Accrued, but unused vacation leave will be paid when the individual terminates from service.

Family Medical Leave (FML):

Returning retirees are eligible for FML in accordance with the university's FML policy.

Workers' Compensation and Unemployment Compensation:

These statutory benefits will be applicable to the returning retiree.

Medicare Hospital Insurance Tax:

Returning retirees are required to pay this tax if there has been a break in employment or if previously required to pay this tax.

II. The following benefit programs are not available to returning retiree appointments:

- Dental
- Vision
- Disability
- Life Insurance (university sponsored and voluntary programs)
- Leaves of Absence (Personal and Medical)
- Tuition Assistance (Faculty/Staff and Dependent Assistance), although individuals may be eligible as a retiree for dependent tuition assistance for up to five (5) years from the date of initial retirement

Checklist for Retirees Appointed to a **Returning Retiree Position** (Job Codes 7284, 7286, 7287, 7288)

- 1. Was the individual an OPERS/STRS retiree? If so, **two months** must elapse from retirement date
 - Ensure the individual completes the appropriate retirement system's form and returns it to the Office of Human Resources within 30 days of the re-employment date
 - If an OPERS retiree: Complete the form title *Notice of Re-Employment of an OPERS Retirant*
 - If a STRS-OH retiree: Complete the form title *Notice of Employment as a Teacher of a Retiree of an Ohio Public Retirement System*.
 - Notify the individual that if receiving OPERS retirement benefits he or she must elect university medical coverage if appointed to a non-temporary retiree position of 50% or greater FTE; university medical coverage is optional for individuals receiving STRS-OH retirement benefits.

- 2. Was the individual an OPERS, STRS-OH, or ARP retiree who is returning to the same position, which requires approval from the Board of Trustees (Principal Administrative Officials)? If so, the following steps must be taken:
 - Public notice should be given that the person is seeking to retire, draw a pension, and return to work in the same position, and included on the Board of Trustees agenda at least 60 days prior to the intended date of hire. This notice should include:
 - Name
 - Position
 - Time
 - Date
 - Location of the scheduled public hearing
 - The employing unit is responsible to contact the Vice provost for Academic Policy and Human Resources three weeks prior to the appropriate Board of Trustees meeting to get on the agenda
 - The Vice Provost for Academic Policy and Human Resources is responsible to put the position on the Board of Trustees agenda
 - Comments to be included in the hearing may be given in writing and forwarded to the person responsible for posting before 5:00 p.m. the day prior to the hearing. Comments not received by 5:00 p.m. the day prior to the hearing will not be considered
 - The Vice Provost for Academic Policy and Human Resources and a department official from the employing unit are responsible to conduct a public hearing 30 days after the position appears on the Board of Trustees agenda
 - The Vice Provost for Academic Policy and Human Resources and the department official are responsible to take relevant information learned back to the decision makers
 - The employing unit is responsible to record, in the personnel file, that the hearing occurred

- 3. Have you re-negotiated the salary and FTE?
 - Individuals must have a reduction to their salary. Salary may not exceed 75% of the salary earned immediately prior to retirement.

- 4. Create the position through the university's Human Resource Information System (HRIS) (see details in #5 – 9)

- 5. If the individual is returning to a Retiree Staff position:
 - Use **Retiree-Staff E, Job Code 7288** if the individual is hired in an exempt position
 - Use **Retiree-Staff NE, Job Code 7287** if the individual is hired in a non-exempt position

- 6. If the individual is returning to a Retiree Faculty position:
 - Use **Retiree-Faculty Emeritus, Job Code 7284** if the faculty member has an emeritus status (this position defaults to exempt)
 - Use **Retiree-Faculty, Job Code 7286** if the faculty member retired without emeritus status (this position defaults to exempt)

- 7. How long are you planning to have the individual work?
 - If up to one (1) year, select **Temp** in the Reg/Temp field
 - If longer than one (1) year, select **Reg** in the Reg/Temp field

- 8. What is the individual's eligibility for benefits? (*Note: The individual will receive a benefit enrollment packet detailing their benefit plan options*)
 - If Temp – Special C (refer to Benefits Eligibility Book – Class E)
 - If Regular at least 50% – Returning Retirees (refer to Benefits Eligibility Book – Class J)
 - If Regular less than 50% - Special C (refer to Benefits Eligibility Book – Class E)

- 9. What is the appropriate appointment length? Examples include the following:
 - 9/12 for faculty with nine month appointments
 - 12/12 for exempt staff and other faculty
 - 52/52 for non-exempt staff

- 10. Verify and update data to ensure that vacation leave is accrued appropriately
 - Update the “Service Date” on Employment Data in Job Data (*Administrator Workforce/ Administrator Workforce (GBL)/Use/Job Data*), click on the Employment Data link, and change the date to the day that the individual was rehired into the Returning Retiree position.
 - Check the leave accrual balance (*Compensate Employees/Administrator Base Benefits/Use/Leave Accruals*). If the balance is not zero (0), contact HRSOS at hrosos@hr.osu.edu to have the balance corrected.

- 1. Was the individual an OPERS/STRS-OH retiree? If so, **two months** must elapse from retirement date
 - Ensure the individual completes the appropriate retirement system’s form and returns it to the Office of Human Resources within 30 days of the re-employment date
 - If an OPERS retiree: Complete the form title *Notice of Re-Employment of an OPERS Retirant*
 - If a STRS retiree: Complete the form title *Notice of Employment as a Teacher of a Retiree of an Ohio Public Retirement System*

- 2. Was the individual an OPERS, STRS-OH, or ARP retiree who is returning to the same position, which requires approval from the Board of Trustees (Principal Administrative Officials)? If so, the following steps must be taken:
 - Public notice should be given that the person is seeking to retire, draw a pension, and return to work in the same position, and included on the Board of Trustees agenda at least 60 days prior to the intended date of hire. This notice should include:
 - Name
 - Position
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 - The employing unit is responsible to contact the Vice provost for Academic Policy and Human Resources three weeks prior to the appropriate Board of Trustees meeting to get on the agenda
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- 3. Enter the appointment data in the university’s Human Resource Information System (HRIS) (see details below); of a new position, create the position and appointment through HRIS

- 4. If the individual is returning to a Regular Staff position, select appropriate job code

- 5. If the individual is returning to a Regular Faculty position, select appropriate job code

- 6. What is the individual's eligibility for benefits?
 - The individual will be offered the same benefits available to regular faculty and staff in an equivalent appointment (refer to the Benefits Eligibility Book for details)
 - If receiving OPERS retirement benefits, the individual must elect university medical coverage if appointed to a position that is eligible for benefits
 - If receiving STRS-OH retirement benefits, the individual has the option to enroll in university medical coverage
 - The individual will receive a benefits enrollment packet detailing his/her benefit plan options