

# **Chapter 20 Resignations and Retirement**

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## 20.01 Resignations and Retirement of Classified Employees

### I. Letters of Resignation

When employees resign, they should give reasonable notice by letter to the immediate supervisor.

### II. Staff Benefits upon Termination or Retirement

Please consult materials available from Office of Human Resources Benefits Services or access their web site at <http://www.ohr.wisc.edu/benefits/retirement/>

### III. Return of University Property and Keys

Upon termination, employees must return all keys or other University property previously issued to them by the department.

### IV. Retirement

#### A. Retirement Age

There is no mandatory retirement age for UW-Madison classified staff.

#### B. Retirement Planning

Employee Compensation and Benefits Services offers pre-retirement planning options for UW-Madison employees. Services should be used according to the following guidelines:

##### **For employees two to five years from retirement:**

The Pre-Retirement Workshop is designed for employees age 50 and over. The workshop provides general retirement information and is considered a prerequisite for an individual retirement counseling appointment. Register for a Pre-Retirement Workshop at <https://www.ohrd.wisc.edu/OHRDCatalogPortal/?tabid=29&CourseGroupKey=4614>.

##### **For employees one year or less from retirement:**

- a. Contact the Department of Employee Trust Funds, (877)-533-5020, to request a retirement packet and benefit estimate.
- b. Contact the Social Security Administration, 1-800-772-1213, to request an Earnings and Benefit Estimate statement.
- c. After receiving the above two documents, schedule a one-on-one counseling session. To schedule an appointment with a UW-Madison benefits specialist, go to <https://www.ohrd.wisc.edu/OHRDCatalogPortal/?tabid=29&SeriesKey=300>. Select your preferred date and time, then click on "Login & Register" and enter your NetID and password to complete the registration process. Our offices are located at 21 N. Park Street, Suite 5101. Visitor parking is available in the attached parking structure, and there is a city bus stop in front of the building. If you have an urgent need for an appointment prior to the first available appointment, please e-mail [benefits@ohr.wisc.edu](mailto:benefits@ohr.wisc.edu)

#### C. Recognition Status

##### a. Certificates

A Certificate of Recognition signed by the President of the Board of Regents, the Chancellor, and the Director of Classified Human Resources will automatically be sent to those retirees awarded emerita/emeritus status.

For non-emerita/emeritus retiring classified staff, departments may request a Certificate of Appreciation signed by the Chancellor by completing a fillable form available on the web ([http://www.ohr.wisc.edu/retirement\\_certificate.htm](http://www.ohr.wisc.edu/retirement_certificate.htm)). If an employee has 20 or more years of State service, he or she will also receive a

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Certificate of Commendation signed by the Governor when the Certificate of Appreciation is requested.

### **b. Emeritus/Emerita Status**

Emeritus/emerita status is an honorary title which may be conferred only upon individuals who have had permanent employment with the University of Wisconsin-Madison and who are eligible to activate their annuities from the Wisconsin Retirement System (WRS). Volunteer staff on a zero-dollar basis who no longer provide volunteer support are not eligible for this status.

#### **i. Eligibility**

1. Emeritus/emerita status is limited to classified staff retiring after distinguished service at the University of Wisconsin-Madison. Classified staff must have completed ten or more years of service at the University to be eligible for such recognition. Classified staff may be granted emeritus/emerita status in their final classification.
2. Individuals granted emeritus/emerita status who have held a concurrent senior administrative title of Dean or higher may, upon recommendation of the Provost, be granted emeritus/emerita status by the Chancellor for the administrative title also.

#### **ii. Process for Obtaining Emeritus/Emerita Status**

1. Recommendations for emeritus/emerita status for retiring classified staff usually begin at the department level (through the executive committee, when necessary) and proceed through the dean's office to the Chancellor. The recommendation should include the following:
  - 1) a narrative summary citing the professional accomplishments and record of university service of the retiring classified staff;
  - 2) the expected date of retirement (a copy of the letter of retirement);
  - 3) dean level approval.
2. Recommendations may be submitted throughout the year. Chapter 6 of the Budget Instructions provides additional information.

#### **iii. Reappointment of Emeritus/Emerita Staff**

See section entitled Re-employed Annuitants within this chapter.

## **D. Privileges Retained After Retirement**

There are certain privileges extended by various offices of the University of Wisconsin-Madison to UW-Madison retirees. Nothing in these paragraphs is meant to alter other currently established policies concerning priorities for use of certain facilities by students, faculty, staff or visitors, nor is there any intent to limit the authority of individual program units to recommend such priority/use policies.

### **Office and/or Laboratory Space**

Departmental assignment of office space and/or laboratory space for retired classified staff is within the purview of each department and dean, and shall be reviewed periodically.

### **Identification Card**

Retired University of Wisconsin-Madison employees (i.e., former employees eligible to receive WRS annuities) should retain their UW-Madison identification cards for access to university libraries, recreational\*\*, and other facilities. Retirees who wish to continue using the facilities should contact their department prior to their retirement date. The department will email the Office of Human Resources: [retiredID@ohr.wisc.edu](mailto:retiredID@ohr.wisc.edu).

\*\*Retiree is responsible for annual access fee due 9/1 each year for use of recreational facilities (contact 262-8244).

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### WiscWorld

UW-Madison retirees may retain WiscWorld privileges (Internet access, email usage, and the WiscWorld software bundle) and continue to have access to specific\*\*\* Division of Information Technology (DoIT) services and products. A valid ID card is required (see above).

\*\*\* For a list of current services and products, contact the DoIT Showroom directly at 262-4418 or see their website <http://techstore.doit.wisc.edu>.

### Wisconsin Union

Union membership options are available to all retirees. Members receive access to Union programs and services, including Mini Courses and Hoofers, and may reserve Union facilities for personal social events. A full list of benefits is available at <http://www.union.wisc.edu/membership/index.html> or by calling 262-2263. All UW retirees are eligible to purchase a Wisconsin Union lifetime membership at the graduating student rate. This rate is good only for up to one year from retirement.

### UW News

Upon request, UW-Madison retirees may receive a complimentary subscription to Wisconsin Week, the official newspaper of record for the University of Wisconsin-Madison, at their home address. The retiree should send a written request to Wisconsin Week, UW-Madison, 500 Lincoln Drive, Room 134, Madison, Wisconsin 53706. (This is also available on the web at <http://www.news.wisc.edu/wisweek/>.)

The free Wisconsin Week Wire e-mail news-letter publicizes especially timely information that falls outside Wisconsin Week's biweekly publishing schedule. It's a quick, succinct update on major campus issues and events. The e-mail is delivered each Wednesday year-round. To subscribe or unsubscribe, retirees may fill out the simple form on the web at <http://www.news.wisc.edu/wisweek/subscribe.php>.

### Libraries

UW-Madison retirees are eligible to use all campus libraries. A valid ID card is required (see above). Retirees are responsible for any costs or fines incurred. Spouses/partners who utilized the service prior to the employee's retirement will retain the privilege.

### Parking Privileges

Retirees who are providing essential functions on campus will need to use one of the following options.

- UW Departments can provide a Department Limited permit to retirees doing work on campus.
- UW Departments can provide a Department Temporary permit to retirees doing work on campus.
- UW Departments can let retirees participate in the annual priority parking assignment system and purchase a base lot permit or park-and-ride lot permit.

In addition:

- Emeriti may obtain a free Validation Pass that will provide access to parking in any of the campus parking garages. Each Validation Pass is authorized for 24 parking sessions.

The following options also are available to all retirees:

- Some lots are available to the public FREE after 4:30 pm. See Lot Time/After Hour Policy on the web page listed below.

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- Use one of the visitor stalls on campus for daily/hourly parking (meters & cashiered lots).

Retirees who have been granted Emeriti status or who are members of the UW-Madison Retirement Association should consult the Transportation Services website at: [http://transportation.wisc.edu/parking/Permit\\_UW\\_affiliated.aspx](http://transportation.wisc.edu/parking/Permit_UW_affiliated.aspx) for further parking and transportation options available.

### E. Re-employed Annuitants

#### Break in Service

Prior to July 2, 2013, Wis. Stat. § 40.26 (5) required a WRS participant who had applied for a retirement annuity or lump sum payment to wait at least 30 days between terminating WRS covered employment and returning to WRS participating employment. If the participant did not meet the minimum 30-day break prior to reemployment, the participant was not eligible to receive a WRS retirement annuity.

Effective July 2, 2013, Wisconsin Act 20 amended Wis. Stat. § 40.26 (5) to require that WRS participants who terminate employment **on or after July 2, 2013** wait at least 75 days between terminating WRS covered employment and returning to WRS participating employment. Returning to WRS eligible employment within the 75-day minimum break period will invalidate a retirement annuity or lump sum payment.

There will now be two categories of rehired annuitants; those grandfathered under the old law who have the option of electing WRS participation and those subject to the new law who are mandated to participate in the WRS. The key variable for determining which law applies is the participant's termination date for retirement purposes; therefore, if the:

Termination date is **prior to** July 2, 2013, the earliest return to WRS eligible employment is the **latest** of the following dates:

- The day after the annuity effective date.
- The 31st day after termination of all WRS participating employment.
- The 31st day after the date ETF receives the benefit application.

Termination date is **on or after** July 2, 2013, the earliest return to WRS eligible employment is the **latest** of the following dates:

- The day after the annuity effective date.
- The 76th day after termination of all WRS participating employment.
- The 76th day after the date ETF receives the benefit application.

Contact Employee Compensation and Benefits Services with questions about the break-in-service requirement.

#### Pre-retirement Agreements to Return to Work are Prohibited

Effective July 1, 1998, a Department of Employee Trust Funds Administrative Rule ([ETF 10.08](#)) prohibits an employer and employee from reaching, before retirement, an agreement for the employee to return to work after retirement. Agreements, oral or written, reached prior to retirement, will jeopardize the employee's annuity—the person might have to forfeit any retirement benefits received. The rule does, however, explicitly allow employees to express "willingness or interest in providing compensable services at some time in the future."

#### No Earnings Limit

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Re-employed annuitants do not have an earnings limit.

### **Procedures**

Refer to [Ch. 3](#) of this manual and Ch. 6 of the current [Annual Budget Instructions](#) for procedures regarding reappointment of annuitants.

### **Titles and Appointments for Re-employed Annuitants**

- An annuitant is eligible to compete for any position, subject to the applicable hiring criteria. If an annuitant chooses to apply for a classified permanent position or an unclassified appointment, the annuitant must go through any required testing and interviewing process.
- Terminal appointments for re-employed annuitants may be renewed, any number of times, at the employer's option.

### **Benefits**

Refer to [Staff Benefits Booklet](#) for benefits available to re-employed annuitants.

## **V. Reference**

For more detailed and specific information, contact the Classified Human Resources (262-3233), or Employee Compensation and Benefits Services (265-3896) for information about benefits for re-employed annuitants.

Reference documents ETF 10.08, ETF Employer Bulletin [http://etf.wi.gov/employers/bulletins\\_all/eba20130701.pdf](http://etf.wi.gov/employers/bulletins_all/eba20130701.pdf) [Budget Instructions Chapter 6](#).