



PHASED RETIREMENT REQUEST FORM

Program Details:

Completing this form is the first step in requesting to participate in the Board of Regents Phased Retirement Program.

Eligibility: Employee is 57+ years old and has 15 years of service.

% of Time: Must be between 50-65%. Last year of phased will be 50%.

Length: up to a 3-year maximum period (pilot expires 6/30/2028).

Salary Incentive: No incentive if the phased period is one year or less.

Employee Information:

Employee name:

Employee ID:

Date of Birth:

Department:

Years of Service:

Phone #:

Request Details:

1. Length of phased retirement in years (max of 3 years):

2. Dates of phased period:

Fiscal Year Fac and Staff - start and end dates must be on a traditional workweek day, Monday through Friday, and a non-university holiday. The phased period must not exceed three years (including your last day, worked).

AY 9-month faculty - must begin **three working days before a semester begins** (Fall '25 classes start 8/25/25, AY Fac will use 8/20/25 start date). Member will use 12/31 or 6/30 as the end date because employment, pay & benefits continue to those dates.

Start date of phased:

End date of phased:

3. Percentage of time to be worked (range must be between 50-65%):

The last year in your phased period will always be 50% time, or if a one-year agreement, the appointment must be at 50% with no incentive.

Year one:

Year two:

Year three: 50%

4. Employee requesting phased retirement signature and date:

Date

Once you have reviewed your information, you must forward this form to your HR representative or departmental admin for further approval.

Department Use Only

Does the Department/College approve a salary incentive? Please answer yes or no. If yes, please enter in the percentage for Year 1 and Year 2, if applicable.

Approved?

YES

NO

% for year 1

% for year 2

Approved by:

Date

Departmental Executive Officer (DEO)

Date

Dean/Major Administrative Officer