RETIREES PERFORMING SERVICES FOR THE UNIVERSITY

Employment

- SERS Annuitant
  - Emergency rehire for up to 95 working days in one calendar year
    - Rehire must alleviate an emergency situation that creates an increase in the university workload such that there is a serious impairment of service to the public.
    - Emergency rehire must meet SERS criteria and be pre-approved by Associate Vice president for Human Resources. (Criteria based on the Baillie v. PSER decision and outlined in HR45; approval contingent on SERS final approval.)
    - SERS must be pre-notified of the intent to rehire an annuitant under emergency rehire provisions and must give final approval the rehire. The Office of Human Resources will complete all notifications to SERS.
  - Freezing retirement annuity while retiree returns to active service.

- TIAA Annuitant
  - May be employed by the University on a temporary basis. Office of Human Resources must be notified of the part-time employment of a TIAA annuitant in order to maintain accurate employment records.

- SERS and TIAA - Phased Retirement – For employees considering retirement, Policy HR29 permits a gradual work commitment reduction over a defined period of time. TIAA members can begin drawing a pension prior to full retirement. State law does not allow SERS members to begin drawing a pension during a phased retirement; SERS members must be fully separated from the University in order to receive payment from a pension.

Independent Contractors: (including retiree affiliations with a separate business entity)

- Contractor services must be:
  - Entirely separate and unrelated to retiree’s prior employment duties;
  - Performed outside of College or Unit from which individual retired;
  - Clearly qualify as independent contractor services under the tax law; and
  - Pre-approved by the University’s Tax Director.

Volunteer Services

- Retiree may perform services on an uncompensated basis.

Travel & Expense Payments

- The University may pay for legitimate retiree business expenses and travel which further the PSU’s mission. This may include both direct payment and expense reimbursements.
- Examples include:
  - Conferences enhancing the retirees ability to assist the University;
  - Travel for meetings in which the retiree is representing the University;
  - Supplies necessary to perform volunteer services for the University.

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