

Agency Planning for Phased Retirement

There are seven main areas that agencies need to consider when planning for phased retirement.

1. What criteria will be used to approve applications?
 - Is a part-time work schedule appropriate for the position?
 - Can the mentoring requirement be met?
 - Will any positions or locations be excluded based on the criteria used to approve requests?
2. Have bargaining obligations been met?
 - Implementation of phased retirement is subject to collective bargaining requirements.
 - OPM recommends that agencies should address phased retirement implementation predecisionally with their labor organizations.
3. How will the authority to approve requests be delegated within the agency?
4. Will time limit agreements be used?
 - Use of time limit agreements is discretionary may be used as a condition of approval.
 - Agreements must be in writing.
5. How will multiple requests be handled if all requests cannot all be accommodated?
6. What process/procedures will be used for tracking mentoring requirements and controlling work hours?
7. Are payroll system or HRIS system updates needed?
 - New codes have been created to implement phased retirement.
 - System modifications may be needed to implement the new codes.

Upcoming Webcasts

Entering Phased Retirement Webcast

Monday, September 29, 2014 from 1:00pm to 2:30pm ET

This broadcast will provide information on the laws and regulations concerning entering into phased retirement. This webcast will focus on issues that Human Resource professionals should consider concerning the employment of phased retirees. The presenters will be employees of OPM's Employment Service and Retirement Service.

The link to view the OPM webcast is:

<http://new.livestream.com/OPMWebcast/20140929phased>

The link to view the captioning for the webcast is: <http://recapd.com/w-4746fa>

Preparing the Employee for Phased Retirement

Tuesday, October 21, 2014

This broadcast will focus on issues Human Resource professionals should consider when providing benefits counseling to employees considering phased retirement and discuss phased retirement case processing.