



**PHASED RETIREMENT PROGRAM
REQUEST TO PARTICIPATE
FACULTY**

Instructions for faculty: Prior to submitting this form for approval please review the Policy on Phased Retirement, discuss participation in the Phased Retirement Program with your department head, and consult with your financial advisor(s), if applicable. Please contact the Office of Payroll and Employee Benefits with any questions you may have about the Phased Retirement Program.

Name:	BSU ID #:
Department:	Title:
Proposed First Semester and Year:	Proposed Last Semester and Year:

Semester		Teaching		Non-Teaching Assignment*		Total**	
Fall or Spring	Year	Credit Hours	Percent	Credit Hours	Percent	Credit Hours	Percent
Example: Fall	2020	3	25%	3	25%	6	50%

*Attach separate sheet with details of non-teaching assignment.

**Total load for each academic year should average 50-75%.

Please note that if you are a member of TRF and you only work during one semester of any academic year while you are participating in the Phased Retirement Program, you will not earn TRF service credit for any semester you are not working. This may result in a reduction in your TRF retirement benefit. You can avoid this reduction by working a reduced load in each semester during your phased retirement. ***Service credit rules are determined by TRF and not the University.***

I hereby request to participate in the University's Phased Retirement Program. I have read and understand the Phased Retirement Policy, including the eligibility requirements described therein.

Employee Signature: _____ Date: ____/____/____

To Be Completed by the Department/ Administrative Unit	
How will department cover remaining load?	
Current academic rank of faculty member:	Months of service within current rank:
Total months of service at Ball State University:	Date of last sabbatical leave/ indicate full year or semester:
Department/ Administrative Unit Head Signature:	Date Received:
To Be Completed by The Dean's Office Prior to Submission	
College Dean Signature:	Date Approved:
Submit to the Provost and Vice President for Academic Affairs	
Provost and Vice President for Academic Affairs Signature:	Date Approved:

Provost's Office: Please forward the approved request to Payroll and Employee Benefits to initiate the development of the formal Phased Retirement Program Agreement.