

## Retiree Rehire Processing Checklist for Paid Appointments

	<p><u>Section 1.</u> Enter Unit contact information</p>
	<p><u>Section 2.</u> Enter Retiree rehire information</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> SURS Highest Annual Earnings – review PEAEMPL lightbulb screen in BANNER to verify this amount *If nothing is entered in PEAEMPL use the amount from Statement of SURS Annuity Status form</li> <li><input type="checkbox"/> Attach Statement of SURS Annuity Status form – version 04/06/2015: <a href="http://humanresources.illinois.edu/assets/docs/AHR/Statement-Of-Annuity-Status.pdf">http://humanresources.illinois.edu/assets/docs/AHR/Statement-Of-Annuity-Status.pdf</a> and review the following questions on the form <b>before attaching to the request:</b> <ul style="list-style-type: none"> <li>✓ Question 1 – Name and SURS Employer listed (if retired from a SURS covered employer)</li> <li>✓ Question 3 – Review amount for accuracy (i.e. comma in the right place, not the amount from Question 6, etc.)</li> <li>✓ Question 6 – Review amount with SURS HAE in PEAEMPL screen (they should match)</li> <li>✓ Question 7 – Verify dates and dollar amount for the CURRENT appointment (to include all appointment information in the SURS year for which the request is being processed; historical appointment information for a previous SURS year should not be included)</li> <li>✓ Question 8 – Ensure this question is answered accurately</li> <li>✓ Confirm the form is signed/dated (must be signed and dated no earlier than two months from the request submission date)</li> </ul> </li> </ul> <p>*If retiree is a participant in the Self-Managed Plan, the following should be answered on the SOSAS form along with the name, signature and date completed: Questions 1, 2, and 9. The following should be entered in Section 2 of the retiree form: Name, UIN if individual has one (if not enter SSN), first rehire date after retirement, and SURS Institution.</p>
	<p><u>Section 3.</u> Enter paid positions prior to retirement, do not enter unpaid appointments</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> If Emeritus/Emerita status was approved, enter title and date approved by the Board of Trustees *This section should be left blank if member of the Self-Managed plan.</li> </ul>
	<p><u>Section 4.</u> Enter proposed retiree rehire appointment details</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Enter correct title</li> <li><input type="checkbox"/> Enter service begin and end date and review for accuracy – these dates should match the SOSAS form if teaching use standard semester dates)</li> <li><input type="checkbox"/> Review dollar amount based on appointment dates (keep in mind the monthly rate may not populate the correct annual amount to be paid)</li> <li><input type="checkbox"/> Review FTE – pre-retirement earnings should be reviewed against the proposed FTE, also previous appointments should be reviewed as well; the FTE or equivalent FTE cannot be greater than .5 without prior Provost Office approval</li> <li><input type="checkbox"/> CFOP(s) – if using a CFOP other than your own unit please upload approval to use the funds in Section 4 *Be mindful of exempt vs. non-exempt funding</li> <li><input type="checkbox"/> Proposed appointment category – Review each option and if there are multiple options that need to be checked, please do so (i.e. teaching and research, etc.)</li> <li><input type="checkbox"/> Job Description – enter full description, if Academic Hourly/AP attach approved JD/PAPE</li> <li><input type="checkbox"/> Justification for request – provide an answer for ALL 3 justification questions</li> <li><input type="checkbox"/> Documents to attach – if hired via a search waiver or academic hourly appointment, attach approved ODEA waiver email *Multiple appointments can be requested on one RR request form if the service period is in the same SURS year (ex: teaching in the fall and research in the spring, 2 separate proposed appointments are allowable on the same form).</li> </ul>
	<p><u>Section 5.</u> This section is a summary of all appointments requested during the SURS year (i.e. if teaching in the fall and research in the spring, 2 separate proposed appointments will be reflected. Pay attention to the total % of HAE field(s). The total HAE between all jobs held in a SURS year cannot be greater than 40%. If the appointment(s) make the employee close to the</p>

	40% max, AHR will provide a Close to Affected Letter to the unit for the rehired retiree to read and sign.
	<p><u>Section 6.</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> General Comments – if the request is submitted within 2 weeks of the start date a justification must be entered in the comments for the late request. If there is any additional information that would be helpful for college/AHR review, please enter here (i.e. if the FTE for the appointment is based on unit standard for teaching, standard FTE for online course FTE/amounts, etc.). Also, include a comment if retiree is a participant in the Self-Managed plan.</li> <li>✓ Message to Unit – AHR enters comments in this section (including what documents must be attached to the HRFE transaction)</li> <li><input type="checkbox"/> Attach relevant documentation – Close to Affected Letter, etc. *Do not attach SURS Statement of Annuity Status in Section 6</li> <li><input type="checkbox"/> Submit request for unit approval</li> <li><input type="checkbox"/> Submit request for college review/approval to <a href="mailto:engr-rr@illinois.edu">engr-rr@illinois.edu</a></li> </ul>

**\*Rehired Retiree Progress Report:**

<https://hrnet.uillinois.edu/uhr/HRSystems/ReportingPortal/HRReports/RehiredRetiree/RRProgress/RRProgressForm.cfm>