REQUEST TO PARTICIPATE IN THE PHASED RETIREMENT PLAN
BALL STATE UNIVERSITY

INSTRUCTIONS FOR FACULTY: Please review the *Policy on Phased Retirement* before completing this form and submitting it to the Provost and Vice President for Academic Affairs. Prior to submitting this form you should also discuss the advantages and implications of participating in the Phased Retirement Plan with your administrative unit head, the Payroll & Employee Benefits Office, and your financial advisor(s), if applicable. If your request is approved, you will meet with the Vice President for Business Affairs and Treasurer to create your formal Phased Retirement Plan agreement.

EMPLOYEE INFORMATION

Name:	**BSU ID #:**
College:	**Department/Program:**

PART I: PARTICIPATION PERIOD AND COURSE LOAD REDUCTIONS

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 Plan, 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 <u>not</u> the University***.

Proposed Phased Retirement start date _____. During this period of Phased Retirement, course load will be reduced to the following amounts for the following periods (maximum three academic years, listed consecutively by semester):

Semester Begin Date Fall/Spring and Year	Semester End Date Fall/Spring and Year	Desired Course Load Percentage 50% to 75%	Percentage of Desired Course Load That is Non-Teaching (If Applicable)*

*On a separate sheet, please provide details about the course load percentage that will be non-teaching.

PART II: REQUEST AND ACKNOWLEDGEMENT OF FACULTY MEMBER

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

_____ _____

Employee Signature Date

PART III: APPROVALS - OFFICIAL DATE OF SUBMISSION IS DATE SIGNED BY THE ADMINISTRATIVE UNIT HEAD

The undersigned have reviewed and recommend approval of this request:

_____ _____
Department/Administrative Unit Head Date Received

_____ _____
College Dean Date Approved

Dean's Office: Please complete Part IV of this form prior to submitting to the Provost and Vice President for Academic Affairs.

PART IV: TO BE COMPLETED BY THE DEAN'S OFFICE PRIOR TO SUBMISSION

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*:**

*Please indicate if Sabbatical was full-year or semester in duration.

PART V: SUBMISSION TO THE PROVOST AND VICE PRESIDENT FOR ACADEMIC AFFAIRS FOR APPROVAL

_____ _____
Provost and Vice President for Academic Affairs Date Approved

Provost's Office: Please forward the approved request to the Vice President of Business Affairs and Treasurer to initiate the development of the formal Phased Retirement Plan agreement.