

Retirement from the University:
Summary of processes from 18 October 2022

Step 1 for staff grades 1-10, & ALC6

Staff in grades 1-10 and ALC6 receive a letter from their Department or Faculty about retirement planning when staff are aged 55, and then approximately every 5 years thereafter.* See section 4 in *Guidance*.

Employee considers their retirement options: for support staff, see [here](#); for staff at grades 6-10 and ALC6, see [here](#).
Employee should contact the **Pensions Office** for further information regarding their pension
Also see sections 3 and 4 in *Guidance*.

Employee meets with their line manager to discuss their future plans. See section 4 in *Guidance*.

Employee contacts their line manager or departmental administrator in writing as soon as possible to inform them of their retirement plans. See section 4 in *Guidance*.

Department / Faculty contacts the **Pensions Office** as soon as possible, and at least 3 months in advance of an employee's retirement date, to ensure benefits are paid promptly. See section 4(b)(iv) in *Guidance*.

Employee retires from the University.
See section 8 in *Guidance* for more information about retiree benefits and about ways to stay connected to the University in retirement.
If alternatives to employment have been agreed with the department, the necessary arrangements are implemented. See section 7 in *Guidance*.

Step 1 for SP, AP and RSIV's

Staff in academic and RSIV roles and equivalents, receive a letter about their retirement from their Department, Faculty or Division *at least 2.5 years* in advance of their retirement date.* See section 4 in *Guidance*.

Employee considers their **retirement options**.
Employee should contact the **Pensions Office** for further information regarding their pension
See sections 3 and 4 in *Guidance*.

Employee meets with their line manager to discuss their retirement options. In the case of academic staff, this will be the Head of Department or Faculty Board Chair. See section 4(b)(ii) in *Guidance*.
Discussions may include consideration of alternatives to employment after retirement. See section 7 in *Guidance*.

Employee contacts their line manager or departmental administrator as soon as possible regarding their retirement plans.
Department / Faculty contacts the **Pensions Office**. Pensions requires a minimum of 3 months' notice to process benefits on time. See section 4 in *Guidance*.

Employee wishes to apply for an extension of employment beyond their EJRA.**
See section 5 in *Guidance*.
A separate EJRA process map is available to [download](#)

Employee chooses to:

- Retire at the normal pension age
- Retire at their EJRA date
- Retire before the normal pension age
- Explore flexible retirement

See section 3 in *Guidance*.
Staff may wish to consider alternatives to employment after retirement. See section 7 in *Guidance*.

Please note:
The [Guidance](#) referred to here is available to download from the HR Support website
<https://hr.admin.ox.ac.uk/retirement>

* Administrators can use the report [PERDEP07 Retirement Planning](#) to identify staff nearing retirement age.
** Administrators must complete the EJRA UDF in PeopleXD for all employees who apply for an extension to their EJRA – see the [scenario factsheet](#) for information