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.

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

Employee contacts their line manager to discuss their future plans. See section 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 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.

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.

Please note:

* 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

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.

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 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 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 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.

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 retreats 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.

Please note:

* The Guidance referred to here is available to download from the HR Support website https://hr.admin.ox.ac.uk/retirement

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.

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