Reduced Work Policy (HR9) – Procedure for Administrators/Managers

This procedure outlines the steps that a departmental administrator or manager should follow when a request for a reduced work appointment leading up to retirement has been made by an eligible staff employee under UBC's Reduced Work Policy (HR9).

Procedure Steps

1. Retirement Plan Discussion

It is suggested that the departmental administrator or manager have a meeting with the employee to discuss their interest in applying for a reduced appointment leading up to retirement. This is an opportunity for the employee to share further details regarding their request, and an opportunity for the administrator/manager to collect and understand the pertinent details of the employee's proposed plan and timeline.

2. Consultation with HR

Please consult with the relevant HR Advisory representative who will guide you through the process. If the employee is a unionized member of staff, there is no need to complete the **Reduced Work Policy Application and Agreement Form**.

Staff employees who are members of the Association of Administrative and Professional Staff (AAPS), may have access to alternative options. These are outlined in the Letter of Agreement #2, in the Agreement on Conditions and Terms of Employment. Please consult with the relevant HR Advisory representative.

3. Form Completion

The departmental administrator or manager will use the information gathered to complete the **Reduced Work Policy Application and Agreement Form for Non-Union Staff (HR9)** and consults with the Administrative Head of Unit to assess the operational and business needs of the department. The following will need to be outlined in the Form: (1) the nature of the position, (2) the proposed changes to the work performed, (3) what is happening to the work, (4) the duration of the changes and the proposed work schedule, and (5) details as to the financial impact of the arrangement such as cost savings or increased costs.

The departmental administrator or manager will then:
- Attach all relevant and supporting documentation; and
- Consult further with the relevant HR Advisory representative (if required).

4. Departmental Approval
The departmental administrator or manager obtains the Administrative Head of Unit's signature.

5. Submission to HR
The completed and signed form, along with supporting documentation, is submitted to the relevant HR Advisory representative who will coordinate the process and obtain approval from the Responsible Executive.

6. Finalized Form
Once approval is granted, the HR Advisory representative will return a fully executed copy of the form/agreement to the departmental administrator or manager.

7. Workday Processing
When processing the FTE change(s) in Workday, the initiating department/unit must:
- Attach the approved HR9 form to the applicable business process in Workday and process the change(s) using the Change Job – FTE Changes – Reduced Appointments < Staff: Reduced Workload/Responsibility (Policy HR9) action reason. **Please refer to the applicable KBA for direction on how to process the Change Job business process correctly to ensure that the employee pension and other benefits are administered appropriately during the reduced FTE period.** Note, attaching the approved form to the Workday business process is a mandatory step.