

**MEMORANDUM**

**DATE:** November 9, 2016

**TO:** Deans, Directors, Department Heads, and Chairs

**FROM:** April C. Mason, *asm*  
Provost and Senior Vice President

**RE:** Phased Retirees Not Eligible for Overloads Reminder

As a reminder, I am resending the memo that was sent back in 2012 with the information that phased retirees are not eligible for overloads.

It recently came to my attention that there is confusion about overload assignment eligibility of employees on phased retirement (“phased retirees”). I have been made aware of several cases where phased retirees have been approved for overload assignments. To clarify, the statute, regulations, and Kansas Board of Regents policy that create the K-State Phased Retirement policy prohibit any increases to the FTE of phased retirees. K.A.R. 88-12-7. Thus, any overloads for phased retirees are inconsistent and noncompliant with the program. See University Handbook Section E140 (<http://www.k-state.edu/provost/universityhb/fhsece.html>), and PPM Chapter 4810.030 (<http://www.k-state.edu/policies/ppm/4810.html>).

Similarly, our Policies and Procedures Manual Chapter 4650.110 states that overload payments are additional compensation for extra work above normal *full-time* duties <http://www.k-state.edu/policies/ppm/4650.html>. Some units have interpreted this as anything exceeding an employee’s FTE duties. That interpretation is inconsistent with the Phased Retirement program and, therefore, does not apply in these cases. However, there is one exception: In the case of nine-month faculty on phased retirement, add pay may be earned outside the academic year because such faculty members are on leave during the summer.

We have modified the Phased Retirement Agreement Template to clarify this issue. The Phased Retirement Transmittal Form includes a section for the department head or unit supervisor to provide a detailed description of the anticipated responsibilities during the phased retirement period. We will directly incorporate this detailed description of anticipated duties into the body of the Phases Retirement Agreement, rather than having this information as an attachment to the agreement. The anticipated duties can be modified at any time through the submission of an addendum to the original agreement. The revised Phased Retirement Transmittal Form is available on the Human Capital Services website at: <http://www.k-state.edu/hcs/forms/phased-retire-transmittal.html>

I have asked Amanda McDiffett, Director of Benefits (532-6277, [amcdiffe@k-state.edu](mailto:amcdiffe@k-state.edu)) to answer any questions you may have about the Phased Retirement program.

cc: Amanda McDiffett, Director, Benefits – Human Capital Services  
Ruth Dyer, Senior Vice Provost for Academic Affairs