THE EMERITUS TITLE

1) How do I get the Professor Emeritus title?
Associate Professors, Professors, and other members of the Academic Senate are automatically conferred the Emeritus title when they retire. There are no special criteria or review processes. However, you must notify your department chair and copy the dean on the dates of your separation and your retirement. The division will make the formal change in the payroll personnel system.

✓ One caveat: The effective date of retirement must be within 120 days of separation from the University (e.g., faculty who separate from UC to take another job and later retire after greater than 120 days will not be conferred emeritus status).

2) What is the difference between a separation date and a retirement date?
Your separation date is the last day that you are in paid status with the University and your retirement date is the start of your retirement. These do not have to be consecutive dates. Individuals who are separated from University employment and who are vested but who are not yet retired are “Inactive Members” of the UC Retirement Plan (UCRP).

3) What rights do I have as Professor Emeritus?
- You continue to be a member of the Academic Senate with the same rights and privileges.
- You remain eligible to apply for Academic Senate grants.
- You can participate in teaching, research or creative activities, and service – as long as the work is uncompensated or you are not the instructor of record.
- You continue to be a member of your department; however, you no longer have the right to vote on personnel actions in your department - unless the department extends voting privileges to emeriti faculty.
- More information on Senate Bylaw 55 can be found at: http://www.universityofcalifornia.edu/senate/manual/b/part1.html#bl55

4) Can I negotiate with my department or division for privileges after I retire?
Yes – there are items that departments or divisions may grant to a retiree, including:
- You may be provided with office and/or lab or studio space depending on its availability. This does not imply any claim upon a departmental or divisional budget.
- You may continue to have a mailbox.
- You may be eligible for computing support.
- You may be eligible for recall for teaching, research, or service, with or without pay.

RETIREMENT DATES

5) When during the year should I retire?

Pay dates differ from service dates
For academic year (9-month) faculty, consider a July 1 retirement date. Why? You are paid in advance of actually doing the work for UCSC.

<table>
<thead>
<tr>
<th>Service Dates</th>
<th>Fall Quarter</th>
<th>Winter Quarter</th>
<th>Spring Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>End of September</td>
<td>January through</td>
<td>April through</td>
</tr>
<tr>
<td></td>
<td>through December</td>
<td>March</td>
<td>mid-June</td>
</tr>
<tr>
<td>Payroll Period</td>
<td>July 1 to October 31</td>
<td>November 1 to February 28/29</td>
<td>March 1 to June 30</td>
</tr>
<tr>
<td>Checks Issued (unless the 1st is a weekend or holiday)</td>
<td>August 1 to November 1</td>
<td>December 1 to March 1</td>
<td>April 1 to July 1</td>
</tr>
</tbody>
</table>
What happens if I retire at the end of fall quarter?
Your pay stops with the November 1 check, but you must keep working until the end of the quarter (sometime in December) since you were paid in advance.

Plan ahead—you can arrange for a November 1 retirement date, avoid having to repay the University for services paid in advance, and arrange for your first retirement check to be issued on December 1.

What if I’m on sabbatical leave?
You cannot retire immediately after sabbatical leave, unless you reimburse the campus for your sabbatical pay. You must return to the University for at least the same amount of time as the length of your sabbatical (return to service requirement).

6) Why should I consider a late June separation date? (The “Inactive COLA”)
UCRP provides that the HAPC* used in the calculation of Basic Retirement Income is the HAPC at the separation date. For individuals in the 1976 Tier who are inactive members of UCRP (they are vested, have separated, but haven’t yet retired), their HAPC is increased by a cost-of-living adjustment (COLA) that is applied at the end of each June. This COLA is tied to the Consumer Price Index.
✓ If you separate from the University at least one working day prior to your retirement date, you become an inactive member and therefore eligible for an “Inactive COLA”.
✓ If your last day on paid status is not immediately prior to your retirement date, you will not be paid for the day(s) you are separated from the University.

* What is HAPC?
HAPC is the “Highest Average Plan Compensation” and is your highest full-time equivalent annual covered compensation averaged over 36 consecutive months. This includes stipends, such as a stipend for serving as department chair, but does not include summer research salary or teaching for UNEX or in summer session.

RECALL APPOINTMENTS

7) Who can be recalled to active service in an academic position?
Recall appointments are limited to individuals returning to an academic title who have retired from a UC academic appointment. This includes academic retirees who elected to receive their UCRP benefits in the form of monthly payments or as a lump sum cashout.

8) When is a recall appointment required?
If you will receive pay or will be an instructor of record, you must have a recall appointment. Recall to an academic title may be for one or more of the following duties: teaching, research or creative activities, service, or faculty administrator service.
However,
✓ You must have a break in service of at least 30 days after your retirement date.
✓ The University can enter a pre-retirement agreement to recall an employee, only if… …you are age 60 or older and have at least 5 years of retirement service credit.
✓ When you retire, you must intend to separate permanently or you could jeopardize the tax status of the retirement plan, which could result in tax for all participants.

9) What are the parameters of recall appointments?
There are two payroll titles for recalled academic senate members: Recall Teaching and Recall Faculty. A working title such as Research Professor or Director Recalled may be used.

Recall Teaching: Recall duties are for teaching only.
Recall Faculty: Recall for non-teaching duties, but may also include assigned teaching.
  • Appointments limited to 43% time or 43% of salary rate per month, cumulative
  • Term appointments; usually for one year or less
• Appointments involving active research grants can be made for a term up to the period of secured funding
• Pre-retirement agreements can be made for up to three years, with possible annual renewal thereafter
• Appointment file is required
• Reappointment is not automatic – a review is required
• Deans have authority for most recall appointments in the division; CAP or DCAP review is not required
• Currently, recall appointees who are receiving pay are required to take the online UC Ethical Values and Conduct Compliance Briefing or the UC Ethical Values and Conduct and Conflict of Interest for Researchers Compliance Briefing

10) What is the pay rate for a recall appointment?
Recall appointments are often paid a flat-rate, by-agreement amount, particularly for teaching. In some cases, a funding agency may require a documented percent effort.

The maximum salary rate for recall appointments is the individual’s annual base salary rate (including any off-scale) for the academic position held at the time of retirement, range adjusted forward. Other compensation earned, including stipends and summer salary, is not included.

However, the salary rate for recall to faculty administrator titles (e.g., director, interim dean or vice provost) is a negotiated rate based on the nature and scope of the duties assigned.

11) What happens to my retirement if I’m recalled?
Recall appointments are not eligible to accrue health benefits or UCRP service credit; therefore, you keep receiving your retirement income. However, if you are hired into a career or long-term position that is benefits eligible, you must suspend retirement payments and be reinstated as an active UCRP member. A retiree who took a lump sum cashout with a retirement date of January 1, 2009 or later may not be hired into a career or long-term appointment.

✓ University policy for retirees who are recalled into academic positions limits the percent time of the appointment to 43% in order to prevent re-entry into or eligibility for benefits.

OTHER PERKS CURRENTLY PROVIDED TO EMERITI

NOTE: THESE PERKS ARE REVIEWED EACH YEAR AND MAY BE DISCONTINUED OR CHANGED, PARTICULARLY DUE TO BUDGET CONSTRAINTS (verified 2/1/15)

• E-mail
  You are eligible to continue your UCSC email account.

• Transportation
  You are eligible for a free “A” parking permit –or– a bus pass.
  However, if recalled with a paid appointment, you must pay for the permit or pass.
  Information can be found at http://taps.ucsc.edu/parking/parking-permits/retiree-permits.html

• Library Borrower Account
  You retain full faculty privileges for library access.

• Continuing Education
  You qualify for reduced fee enrollment for academic classes offered through UCSC Training and Development (this does not include UNEX classes).
  Enroll through http://shr.ucsc.edu/training/index.html and click on “reduced fee programs” on the left side of the page.

• OPERS
  Reduced cost “Blue Wellness (Day Locker) Card” recreation pass (provides access to all facilities). As of 2/1/15: $2.50 per day or $11.05 per month, subject to change.

• Eligible Affiliations
  UCSC Emeriti Association:  http://emeriti.ucsc.edu/
  UCSC Retirees Association:  http://retirees.ucsc.edu/
## RESOURCES

<table>
<thead>
<tr>
<th>UC Retirement Administration Service Center (RASC)</th>
<th>Retirement Counseling Services</th>
<th>800-888-8267 8:30-4:30 M-F (Best route for contact)</th>
<th><a href="https://secure.ucop.edu/securereapps/ays/csform.html">https://secure.ucop.edu/securereapps/ays/csform.html</a> (Web-based question form; may take up to 5 days for a reply)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UCSC Benefits Office</strong></td>
<td></td>
<td>459-2013</td>
<td><a href="http://shr.ucsc.edu/benefits/index.html">http://shr.ucsc.edu/benefits/index.html</a></td>
</tr>
<tr>
<td>• Health Plan Problems &amp; Billing Issues</td>
<td>Frank Trueba</td>
<td>459-3573</td>
<td><a href="mailto:ftrueba@ucsc.edu">ftrueba@ucsc.edu</a></td>
</tr>
<tr>
<td>• Medicare Question</td>
<td>Benefits Manager Health Care Facilitator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• UCRP Disability counseling</td>
<td>Marianne McIvor</td>
<td>459-3993</td>
<td><a href="mailto:memcivor@ucsc.edu">memcivor@ucsc.edu</a></td>
</tr>
<tr>
<td>• UCRP payroll deduction questions</td>
<td>Principal Benefits Analyst</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Counseling for survivors of deceased employees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Academic Personnel Office</strong></td>
<td></td>
<td>459-5579</td>
<td><a href="mailto:apo@ucsc.edu">apo@ucsc.edu</a></td>
</tr>
<tr>
<td>• Recall Appointments</td>
<td>Pamela Peterson</td>
<td>459-5579</td>
<td><a href="mailto:ppeters@ucsc.edu">ppeters@ucsc.edu</a></td>
</tr>
<tr>
<td>Assistant Vice Chancellor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>UC Net (At Your Service Online)</strong></td>
<td>Retirement Calculator</td>
<td></td>
<td>Log into AYS Online <a href="https://atyourserviceonline.ucop.edu/ayso/">https://atyourserviceonline.ucop.edu/ayso/</a></td>
</tr>
</tbody>
</table>

**UC Retirement Handbook**  

**UC Retirement Plan 1976 Tier Summary Plan Description for Members with Social Security**  

**Campus Academic Personnel Manual**  
Recall of Academic Appointees (CAPM 500.205)  
http://apo.ucsc.edu/policy/capm/500.205.html

**Academic Personnel Manual**  
Emeritus Titles (APM-120)  
http://www.ucop.edu/academic-personnel-programs/_files/apm/apm-120.pdf  
Recall for Academic Appointees (APM-205)  
http://www.ucop.edu/academic-personnel-programs/_files/apm/apm-205.pdf