Early Retirement Incentive Plan Management System (ERIPMS)

Application Review Process
April 18, 2011

I. Overview - Applicants
A. Eligible employees may apply by accessing the ERIP website at www.hr.iu.edu/erip and clicking the Online Application/Withdrawal button (upper right of the web page). Eligible employees may also fill out a paper application form at any HR office.
   1. Application dates: 4/18/11 through 5/13/11
   2. Applicants may withdraw using the same website
B. Once submitted, UHRS will review the university’s records to verify eligibility.
C. After eligibility is verified, the ERIP application will be displayed in the reviewer’s online screen.
D. If the application is denied at the first level of review, the applicant will be able to email the first level reviewer to request reconsideration.
E. After final review and approval, the ERIP applicant will be provided a separation agreement for consideration and signature.
F. Voluntary separation dates are specified by reviewers:
   1. June 30, 2011 for Academic and Staff employees
   2. August 31, 2011 for Academic and Staff employees
   3. December 31, 2011 for Academic employees only

II. Overview - Reviewers
A. Level of Reviewers:

<table>
<thead>
<tr>
<th>Regional Campus</th>
<th>Initial Reviewer</th>
<th>2nd Level Reviewer</th>
<th>Final Reviewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>IUB or IUPUI Campus</td>
<td>RC Head (e.g., Dean)</td>
<td>Provost/Chancellor</td>
<td>President’s Office</td>
</tr>
<tr>
<td>UA units and IU School of Medicine</td>
<td>Vice President</td>
<td>n/a</td>
<td>President’s Office</td>
</tr>
</tbody>
</table>

B. It would be helpful for reviewers to make decisions during the application window (4/18/11 through 5/13/11) so UHRS can process applications efficiently and communicate decisions to employees in a timely fashion.
C. Reviewers will login to the ERIP Management System by clicking the “Reviewer Login” button on the ERIP home page.
   1. www.hr.iu.edu/erip

D. After UHRS has verified eligibility, the applicant’s request for the ERIP will be displayed in the reviewer’s online “Summary Screen.” Applicants will be listed in ascending order by the level of review they are in, then by campus, then by review organization, then by review department.
   1. Keep in mind that an applicant will show up in the reviewer’s list even if it is unprocessed at a lower level, so it is important to pay attention to the level column to determine what level needs to take the next action.
   2. The “Summary Screen” will look like this:

![Summary Screen Image]

E. Reviewers may appoint a delegate to manage or assist with managing the online application system by sending the delegate’s ID number, name and the org code or regional campus location to erip@indiana.edu.
F. The “Summary Screen” can be filtered to reveal applicants that are:
   1. Unprocessed
   2. Approved
   3. Denied
   4. All Active
   5. Withdrawn – Employees who have withdrawn will ONLY show up under this filter, regardless of if they are Unprocessed, Approved or Denied
   6. In a specific department
   7. For example, the reviewer can select “approved” to display only those that have been approved

G. Review of the ERIP application: From the reviewer summary screen, simply click on the applicant’s name to go to the “Applicant Detail” screen:

   1. Please note that all levels of reviewers will be able to see where the applicant is in the review process, even after they have approved/denied the applicant at their level of review. The process is that the 1st level reviewer will first approve/deny, then the 2nd level reviewer will approve/deny, and then the 3rd
Level reviewer will make the final decision. (This will allow reconsiderations and evaluations for disparate impact to occur.)

2. If the reviewer’s decision is to approve the ERIP application, the reviewer will:
   a. Select the “approve” radio button
   b. Select the reason code radio buttons for each of the objectives that the approval meets
      - Reduction in salary/wage and benefit costs
      - Redirecting positions to focus on higher priorities
      - Avoiding or minimizing future involuntary terminations due to reductions in personnel
   c. Must provide detailed notes to substantiate the reason code above and SAVE
   d. Select the appropriate separation date for that employee and SAVE this section separately

3. If the reviewer’s decision is to deny the ERIP application, the reviewer will:
   a. Select the “denied” radio button
   b. Select the reason code radio button that reads “does not meet plan objectives”
   c. Provide brief notes to explain the denial, and SAVE

4. If an employee is denied approval at the first level, the employee will be notified (outside of the ERIPMS) soon thereafter with instructions for requesting reconsideration if desired. Requests for reconsideration will come to the first level reviewer in an email to their university email address. First level reviewers may designate an alternative email address for these reconsideration requests to go to, simply send an email to erip@indiana.edu.
   a. If an applicant requests reconsideration, it is important to use the “notes” section to document that the request was reconsidered (please include a date) and then make a note of the final decision. If the decision changed, please edit the “approved” or “denied” section.

III. Funding
A. Units will fund ERIP incentives.
   1. Income Replacement Payment
   2. Health Reimbursement Account
   3. Payment for unused paid time off (if applicable, staff only)
B. Units that would like information regarding an internal loan should contact their campus budget office.

IV. April Underwood, Compensation Specialist-UHRS, will be a resource regarding the ERIPMS. She can be reached at 812-856-6835 or erip@indiana.edu.