Steps to Managing Your Employees' Retirement

1. Prior to receiving a formal, written notice of retirement, if applicable, consider succession planning. Succession planning is the process of looking to develop internal staff with the ability to fill key positions should someone separate from employment.

2. Once an employee indicates the desire to retire:
   a. Provide employee with the Retirement Checklist Brochure. The checklist will provide a timetable to follow for retirement preparation. Link to the brochure can be found at: http://sra.state.md.us/Participants/Members/Downloads/RetirementChecklist.pdf
   b. Provide employee contact information for Maryland Supplemental Retirement.
   c. Refer employee to Payroll for leave payout and/or instructions for deferring annual leave payout into their Maryland Supplemental Retirement Account.
   d. Inform employee to contact the HR Liaison for your court two months prior to retirement in order to file an Application for Service Retirement and official letter of retirement.
   e. Notify employee they may be eligible for one additional month of creditable service for each 22 days of unused sick leave. Unused sick leave can increase the amount of the employee's retirement allowance.

3. Once you receive a formal, written notice of retirement:
   a. Complete a Separation Request in CONNECT indicating the reason as Retirement.
   b. Review your current business needs to verify that the position is still needed. Consider your succession planning, if applicable.
   c. Review the Position Description Questionnaire (PDQ).
   d. If the PDQ has significant changes, submit the PDQ to Classification & Salary Administration.
   e. Verify the Reports To structure in Connect. If a change is required, submit a Position Change Request via CONNECT.
   f. Once the PDQ is finalized, create a job opening attaching the PDQ.
   g. Follow-up with the Recruiter to create a recruitment strategy and discuss posting options (e.g. post internal only, post internal and external, etc.).

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Maryland Judiciary
Human Resources Department
Employment Services
187 Harry S. Truman Pkwy.
Annapolis, Maryland 21401
410-260-1731 410-974-2849 (fax)
mdcourts.gov/hr

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