1. Purpose
   1. The purpose of this instruction is to clearly identify the steps required to effectively process a request for a Reduced Load/Fractional Load.
2. Scope
   1. The Reduced Load/Fractional Load Request Form is to be utilized to request a Reduced Load/Fractional Load until retirement, as well as a temporary Reduced Load/Fractional Load as outlined in Policy 59, see section 7.1. This form is applicable to both Staff and Faculty.
3. Roles & Responsibilities

3.1 The Applicant:

3.1.1 Completes the Reduced Load/Fractional Load Request Form utilizing the instructions below.

3.1.2 Obtains the required signatures.

3.1.3 Sends the original completed document to Human Resources prior to the start of the Reduced Workload/Fractional Load.

3.2 Human Resources:

3.2.1 Processes the Reduced Load/Fractional Load Request Form in the HRMS system.

3.2.2 Provides a confirmation letter regarding the approved request which confirms the individual’s details regarding the Reduced Load/Fractional Load.

4.0 Terms and Definitions

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| --- | --- |
| **Term** | **Definition** |
| Definite Term | A definite-term appointment is an appointment for a contractually limited period of time. (Refer to Policy 76) |
| Probationary Term | A probationary-term appointment is a regular faculty appointment at the rank of Assistant Professor, Associate Professor or Professor for a contractually limited period of time. (Refer to Policy 76) |
| Tenured/Continuing | Tenure is a form of continuing appointment granted only to regular faculty members, full or fractional load, in the professorial ranks. A Continuing Lecturer position is an ongoing faculty position at the rank of Lecturer. (Refer to Policy 76) |
| Employee ID | An individual who has previously worked with UW will have a 6-digit identification number assigned. If the individual is a new employee leave blank. |

1. Instructions
   1. Starting at the top of the form, check whether the request is for an individual in a Staff position or a Faculty position.
   2. Enter the Employee ID (if known).
   3. **Complete the Employee Information Section:**
      1. Complete the Given Name, Initial and Surname (family name).
      2. Complete the Department name.
      3. Complete the Position title, number if applicable, or rank.
   4. Check the box to indicate the Type of Appointment per the definitions above. This is to be completed for Faculty only.
   5. **Complete the Details of Request Section:**
      1. Complete the current hours/month being worked (prior to Reduced Workload).
      2. Complete the Reduced Workload/Fractional Load hours/week being requested. Note that Faculty member standard hours are 35/week at 100% load. Any reduced %’s should be based on this.  E.g. reducing to 4 days vs. 5 would be 80%, 3 days 60%, etc.
      3. Complete the Reason for Request.
      4. Check the box to indicate whether the request is for a Temporary Reduced Workload or for a Reduced Workload to Retirement.
         1. For Temporary Reduced Workload:
            1. Complete the Begin Date (MM/DD/YYYY).
            2. Complete the End Date (MM/DD/YYYY)
         2. For Reduced Workload to Retirement:
            1. Complete the Begin Date (MM/DD/YYYY).
            2. Complete the End Date (MM/DD/YYYY). This date reflects the latest date of retirement.

Retirement can occur earlier than this date, but not later.

If participating in the Vacation Exchange Program, the retirement date must align with the retirement date in this program.

* 1. **Complete the Applicant Section:**
     1. Read the information below the signature.

***\*Note that the signature indicates that a review of the impact of the request on pension and benefits has occurred with Human Resources and that this review has covered the Income Tax Act limitations regarding pension plan contributions. The signature also indicates that the applicant understands they can elect to retire earlier than the declared date, but no later than the declared date of retirement. It also indicates the applicant understands that salary and vacation will be adjusted proportionately to reflect reduction of work. The signature also indicates the applicant has read and understands the terms in Policy 59 and that the Reduced load to retirement is a special appointment with respect to participation in UW pension and benefit plans.***

* + 1. Print Name, Sign and Date Form.
    2. Complete Phone Extension information.
  1. **Complete the Approvals/Authorizations section:**
     1. Obtain the signature of the Chair/Department Head.
     2. Obtain the signature of the appropriate senior administrative officer (e.g., Dean/Associate Provost/Vice-President/Associate Vice-President) where the period exceeds four calendar months.
     3. Obtain the signature of the Vice-President Academic and Provost if the request is for a Reduced Workload to Retirement.
     4. Send the original completed form to Human Resources as soon as they are completed for processing.

**Note:** Incomplete forms will be returned to the originator to obtain missing information.

1. Forms & Records

6.1 [Reduced Load/Fractional Load Request Form – HRAD-FR-015](https://uwaterloo.ca/human-resources/sites/ca.human-resources/files/uploads/files/reduced_fractional_load_request_-_hrad-fr-015.pdf)

1. References

7.1 [Policy 59 – Reduced Workload to Retirement](https://uwaterloo.ca/secretariat-general-counsel/policies-procedures-guidelines/policy-59)

7.2 [Policy 76 – Faculty Appointments](https://uwaterloo.ca/secretariat-general-counsel/policies-procedures-guidelines/policy-76)

7.3 [Vacation Exchange Program - HRPEN-FR-003](https://uwaterloo.ca/human-resources/sites/ca.human-resources/files/uploads/files/vacation_exchange_program_form_-_hrpen-fr-003.pdf)

8.0 Revision History

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| --- | --- | --- | --- |
| **Revision Level** | **Description of Change** | **Date** | **Approved By** |
| 0 | Document creation | 1-23-15 | Shona Dunseith |
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