

Procedure Subject:	Access to Employee Research Funds Post-Retirement				
Responsible Office and Applicability:	Oxford College, All Employees	Adopted:	11/1/2021	Reviewed:	To Be Determined
Responsible Executive:	Chief Business Officer	Revised:	No Revisions to Date		
Policy Type:	Administrative	Policy Contact:	Chief Business Officer		
Related Policy:	Emory University Finance Policies	Related Information	Emory Commodity Matrix		

Policy Overview

The purpose of this policy is to provide guidelines to employees on how to access any available funds in their research account post-retirement.

Eligibility

- Tenure, tenure-track, and lecture-track faculty retired from Oxford College
- **Not eligible**
 - Faculty resigned from Oxford College
 - Staff retired or resigned from Oxford College

Access to Funds

- Any balances will remain with Oxford College and not be disbursed as cash to the employee
- The retired employee will have access to spend their respective research account for ***up to three years after the effective date of retirement or until the account reflects a zero (\$0) balance, whichever comes first***

Allowable Expenses

The available funds can be used for research and professional development per Emory University Policy. Employee salary and equipment purchases of any kind, including but not limited to, computers, laptops, tablets, cellphones, are unallowable.

Oxford College retired employees are not eligible to obtain an Emory University Purchasing Card or an Emory University Corporate Card.

Roles and Responsibilities

Oxford College Retired Employee: Works directly with his/her respective department for allowable purchases and/or expense reimbursements.

Oxford College Departments: Provide fiscal review and management of the faculty research account per Emory University Policy. Serves as a primary contact with the retired employee for all matters regarding the research account.

Oxford College Academic Affairs: Sends approved requests to spend employee research funds post-retirement to Finance for records.

Oxford College Finance Administration: Conducts periodic reviews of the respective employees' research account balance. Requests Chartfield inactivation when the account reaches a zero (\$0) fund balance.