



Retirement Checklist –WTA and WELA Members

(TRS or ERS)

At least 8 months (WTA) to 10 months (WELA) prior to your retirement

_____ Check with your retirement system and make sure you are eligible to retire. You can contact them either by phone or e-mail to set up an appointment. (see below). See guidelines on page 2 regarding the contractual incentive (if applicable). ****Note**** You may contact your respective retirement system up to 18 months prior to your retirement date.

At least 6 months prior to your retirement (or within contractual time limits if you are eligible for a retirement incentive).....

_____ Contact Glenna Blitz in Human Resources at 216-0011. A personnel file review will determine if you have met the contractual Full-Time Service requirement to retire with health benefits. (Note: in order to receive these benefits you must also be eligible to retire from your retirement system).

_____ Contact Barb Caramanna, Benefits Supervisor, and let her know of your intent to retire. (Depending on your age at retirement, there needs to be a discussion regarding your health insurance so she can assist you with all your health insurance needs.)

_____ **Following the guidelines discussed at your ERS/TRS retirement meeting**, you submit your Retirement Application to your retirement system. *Please follow all instructions carefully. See below, for instructions on how to download the form.* You will receive notification from the retirement system of your approved date of retirement.

At least 8 to 10 weeks prior to your retirement (if you are not eligible for an incentive).....

_____ Submit a letter to the Assistant Superintendent for Human Resources, (cc your immediate supervisor and your union president). Indicate your retirement date (**which must match the date established with your retirement system**) and your last paid work date on your letter of retirement. **Union Presidents may provide a standard letter for people retiring without any incentive.**

Contact Information for Employees’ Retirement System (ERS)

Phone Number: 1-866-805-0990 E-mail: <http://www.osc.state.ny.us/contact.htm>
Website: www.osc.state.ny.us/retire (retirement applications can be downloaded from this website by clicking on “Retirement Contact Page” blue link under Retirement.)

Contact information for Teachers’ Retirement System (TRS) (Certified Staff & Teaching Assistants only)

Phone Number: 1-800-356-3128 E-mail: media@nystrs.state.ny.us
Website: www.nystrs.org (retirement applications can be downloaded from this website by Clicking on “Print a Form” and on next page “Retirement Related Forms.”)

Guidelines for Retirement Incentive (WTA and WELA)

- *An irrevocable letter of retirement must be filed with the BOE by
- **December 15th for WELA members**
 - **February 1st for WTA members**
- of your last school year, for retirement effective July 1st of that year.*
(Contact your Union President for a sample letter.)

Retirement Incentive Steps:

_____ **Contact Human Resources 2-3 months prior to submitting your letter:** Contact Glenna Blitz, Secretary to the Asst. Superintendent for Human Resources (216-0011) and let her know of your intent to retire. A complete personnel file review will be conducted at that time. This will determine if you qualify for the incentive and/or health benefits upon retirement.

_____ ****Important:** *Send a copy of the front page of your most recent retirement service summary statement from TRS/ERS to Glenna Blitz after you have contacted her. This is needed to confirm your years of service with your retirement system. If it is determined that you are eligible for the district incentive, Glenna Blitz, will then send you a service summary and sign-off for your review.*

_____ **Service Summary Review:** Review your service summary and sign-off on your retirement incentive amount. If you are in agreement, return the signed form to Glenna Blitz, in the Human Resources Department, 216-0011.

_____ If you need a more detailed explanation of the summary, please make an appointment with Abi Buddington, Human Resources Administrator, 216-0010.

_____ *** Letter of Retirement:** Once you have returned your service summary sign-off, send an irrevocable letter of retirement to the Board of Education. (*CC Asst. Superintendent for Human Resources, Building Principal, Union President) by the date indicated above. **Union Presidents may have a sample letter.**

_____ **Board Agenda:** All WTA Incentive Retirements will be placed on the March or April Board of Education Agenda, after the sign-off form is returned.

_____ **Retirement Incentive Meeting:** In June, an e-mail will come to you from Assistant Superintendent for Business, giving the date for the WTA Retiree Meeting. At this meeting, the Benefits Department will review processes for health insurance. Marty Lazzaro from Legend Equities will be at the meeting to discuss how the retirement incentive monies are distributed.

_____ **Substituting in Webster in Retirement:** If you are interested in subbing for Webster, please contact Shannon Peterson in Human Resources (216-0014). If you have a break in service and you were originally hired prior to July 1, 2001, you will be required to obtain a fingerprint clearance. If you let Shannon know that you are interested in subbing prior to retirement, then there is no "break in service" and a fingerprint clearance is not required.

_____ Enjoy your retirement and stay in touch with the Benefits Department if you have retiree healthcare.