

RETIREMENT: TIMELINE AND FAQ'S

Resources for employees considering transitioning into retirement.

RESOURCES:

- Preparing for Retirement
- Submitting Retirement Resignation
- Timeline
- Substitute Employment
- Health Insurance
- Monetary Funds
- FAQ's

Preparing for Retirement (6 Months Prior)

Employees are encouraged to start the retirement process at least six months prior to retirement. The first step would be to check with your retirement system of to make sure you are eligible to retire and follow their guidance.

NYS Teachers' Retirement System
(800) 348-7298 x. 6020
www.nystrs.org

NYS and Local Retirement System
(866) 805-0990
www.osc.state.ny.us/retire

Submitting a Retirement Resignation:

Complete the resignation form on the employee portal with effective date and "for purposes of retirement" before you submit to Human Resources via email or mail.

After submitting the form, you will receive a confirmation of receipt with additional information and additional frequently asked questions with answers for your reference and to support you with your transition.

Timeline:

For Educators Association:

Prior to April 1st for June-August 31 retirement effective date (EA contract pg. 35) or 90 days prior for retirement effective dates of September 1-May 31

Support Staff Association:

Please note that while 30 days is the minimum notice contractually (SS Contract pg. 21, or AA Contract pg. 15) the more notice you can give is appreciated.

- Notify your immediate supervisor
- Notify the retirement system that you are a member of (no more than 90 days before last day worked but at least two weeks before last day worked)
- Notify Human Resources at the same time you notify the state retirement system. Human Resources has a system in place to notify the Payroll office. Retirements will be processed on the next board agenda.

Substitute Employment:

If you are interested in applying to be a substitute for the organization after resigning from your regular employment, begin the process of approval as a substitute by completing an application.

Non-Certified: Apply on Ontario County Civil Service website at ontario-portal.mycivilservice.com/

Certified: Apply on the WFL BOCES Job Board at wflboces.recruitfront.com/ Job Opportunities

Once your application is received it will be sent to the hiring managers for review and interview.

Any questions on substitute employment with WFL BOCES contact Kaitlin Driscoll in WFL BOCES Human Resources at kaitlin.driscoll@wflboces.org



Continued on Page 2: Health Insurance, Monetary Funds, FAQ's

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Health Insurance

For Employees staying on BOCES medical and/or dental plans:

You, and any dependents currently on your plans, can remain on the BOCES group at retirement. You can choose medical, dental or both. If you or any dependent are age 65 or older, that dependent must convert to a Medicare plan.

For rate information, please contact Carrie Spelman at (315) 332-7422 or carrie.spelman@wflboces.org.

For employees not staying on the BOCES medical and/or dental plans:

Your insurance will terminate the same date of your resignation for retirement purposes. Example: If you use June 30th as your retirement date, all insurance policies will terminate that day. Any premiums you have paid for July and August will be refunded to you.

Monetary Funds

Any contractual funds due to you will be deposited into either of the following accounts.

- A 403(b) account that the employee establishes (If employee chooses insurance outside of BOCES)

OR

- A newly created Medical Reimbursement Account that is managed by WFL BOCES*

*This is if you choose to remain in the BOCES medical group. Premiums for medical and dental insurance will be deducted from this account to pay for coverage. A letter will be sent to the employee annually to decide if the current practice is to remain or if the funds should be withdrawn. If the funds are withdrawn, BOCES will bill for the monthly premiums. A 1099 will be issued and the employee will be responsible for applicable taxes.

Frequently Asked Questions

Q. What happens to the existing Medical Reimbursement Account with Lifetime Benefit Solutions (formerly EBS)?

A. These funds are yours and can be used for unreimbursed medical expenses. Funds may be pro-rated in current school year for the time worked.

Q: What happens to my unused personal, sick and vacation time when my employment ends?

Employee Group	Sick/Personal Time	Vacation Time
Support Staff	Retirement benefit per contract (pg. 21-22)	With 30 days notice, paid for earned, unused vacation time
Educators Association	Retirement benefit per contract (pg. 35-36)	Paid for earned, unused vacation time
Admin Union (WADU)	Retirement benefit per contract (pg. 21-22)	With 2 week notice, paid for earned, unused vacation time
Non-Bargaining Admin (P5307)	Retirement benefit per BOE Policy P5301	No payment for vacation time
Certified Non-Bargaining (P5304)	Retirement benefit per BOE Policy P5371	Paid for earned, unused vacation time
Non-Certified, Non-Bargaining (P5305)	Retirement benefit per BOE Policy P5370	With 2 week notice, paid for earned, unused vacation time

