OFFICE OF PENSIONS

Training and Development Quarterly Newsletter

Greetings! We are happy to provide this quarterly newsletter to remind and inform End Users about items of importance regarding pension application processing. This quarter we focus on pension deadlines, submission of important documents, retirement after age 65, and a forms update.

Notice on late submission of Pen-Apps!

Signed pension applications are due 30 days prior to an employee's retirement date (See the Pension Application Deadlines 2021 schedule for detailed information).
Our team received Pen-Apps in June for a July 1st retirement. These applications would normally be eligible for August payroll. However, due to the late notice, employees should be advised that their pension benefits may be delayed.

Submission of forms for retiring employees:

Please ensure employee selects ***only ONE*** withholding option for Federal and State taxes on the Tax Withholding Form. For example, if an individual selects "flat amount", no other boxes should be selected (e.g. Married, Single, etc.) Please submit or advise employees to submit Employee Retirement Packet forms (Tax Withholding, Direct Deposit, Joint and Survivor Benefit, and Benefit Enrollment) to the Office of Pensions only after the HR Rep has submitted a Pen-App.

Forms Update:

The Office of Pensions recently improved their forms for consistency and clarity. The dental, vision and non-Medicare healthcare applications now include the ability to elect or refuse to participate, eliminating the need for refusal forms. You will also notice the option to use Adobe to complete a majority of the forms on your computer. Many thanks to Lisa Callaway, a former Office of Pensions team member, for her recommendation to update the Creditable Service Form to include a zero in the dropdown menu in the column labeled *Period Covered – Years, Months, and Days.*

Reminder!!!

Actuarial Form

The actuarial form is to be completed upon initial hire or upon REHIRE, not transfer. This form should not be used to update items in Block 1 of the Comprehensive Annual Statement, such as Address or Marital Status. If there is a change in beneficiary, then the member should use the Change of Beneficiary form. Please contact our office at 302-739-4208 for further information if needed.

End User Spotlight

Meet Calik Reaves!

Title: HR Specialist III

Responsibilities:

Facilitating new hire orientation, interviewing, discussing retirement eligibility, processing new hires/terms/transfers/ promotions/ benefit enrollment, vested pension applications.

Any advice for HR Reps that process pension applications?

Remember to reference the pension application document checklist as a guide to help keep you on track for documents needing to be submitted to pension office. I take my time going through the checklist with an employee so they know which documents need to be submitted and I review the checklist when they turn documents in.

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Retiring after age 65

HR Rep Actions:

1. Have the active employee apply for Medicare Part B (Medical Insurance) three months prior to the active coverage termination through the Social Security Office.

2. Complete the Request for Employment Information form (CMS L-564) for the employee. This form verifies their active coverage, the date of termination, and will prevent them from being assessed a late enrollment penalty. Please give the form to the employee so they can submit it with their application for Medicare Part B (Medical Insurance).

3. Once the employee has submitted the Request for Employment Information form and received an enrollment verification, send the enrollment verification and their Medicare Supplement Application to the Office of Pensions.

Employee Action:

1. The employee will submit the “Request for Employment Information” form (CMS L-564) to Social Security along with the Medicare Part B application. The effective date of enrollment should be the retirement effective date.

Pen App Personal Email Address

In preparation for The Office of Pensions migration from DE-SSO to OKTA for pensioners to view their pay advice, we need your assistance with one of the requirements for our pensioners to obtain an OKTA account. Their personal email address must be populated on the Pension Application on the Employee Details tab. Please do not use their current work email address. Thank you for your cooperation.