

GUIDANCE DOCUMENT

Retirement

Statement

This Guidance Document provides guidance on the retirement process from Texas A&M University, including with pre-retirement counseling, proper notification, retiree identification cards and possible post-retirement employment with Texas A&M University. For purposes of this guidance, the reference to Human Resources means the responsible Human Resources (HR) office for Texas A&M University entities. Human Resources and Organizational Effectiveness (HROE) is the responsible HR office for the main campus and branch campus Texas A&M Qatar. The HR office at branch campus Texas A&M University Galveston (TAMUG) is the responsible HR office for TAMUG. Texas A&M University Health Science Center (TAMUH) Human Resources is the responsible unit for TAMUH colleges and divisions, under the direction of HROE.

Procedures and Responsibilities

1. PRE-RETIREMENT COUNSELING

- 1.1 Employees planning to retire should attend a pre-retirement workshop (TAMU) or counseling appointment with the appropriate human resources office approximately 6-12 months prior to the last day of work to learn more about the retirement process and eligibility for insurance benefits continuation as a TAMUS retiree. Texas A&M Human Resources hosts separate sessions for Teacher Retirement System and Optional Retirement Program participants on a monthly basis.
- 1.2 The pre-retirement workshop includes a discussion of the impact of retirement on group insurance plans, accrued vacation and other benefit programs; the necessary forms or online steps to establish retiree status and benefit plan enrollment; and information regarding employment after retirement.
- 1.3 Teacher Retirement System participants should request an estimate of retirement benefits from <http://www.trs.texas.gov> approximately 10-12 months prior to their planned retirement date. Optional Retirement Program participants should initiate contact with their ORP retirement investment vendor(s) to review accounts and discuss income options available to them in retirement Retiring employee who will

be age 65 or older at the time of their planned retirement need to contact the Social Security Administration to determine eligibility for Social Security and Medicare benefits.

- 1.4 Retiring employees should plan to submit final documents to the appropriate Human Resources unit 30-45 days prior to their planned last day. Once final documents have been received, Human Resources notifies the department with an Acknowledgement of Employee Retirement form (TAMU). This form serves as verification of retirement counseling and confirmation of retiree eligibility. The form also provides action steps for the department to take in Workday. The department will complete the termination action in Workday using the reason voluntary- retirement.
- 1.5 Once the employee's final payroll is processed, Human Resources will complete the Notice of Final Deposit before Retirement (TRS Form 7 for TRS retirees) or Notification of Change in Employment Status (TAMU Form 15 for ORP retirees).
- 1.6 Employees who do not otherwise qualify for service retirement may qualify for disability retirement per System Policy 31.07. Employees should contact Human Resources for assistance with the disability retirement process.
- 1.7 Departments should process the appropriate offboarding tasks in Workday, as well as follow payroll processes for payout of accrual annual leave, as applicable, and submit Sick Leave Pool donation form to Human Resources, as applicable.
- 1.8 Employees should be aware that the payout of annual leave balances, as applicable, may take up to 30 days. The payout date depends on multiple factors including retirement date, annual leave requests taken up to and include the final date of active employment that could impact the payout balance, the payroll processing calendar and appropriate forms being submitted by the employee's Workday absence partner to payroll for processing.
- 1.9 Retiring employees who are seeking to retain their employee email address should discuss that option with their department leadership and information technology support. Employee access to a Texas A&M Exchange mailbox after retirement is at the discretion of the department.

2. RETIRED EMPLOYEE IDENTIFICATION CARDS

Any former employee of Texas A&M University who qualifies as a Texas A&M System retiree based on service with the University and whose last employment was with the University may purchase an identification card that identifies him/her as a retired employee of Texas A&M University. Retirees from Texas A&M should follow the online process to request a card at myaggiocard.tamu.edu. Retirees from Texas A&M Galveston should contact the TAMUG Human Resources office for further assistance.

3. EMPLOYMENT AFTER RETIREMENT

- 3.1 All post-retirement employment with Texas A&M University must maintain compliance with System Regulations and any return to work restrictions applicable to their retirement plan.
- 3.2 Both the returning employee and the employing department have responsibility to understand the post-retirement rules that govern their retirement and any impact reemployment might have on their benefits.
 - 3.2.1 Faculty: Employment of a formerly tenured faculty member after retirement will be in a non-tenured status. The Separation and Post-Separation Service Agreement form explains the conditions of such post-retirement employment and must be completed. The department should retain the Acknowledgement of Employee Retirement form (provided to the department by Human Resources) with the Separation and Post-Separation Service Agreement to assure that the retiree understands the rules regarding employment after retirement.

Related Policies, Regulations, Rules and other Requirements

System Policy 31.07: Retirement

<http://policies.tamusc.edu/31-07.pdf>

System Regulation 31.07.01: Retirement and Employment after Retirement

<http://policies.tamusc.edu/31-07-01.pdf>

University SAP 31.02.08.M0.01: Teacher Retirement System of Texas

<http://rules-saps.tamusc.edu/PDFs/31.02.08.M0.01.pdf>

University SAP 31.02.08.M0.03: Optional Retirement Program

<http://rules-saps.tamusc.edu/PDFs/31.02.08.M0.03.pdf>

Contact Office

For information on clarification on this Guidance Document contact Human Resources and Organizational Effectiveness, Benefit Services at (979) 862-1718 or by email at benefits@tamusc.edu.

For information regarding TAMUH positions contact: Human Resources by email at hschr@tamusc.edu.

For information regarding TAMUG positions contact: Human Resources at (409) 740-4532 or by email at hr@tamug.edu.

OFFICE OF RESPONSIBILITY: [Human Resources and Organizational Effectiveness](#)