MANHASSET PUBLIC SCHOOLS

Human Resources Office

CHECKLIST FOR RETIREES

Name of Retiree:_____ Retirement Date: _____

_____ MEA MASA & MESPA - Notify Retirement System

Employee should consult Retirement System for retirement counseling which would include best effective date for retirement. Must file retirement application 30 days prior to retirement date but no sooner than 60 days prior to retirement date.

MASA, MEA and Teaching Assistants - call TRS at (518) 447-2666 All other MESPA - call ERS at (866) 805-0990

(NOTE: Usually, TRS members (administrators, teachers, teacher assistants) retire as of the 1st of the month and ERS members (support staff) retire at the end of the month). Retirees choose their retirement date. You ækgn from Manhasset; you retire from TRS/ERS.

_____ MEA MASA & MESPA Submission of Letter of Resignation for the purpose of retirement Submit letter of resignation for purposes retirement as per contractual obligation.

- MEA as per contract, possibly by December 15th of year of retirement
- MESPA at least 4 months prior to the person's retirement date as per contract • MASA - see MOA dated 7/1/2020 -6/30/2025

_____ IMPORTANT!!! MEDICARE (INCLUDES EMPLOYEE & ANY SPOUSE 1 DEPENDENTS)

If you are 65 on or before your retirement date, you must contact Medicare 3 months before retirement to enroll into Medicare Parts A and B. Your Medicare enrollment MUST coincide with your Retirement Date. (If 65 or older, it is required by the NYSHIP Empire Plan, that in order for you to keep your health insurance into retirement, you must be enrolled). If your spouse is 65 or near 65 at time of your retirement, he/she must apply as well. Please note the effective date of when your Medicare should start on #12 (Remarks) of the Application for Enrollment in Medicare Part B form.

If you are not 65 by the time of retirement, you will need to contact Medicare 3 months prior to your 65th birthday to apply.

In order to qualify for Medicare reimbursement, you must be officially retired, over 65 and have submitted copies of yours and your spouse's (if applicable) Medicare card(s) to the Benefits Office.

_____ FOR MESPA ONLY - VACATION/SEPARATION PAYMENT

If you were hired prior to the year 2006, you may be eligible for unused vacation payout.

_____ CHANGE OF ADDRESS OR SECONDARY ADDRESS

Please be sure to update HR should you have a change of address at retirement you would like to include, for the purpose of mailings and or health insurance information.

OTHER IMPORTANT INFORMATION

MASA and MESPA Dental and life insurances and end at time of retirement

Retiree MEA Benefits Trust benefits will be provided — Buy-ln

Excess Medical may continue into retirement, retiree covers 100% of cost. Must notify HBA.

Flex Spending will continue till the end of the calendar year. Then End.

Manhasset Retiree Reference

Health Insurance — Billed in quarterly. When enrolling in Medicare (do not miss deadline), always send a copy of Medicare Card (reflecting Part B to the District) for both yourself and spouse/partner (if applicable)

- December Billing (3 months: covering January thru March)
- March Billing (3 months: covering April thru June)
- June Billing (3 months: covering July thru September)
- September Billing (3 months: covering October thru December)

Insurance rates normally change in January of each year.

Retiree Plan changes (i.e., enrolling in Medicare for yourself, spouse, partner, etc.) will be captured in the subsequent quarterly billing cycle.

Medicare — Part B Reimbursement (for those retirees and spouse/partner collecting Social Security)

- June - Reimbursement (covers January thru June) December - Reimbursement (covers July thru December)
- March - Settlement for Prior Year (requires timely submission of SSA-1099 (copy) — normally issued in January — Please do NOT submit the original, that should be kept for your own tax records)

If you are enrolled in Medicare but NOT collecting Social Security (this applies to a very small group of retirees), send copies of Medicare invoices with completed 6-month Medicare Reimbursement form when received. (Note: The District can only reimburse when copies of the Medicare bills are supplied)

Please complete and return all paperwork to the Manhasset Business Office promptly.

Manhasset HR/Benefits Department

- Home Address Changes
- Health Insurance Plan Changes
- Replacement Insurance Cards

403(b) Plan Withdrawal

Complete plan paperwork — supplied by the service provider managing your account, or if you're transferring your account, your new service provider - and submit to Manhasset UFSD — Business Office for approval and submission to OMNI (the District's 3 rd Party Plan Provider). For transfers to a new service provider, a copy of a recent statement is also suggested.

MEA Trust — (applies to Teaching Staff ONLY)

All Dental/Vision coverage questions/issues ... the District has no information ...
Current contact is Mike Faraci

NYS Retirement System - Contact Center at 1-866-805-0990 or 518-474-7736

All pension related questions/issues ... the District has no information

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Frequently Asked Questions

When do I apply for Medicare Part B? What happens if I am not 65 at my retirement date?

- You will need to reach out to Medicare 3 months before your retirement date. If you are 65 on or before your retirement date, your Medicare enrollment MUST coincide with your retirement date. You will not receive any reimbursements for Medicare until you have officially retired and we have a copy of your Medicare Part B card on file.
- If you are not 65 by your retirement date, you must reach out to Medicare 3 months before your 65th birthday. As soon as you receive your card, make sure to send HR a copy of your Medicare card, so that your benefits profile is updated for the Medicare Reimbursement. o The above would also apply for your spouse. Once you receive his/her card, please send a copy to Human Resources. Failing to do so, may result in your spouse being dropped from the Health Insurance plan.

I am currently contributing to the Flexible Savings Account, what happens with the money? Can I continue to contribute?

- You can max out your contribution by sending an email to Payroll asking to increase the deductions to meet the annual contribution in your remaining paychecks. o You may NOT continue to use your FSA once you have retired.

I am currently contributing to Excess Major Medical, what happens to it once I retire?

- The District will communicate with JJ Stanis that you have retired and it cancels your policy from being billed through the district. Should you opt to continue with EMM, you may contact Donna at JJ Stanis to continue your coverage personally.

I am currently contributing to AFLAC; may I continue to pay for this on my own?

- The District will send notification to AFLAC informing them of your retirement day. You may choose to contact them to inquire about continuing your supplemental insurance personally.

Should I consider in enrolling in supplemental Medicare insurance for prescriptions, such as AARP, Paul Revere, etc.?

- DO NOT enroll into any supplemental prescription insurances as this will affect your Medicare and NYSHIP will cancel your insurance with no warning.

What if I were to pass, could my spouse continue on the Health Insurance?

- Your spouse will have to contact the district immediately, to inform us of the passing. o He / She continue to receive benefits at no cost for up to 3 months.
- He / She will receive a letter and enrollment application, in the event they would like to continue with the health insurance beyond 3 months at his/her own cost at 100% of the premium.

Will my workers compensation case impact my social security Medicare?

- Yes, be sure your workers compensation case is closed, if expecting social security Medicare. If your case is still open, you will be required to inform your physician that your appointment is related to your workers compensation case.

Do I need to inform my Annuity Advisor of my retirement?

- Yes, your 403B/457 retirement annuity is under your responsibility. Please be sure to connect with your Annuity Advisor regarding your retirement date. The Annuity Advisor should send a letter to the Manhasset Payroll Office confirming your retirement date.
- Annuity advisor contact information can be found on your quarterly statements.
- The District will not be responsible for informing the annuity companies of your retirement.