

# Retirement FAQ



Welcome to the Dallas Independent School District Retirement FAQ, your ultimate resource for navigating the transition into retirement! Whether you're a seasoned educator or a new recruit, we're here to guide you through the ins and outs of retiring with confidence. Let's embark on this next chapter together!



## Steps to Retirement

**Step 1-** Contact Teacher Retirement System of Texas (TRS) as soon as possible to request your retirement packet. It is recommended that you request your packet at least 60 days in advance as it can take a couple of months to receive. Below is the contact information:

- [trs.texas.gov](https://trs.texas.gov)
- 1-800-223-8778

### **Virtual TRS Appointments are available!**

A TRS Advisor will be able to assist with your questions regarding your personal retirement funds, years of service, retirement medical insurance and beneficiary information. The TRS packet contains all your information and forms needed to retire from TRS.

**Step 2-** Submit your Notice of Separation through Oracle self-service for DISD. Please click link for how to submit: <https://www.dallasisd.org/Page/28655>.

**Step 3-** Complete the TRS Retirement packet and return all forms to TRS. We recommend certified mail so you can track your package.

# Retirement Service Award (RSA)

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The Retirement Service Award is a program that allows retirees to donate their local days to the Sick Leave Bank (SLB) and in exchange, can request a cash payout for their local days after they officially retire. The exact rate to be paid will be determined upon calculation of all the participants' remaining local days for the year multiplied by a precalculated daily rate. There is no cap on the number of local days paid. State hours are not eligible for the retirement service award.

Dallas ISD will have two payouts for the Retirement Service Award. To qualify for the RSA, employees must submit their Notice of Separation and complete the RSA form by the deadline.

- For Fall RSA: employees must enter their Notice of Separation in Oracle Self-Service and complete the RSA form no later than November 1st. Payout is in December. This includes those who plan to retire in January, to secure their additional year of service requirement of working into January. **Please note that Campus-based certified employees are ineligible for the Fall cycle. (per DEC policy)**
- For Spring RSA: employees must enter their Notice of Separation in Oracle Self-Service and complete the RSA form no later than April 15th.

**Please note retirees are only eligible for the RSA on their first retirement. If you have already retired from TRS, you are not eligible for the RSA.**

## Frequently Asked Questions

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How do I know if I am eligible to retire?

- Please visit the TRS website for resources on normal retirement age and early retirement eligibility . myTRS is an easy and great resource click [here](#) to access the member portal.

Which forms do I need to submit to Dallas ISD for retirement?

- The only Notice of Separation – complete in Oracle self-service. Instructions for submitting this can be found [HERE](#).



If I want to retire in the middle of my contract year? Will I still receive a full year's service credit with TRS?

- Yes, if you work 90 days from September 1 (regardless of when your semester starts), you will receive credit for one service year. Please note that, in your final year before retirement, you may earn a full year of service by working or receiving paid leave for each day of the full fall semester, even if that semester is less than 90 days.

I checked my years of service on the TRS website, but not all my years are showing. How do I fix that?

- Contact Employee Records at [employeerecords@dallasisd.org](mailto:employeerecords@dallasisd.org) to update your years of service.

Who do I contact if I would like to continue my insurance coverage once I retire (COBRA)?

- Medical-TRS Care 1-888-237-6762
- Dental/Vision- Benefits Call Center 972-925-4000

**COBRA Administration (TRS-ActiveCare)**

P.O. Box 860620

Minneapolis MN 55486-0620

Phone: 1-833-682-8972

7 a.m. - 7 p.m. CT (Mon-Fri)

When does TRS receive the Retirement Certification form? Will I receive a notification from Dallas ISD?

- The Payroll department will submit the Retirement Certification form the last month in which you are paid with the District. There is no formal notification provided. Please reach out to TRS for confirmation of receipt of form. If your form has not been sent after the given timeframe please submit a Let's Talk to Payroll so they may further assist.

<https://www.dallasisd.org/Page/32798>

What do I do with the TRS 587 Form- Certification of Unused State Sick and/or Personal Leave Form ?

- Take the form to the Payroll Department. They will complete the form and you must send the completed form to TRS. This form will include the date of your last paycheck and your annualized salary at the time of your retirement.

## How do I know how much my monthly payment will be?

- Call TRS at 1-800-223-8778 or login to myTRS account to confirm your monthly annuity amount.

## When can I expect my first annuity payment from TRS?

- You will receive your first check once TRS has received the Retirement Certification form from the Payroll Department. Generally, one month after you receive your last check from the District you will receive your first annuity check.

## If I have any questions or concerns relating to the process within Dallas ISD, whom do I contact?

- Email us at [Retirement@DallasISD.org](mailto:Retirement@DallasISD.org) for the Internal Benefits Department or call 972-925-4300

## Questions regarding 403bs (deductions, how to withdraw, who to contact)

- You will need to contact our administrators, TCG @ 1-800-943-9179 or [tcgservices.com](http://tcgservices.com).

## I have a lot of State days remaining. What can I do with them when I retire?

- If you have over 400+ hours of STATE time available, you are eligible to purchase a service year through TRS. Please see the TRS online Brochure "TRS Service Credit: Pushing all the Right Buttons" for information on cost and eligibility. Otherwise, there is no payout for State Days. Your State days will remain available to you if you return to the District or another TRS-covered entity.

## What day should I note as my separation/retirement date on the online separation form in my Oracle Self Service?

- If you plan to fulfill your contract for the current school year, you will need to use your last working day on your contract calendar as your separation date. Please see the District Calendars for last working dates for your location or email [contracts@dallasisd.org](mailto:contracts@dallasisd.org) for specific dates.

Please be advised that the Benefits Department does not offer financial or retirement planning services. For such requests, kindly direct your inquiries to TCG or TRS.

## I changed my mind about retiring: what do I need to do now?

- letting your Principal or supervisor know and they will contact the appropriate Talent Partner or HCM representative.
- Notifying TRS
- Notify payroll of your rescinded resignation by completing a [Let's Talk](#).

**If these steps are not completed, you risk losing your annuity.**

## How soon can I get rehired after I retire?

- **Part-time position** - you must remain off one full month
- **Full-time** - you must remain off for one full school year (12-month period)

Please see the TRS online Brochure ["Employment After Retirement: How it Works for You"](#) for specifics. It is very important to follow the rules with EARs so you do not lose your annuity payment.

Important Information to Know: TRS has the following rules which must be followed to not forfeit your retirement and annuity.

- **Mandatory One-Month Break in Service:** All retirees must observe a one full, calendar-month break in service after their effective retirement date to avoid revoking their retirement. If you work in a month, you forfeit your retirement check for that month.
- **June 15th Rule:** The June 15 rule allows a member to have a retirement date of May 31 if the member terminates his or her employment no later than June 15 in order to complete all work required for the school year.
- **Exception:** As of August, 2022, TRS members who retired prior to January 1, 2021, and who thereafter are reemployed full time will not have to complete a 12-month waiting period to be reemployed by a TRS member employer, in order to be exempt from losing their TRS annuity payments.

## TRS has not received the Retirement Certification form from Dallas ISD, who do I contact?

- If you are still waiting for your Retirement Certification form to be sent to TRS, please contact the Payroll Department via [Let's Talk](#).



The Benefits Department is here to serve you in answering your retirement questions and providing information. Benefits does not offer retirement counseling or financial planning. Please contact TRS for retirement questions specific to your circumstances, or TCG Services for questions relating to your 457 or 403B accounts. For questions about the Dallas ISD process, please email Benefits at [retirement@dallasisd.org](mailto:retirement@dallasisd.org) or call 972-925-4300

# Helpful Resources

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## TRS – Helpful pages

- <https://www.trs.texas.gov/Pages/Homepage.aspx>
- [https://www.trs.texas.gov/Pages/active\\_member\\_planning\\_retirement.aspx](https://www.trs.texas.gov/Pages/active_member_planning_retirement.aspx)

MyTRS is the online access portion of the TRS website. After establishing a User ID and password of your own choosing, as a member you can plan for retirement and keep track your personal account. This is a great resource at your fingertips! Simply login to the TRS main page website and click the link on the upper-right top of the page.

### **TRS Member Services:** 1-800-223-8778

Monday – Friday, 7 a.m. – 6 p.m. Automated information available day or night, seven days a week  
Low-peak days and times are Wednesdays and Thursdays 7 – 8 a.m. and 5 – 6 p.m.

### **TRS Benefit Services Fax Number:** 512-542-6597

Note: All forms related to pension benefits are acceptable by fax. To fax health care documents, please use the designated TRS Health & Insurance Benefits fax number located on the TRS webpage.

### **TRS- CARE General Questions:** 1-888-237-6762

(TRS Health & Insurance Benefits Eligibility and Enrollment) Monday – Friday, 7 a.m. – 6 p.m.

### **TRS Health & Insurance Benefits Fax Number:** 512-542-6575

Note: Please include your name and ID on all faxed pages to ensure your documents get to the right place.

**TRS Headquarters**

1000 Red River Street

Austin, Texas 78701

**TRS Investments**

816 Congress Ave., 13th floor

Austin, Texas 78701