

STANDARD ADMINISTRATIVE PROCEDURE

31.07.01.M0.01 Retirement

Approved November 25, 1998

Revised April 16, 2009

Revised April 20, 2012

Next Scheduled Review: April 20, 2017

Standard Administrative Procedure Statement

This SAP defines the retirement process beginning with pre-retirement counseling, proper notification, retiree identification cards and possible post-retirement employment with Texas A&M University.

Procedures and Responsibilities

1. PRE-RETIREMENT COUNSELING

- 1.1 Employees planning to retire should make initial contact with Human Resources, Benefits Services approximately six months prior to the last day of work to start the individual counseling process and to verify Texas A&M System retiree eligibility.
- 1.2 Retirement counseling includes a discussion of the impact of retirement on group insurance plans, accrued vacation and other benefit programs; assistance with processing the necessary forms to establish retiree status and benefit plan enrollment; and dissemination of information regarding employment after retirement.
- 1.3 Once the retirement counseling is complete, the department will receive an Acknowledgement of Employee Retirement form from Benefit Services as verification of retirement counseling and confirmation of retiree eligibility. The Department will complete the Electronic Payroll Action form (EPA) with an occupant action of "Retire" not "Termination", attach a copy of the Acknowledgement of Employee Retirement form, and submit to Payroll Services for processing.
- 1.4 After the EPA is processed by Payroll Services, 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) and Request for Estimate of Retirement Benefits (TAMU Form 18 for ORP retirees) will be processed by Payroll Services to initiate individual retirement benefits.

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. The card is issued by completing an ID request form available on-line at <http://sbs.tamu.edu/media/21030/faculty-staff-id-form.pdf> and taking the completed form to the Aggie Card Office as instructed on the form.

3. EMPLOYMENT AFTER RETIREMENT

3.1 All post-retirement employment with Texas A&M University must be approved in advance and both the returning employee and the department should understand the implication of post-retirement employment and maintain compliance with 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 Memorandum of Agreement upon Retirement from a Tenured Faculty Appointment and Appointment to Post-Retirement Service at Academic Institutions explains the conditions of such post-retirement employment and must be completed. The department must attach the Acknowledgement of Employee Retirement form to the Agreement to ensure that the retiree understands the rules regarding employment after retirement. Proposed agreements shall be submitted through the administrative channels to the appropriate Vice President or designee for approval. The approved Agreement and Acknowledgment Form must accompany the EPA and a copy placed in his/her official personnel file.

Related Policies, Regulations, Rules and other Requirements

System Policy 31.07: Retirement

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

System Regulation 31.07.01: Retirement and Employment after Retirement

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

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

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

University SAP 31.02.09.M0.01: *Optional Retirement Program*

<http://rules-saps.tamu.edu/PDFs/31.02.09.M0.01.pdf>

Contact Office

For more information on membership eligibility, employment after retirement, or clarification on this SAP, contact [Human Resources, Benefits Services](#) at (979) 862-1718, or by email at benefits@tamu.edu.

OFFICE OF RESPONSIBILITY: [Human Resources](#)