

Total Rewards Service Center



Standard Operating Policy and Procedure

October 2019

Subject: Ordinary Disability Retirement

Policy: An applicant must have at least 5 years of pension creditable service to be eligible for Ordinary Disability Retirement.

Procedures:

1. Applicant submits a letter from physician stating he/she is totally and permanently disabled from performing job duties to the TR-Benefits Service Center.
2. Verify applicant meets criteria to retire by retrieving pension information and viewing the special information or EIT screen in Oracle EBs and Oracle Fusion.
3. Applicant completes retirement forms:
 1. Application for Ordinary Disability Retirement
 2. Retirement Benefit Election Form)
 3. W4-P
 4. Direct Deposit (optional)
 5. Retiree Beneficiary Form
4. Request job description of applicant's position from Compensation
5. Make copy of medical file, physician's letter, application for retirement, job description and send to Case Manager.
6. Case Manager will coordinate individual medical examinations with two physicians for the applicant.
7. Upon receipt of reports from the evaluating physicians, the Case Manager will bring a copy of the applicant's packet to the Benefits Office for distribution to Board Members. These packets will include the Case Manager's report, the evaluating physician reports, and a copy of the medical file.
8. Put on agenda for next Pension Board Meeting.
9. Notify applicant, by certified letter, of Pension Board Meeting date, time and location.
10. If the Board approves the retirement, generate resolution and retirement percentage document and have the Pension Board Secretary sign.

11. Send signed resolution, signed retirement percentage and application forms to Pension Payroll for processing of retirement benefit.
12. Notify applicant's department of approval or denial of request and effective date. If applicant is still receiving pay, effective date is the 1st of the next month. If applicant is on no pay status, effective date is the next day after last paid day or date completed retirement application, whichever is latter.