

Retiring

Thank you for your years of service and Congratulations!

The below checklist is designed to help you navigate through the retirement process and assist you in making the best possible choices for your future health and financial wellbeing.

- Contact **OPERS** (<https://www.opers.org/about/contact/>) to schedule an appointment to talk through your retirement options and set a retirement date.
- Send an email to your supervisor informing them of your retirement date. The date must be the same date as your last day worked or last day on PTO. A minimum of two weeks' notice is requested.
- At least a month prior to your last day, contact Payroll & Benefits if you have an **Ohio Deferred Compensation** plan that you wish to roll your PTO payout into. Payroll can help you estimate the payout which you will need to report to Ohio Deferred Comp: <https://www.ohio457.org/home>.
- If necessary, update your contact information in **ADP** (mailing address and email). so we can mail your W2 and other tax documents. You may also consider updating your Preferred Email Address to your personal email for future ADP communications such as assistance with updating your password. ADP -> Myself -> My Information -> Profile -> Contact Preferences.
- Make sure to document your current ADP password.
- Write down ADP's phone number should you need assistance logging into your account (1-855-547-8508). You will have access to your tax and pay statements in ADP after you leave CML.
- Are you signing up for **Medicare**? If you need CML to verify your employer health coverage please email payrollbenefits@columbuslibrary.org.
- Are you planning to elect **COBRA**? You will receive information in the mail from **HealthEquity/WageWorks** with instructions on how to enroll. You will have 60 days to decide and coverage will be retroactive to your last day worked with CML.
- Questions regarding your retirement gift? HR will send you an email on how to choose a gift. Any questions should go to humanresources@columbuslibrary.org.
- Question regarding your 403b **Newport** account? Please contact Newport: www.newportgroup.com or by calling 1-844-749-9981.

Important Information to Keep in Mind:

- All CML benefits end on your last day worked.
- Your PTO will be paid in accordance to the Paid Time Off Policy. CML will not defer PTO to other employers in lieu of a payout.
- Employees are allowed to have one day of PTO in their last week. PTO cannot be used on your last day. Your last day cannot be a CML paid holiday.
- CML will not deduct for medical, dental and vision benefits on your last check.

- **Ohio Public Employees Retirement System (OPERS):** OPERS representative(s) will remain your primary contact for the retirement application process and administration of your retirement benefit. Contact information for OPERS is 1-800-222-7377 or visit www.opers.org.
- **Paycheck:** Your final paycheck will be issued as per CML's payroll schedule. The check amount will be directly deposited into your financial institution account(s) as you currently have arranged. To view your paystubs, please log into MyHR through workforcenow.adp.com. You will have access to ADP/MyHR for three years following your last day of employment. They can be reached at 855-547-8508, Mon – Friday, 8:00 am – 11:30 pm EST.
- **Tax Documents:** It is necessary that your records with us remain current so that your W-2 Form is forwarded to the correct address. If needed, please update your address through workforcenow.adp.com.
- **Voya voluntary plans:** If you are currently enrolled in any of the VOYA voluntary plans through CML (Accident, Critical Illness or Hospital Indemnity) you may port these plans to an individual policy by directly paying VOYA their established premiums. You have 31 days from your date of termination if you wish to apply for portability. VOYA will send information directly to your home address in ADP.
- **New York Life voluntary plans:** If are currently enrolled in any of the New York Life voluntary plans through CML (Basic Life & ADD, Voluntary Employee/Spouse/Child Life, Basic Dependent Life) you may be able to port or convert the coverage to an individual policy by directly paying New York Life (Life Insurance Company of North America) their established premium. If you are interested in porting or converting a life insurance policy, please contact payrollbenefits@columbuslibrary.org for more details. Portable coverage will be effective the first of the month after your group coverage ends subject to your applying for portable coverage for yourself and paying the first premium within 31 days after the date your group coverage ends.
- **LegalEase:** If you are currently enrolled in the LegalEase plan, you may port to an individual policy by directly paying LegalEase their established premiums. Contact LegalEase at 1(800) 248-9000 to request the port form.

Please email questions to payrollbenefits@columbuslibrary.org.

If there's any discrepancy between this document and CML's Policies and Procedures(P&Ps) or benefits governing documents, CML's P&Ps/governing documents prevail.