



Completing Retirement Paperwork (BEN-W004)

CLARKSVILLE-MONTGOMERY COUNTY SCHOOL SYSTEM

1.0 WORK INSTRUCTION:

The online version of this document is official. Therefore, all printed versions of this document are unofficial copies.

- 1.1 Employee starts the process by submitting a request for a retirement application meeting in the online retirement portal. Employees needing assistance with submitting their requests in the portal may contact Human Resources office to schedule retirement application meeting.
- 1.2 Appointment is scheduled with Chief Human Resources Officer or Human Resources Coordinator to complete the Tennessee Consolidated Retirement System online application using the Retiree's online Self-Service account with the Tennessee Consolidated Retirement System for Service or Early Retirement Benefits. Copy of photo ID is uploaded to the Tennessee Consolidated Retirement System during the online application process.
- 1.3 Employee submits through the online retirement portal form [BEN-F011](#). Form BEN F011 is forwarded through the online system to principal for electronic signature and is then forwarded to appropriate HR staff for processing.
- 1.4 During the retirement application meeting, if employee is eligible for Retiree Health Insurance Benefit, employee completes and submits [BEN-F032](#) through the online portal
- 1.5 Also, during the retirement application meeting, the following forms are completed, if applicable through the online retirement portal
 - 1.5.1 BEN-F004
 - 1.5.2 [BEN-F001](#)
 - 1.5.3 [BEN-F049](#)
 - 1.5.4 BEN-F075
 - 1.5.5 BCBS Change Request Form (ADC-09)
- 1.6 HR determines if employee is eligible (Certified employees with 20 CMCSS years of service) for Retiree Life Insurance Benefit. If eligible, employee completes [BEN-F033](#). After completion, a copy certificate is made and filed with the [BEN-F033](#) in the Benefits Office. The original certificate is presented to the retiree.
- 1.7 Retiree information is placed on spreadsheet and Life Insurance census added if applicable.

2.0 ASSOCIATED DOCUMENTS

- 2.1 Retirement Form ([BEN-F011](#), [BEN-F032](#), [BEN-F033](#), BEN-F004, [BEN-F001](#), [BEN-F049](#), BEN-F075, BCBS ADC-09 Certificate of Retiree Life Insurance Benefits).
- 2.2 Tennessee Consolidated Retirement System (TCRS)
- 2.3 Employee Retirement ([HUM-A022](#))
- 2.4 Employee Handbook ([HUM-M001](#))

3.0 RECORD RETENTION SCHEDULE

Identification	Storage	Retention	Disposition	Protection
Personnel File	Hard Drive/Docuphase	Perpetual	Permanent	Back to server



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Benefits File	Benefits	Indefinitely	Permanent	Locked Building
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