

# OPERS EMPLOYER Notice

April 7, 2008

Ohio Public Employees Retirement System • 277 East Town Street • Columbus, Ohio 43215

## Retirement forms and disability process changes

### Who should read this notice

Payroll officers, human resources professionals and those responsible for processing service retirement and/or disability benefit information

### Important:

*Some retirement notifications have been revised as of February 2008.*

### Situation overview

To improve the processing of your employees' service and disability applications, changes have been made to the *Certification of Employee's Final Payroll* letter (SRF-85 and DRF-85) and the *Report of Employer for Disability Applicant* form (DR-4).

- Regarding the *Certification of Employee's Final Payroll* letter: Your information on this letter applies for both service retirement and disability benefit processing.
  - As part of the **service retirement** process, employees indicate on their retirement application the intended last day of employment. OPERS provides the employer with this date on the *Certification of Employee's Final Payroll* letter. Employers are asked to verify this date is the last date the employee is on the payroll.

OPERS recognizes an employee's final day before retirement may change, so please know you're asked to provide the final payroll information to *the best of your knowledge*—as of the date you receive the certification letter—and return the letter promptly. OPERS will then determine the employee's interim benefit amount. Final benefit calculation will be done when we receive the *Retirement Contribution Report* that reports the employee's termination, indicated by your using the pay period end code of "P".

If your employee changes the termination date, please notify OPERS immediately. We will provide you with a new *Certification of Employee's Final Payroll* letter to complete.

- For both **service and disability retirements**, clarifying questions have been added to the letter to ensure the correct earnable salary information is captured. Specifically, these questions are about conversion plans. Some employers offer a program that permits employees to receive a payout of accrued sick and/or vacation leave annually, called a conversion plan. If an employer has an OPERS-approved annual conversion plan on file, these amounts can be included in the employee's reported earnable salary if the scheduled conversion leave payout coincides with the employee's termination date. Restrictions apply.
- Questions asking the employee's final three pay periods and amounts have been removed. OPERS is now requesting only the final pay period end date and the month that the *Report of Retirement Contributions* will report the employee's final salary payment.
- Soon, employers will have the capability to return the *Certification of Employee's Final Payroll* information electronically, via ECS.

(More information on back)

- Regarding the **disability retirement** process: Within five days of OPERS' receipt of the approval recommendation from the medical advisor, we will send you the *Certification of Employee's Final Payroll* letter for completion. Formerly, you were sent this letter upon our receipt of the disability application. Prompt return will expedite the payment of your employee's disability benefit.
- Regarding the *Report of Employer for Disability Application* form (DR-4):
  - o Section 3 has been revised; employers are asked only for the final date of service, if known.
  - o Note that Section 2 requests employers provide a written job description for the employee's last public employment position. This information is necessary and, if not included, will delay the employee's application process.

### **What you need to do**

Be aware of these changes so when you receive the revised letter and form, you can review and complete accurately—and return as quickly as possible.

### **Why this is important**

These changes will help employers and OPERS to better service retirement and disability benefit applicants so that benefit payments may be processed—and received—quicker.

### **Revisions to *Employer Manual***

To accurately reflect these changes, the *Employer Manual* has been updated and posted online. Those employers who maintain a hard copy should download pages 7.1, 7.2, 7.8.

### **Who to contact for more information**

After you review this *Employer Notice*, contact your Employer Outreach representative with questions or comments at 1-888-400-0965 or via the Internet at [employeroutreach@opers.org](mailto:employeroutreach@opers.org).

*This Employer Notice is written in plain language for use by public employers who are subject to coverage under the Ohio Public Employees Retirement System. It is not intended as a substitute for the federal or state law, namely the Ohio Revised Code, the Ohio Administrative Code, or the Internal Revenue Code, nor will its interpretation prevail should a conflict arise between it and the Ohio Revised Code, Ohio Administrative Code, or Internal Revenue Code. Rules governing the retirement system are subject to change periodically either by statute of the Ohio General Assembly, regulation of the Ohio Public Employees Retirement Board, or regulation of the Internal Revenue Code. If you have questions about this material, please contact our office or seek legal advice from your attorney.*



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