

# EMPLOYER Notice

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

**Note:**

*Effective  
December 17, 2009,  
paper-based  
retirement applications  
for the Traditional  
Pension Plan will be  
eliminated.*

*Employees will have  
two options for  
completing the  
Traditional Pension  
Plan Retirement  
Application.*

## **Paper-based Traditional Pension Plan Retirement Application (SR-1T) to be eliminated**

### **Who should read this notice**

Human resources professionals or anyone who works with retiring or soon-to-be retiring employees

### **Situation overview**

OPERS works to provide the best possible service to all its members—a service standard that's critical as employees transition from contributing members (your employees) to retirees. Recently, we benchmarked the retirement application process and discovered that approximately 85 percent of all retirement applications for the Traditional Pension Plan had been submitted with inaccurate or missing information. The result? The application errors caused processing delays that, in turn, caused delayed monthly benefits for recent retirees.

To solve this problem, the paper-based *Traditional Pension Plan Retirement Application (SR-1T)* will be removed from the OPERS Web site effective December 17, 2009.

*Going forward:* Employees who are in the Traditional Pension Plan and who will be filing a retirement application will have two options for electronically completing their retirement application. The form may be completed:

- Online, via the My Benefits System (MBS) function, or
- In person, via an appointment and with the assistance of an OPERS retirement counselor.

### **Actions Requested**

We consider it important that you and your employees are informed about this change. Please:

- Make sure all employee resources within your organization are informed, and
- Direct affected employees to either of the two OPERS options available to them:
  - The OPERS Web site, [www.opers.org](http://www.opers.org), and then to the MBS function to access an application, or
  - Contact the Member Services Center at 1-800-222-7377 for guidance.

Employers are an important source of information for employees. Because this change is significant, we anticipate many employees may come to you for information. When that happens, we ask that you direct them to OPERS.

### **Why this is important**

Accurate information will help your employees smoothly transition to retirement. Because the online MBS function provides for instant validation of some information and routes the application directly to the right department, we expect the retirement process to be significantly enhanced. Similarly, working directly with a retirement counselor will help ensure accuracy and eliminate delays in application processing.

**More Information on back**



1-888-400-0965  
[www.opers.org](http://www.opers.org)

### Additional resources available

- *Seminars scheduled:* OPERS sponsors retirement seminars on an ongoing basis. Encourage your employees to go online to review the entire retirement seminar schedule and to sign up for the seminar best suited to their particular situation.
- *Member Services Center:* Our department dedicated to providing information concerning your employees' specific retirement questions.

### Who to contact for more information

*Employers* may contact Employer Outreach representatives with questions at 1-888-400-0965 or by email at [employeroutreach@opers.org](mailto:employeroutreach@opers.org).

*Employees* may contact the Member Services Center at 1-800-222-7377 for guidance on completing an online form or to initiate an appointment.

*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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