




# FEA Retirement Packet

(as simple as 1, 2, 3)

1	<p><i>Tips</i> to help guide you through the <i>Retirement Process</i></p>	<p>This guide was put together with input from FEA members who have already retired. We are aware that procedures may change, so it is important to follow your principal's and human resources' guidance. Let us know if you have additional tips, and we will add them! Email: <a href="mailto:retiredfea@gmail.com">retiredfea@gmail.com</a></p>	
2	<p>The <i>Good-bye Grievance</i>* templates and instruction</p> <p>* For those retiring from Europe or the Pacific Districts</p>	<p>This is an important legal protection for our FEA members. Read the instructions carefully. If you have questions, see your local building representative.</p>	
3	<p>Join <i>FEA-Retired</i></p> <p>There is a <b>one-time</b> dues payment -- form to join is included in retirement packet</p>	<p>To join <i>FEA-Retired</i>, you only need to pay dues one time! Currently, the cost is \$419.00. Being a member of <i>FEA-Retired</i> allows you a number of benefits, including:</p> <ul style="list-style-type: none"> <li>✓ Frequent NEA publications</li> <li>✓ Electronic updates on educational and retirement issues</li> <li>✓ Support for NEA government relations to safeguard Federal programs for retirees</li> <li>✓ Retiree representation at NEA and FEA meetings</li> <li>✓ Continuation of the Educator Employment Liability Coverage (should you choose to substitute teach)</li> </ul> <p>To view all the benefits of being a retired member, visit <a href="http://feasonline.org">feasonline.org</a>. Click on "Member Resources" on the righthand side. Then click on "Retired members."</p>	

## ***Tips for Retirees***

1. This is provided as a guide for members considering retirement in the near future. FEA is aware that management may change the procedure, forms and requirements; so work with your school administrator and human resource (HR) contacts to complete the process and answer your questions. (Also, let us know of changes so we can update our information.)
2. Be sure to change the way you are paid from 26-months, to the 21-month allotment at least one-year prior to retirement. This is important to make sure you receive your pay and deductions correctly prior to separation. If you forget to do this, contact HR during your final school year for assistance.
3. Ask your school principal or HR representative to provide you with a *checklist* (such as the *FERS Nondisability Retirement Checklist*) to follow so you will know the steps of what you need to do. If the checklist is long/overwhelming, have that person explain which items on that list do **not** apply to you.
4. Plan to attend any *retiree workshops* that are offered by management. If there are none, have your building representative request one. Another option is to allow for administrative time to consult with an HR representative. While an in-person meeting is preferable, telephonic or virtual meetings are another option. It is best to start attending workshops that are offered at least 5 years out.
5. An employee can request a retirement estimate at any time from HR, this should definitely be done at least one-year prior to retirement. (Employees can also get an estimate of how much they will receive during retirement by using the "retirement calculator" on DODEA's Government and Retirement Benefits (GRB) website.)
6. Gather your personal paperwork that may be needed for retirement, such as:
  - a. Marriage license.
  - b. Check to see if your POV has a recall notice, and if so, you have documentation that your POV was taken care of. Some employees choose to sell their POV and purchase a car stateside (or purchase car while overseas and have it delivered stateside).
  - c. If you had prior military service, you will also need a DD-214.
7. When you are ready to start the formal process, the employee should contact the *Army Benefit Center-Civilian (ABC)*, and complete the packet. ABC will provide you with the forms to complete and they are returned by U.S. mail. ABC will review this. Be sure to request an interview with ABC after your packet is received and reviewed to make sure all is complete.
8. Request your travel orders for *separation from DoDEA* through TOPS online. One does not need to wait on a response from ABC.
9. When you get your orders, contact your local military servicing agency to schedule your PCS move and shipping of your POV.
10. ABC can be very helpful in guiding you through the process. Contact them during the process if you have questions, and when you believe you have completed all the necessary steps.
11. If you have a Federal savings account for paying for health benefits with pre-taxed dollars, be aware that only expenses which were incurred before your last FSA deduction, will be reimbursed.
12. Finally, if you are retiring from FEA-Europe or FEA-Pacific, do not forget to file a *Good-bye Grievance*, **prior** to your last duty day. The forms and instructions are included in this packet.
13. Also remember that as a federal retiree, you will be able to take your health insurance into retirement. Be sure to review your coverage and see if any changes need to be made when you are filing for your retirement.
14. Please notify the FEA office of the date to change your membership category from "active" to "retired." As a retired member of FEA you will continue to have access to all the program in the NEA-Member Benefit programs, along with publications and updates from FEA on employees' and retirees' issues.

## ***Instructions for filing the FEA Good-bye Grievance***

*(For members retiring from FEA-Europe or FEA-Pacific)*

Members should file a *Good-bye Grievance* prior to separating from DoDEA. It involves filing two forms with your building administrator, and then sending the documents to Bill Freeman, the FEA UniServ attorney who handles those cases.

1. Complete the *Good-Bye Grievance* form in this packet (or see your FRS for a copy). One only needs to fill in the blanks, and should not change any of the pre-printed words on the form. Make a copy, and give the original to your building administrator. (Principals are aware of this process and receive these forms routinely at the end of the school year from educators who are retiring.) It is recommended that this be done about 2 weeks prior to your last duty day.
2. Most principals will respond with a boilerplate form denying the grievance. As soon as you receive the principal's response, complete the *Request to Elevate to Step 3*. Make a copy and give the original to your principal. If you do not receive a response from your principal, file the *Request to Elevate to Step 3*, on the 8<sup>th</sup> calendar day after you gave your administrator the *Grievance*.
3. Send a copy of the *Good-bye Grievance*, *Request to Elevate to Step 3*, and the response you received from your principal (if you received a response) to Bill Freeman. His email address is [BFreeman@nea.org](mailto:BFreeman@nea.org)
4. Keep all your documents in a safe place during your PCS move.

## **Good-bye Grievance**

**DATE:**

**TO:** Principal

**SUBJECT:** Employee Grievance Initiated Under the FEA/DoDDS Negotiated Agreement.

**PARAGRAPH 1:** This grievance is being submitted under STEP 2 of the grievance process.

**PARAGRAPH 2:** Grievant's name:

Duty Phone:

Home Phone:

SSN (last 4 digits):

Address:

**PARAGRAPH 3:** DoDDS has expressed their intent to collect an alleged overpayment from me. I believe DoDDS could actually owe me back pay, interest, and/or lost earnings I could apply toward any alleged overpayments. I hereby invoke all of my rights under the Debt Collection Act and Article 45 of the CBA, as well as other laws, rules, and regulations. I hereby preserve all of my rights as a bargaining unit member.

**PARAGRAPH 4:** Relief sought:

I hereby request a "full pay and benefits" audit covering the last six years and payment of any back pay, interest and lost earnings owed to me, so I can apply the proceeds toward any alleged overpayments. I also hereby request that I be afforded all of the rights above before any deductions or collections are made. If deductions or collections are made, I request a refund plus interest in accordance with the Back Pay Act, Attorneys' Fees plus costs, and any other relief necessary to make me whole.

**PARAGRAPH 5:** FRS's Name:

Duty Phone:

Home Phone:

Address:

**Signature of Grievant**

### **Request to Elevate to Step 3**

TO: Principal

FROM:

DATE:

RE: Grievance filed

Please elevate my grievance to Step 3 as I did not receive the relief sought.

Signature of grievant

**Instructions:** (1) Complete the form below; (2) Enclose a check for \$419.00 made payable to FEA;  
 (3) Mail the form and check to: Federal Education Association  
 1201 16th Street NW, Suite 117  
 Washington, DC 20036

**Questions:** Please contact Nereyda Jones-Luciano at [NJones@nea.org](mailto:NJones@nea.org)

**2021-2022  
 FEDERAL EDUCATION ASSOCIATION  
 NATIONAL EDUCATION ASSOCIATION  
 PRE-RETIRED MEMBERSHIP FORM**

N/A

LOCAL

N/A

WORK LOCATION

HOME PHONE

PERSONAL (NON DODEA) EMAIL ADDRESS

Last 4 Digits of SSN:

XXX-XX-\_\_\_\_\_

CORRECT / ADD SSN

NAME			
ADDRESS			
CITY STATE		ZIP	

ASSN.	MEMBERSHIP TYPE	AMOUNT
	NEA/FEA RETIRED	419.00
TOTAL		419.00



Dues payments are not deductible as charitable contributions for federal income tax purposes.  
 Dues payments (or a portion) may be deductible as a miscellaneous itemized deduction.

I hereby authorize continuous membership in FEA/NEA and my local association beginning this year and every year hereafter. I may revoke this authorization after one year.



[www.feaonline.org](http://www.feaonline.org)

MEMBER'S SIGNATURE

DATE

## FERS Nondisability Retirement Checklist

This list identifies the forms that must be submitted when applying for an optional/voluntary/discontinued service/MRA+10 retirement under the Federal Employees Retirement System (FERS). These forms are available through the ABC-C website <https://www.abc.army.mil>.

### REQUIRED BASIC RETIREMENT FORMS

FORM NUMBER AND TITLE	REQUIREMENT
SF 3107 Application for Immediate Retirement	Required in all cases.
SF 3107 Schedule A - Military Service Information Schedule B - Military Retired Pay  Schedule C - Federal Employees Compensation Information	Required if you served in the military. Required if you served in the military and are receiving retired military pay. Required if you received OWCP benefits.
SF 3107-1 Certified Summary of Federal Service	<b>DO NOT</b> attempt to complete this form. The ABC-C will verify your service.
SF 3107-2 Spouse's Consent to Survivor Election	Required if you are married at retirement and do not elect a full survivor annuity for your current spouse.
SF 2818 Continuation of Life Insurance Coverage	Required when eligible to continue into retirement (even if electing not to).
W-4P withholding Certification for Pension or Annuity Payment	Required for tax withholdings from annuity.
State Tax Forms	If applicable
Copy of marriage certificate	If married at retirement
Copy of divorce decree	If applicable
Military Service	See Military Forms and Documents below

### OPTIONAL HEALTH BENEFITS FORMS

RI 79-9 Health Benefits Cancellation/Suspension Confirmation	Required if you are suspending your FEHB in retirement to use TRICARE or a Medicare Advantage health plan.
SF 2809 Health Benefits Election Form	Required only if you are making an Open Season election and will retire before the effective date; moving outside of your current HMO plan. The SF 2809 will be processed by OPM and not ABC-C.
TRICARE/CHAMPUS Certification Letter	Required if using TRICARE/CHAMPUS coverage to meet the five-year requirement for taking FEHB into retirement. The TRICARE Office can provide a certification letter. <b>NOTE:</b> You <b>MUST</b> be enrolled in FEHB on effective date of retirement.

### OPTIONAL BENEFICIARY FORMS IF YOU NEED TO UPDATE

SF 2823 Designation of Beneficiary (FEGLI)	Required if you want to update beneficiary information.
SF 3102 Designation of Beneficiary (FERS)	Required if you want to update beneficiary information.
TSP-3 Designation of Beneficiary	Changes should be sent directly to TSP for processing (mailing address is listed on the form).

### MILITARY FORMS AND DOCUMENTS AS APPLICABLE

DD Form 214 Report of Separation from Active Duty (or equivalent)	Attach copy if you have served in the military.
Waiver of Military Retired Pay (copy) or acknowledgment of the waiver from Military Finance Office.	Required to waive military retired pay to use military service in FERS annuity. Letter should also be sent to Military Finance Office at least 90 days but no later than 60 days before planned retirement date to preclude overpayments.
Proof of payment of military deposit (OPM Form 1514 Military Deposit Worksheet <b>OR</b> equivalent)	Required if you paid for military service performed after January 1, 1957.
SF 3106 Application for Refund of Retirement Deductions (FERS)	Required if applying for a refund of Post-1956 military service deposit because you do not want to waive military retired pay.

All retirement forms should be submitted at least 90-120 days before the date of retirement to:

Army Benefits Center - Civilian  
305 Marshall Ave  
Fort Riley, KS 66442-7005

REMEMBER: We must have original forms with no corrections or whiteout.