




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: retiredfea@gmail.com</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 one-time/lifetime 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 \$422.25. Being a member of <i>FEA-Retired</i> allows you a number of benefits, including:</p> <ul style="list-style-type: none"> ✓ Frequent NEA publications ✓ Electronic updates on educational and retirement issues ✓ Support for NEA government relations to safeguard Federal programs for retirees ✓ Retiree representation at NEA and FEA meetings ✓ Continuation of the Educator Employment Liability Coverage (should you choose to substitute teach) <p>To view all the benefits of being a retired member, visit: feaonline.org</p>	

Tips for Retirees

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 please 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.)

1. Be sure to change the way you are paid from a 26-month to a 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.
2. Ask your school principal or HR representative to provide you with a *checklist* (such as the *FERS Non-disability Retirement Checklist*) so you will know the correct steps to follow. If you find the checklist too long or overwhelming, ask the principal/representative to explain which items **do not** apply to you.
3. Plan to attend any retiree workshops offered by management. Ask your building representative to request one if necessary. Another option is to take administrative leave to consult with an HR representative. While an in-person meeting is preferable, telephonic or virtual meetings are also options. It is best to start attending retirement workshops at least 5 years out.
4. An employee can request a retirement estimate at any time from HR. This request should definitely be made at least one year prior to retirement and can only be made once in a 366-day time period. (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.)
5. Gather your personal paperwork that may be needed for retirement, such as:
 - a. Marriage license.
 - b. Check for recall notices for your POV; if applicable, provide documentation showing any required recall repairs were completed. Some employees choose to sell their POV and purchase a car stateside (or purchase a car while overseas and have it delivered stateside).
 - c. If you had prior military service, you will also need a copy of Form DD-214.
6. When you are ready to start the formal process, contact the *Army Benefit Center-Civilian (ABC)*, and complete the packet. ABC will provide you with forms to complete and return by U.S. mail. Be sure to schedule an interview with ABC after the packet has been received/reviewed to make sure it is complete.

7. Request your travel orders for separation from DoDEA through TOPS online. There is no need to wait on a response from ABC.
8. When you get your orders, contact your local military servicing agency to schedule your PCS move and shipment of your POV.
9. ABC can be very helpful in guiding you through the process. Contact them if you have questions, and once you believe you have completed all the necessary steps.
10. If you have a Federal savings account to pay for health benefits with pre-taxed dollars, be aware that only expenses incurred before your last FSA deduction are eligible for reimbursement.
11. Check with your military financial institution to see how long you can keep your account open once you separate from government service. Most banks allow only 90 days. Some credit unions do not require members to close their accounts. This is important if one has automatic payments to host nation companies that may require more than 90 days for all final payments. In addition, if you plan to continue living overseas and will have base/post privileges, you may wish to check ahead of retirement to see what services the financial institution on post/base can provide, including the use of ATMs.
12. Remember that as a federal retiree, you will be able to take your health insurance into retirement. Carefully review your coverage when filing for your retirement to see if anything needs to be updated/changed.
13. Please notify the FEA office of your retirement date to change your membership category from “active” to “retired.” As a retired FEA member, you will continue to have access to NEA-Member Benefit programs, along with publications and updates from FEA on employee and retirees issues.
14. 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.

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 8th 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
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: Complete the form below; enclose a check for \$422.25 (\$253.35 for ESPs), made payable to FEA; mail the form and check to:

FEA
1201 16th St. NW, Suite 117
Washington, DC 20036

Questions: contact Nereyda Jones-Luciano at NJones@nea.org

2022-2023
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 PRE-RETIRED	422.25
	PRE-RETIRED ESP	253.35
TOTAL	Certified	422.25
	ESP	253.35



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

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	DO NOT 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. NOTE: You MUST 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 OR 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.