



Ohio Administrative Code Rule 3337-41-90 Retirement separation.

Effective: August 31, 2018

The version of this rule that includes live linksto associated resources is online at

<https://www.ohio.edu/policy/41-090.html>

(A) Overview

This policy serves to differentiate between the ability to receive funds from a retirement system (STRS, OPERS, OPERS LE, ARP) and qualifying for retiree status as a faculty, administrator, or classified staff at Ohio university. This policy also serves to establish consistent criteria for an employee to be considered retired from Ohio university, and thereby to qualify for retirement benefits provided directly by Ohio university.

Ohio university offices and departments that provide services to retirees shall base their eligibility decisions on the criteria established by this policy. If in doubt about a particular case, they shall consult university human resources.

(B) Scope

This policy has no impact on STRS, OPERS, OPERS LE, IRS, and ARP provider rules and regulations regarding distribution of retirement funds or qualifying for retirement benefits from those systems.

(C) Criteria for retiree status

To separate employment from Ohio university with "retiree" status, an employee under OPERS, STRS, and ARP must meet the following two specifications:

(1) The employee must be considered a benefits eligible faculty and staff member as defined in



policy 41.010 "Faculty and Staff Health and Welfare Benefits" at the time of retirement.

- (2) The employee must have at least five years of service with Ohio university, and
- (3) The employee must have achieved a total qualified service and age combination according to one or more of the following criteria:
 - (a) Five years of qualified service and age at least sixty
 - (b) Twenty-five years of qualified service and age at least fifty-five
 - (c) Thirty years of qualified service at any age

An employee who is in the OPERS LE retirement system may retire with twenty-five years of service and age at least forty-eight.

Qualified service is service with any combination of state or federal (including military) employers. Qualified service does not have to be continuous time. The age criterion is met if the employee's birthday is the day immediately following the last day of work.

(D) Initiation

The employee is responsible for initiating and completing required paperwork with their retirement system or provider, in addition to the "Ohio University Retirement Separation Form."

(E) Timetable

The employee must complete the "Ohio University Retirement Separation Form" at least thirty days prior to their desired retirement date.

The "Ohio University Retirement Separation Form" will serve as notification of intent to retire to the employing department and to the university.



(F) Documentation

If qualified service, as defined in paragraph (C) of this policy, includes other state, federal, or military service, the employee must provide certifying documentation.

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