



## Retiree Checklist

Eligibility –

62 years of age and 10 years of service

65 years of age and 5 years of service

### Health Coverage

Under age 65			Over age 65		
Medical	Prescription	Mental Health	Medical	Prescription	Mental Health
BCBSNC	OptumRx	Carolina Behavioral Health (CBHA)	Via Benefits	Via Benefits	Via Benefits
same coverage as active faculty and staff <b>877.258.9787</b>	same coverage as active faculty and staff <b>888.869.4600</b>	same coverage as active faculty and staff <b>800.475.7900</b>	<p><i>A retiree or spouse must have Medicare Parts A and B before enrolling in a plan through Via Benefits.</i></p> <p><b>To enroll:</b>  Call Toll Free 1.844.570.2795 (TTY:711)  WFU website: <a href="https://my.viabenefits.com/wfu">https://my.viabenefits.com/wfu</a></p>		
Dental	Vision	Flexible Spending		AFLAC (Supplemental Medical Plans)	
MetLife	Superior	McGriff		AFLAC	
same coverage as active faculty and staff <b>336.759.2013</b>	same coverage as active faculty and staff <b>800.507.3800</b>	Stay on COBRA FSA coverage (Health only) through end of current plan year <b>800.930.2441</b>		Move to direct bill within 31 days of retirement (group plan rates apply) <b>800.992.3522</b>	

### Life and AD&D Insurance Coverage

Basic Life (WFU coverage)	Optional Life	Basic AD&D (WFU coverage)	Optional AD&D
New York Life	New York Life	New York Life	New York Life
<p><i>Portability (under age 70) &amp; conversion up to 31 days after retirement.</i></p> <p><i>Forms: <a href="http://hr.wfu.edu/benefit-forms/">http://hr.wfu.edu/benefit-forms/</a>. Rates are based on insured's age and subject to change.</i></p> <p><i>For rates: NEBCO is the third party administrator – 800.423.1282 (8:00a.m. – 4:30p.m. Central)</i></p>			

### Additional Coverage/Resources

Short Term Disability	Long Term Disability	Legal	Employee Assistance Program	Elder Care Choices
WFU	New York Life	ARAG	EAP	Senior Services
No conversion opportunity	No conversion opportunity	Able to move to direct bill within 31 days of retirement <b>800.247.4184</b>	Not available to retirees	<b>336.748.2171</b> or <b>800.648.2171</b>  <a href="mailto:ecc@seniorservicesinc.org">ecc@seniorservicesinc.org</a>

## Billing

<b>Automatic Draft – recommended</b> Bank account drafted around the 10 <sup>th</sup> each month for BCBS medical, dental and vision  <a href="http://hr.wfu.edu/retirees/retiree-benefit-forms/">http://hr.wfu.edu/retirees/retiree-benefit-forms/</a>  <b>Via Benefits and AARP Medicare Supplement Plans are drafted separately.</b>	<b>Direct Billing to residence</b> Billed monthly for BCBS medical, dental and vision.  <b>VIA Benefits and AARP Medicare Supplement Plans are billed separately.</b>	<b>Delinquency of 60 days or greater will result in suspension and possible termination of coverage</b>
--	--	---

## Retirement Plans – 403(b)/457(b)

Defined Contribution Plan – RA WFU Contributions – 403(b)	Tax Deferred Annuity Plan – SRA Individual Contributions – 403(b)	Deferred Compensation Plan 457(b)
<i>Participation ends as of retirement date</i>	<i>Participation ends as of retirement date</i>	<i>Participation ends as of retirement date</i>
<b>TIAA</b> 800.842.2776	<b>TIAA</b> 800.842.2776	<b>TIAA</b> 800.842.2776
Please contact participating provider for distribution of funds. To meet with a retirement plan counselor on campus, visit Visit TIAA's website for one on one meetings or contact the provider directly to help set up a meeting.	Please contact participating provider for distribution of funds. To meet with a retirement plan counselor on campus, visit Visit TIAA's website for one on one meetings or contact the provider directly to help set up a meeting.	<b>Must make election on disposition of Plan assets within 60 days of retirement; able to defer payout to a future date (irreversible election); if no election within 90 days of</b>  <b>will occur. 457(b) funds can only role over to another employer-sponsored 457(b) Plan.</b>

## Paid Time Off (PTO)

<b>Retirees are eligible for a PTO payout for any PTO earned but not used. The PTO payout will be in the final paycheck. For further information, please contact Donne Sides at 758.2971.</b>
---

## Other University Benefits

Parking Stickers	Retiree ID Card	Email	Death Benefit
University Police	Deacon One Card	AskHR@wfu.edu	WFU
Retiree Parking Sticker Parking Management Alumni Hall	Retiree WFU ID cards Angelou Hall, Suite 001	Email access may be continued – indicate on the Retiree Benefits Enrollment Form	\$2,000 Death Benefit offered to all retirees

## Additional Benefits/Perks

Athletic Tickets	University Stores	Other Facilities	The Arts
Ticket Office	WFU Stores	WFU	Secret/Theatre Tickets
Reduced rates for football and basketball tickets if purchase is a renewal from the preceding season.	Discounts at the University Stores with your Retiree ID Card	Continued membership at Graylyn Pool. Sutton Center, Gymnasium, Tennis Courts and Pool.	Complimentary Secret Artist Series Tickets University Theatre Tickets at a discount.

<b>Social Security Administration</b> <b>1370 Lockland Avenue, Winston-Salem, NC 27103   800.772.1213   <a href="http://www.ssa.gov">www.ssa.gov</a></b>
---

Human Resources | PO Box 7424 | Winston-Salem, NC 27109 | p 336.758.4700 | f 336.758.6127 | [hr.wfu.edu](http://hr.wfu.edu)

**Retiree Benefits Helpline | 336.758.6233 | 855.733.5201 | Email: [retiree@wfu.edu](mailto:retiree@wfu.edu)**