



## 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	Behavioral Health	Medical	Prescription	Mental Health
Aetna	Aetna/ CVS Caremark	Carolina Behavioral Health (CBHA)	Via Benefits	Options with Via Benefits	Via Benefits
same coverage as active faculty and staff <b>855.586.6961</b>	same coverage as active faculty and staff <b>855.586.6961</b>	same coverage as active faculty and staff <b>800.475.7900</b>	<i>A retiree or spouse must have Medicare Parts A and B before enrolling in a plan through Via Benefits</i>  <b>To enroll:</b> <b>Call Toll Free 1.844.570.2795 (TTY:711)</b> <b>WFU website: <a href="http://myviabenefits.com/wfu">myviabenefits.com/wfu</a></b>		
Dental	Vision	Flexible Spending		AFLAC (Supplemental Medical Plans)	
Metlife	Superior	McGriff		AFLAC	
same coverage as active faculty and staff <b>800.942.0854</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 @ COBRA rates <b>888-888-3442</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 Insurance	New York Life Insurance	New York Life Insurance	New York Life Insurance
<i>Portability (under age 70) &amp; conversion up to 31 days after retirement.</i> <i>Rates are based on insured's age and subject to change.</i> <b>For rates: NEBCO is the third party administrator – 800.423.1282 (8:00a.m. – 4:30p.m. Central)</b>			

### Additional Coverage/Resources

Short Term Disability	Long Term Disability	Legal	Employee Assistance Program	Elder Care Choices
WFU	ARAG	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>	No conversion opportunity	<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 WFU BCBS medical, dental and vision premiums	<b>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)		
<b>Defined Contribution Plan – RA</b> WFU Contributions – 403(b)	<b>Tax Deferred Annuity Plan – SRA</b> Individual Contributions – 403(b)	<b>Deferred Compensation Plan</b> 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 the provider for distribution of funds. To meet with a retirement plan counselor on campus, visit <a href="https://pdc.wfu.edu/">https://pdc.wfu.edu/</a> for one on one meetings or contact the provider directly to help set up a meeting.	Please contact the provider for distribution of funds. To meet with a retirement plan counselor on campus, visit <a href="https://pdc.wfu.edu/">https://pdc.wfu.edu/</a> for one on one meetings or contact the provider directly to help set up a meeting.	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 retirement, a lump sum payout will occur. 457(b) funds can only roll over to another employer-sponsored 457(b) Plan.

Paid Time Off (PTO)		
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 Human Resources at 336.758.4700.		

Other University Benefits			
<b>Parking Stickers</b>	<b>Retiree ID Card</b>	<b>Email</b>	<b>Death Benefit</b>
<b>University Police</b>	<b>Deacon One Card</b>	<b>AskHR@wfu.edu</b>	<b>WFU</b>
Retiree Parking Sticker Parking Management Alumni Hall	Retiree WFU ID cards Deacon One Card Office Angelou Residence Hall	Email access will be continued, and must respond annually by email to keep access.	\$2,000 Death Benefit offered to all retirees with living beneficiary on file.

Additional Benefits/Perks			
<b>Athletic Tickets</b>	<b>University Stores</b>	<b>Other Facilities</b>	<b>The Arts</b>
<b>Ticket Office</b>	<b>WFU Stores</b>	<b>WFU</b>	<b>Secretst/Theatre Tickets</b>
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. Miller Center, Gymnasium, Tennis Courts and Pool.	Complimentary Secretst Artist Series Tickets University Theatre Tickets at a discount.

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