



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 855.586.6961	same coverage as active faculty and staff 855.586.6961	same coverage as active faculty and staff 800.475.7900	<i>A retiree or spouse must have Medicare Parts A and B before enrolling in a plan through Via Benefits</i> To enroll: Call Toll Free 1.844.570.2795 (TTY:711) WFU website: myviabenefits.com/wfu		
Dental	Vision	Flexible Spending		AFLAC (Supplemental Medical Plans)	
Metlife	Superior	McGriff		AFLAC	
same coverage as active faculty and staff 800.942.0854	same coverage as active faculty and staff 800.507.3800	Stay on COBRA FSA coverage (Health only) through end of current plan year @ COBRA rates 888-888-3442		Move to direct bill within 31 days of retirement (group plan rates apply) 800.992.3522	

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) & conversion up to 31 days after retirement. Rates are based on insured's age and subject to change. For rates: NEBCO is the third party administrator – 800.423.1282 (8:00a.m. – 4:30p.m. Central)</i>			

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 800.247.4184	No conversion opportunity	336.748.2171 or 800.648.2171 ecc@seniorservicesinc.org

Billing

Automatic Draft – recommended Bank account drafted around the 10 th each month for WFU BCBS medical, dental and vision premiums	Medicare Supplement Plans are billed separately.	Delinquency of 60 days or greater will result in suspension and possible termination of coverage
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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>
TIAA 800.842.2776	TIAA 800.842.2776	TIAA 800.842.2776
Please contact the provider for distribution of funds. To meet with a retirement plan counselor on campus, visit the TIAA webpage 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 TIAA webpage 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

Parking Stickers	Retiree ID Card	Email	Death Benefit
University Police	Deacon One Card	Retiree@wfu.edu	WFU
Retiree Parking Sticker Parking Management Alumni Hall	Retiree WFU ID cards DeconOne 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

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. Miller Center, Gymnasium, Tennis Courts and Pool.	Complimentary Secret Artist Series Tickets University Theatre Tickets at a discount.

Annual Retiree Luncheon

Social Security Administration

1370 Lockland Avenue, Winston-Salem, NC 27103 | 800.772.1213 | www.ssa.gov