



EMPLOYEE RETIREMENT PROCEDURE (BEN-P004)

Clarksville-Montgomery County School System

1.0 SCOPE:

- 1.1 This procedure outlines the process for retirement from the Clarksville-Montgomery County School System.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Human Resources (HR) Director

3.0 APPROVAL AUTHORITY:

- 3.1 Chief Human Resources Officer

4.0 DEFINITIONS:

- 4.1 TCRS: Tennessee Consolidated Retirement System
- 4.2 CMCSS: Clarksville-Montgomery County School System

5.0 PROCEDURE:

- 5.1 Employee seeks information leading to retirement.
- 5.2 Employee makes appointment with the HR Director.
- 5.3 Employee's annual employment history reviewed with employee.
- 5.4 Estimated benefits calculated.
 - 5.4.1 Employee decides not to retire, procedure ends.
- 5.5 Employee chooses to apply for retirement:
 - 5.5.1 Employee completes retirement form #TR0020,
 - 5.5.2 TR0020 is forwarded to the payroll office from the HR Office,
 - 5.5.3 Employee and supervisor sign CMCSS Retirement Request ([BEN-F011](#)) and forwards form to HR Office.
- 5.6 Retirement form is forwarded to Payroll staff for verification of sick leave accumulation and fiscal year salary earned by the employee.
- 5.7 Payroll staff returns form to HR Office after verification is complete.
- 5.8 Completed retirement form #TR0020 is sent to TCRS.
- 5.9 Copy of retirement form #TR0020 is placed in employees personnel file and sends a copy to employee.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Retirement Form #TR0020
- 6.2 Retirement Request ([BEN-F011](#))

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7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Retirement Form	Filing cabinet	Indefinitely	Permanent	Secured Building
Retirement Request	Filing cabinet	Indefinitely	Permanent	Secured Building

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
9/29/03		Initial Release
12/12/03	A	Clarify 5.5.4, reference TR0020 in 5.6 and 5.7 and update flowchart
12/04/06	B	Change responsibility, replace Benefits Manager with Assistant HR Director throughout, remove 5.5.4, clarify 5.6, update flowchart
3/11/09	C	Update titles, no revisions to procedure

9.0 FLOWCHART:

9.1 A flowchart detailing this process can be found in "Exhibit A" of this procedure.

***** End of procedure *****

Employee Retirement Flowchart

