

Slide 1




Good Afternoon and congratulations on getting to this point in your career to consider retiring!


We purposely structure these sessions for small groups to provide a little more personal attention, so please feel free to stop me at any time to ask whatever questions you may have. Also, we have found that group sessions are better than one-on-one, because your neighbor may ask a questions that is of interest to you, but you did not think to ask.

The Retirement Guide within the materials provided contains most, if not all, of the information that we will be presenting in this session. One of the most valuable things about the Retirement Guide is a checklist at the end which will help guide you through the retirement process to help ensure you complete everything needed in a timely manner.

Overview

- OSU Retirement
- Accrued Leave
- OTRS Retirement
- TIAA Retirement
- Insurance Options
- OSU Retiree Benefits

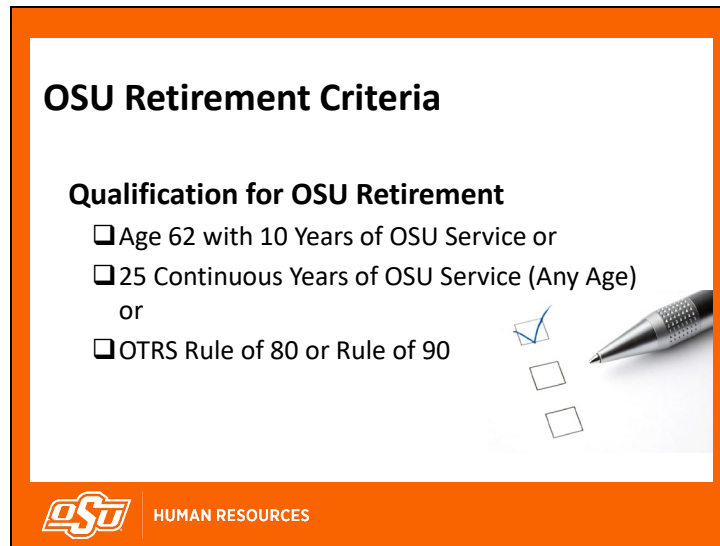


 HUMAN RESOURCES

Let us begin with an overview of today's meeting.

Each entity has its own retirement criteria, so it is possible to meet the retirement criteria for OTRS or TIAA, but not for OSU. In such a case, OSU's records would reflect a resignation (rather than a retirement) and the individual would not be entitled to OSU retiree benefits.


First, we will review the criteria and process to retire from OSU. Next, we will discuss what happens to your accrued sick and annual leave at retirement. Then, we will review the criteria and process for OTRS Retirement, and TIAA Retirement, and follow with Health, Dental, Vision & Life Insurance Options. We will close with OSU Retiree Benefits offered by departments across campus.

The slide features an orange border and a white background. At the top, the title "OSU Retirement Criteria" is displayed in bold black text. Below this, the sub-header "Qualification for OSU Retirement" is also in bold black text. A list of three criteria follows, each preceded by an unchecked checkbox: "Age 62 with 10 Years of OSU Service or", "25 Continuous Years of OSU Service (Any Age)", and "OTRS Rule of 80 or Rule of 90". The word "or" is centered between the second and third items. To the right of the text is a graphic of a silver pen and a checklist with three items; the top item is checked with a blue checkmark, while the other two are unchecked. At the bottom left is the OSU logo, and at the bottom center is the text "HUMAN RESOURCES" in all caps.

OSU Retirement Criteria

Qualification for OSU Retirement

- Age 62 with 10 Years of OSU Service or
- 25 Continuous Years of OSU Service (Any Age)
- or
- OTRS Rule of 80 or Rule of 90

 HUMAN RESOURCES


There are three ways to meet OSU's retirement criteria. The qualifications for OSU Retirement are at least age 62 with 10 continuous years of OSU service or any age and 25 continuous years of OSU service or you would need to meet your OTRS Rule of 80 or Rule of 90.


The OTRS Rule of 80/90 is when your age plus your years of OTRS membership equal 80 or 90. Employees who meet their OTRS Rule of 80 or 90, will automatically qualify for OSU retirement. We have a slide coming up about the OTRS rules with dates when membership with OTRS had to occur to qualify for each rule.

Are there any questions about the eligibility requirements for OSU retirement before we move on?

OSU Retirement Process

- Resignation Letter**
 - 90 Days Prior to Retirement
- Department Completes EPAF**
 - Last Day of Active Work
- Flex**
 - Flex account stops (FSA)
 - 90 days to submit claims

A 3D illustration of a white humanoid figure standing next to three interlocking gears of different sizes, colored in shades of red and orange. The figure appears to be interacting with the gears.

HUMAN RESOURCES

Advance notice and planning with your department is extremely important to avoid possible delays in your retirement. You should:

Submit your resignation letter to your department approximately 90 days prior to retirement or sooner.

Your department should then generate the Employment Action, or EPAF form indicating your separation. This form is generated electronically and will process through the system. It alerts us of your upcoming retirement so that we're able to timely process forms with OTRS, as well as reach out to you about completing your paperwork to continue benefits as an OSU retiree.


We like to make note here that your Flex account will stop as of the end of the month of your last employment date. Your Flex account contributions stop when you receive your last pay for your last day of work. You will want to make sure to plan ahead to utilize the funds you have in your account prior to your last day. Your Flex reimbursements are for services rendered during your time of work and you will only have 90 days after your retirement date to submit claims for reimbursement incurred prior to your retirement date. You might want to COBRA your Flex account at the time of retirement. If so let OSU Benefits know just prior to retirement. This COBRA Flex arrangement will not be tax deferred.

Also please note that if you use more than you placed into this account (since this is a "prefunded account), you will not be asked to refund that money to either OSU or Chard Snyder, the flex administrator. This is based upon rules setup with flex plans.

Annual Leave

Be aware of your leave situation prior to retirement.

- Faculty leave records are maintained at departmental level
- Forfeit if more than one year's accrual is banked
- Paid in last payroll check, in most cases, up to 22 days

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You will want to be aware of your leave situation prior to retirement, so you can plan to take any excess annual leave that you may have accrued.

Faculty leave records are maintained at the departmental level and we do not handle accruals on the HR system.

Other employees can monitor your Payroll leave through Banner self-service to determine leave accumulation.


Your department will project your leave through the last day of work. OSU policy allows payment of up to one year's accrual of annual leave upon retirement.

In the case of Annual Leave, you will forfeit any excess leave. Annual leave accruals are paid in the last payroll check. In most cases up to 22 days (176 hours) accumulation could be paid and the remainder would be forfeited. Also, please know that this annual leave payout is taxed higher, at 20%. Some employees choose to use up all their leave to avoid this higher tax withholding.

Sick Leave

Be aware of your leave situation prior to retirement.

- Forfeit unused
- Possible one year OTRS credit
- Sick leave plus partial year work
- OSU verifies with OTRS

HUMAN RESOURCES


In the case of Sick Leave, 1600 hours is the maximum amount of sick leave that can be accumulated at OSU. Any unused sick leave is forfeited but captured in your Excess Sick Leave Account. If you are a member of OTRS, you may use up to 960 hours (120 days) of your sick leave accrual for additional service credit.

If you have less than 120 days (960 hours); then your sick leave may be combined with a partial year of work. OTRS runs on the fiscal year, July 1 to June 30; so, for example if you're retiring in the middle of the fiscal year, say December and have enough leave (so, 60 days (480 hours) to make up the remainder of this time; you could potentially have a full year for your final year.

OSU Benefits verifies the amount of sick leave with OTRS, but the decision about credit is up to OTRS.

Are there any questions about leave before we look at OTRS retirement?

Oklahoma Teachers Retirement System




OKLAHOMA TEACHERS
RETIREMENT SYSTEM

OTRS Retirement Criteria

	Rule of 80	Rule of 90	Rule of 90 / Minimum Age 60	Rule of 90 / Minimum Age 60, 7 Years Vesting
OTRS Entry Date	Up to June 30, 1992	July 1, 1992 – October 31, 2011	November 1, 2011 – October 31, 2017	On or after November 1, 2017
Eligibility	Age + Service = 80 Or Age 62 + 5 Years Service	Age + Service = 90 Or Age 62 + 5 Years Service	Age + Service = 90, Minimum Age 60 Or Age 65 + 5 Years Service	Age + Service = 90, Minimum Age 60 Or Age 65 + 7 Years Service

Please note that Service = OTRS Service and could be different from your OSU Service



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As mentioned earlier, there are several ways to meet OTRS retirement criteria and only one of these also meets the criteria for OSU retirement, meeting your Rule of 80 or 90.

When you don't meet your Rule of 80 or 90; then OTRS states you must have at least five years of OTRS service to retire, if you joined prior to November 1, 2017 and you must be:

- age 62 or older to receive full benefits or you could qualify for a reduced benefit between ages 55-61.

If you joined OTRS prior to 7/1/1992 and meet the Rule of 80, this also qualifies you for OSU retirement. You can reach the Rule of 80 at any age that adds with years of OTRS membership to total 80.

If you joined OTRS after 7/1/1992 but prior to 11/1/2011 and meet the Rule of 90, this also qualifies you for OSU retirement. You can reach the Rule of 90 at any age that adds with years of OTRS membership to total 90.


If you joined OTRS on or after November 1, 2011; you must be at least age 60 when you meet the Rule of 90 to qualify for OTRS full retirement benefits. Or you can qualify for full benefits at age 65 with at least 5 years OTRS service.

And finally, members who joined OTRS on or after November 1, 2017; now have a 7 year vesting; so they would have to be at least age 65 with at least 7 years OTRS service to be able to qualify for retirement; if they don't meet their Rule of 90.

Oklahoma Teachers Retirement System

STEP 1

- Submit the [Pre-retirement Information Verification \(PIV\)](#) form. Attach a copy of your leave statement.
- It is recommended you refer to the OTRS Timeline of on page 3 of your PIV form for strict deadlines associated with retiring with OTRS.

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The first step for retiring with OTRS is to submit a [Pre-Retirement Information Verification \(PIV\)](#) form.

This should be done at least 120 days prior to retirement. However, it can be done at any time, and the earlier the better. As you can see by the timeline [*refer to the timeline that is included with the PIV*]; OTRS has deadlines and if the deadline is not met with each step, OTRS will push your retirement back by a full month.

Also please know that when you submit the PIV, you will need to supply a copy of your proof of birth (driver's license; birth certificate, passport are all acceptable). If you want information for a joint annuitant benefit then a copy of your joint annuitant's proof of birth; and a copy of your marriage certificate, if your joint annuitant is your spouse.


You will also need to provide a copy of your unused sick leave balance from Banner self-service in order for your estimate to include this benefit within your calculation.

The retirement date is not etched in stone and the date can be changed even after you receive your next-step packet from OTRS.

Oklahoma Teachers Retirement System

STEP 2

- Complete the Application to Retire (ATR) and Employer Retirement Verification (ERV)
 - ATR:** Sign, date and return to OTRS
 - OSU Benefits can submit the form to OTRS on your behalf.
 - OTRS will notify OSU Benefits when the **ERV** needs to be completed.
 - OSU Benefits must know your last day of employment in order to complete the ERV on time. Please notify your department of your retirement prior to this deadline.

 HUMAN RESOURCES

OTRS will prepare various calculations personalized to your situation and send the projections to you. This form is the Application to Retire. When the ATR arrives, you will need to choose a retirement option. Each option is explained in the information that OTRS sends to you. If you have questions about OTRS' explanations of the options, you should contact OTRS. However, if you need financial advice to help you with this decision, you should contact a financial planner.

After you decide the best option for you, you will circle your option, sign the ATR and send the form to OTRS; ensuring you send it by the deadline; and of course the earlier the better to avoid missing the deadline and delaying your retirement by a month.

The Employer Verification form is now handled electronically. OTRS will notify the Benefits office when your ERV is ready to complete and this is also when we will need to be able to find or see that your department has submitted your EPAF/retirement through the system that we discussed earlier.


Please know that we are aware that this ERV must be completed by the deadline to avoid delaying your retirement. Once you have finalized your process with OTRS; they will notify you that your retirement is set, and that your employer still has a step to complete. Please rest easy as we are aware and OTRS makes us "re-verify" the data; so we have to actually complete it twice. And the second time, they don't open it up for us to be able to complete until about 5 days prior to your retirement and then they give us 15 days into your retirement thus a total of about 20 calendar days. We don't want to be responsible for delaying your retirement; we will make sure to do our part as soon as they allow us too!

Oklahoma Teachers Retirement System

STEP 3

- Final Contract from OTRS
 - You will receive:
 - Retirement Contract
 - Tax Withholding
 - Direct Deposit

**RETURN SIGNED, DATED AND NOTARIZED FORMS AT LEAST
30 DAYS PRIOR TO YOUR RETIREMENT DATE.**

HUMAN RESOURCES

This final packet you receive is considered your “final contract” and solidifies your retirement with OTRS.

The packet includes


- Benefit payment authorization, so direct deposit setup,
- Tax withholding, and
- Beneficiary designation

•Again, these documents have a deadline, so be sure you meet your deadline for your retirement date, otherwise your OTRS retirement could be delayed by a month.

Oklahoma Teachers Retirement System

**Post-Retirement Employment with
OSU or Another OTRS Employer:**

- There must be a 60-calendar day break
- Earning limits may apply
- It's advised to contact OTRS before starting back to work

HUMAN RESOURCES

[refer to the Retirement Guide, page 16]



If you intend to return to work with OSU or another OTRS participating employer (such as Stillwater Public Schools, or Meridian Technology Center); then you must have a 60-calendar-day break before you may return to work and you have earning limits that apply. It is very important to know these earning limits and to communicate this information to OTRS. If you exceed the limits you can be penalized.

Oklahoma Teachers Retirement System

Questions

Telephone: (405) 521-2387 or (877) 738-6365
PO Box 53524
Oklahoma City, OK 73152-3524
Email: mail@trs.ok.gov

Physical Address:
Teachers' Retirement System
301 NW 63rd Street, Suite 500
Oklahoma City, OK 73116-7921



HUMAN RESOURCES

This information is in your Retirement Guide, so you have a double reference. If you have any questions, please do not hesitate to contact OTRS.

Are there any questions about OTRS before we look at TIAA Retirement?


mail@trs.ok.gov

Oklahoma Teachers Retirement System

Member Portal


Access your personal contribution and service information at <https://myotrs.trs.ok.gov/>

- Click on *Register* and complete requested information
- OTRS will send an email to activate account
- Upon activating; OTRS will mail a PIN to your home address
- Upon receipt of your PIN go back to the 'myotrs' link to enter your PIN and gain access to your account


HUMAN RESOURCES

If you're more than a year out from retirement, you may want to instead access the OTRS member portal at this time to get an idea of what your retirement with OTRS will look like. This slide provides you with instructions on how to gain access to your OTRS member portal.

TIAA Retirement



- 100% Vested after 2 years in ARP (hired on or after 7/1/2004)
- 100% Vested Immediately in Voluntary Plans
- Annuitize at Any Age
- Terminate/Retire from OSU
- Tax Consequences if Annuitize Early
- IRS Minimum Required Distributions at age 72

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Unlike OTRS, it does not take 5 years to become vested with TIAA.

This means once you are vested, that you can annuitize at any age. However, you must be separated from the University. There are potential tax consequences if you withdraw lump sums.

If you retire from the University between the ages of 55 and 59 1/2, withdrawal penalties will likely occur unless you wait until age 59 1/2 to withdraw. You should contact your tax accountant or tax advisor for further details regarding your personal situation. Any tax information provided in this session is only intended as a guide for you to make further inquiries from tax professionals.

You are not required to make withdrawals from your TIAA account until you reach age 72; so you can leave the money alone until then if you wish. At age 72 and retired, you must begin receiving the IRS required minimum distribution. TIAA will make contact with you at that time to give you the option to begin the distribution; if you do nothing, TIAA will automatically make this annual distribution upon your behalf as required by IRS law.

TIAA Retirement

Inform TIAA of Your Retirement Date

- ☐ TIAA Sends Packet
 - Contract options
 - Direct Deposit authorization
 - Instructions
 - Employer Authorization form
 - Return to TIAA
 - If request is made online, TIAA will verify retirement date electronically.

HUMAN RESOURCES

TIAA has multiple options, lump-sum, annuity options; giving you flexibility to choose how to receive your retirement. Based upon this, it is best to contact TIAA and work with them upon retiring.


Once you decide how you wish to make your withdraws, TIAA will draw up the paperwork, unless working through the process electronically; then everything will be handled electronically. If completing your request by paper forms, you may need to bring in the paperwork to the Benefits office to complete “employer authorization” portion of your form. If the request is being done electronically, TIAA will notify us to confirm your retirement or separation date.


TIAA Retirement

Questions

TIAA
730 Third Avenue
New York, NY 10017
(800) 842-2776

TIAA Consultant: schedule an individual appointment on
Campus or at the TIAA Stillwater office
Call: 1-800-732-8353, or
Online: tiaa.org/schedulenow



HUMAN RESOURCES

tiaa.org/schedulenow


If you have questions, you should contact TIAA. These addresses and phone numbers are also in the Retirement Guide for your convenience.

The contract options are too numerous for us to attempt to cover, so you will want to use TIAA's counseling services to receive personalized help.

TIAA is available on campus or at their Stillwater office, across from the Stillwater High School, for an advisement session. Visit the website listed her on this slide or call (800) 732-8353 to set up an individual appointment either on campus or at their Stillwater office.

Are there any questions about the TIAA process before we discuss the insurance options?

Retiree Insurance




BlueCross BlueShield Health Plan

- Pre-Medicare (Under 65)
- BlueSecure Medicare Supplement & Part D Prescription plan (65+)

OTRS Premium Credit

- OTRS Credit applied to bill from Chard Snyder

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As an OSU retiree, you can continue OSU health, dental and vision coverages. You must be enrolled in the coverage as an employee prior to your retirement. You can have the same plan that you had as an active employee, with the opportunity to change during open enrollment each year.

If you are under age 65, you may continue your current insurance plan.

If you are over age 65, you are eligible for Medicare; therefore, the Plan 65 Supplement would act as a Medicare supplement. You will also enroll in a Part D prescription plan. You should apply for Medicare Part A and/or B 90 days prior to your retirement date if you are 65 or older.

OTRS provides a premium credit if you are eligible for OTRS retirement. In other words, OTRS pays part of your premium. The premium credit will apply towards your Health Care premium; it cannot be applied towards dental and/or vision premiums.

If you receive an OTRS retirement check, your health care premium will be billed to you by Chard Snyder with your credit applied to that bill.


Retiree Insurance

Healthcare, Dental, Vision

- Complete BCBS health forms
 - Over age 65 – complete health forms 60-90 days prior to retirement date
- Retiree Election for Dental and Vision
 - Continue current coverage only
- Cannot add later if declined
- Cancel At Any Time

Medicare


- Apply for Medicare Part A and/or B - 90 days prior to retirement date if you are 65 or older

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We will be glad to assist you in filling out your Retiree Election Forms.


- If you are continuing your current health insurance as a retiree under 65, you can complete your health forms once you notify us of your retirement.
- If you are enrolling for Plan 65 & BlueRx with BCBS, your retirement healthcare forms can only be signed and submitted 90 days prior to your retirement and after completing your enrollment in Medicare A and B.
- Once you fill out the Retiree Election Forms, OSU will forward the enrollment to the vendors and keep a copy in your personnel file. You should also retain a copy for your records. You may only enroll a spouse and/or dependents if you have them enrolled at the time of retirement as an employee.
- Please remember that if you decline coverage, you will not be allowed to enroll yourself or current dependents after you retire. Although you cannot enroll in coverage after retirement, you can cancel coverage if you elect the insurance and later decide that you do not need it. You would need to notify OSU in writing of your request to cancel.
- It is important if you do not want health benefits as a retiree to fill out a declination form in our office.

	BlueOptions	BlueEdge
Retiree Only	\$511.98	\$443.68
Retiree + Spouse	\$1,075.18	\$932.37
Retiree + Children	\$921.58	\$798.79
Family	\$1,638.36	\$1,422.17

 HUMAN RESOURCES

Here you will see the monthly rates for those under age 65. If you are over 65 and your spouse is under 65; then the spouse would remain on the under 65 plan and only pay the “retiree” rate shown here, unless you might children covered, then it would be the retiree and children coverage.

2021 Healthcare Premium Chart Retirees Over 65		
Medicare (over 65)	Member	Spouse
BlueSecure Medicare Supplement	See material provided	See material provided
Medicare Blue Rx Basic Plan	\$97.30	\$97.30
Medicare Blue Rx Enhanced Plus Plan	\$232.10	\$232.10

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We will not discuss the various Medicare Supplement health plans in depth, as there are too many, but we have provided you with information [*hold up the booklet that has the Supplement plan information*] to reference and see the differences between all the plans, along with the premiums that are age and gender-based.

For the Rx plan [*hold up the Rx chart*] you have 2 plans to choose from.

2021 Dental and Vision Premiums

Delta Dental of Oklahoma (DDOK)			
2021	Low Plan	High Plan	Platinum
Retiree Only	\$34.80	\$42.26	\$69.24
Retiree + Spouse	\$68.94	\$83.86	\$137.82
Retiree + Children	\$79.18	\$122.98	\$205.42
Family	\$122.44	\$159.16	\$266.32

Vision Service Plan (VSP)		
2021	Basic	Buy-up
Retiree Only	\$5.98	\$10.70
Retiree + Spouse	\$11.98	\$21.42
Retiree + Children	\$12.82	\$22.92
Family	\$20.48	\$36.62


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These are the 2020 dental and vision premiums.

Retiree Insurance Billing

Health, Dental and/or Vision Insurance

- Chard Snyder, chard-snyder.com, 888-993-4646
- Payment due by 1st

Optional Benefits

- Cancer, American Fidelity, 800-933-1853
- MASA – Ambulance Coverage
 - Convert to Platinum Plan
 - Platinum Initiation fees waived
 - \$39/month – Worldwide coverage

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chard-snyder.com

Your insurance will be billed by Chard Snyder. The payment is due by the 1st for that month's coverage. Chard Snyder offers various methods of payment. If you set up an auto draft from your checking, please know that you will have to update your allowed withdrawal with each premium change that can occur, each year.

If you carry any optional benefits, such as Cancer with American Fidelity, you will need to contact them to continue that benefit and arrange payment.

When an individual leaves or retires they become eligible to convert their MASA membership to platinum self-pay plan. Anyone that is a current MASA member and terminates will be reached out to by the MASA Retention Division to offer continuation of membership via Platinum Self Pay. The platinum initiation fees are waived for anyone retiring or that is terminating employment and wants to continue their membership via Platinum Self Pay. If any individual is planning on retiring they are always welcome to reach out to MASA in advance of their retirement date and we can have this transition coordinated in advance also. The Platinum Plan is \$39/month and is good worldwide.

OSU Life Insurance


OSU-Paid Retiree Coverage - \$6,000
Keep beneficiaries current with OSU

Lincoln Financial will send Continuation Options for your Basic and Supplemental plans:

Conversion & Portability Coverage Options

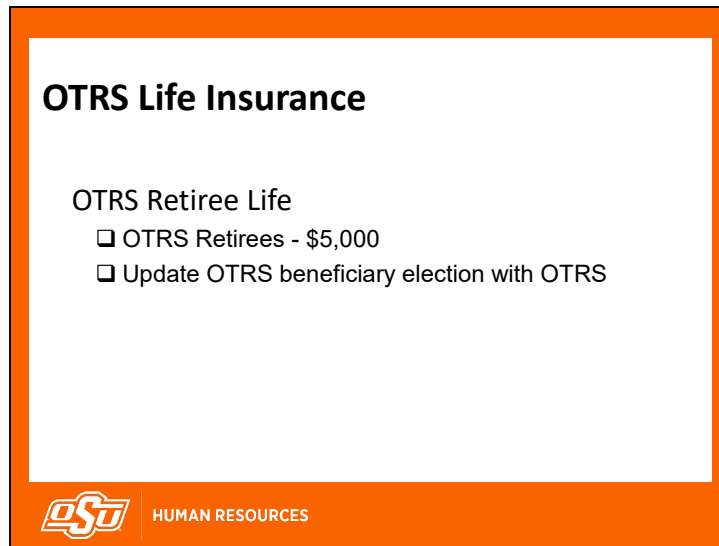
- Conversion = Whole Life Policy
- Portability = Term Life policy

Premiums are paid directly to Lincoln Financial

HUMAN RESOURCES

If you qualify for OSU retirement, you are eligible for the OSU retiree life insurance. The OSU-paid retiree life insurance policy is in the amount of \$6,000. We request that you complete a Retiree Beneficiary Designation form that includes your current address. Any previous beneficiary designations become null and void with the completion of a new designation. Please keep a copy of the form with your important papers.


Your existing OSU Basic life insurance can be ported or converted. The premiums upon porting or conversion are generally high, because they do not have a group rate, and are age rated. Also the conversion to whole life policies are more expensive than porting to a term life policy. If you are interested in porting or converting your policy, please watch your mail for information from Lincoln Financial, they should send you information in the mail regarding the ability to continue life insurance.

A slide with an orange border containing text about OTRS Life Insurance. The title is "OTRS Life Insurance". Below it is the sub-heading "OTRS Retiree Life". Underneath are two bullet points: "OTRS Retirees - \$5,000" and "Update OTRS beneficiary election with OTRS". At the bottom left is the OSU logo, and at the bottom right is the text "HUMAN RESOURCES".

OTRS Life Insurance

OTRS Retiree Life

- OTRS Retirees - \$5,000
- Update OTRS beneficiary election with OTRS

 HUMAN RESOURCES

You may want to note that if you are an OTRS retiree, OTRS provides a \$5,000 term life policy. OTRS has their own beneficiary form and will request that you provide a beneficiary designation within their retirement process. You will need to complete a new form with OTRS whenever you want to change your beneficiaries.

Are there any questions regarding life insurance?

OSU Retiree Benefits

ID Card
ID Services
421 Classroom Building
(405) 744-8434

An image of an OSU ID card template. The card features the OSU logo (a stylized 'O' with 'SU' inside) and a large, stylized illustration of an owl's face. Text on the card includes 'Expires: 09/30/2015', 'ID# 12345678', 'Issued: 9/30/2016', and a name field 'First Name M Last Name' with the number '1234 5678 8765 4321' below it.

Expires: 09/30/2015
ID# 12345678
Issued: 9/30/2016
First Name M Last Name
1234 5678 8765 4321

 HUMAN RESOURCES

I would like to remind you that you will want to obtain a new ID card if your current ID is old or doesn't have a good read when being swiped for various uses on campus. A card can be obtained at ID Services in the Classroom building. You do not need to make an appointment, but you do need to show a picture ID. If you have questions regarding your ID, please call ID Services at (405) 744-8434.



OSU Retiree Benefits

 **Free Parking Permit**
OSU Parking & Transit
(405) 744-6525

Discounted Athletic Tickets
Contact Athletic Department
(405) 744-5745
tickets.okstate.com



 HUMAN RESOURCES

tickets.okstate.com

You may be eligible for the following benefits from OSU upon retirement: These are a departmental provided benefit and are subject to change.

If you have 20 years of OSU service and purchasing parking permits, you may park free on campus with a complimentary permit available through the OSU Parking Department. Call (405) 744-6525 for information.

Also, you may purchase season tickets to athletic events (limit of four) at reduced rates. Contact the Athletic Department.

OSU Retiree Benefits



Audit University Courses
Office of the Registrar
(405) 744-7663

Free Colvin & Wellness
Center Use
(405) 744-9355
wellness.okstate.edu



 HUMAN RESOURCES

wellness.okstate.edu

At age 65, you may audit University courses at no charge. Contact the Registrar's Office.

Use your OSU ID to gain access to the Colvin and Wellness Centers.

OSU Retiree Benefits

OSU Emeriti Association
emeriti@okstate.edu
(405) 744-5263
emeriti.okstate.edu



 OSU Email
Information Technology
(405) 744-4357

 HUMAN RESOURCES

emeriti.okstate.edu


The Emeriti Association is open to membership for all retired OSU faculty and staff from all campuses. They are a wonderful group that hold monthly meetings, travel opportunities and networking opportunities. We on occasion provide content for their monthly newsletter and have in the past spoke at a monthly meeting to provide updates on benefit changes.


You also get to keep your OSU email address, just be sure to keep your o-key activated to maintain your email. For any questions regarding your O-key account, contact the IT Help Desk.

OSU Retiree Benefits

Edmon Low Library Access
(405) 744-9775

- Books
- Electronic Resources
- Visiting Scholar Access
- Librarian Support



HUMAN RESOURCES

Books

Retired faculty and staff are welcome to check out library materials. If you are designated as a retiree in Banner, you should retain the same level of privileges that you had as active faculty and staff.

Electronic Resources

We highlight scholarly/research resources that are freely accessible at <https://library.okstate.edu/using-the-library/alumni/alumni-databases>. The Library is also home to dozens of digitized collections that are free and openly available at <https://library.okstate.edu/search-and-find/collections/digital-collections/>. Retired tenured and tenure-track faculty have access to all digital resources via their O-KEY credentials. Retired staff can access any Library digital resources using public computers in the Library building. (Note: differences in access are due to contracts with publishers/vendors. We are actively working to add retiree access to agreements, but this varies based on vendor.)

Visiting Scholar Access

If you are actively engaged in research or activities with a department on campus, you *may be* eligible for temporary access to digital resources. To request, fill out the [off-campus library access form](#) (and get signatures from your home department). This temporary permission gives you access for a year (renewable) and is evaluated on a case-by-case basis.

Librarian Support

Our librarians specialize in a number of subject areas including government information, patents and trademarks, copyright, oral history and archives. Research consultations are available by appointment.



**HAPPY
RETIREMENT!!**

OSU/A&M Benefits
(405) 744-5449
osu-benefits@okstate.edu

 HUMAN RESOURCES

Thank you for coming and please stay if you have questions. If you have questions, please feel free to contact OSU Benefits at (405) 744-5449.