

Administrative Procedures Manual	Administrative Procedure 426
	Transition to Retirement Program
	APPROVED: September 2013
Page 1 of 2	AMENDED/REVIEWED: November 2017, September 2019
LEGAL REFERENCE:	Section 52, 53, 68, 196, 197, 204, 212, 213, 215, 217, 218, 219, 222, 225. 232 Education Act Employment Standards Code Labour Relations Act Collective Agreement

Background

The Transition to Retirement Program (TRP) is designed to allow individuals under a teaching contract to access pension benefits in the final few months of their employment before retirement, and at the same time, receive full salary for that period under an Interim Contract.

Procedures

1. The TRP is available to all permanent staff members currently employed by the Division and covered by the Alberta Teachers' Retirement Fund (ATRF). Please refer to [Transition to Retirement Application \(Form 426-1\)](#) or [ATRF Designation of Beneficiary Form](#).
2. Applicants must be both:
 - 2.1 Aged fifty-five (55) years or higher to draw a pension as per ATRF regulations, and
 - 2.2 Meet the qualifications for the 85-pension index at the retirement date selected.
3. Employees must fully retire from regular employment with the Division at the conclusion of the school year in which they have chosen to apply for the TRP.
4. For staff covered by the Alberta Teachers' Association (ATA) Collective Agreement:
 - 4.1 Resignations under the TRP will be accepted by the Superintendent or designate before or on November 30 or December 31 and must provide at least one (1) month notice to be approved; such that the earliest end date for retirement would be December 31 or January 31 respectively.
 - 4.2 Resignations must be made effective at the end of a given month in order that the pension benefit can take effect on the first day of the next month.
 - 4.3 ATRF regulations provide for a teacher to teach up to 0.6 FTE of a given school year without reduction to their pension. This time is calculated after pension begins. It is the sole responsibility of the teacher to obtain all information, estimations and advice from the ATRF prior to making application for this retirement transition opportunity.
 - 4.3.1 The Division will not advise and takes no responsibility for any possible reduction of pension or any financial shortfall which may result from service overpayment.
5. Requests for variation from the application dates noted above are to be forwarded to the Superintendent, with consideration to occur on a case-by-case basis.

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6. Should ATRF regulations change and preclude the ability of employees to access pension benefits under the TRP, it will terminate.
7. Any staff who are considering retirement through the TRP are encouraged to contact the Division Payroll and Benefits Department for further information and clarification. Teachers are also encouraged to contact their local ATA Pension Officer.