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Where Passion Meets Progress

## Retirement Planning Checklist

### Six (6) to Eight (8) Months Before Retirement

- Visit <https://nboehrs.com/pension/> for detailed retirement information.
- Set up an **MBOS** account if you don't have one at: <https://www.nj.gov/treasury/pensions/mbos-register.shtml>
- Complete Purchase Application online through MBOS if you are trying to receive additional pension service credit (temporary service, leave of absences w/o pay, former membership, out of state service, military, and uncredited)
- Consider your retirement date(s) and obtain a **Retirement Estimates** through your **MBOS** account.
- Log in to the State's website to enroll in upcoming online classes, webinars, events or schedule a counseling appointment.  
<https://www.nj.gov/treasury/pensions/member-training.shtml>

### Four (4) to Six (6) Months Before Retirement

- Submit your Retirement application online via your MBOS account.
- Provide your proof of age before retirement.
- Provide your beneficiary proof of age if you choose options A, B, C, D, 2, 3, and 4.
- If applying for Veterans status, submit a copy of your DD214 Form to the **NJ Department of Military & Veterans Affairs**.
- Submit a **Retirement Form** online via Employee Self Service (ESS). [Employee Self Service \(ESS\)](#)
- If you participate in the Defined Contribution Retirement Program (DCRP), visit <https://nboehrs.com/pension-dcrp/> for more information.

### Approximately Three (3) Months Before Retirement

- Contact your 403(b) provider(s) if you are planning to defer vacation/sick pay. Complete the DocuSign **Payout Form** or visit <https://nboehrs.com/voluntary-benefits/>.
- Contact the Office of Benefits Services if employee/spouse are 65 years of age or older to discuss completion of **Medicare CMS- L564 Forms**. Please email documents to [benefits@nps.k12.nj.us](mailto:benefits@nps.k12.nj.us).
- State will provide information for you to register for medical coverage online at [www.mynjbenefitshub.nj.gov](http://www.mynjbenefitshub.nj.gov)
- Complete Direct Deposit information via your **MBOS** account.

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