



LET'S GET IT RIGHT!

Let's correct any errors in your enclosed Service Retirement Certificate (SRC) before your application is approved. Once your first pension payment is deposited, it's too late to make a change in your payment if your SRC information does not reflect your accurate service history. Don't worry that taking time to correct errors will cause you to miss a payment since your first check will include any back payments owed to you based on your effective pension system retirement date.

INSTRUCTIONS TO THE APPLICANT:

Please take a few minutes to review the enclosed SRC and determine the accuracy of the information used to calculate your monthly retirement benefit.

Your signature on the SRC will indicate that you accept the qualified service history and proposed monthly benefit as presented and that you are seeking the approval of your application by your Local Board.

INSTRUCTIONS TO THE LOCAL BOARD:

The Local Board Chair must schedule a public meeting of the Local Board to consider and review your SRC and application for benefits. The local board must comply with the [Open Meetings Act](#).

Invite the Applicant: Provide the Applicant with written notice of the time and location of meeting; however, the applicant is not required to attend the meeting.

LOCAL BOARD APPROVAL PROCESS:

The Local Board must meet in an open meeting to consider the merits of the Applicant's claim for service retirement benefits and qualified service history reported on the SRC.

Upon the approval of the SRC by the Local Board, the Local Board Chair (or presiding officer during the meeting) should electronically sign and submit the SRC to the TESRS Executive Director using DocuSign.

APPEAL PROCESS:

If an Applicant is aggrieved by the decision of the Local Board relating to eligibility for or the amount of retirement benefits, the Applicant may appeal the decision to the TESRS State Board in accordance with the provisions of [Government Code §864.016](#).

FINAL APPROVAL:

Upon acceptance of the SRC by TESRS Executive Director, DocuSign will email the fully executed SRC to each of the signatories. If the Local Board fails to meet and consider a retirement application within 16 days, the TESRS Executive Director may determine the merits of the claim.

PAY DAY!

Monthly service retirement annuity payments will commence after the final approval of the TESRS Executive Director. The first payment to the retiree will include any back payments owed based on the TESRS effective retirement date identified on the SRC. The cashing or depositing of the first check is considered acceptance of the amount of the annuity and is conclusive evidence that the payee is retired.

TESRS processes pension payments on the second Tuesday of each month and will send you an IRS Form 1099 each January. Don't forget to notify us if you move or change financial institutions.

QUESTIONS?

Please direct any questions or concerns regarding the application process or the Service Retirement Certificate (SRC) to the TESRS Executive Director at info@tesrs.texas.gov.

DocuSign Process

DO NOT SIGN THE SRC IF YOUR
INFORMATION IS INCORRECT!

Select **DECLINE TO SIGN** and explain the reason why you are declining to sign your SRC. DocuSign will automatically forward your message to the TESRS Executive Director for action.

The TESRS Executive Director will review the SRC and will contact you to discuss your concerns.

An amended SRC will be issued if the review results in a change in your service history and/or proposed benefit.

SIGN THE SRC IF YOUR INFORMATION
IS CORRECT!

Sign where indicated then select **FINISH** to electronically sign your SRC. DocuSign will automatically forward your SRC to the next person in the signing process.