

DCPS Retirement Frequently Asked Questions

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What is my retirement plan?

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What is the Teachers Retirement Plan (TRP)?

All Washington Teachers' Union (WTU) members and Council of School Officers (CSO) members in ET-classified positions automatically participate in the Teachers' Retirement Plan upon entry into DCPS

Each pay period, your mandatory retirement contribution is automatically deducted from your pay. Your contributions are:

- 7% of your annual salary if you were hired before November 1, 1996; or
- 8% of your annual salary if you were hired on or after November 1, 1996.

Note: Eligible employees are automatically enrolled in this plan and cannot elect to opt in or out (see details below). Employees participating in this plan may also enroll in the 403(b) and/or 457 plans (optional).

Where can I find more information about the Teachers' Retirement Plan (TRP)?

The TRP is managed by the DC Retirement Board (DCRB). Please review the [TRP Summary Plan Description 2023](#) for more detailed information on the Plan.

What are the eligibility requirements for regular retirement?

You are eligible for a voluntary retirement benefit if you separate from DCPS at:

- age 62 or older, with at least 5 years of service;
- age 60 or older, with at least 20 years of service;
- age 55 or older, with at least 30 years of service; or
- any age, with at least 30 years of service, if hired on or after November 1, 199

I'm interested in retirement and want to know my TRP annuity. How do I calculate my annuity amount based on my proposed retirement date?

The DC Retirement Board offers a retirement benefit calculator on their website, [click here to access the calculator](#). All employees interested in learning more about their eligibility and annuity calculation should start here. This is the first step in the retirement process

What is the retirement process for Teachers' Retirement Plan or Civil Service Retirement Plan?

Step 1: [DC Retirement Board benefit calculator](#), per the previous question.



Step 2: If you would like to continue in the retirement process to understand your eligibility, complete the DCPS Intent to Retire form (formerly known as the Computation Request form).

- The purpose of the form is to provide you with an estimated computation of your retirement benefits. Please note that submission of the retirement computation form is not an official intent to retire and will not be considered as such.
- Steps to request a computation
 - Log into Quickbase at octo.quickbase.com and click on the link 'DCPS Resignations and Retirement Application' icon. Then click on 'Retirement Computations.' Once you have completed the computation form, hit 'Save' and then 'Submit.' Note that requests for a retirement computation that are submitted outside of Quickbase will not be honored.
 - Make sure to add in any breaks in service (even if not exact) or purchase of service, as this will greatly expedite your eligibility determination.
- Your retirement computation request will be reviewed by the Retirement team based on your proposed retirement date, **we aim for ~90 days ahead of your retirement date.** You will receive notification from Quickbase via email that your retirement computation is ready for viewing in Quickbase.

Step 3: Review your retirement computation in the *Employee Acknowledgement and Validation* section of your computation. Select a computation decision and then enter your name and date to acknowledge your elected decision

Computation decision options:

- If you select "I would like to stop..." the retirement process will be stopped and your computation results will be kept on file for any future inquiries.
- If you select "I am satisfied with the computation..." a personalized retirement application will be generated for you (**this is the next step**).

Step 4: Complete and submit your retirement application packet through Box.

- Once you note that you are satisfied with the computation, you will receive a link to Box, which is an online platform that allows you to complete forms directly from your computer over the internet without having to download to your computer or print the forms out.
- The link will take you to entire retirement application, which will include all the required forms to process your retirement.
 - Forms include direct deposit, W-4 federal tax form, state withholding form, application for regular or disability annuity, DC TR-11 (Designation of Beneficiary form), and health/life insurance forms if you are eligible for benefits.
- Once you have completed all applicable forms, submit the entire packet.
- Our team will review your packet.

Step 4a: If you are a member of WTU or CSO and retiring at the end of the school year, submit the DINR form. [Click here to navigate to the DINR question](#) in this document.

Step 5: When you submit your retirement application, please email dcps.retirement@k12.dc.gov to schedule your mandatory 45 minute in person retirement consultation.

Step 6: With the successful consultation meeting, the retirement team will then process your retirement and submit all necessary forms and information to the DC Retirement Board (DCRB). The DCRB, as the plan administrator, processes the forms on their side, sets up your retirement account, and enrolls you in benefits (if applicable).

What is an Intent to Retire (formerly known as a computation request)?

The Intent to Retire form (formerly known as the computation request) is the second step in the retirement process. It is a Quickbase application that TRP-covered employees can complete to verify if they are eligible for retirement. If they qualify, they will receive an estimate of their retirement annuity based on their total creditable service years by the proposed retirement date selected. Employees can [submit a computation request in QuickBase](#).

The turnaround time to receive an eligibility determination for an Intent to Retire is typically 90 days before the applicant's retirement date.

Will I be able to keep by district health and life insurance coverage into retirement?

To be eligible for District Health and Life Insurance coverage into retirement, you must have at least 10 years of creditable district service and 5 consecutive years of coverage immediately preceding your retirement.

I have prior outside teaching experience; how can I purchase those years for retirement?

WTU employees are eligible to purchase up to 10 years of non-DCPS teaching service. The Purchase of Outside Service (POS) process is managed by the DC Retirement Board (DCRB). The DCPS Retirement team will put together your POS packet and submit it to DCRB for review. DCRB will then provide you with the total cost of purchasing your additional years. This process must be completed before you retire. We recommend purchasing service as early in your teaching career as possible as this may minimize the total cost to purchase service. Steps include:

1. Employees interested in calculating the cost to purchase service start with [DCRB Purchase of Service calculator](#)
2. If an employee wants to move forward, request the purchase of service forms with DCPS Retirement Team (dcps.retirement@k12.dc.gov) with email subject: "Purchase of Service".
3. DCPS Retirement team completes the following three forms:
 1. Certificate of Longevity Placement form/memo signed by DCPS Retirement office
 2. Verification of Employment Form
 3. Personnel action (Date of hire personnel action)
4. DCPS Retirement team sends the forms to the DC Retirement Board (DCRB)
5. DCRB performs the cost calculation
6. DCRB sends the employee a POS letter that includes the cost of the purchase and how to make payments



I want to know how much I have contributed towards my retirement; how can I find out?

Employees can request a copy of their Individual Retirement Record (IRR). The IRR is an employment history and retirement contributions transcript generated by the Office of Pay & Retirement Services (OPRS). For each year of employment, you will see the total amount that was deducted from your pay for retirement.

I did not receive a retirement Statement of Benefits; how can I request it?

DCRB mails out a Statement of Benefits to all active Plan members at the end of the calendar year. If you have not received the most recent statement, please contact DCRB's Member Services office directly at 202-343-3200/3272 for assistance.

Am I eligible for Disability Retirement and how can I apply?

For WTU and CSO members:

If you become disabled while working in the DCPS system, you may be eligible to receive a disability retirement benefit. To be eligible, you must:

- have at least five years of eligible service as a DCPS teacher at the time you become disabled; and
- be incapable of performing your job due to a physical or mental disability.

The DCPS Medical Board must review and approve all disability retirement requests. To apply for disability retirement, please contact the DCPS Retirement team via email:

dcps.retirement@k12.dc.gov to begin the application process.

Reference, Page 21 of the Teachers Retirement Plan

For AFSCME and Teamster members and non-union individuals:

Employees approved for disability retirement by the Social Security Administration are eligible to retire if they have completed 10 years of creditable service with DC government prior to date of approval.

What is the DINR bonus and am I eligible?

WTU members who do not intend to continue employment with DCPS the following year shall be required to submit a Declaration of Intent to Not Return (DINR) form no later than April 1 annually. Teachers who submit the DINR form by April 1 annually, and who do, in fact, leave the school system of their own accord at the conclusion of the school year, shall be eligible for a non-pensionable, one-time \$1,000 bonus payable by September 30 of the calendar year in which they leave DCPS.

To be eligible for the \$1000 DINR bonus payment, you must:

- Submit your computation request no later than April 1, **and**
- Retire after the last workday of the school year and prior to September 30 of the following school year.

For all other retirement inquiries, please contact the Retirement team at dcps.retirement@k12.dc.gov.

How do I donate hours to the WTU Family Leave bank?

If you'd like to donate any remaining sick leave hours to the WTU Leave Bank, you can mark the number of hours to be donated in the Computation Request form. The DCPS retirement team member will review this with you during the retirement consultation.

What is a Deferred Retirement Benefit?

If you are vested with at least five years of eligible service when you separate from the DCPS system, and you are not eligible for a voluntary or disability retirement benefit, you may elect to receive a deferred retirement benefit or an immediate lump-sum refund of your Plan contributions. If you elect the deferred retirement benefit, you can begin receiving your retirement benefit when you reach age 62. You may only apply for a Deferred retirement benefit with DCRB after you have separated from DCPS.

I am being involuntarily terminated from my position; can I apply for retirement?

If you are involuntarily separated from DCPS prior to voluntary retirement, you may be eligible for an involuntary retirement benefit if you have at least:

- 25 years of service; or
- 20 years of service and are age 50 or older

What is the Civil Service Retirement Plan?

Note: Eligible employees are automatically enrolled in this plan and cannot elect to opt-in or out (see details below). Employees participating in this plan may also enroll in the 403(b) and/or 457 plans (optional).

Eligibility: All non-Washington Teachers' Union (WTU) members and non-Council of School Officers (CSO) members who are in ET-classified positions and are hired on or before 9/30/1987 automatically participate in the Civil Service Retirement Plan upon entry into DCPS.

- 55 years with 30 years of service
- 60 years with 20 years of service
- 62 years with 5 years of service

How the plan works: Eligible employees will contribute 7% of pre-tax income into the plan.

Vesting: N/A. Employees have access to the plan balance upon retirement or separation from DCPS.

What is the 401(a) Defined Contribution Plan?

Eligible employees are automatically enrolled in this employer-funded plan after one (1) year of service and cannot elect to opt-in or out (see details below). The 401(a) plan is solely funded by employer (DC Government) contributions instead of deductions from the employee’s salary. Employees participating in this plan may also enroll in the 403(b) and/or 457 plans (optional).

Eligibility: All benefits-eligible non-Washington Teachers’ Union and non-Council of School Officers Union members in ET-classified positions participate in this plan. After one (1) year of service, DC Government will contribute five percent of gross salary earnings into the employee’s 401(a) retirement account.

How the plan works: The plan is 100% employer-funded, which means that employees will not receive a payroll deduction to fund this retirement account (employee contributions are not permitted into the 401(a) plan). Instead, the plan is 100% funded by DC Government. Employees who wish to contribute a portion of their income toward a retirement plan may participate in the 403(b) and/or 457 plans in conjunction with the 401(a).

Vesting: Employees who become fully vested in this plan after five years of creditable service may request a lump sum disbursement or rollover or may schedule installments after departure from DC Government. Employees are vested (acquire ownership of their retirement balance) on a graded vesting schedule, as shown below.

Years of Creditable Service	Vested Percentage
Less than 2	0%
2	20%
3	40%
4	60%
5 or more	100%

What is the 403(b) Tax Sheltered Annuity?

Note: The 403(b) plan is an optional retirement account that employees can use to supplement their current retirement plan contributions. To enroll in the 403(b) plan, you must first sign up for an account with an approved 403(b) vendor. The vendor will communicate your plan startup information to Employee Services, and your authorized payroll contributions will begin as you have elected.

***Please do not sign-up for this option in PeopleSoft.**

Eligibility: All employees are eligible to participate in a 403(b) Tax Sheltered Annuity Plan provided by an



approved 403(b) vendor.

How the plan works: The 403(b) Tax Sheltered Annuity Plan is an optional retirement savings program that employees can utilize to make pre-tax contributions. Employees may defer up to \$18,500 annually for the year 2018. Employees must first set up the account with an approved 403(b) vendor in order to participate.

Note: For the year 2018 the catch-up contribution limit for employees aged 50 and over is \$6,000.

Vesting: The plan will remain 100% vested with the employee’s contributions. Employees have access to the retirement plan balance as permitted by the plan rules (contact the plan vendor for details).

To increase, decrease, or cancel contributions: Complete the Salary Reduction Agreement (SRA) form to change the current biweekly amount of your 403(b) contributions OR to cancel future contributions. Please refer to your vendor to inform them of your planned action so that they can advise you further. You may send your completed and signed form to the Retirement team via fax to (202) 535-2112 or email to dcps.retirement@k12.dc.gov.

What is the 457 Deferred Compensation Plan?

Note: The 457(b) plan is an optional retirement account that employees can use to supplement their current retirement plan contributions. To get started, you must sign up for an account with ICMA-RC (800-669-7400). Your authorized payroll contributions will be processed in their administrative office and your deductions will begin as you have elected.

***Please do not sign-up for this option in PeopleSoft.**

Eligibility: All employees are eligible to participate in the 457(b) Deferred Compensation plan provided by ICMA-RC.

How the plan works: The 457(b) Deferred Compensation Plan is an optional retirement savings program that employees can utilize to make pre-tax contributions. Employees must first set up the account with the approved vendor, ICMA-RC, in order to participate.

Note: Employees may be eligible for increased annual contributions under a special 457 catch-up provision during the three years prior to the year an employee reaches normal retirement age or, if the employee reaches age 50 or older before the end of the calendar year.

Vesting: The plan will remain 100% vested with the employee’s contributions. Employees have access to the retirement plan balance as permitted by the plan rules (contact ICMA-RC at (800) 669-7400 for details).

What is my retirement plan balance?

Please contact the retirement plan administrator to confirm your account balance.

Plan Type	Administrator	Contact Information
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Plan Type	Administrator	Contact Information
Civil Service Retirement	Office of Personnel Management	(202) 606-1800
Teacher's Retirement 401(a) Retirement Plan	DC Retirement Board	(202) 343-3272
403(b) Tax Sheltered Annuity	ICMA-RC	(800) 669-7400
457 Deferred Compensation	Contact your 403(b) vendor	Approved 403(b) vendor
	ICMA-RC	(800) 669-7400

How can I rollover or withdraw from my retirement plan?

Current employees

Individuals who have a 403(b) and/or 457(b) plan may be able to request a loan or other type of disbursement. If you are an active employee under the age of 59 ½ enrolled in a 403(b) plan, you must use Retirement Manager to manage your withdraw request. Retirement Manager must also be used to request a rollover to alternative DCPS 403(b) plans.

If you are interested in a rollover to a non-DCPS 403(b) plan or a non- 403(b) plan, contact your 403(b) vendor to obtain the appropriate forms. If you are interested in a 457(b) plan withdraw or roll over, contact the plan administrator (ICMA-RC (800) 669-7400) to obtain the appropriate request forms.

In case a “plan administrator” or “employer” signature is needed, please forward your application to Employee Services at dcps.retirement@k12.dc.gov or fax to (202) 535-2112 to obtain a plan administrator signature. Once signed (within 2-3 business days), we will forward your application to the vendor directly for processing.

The following accounts are only accessible **after** departure from DCPS:

- Teachers' Retirement Plan
- Civil Service Retirement Plan
- 401(a) Retirement Plan

Former employees

- [Teachers Retirement Withdrawal Rollover Forms](#) (WTU or CSO ET-Officers)
- [Withdrawal and Rollover Application -- Civil Service Retirement Plan](#)
- [Withdrawal and Rollover Application -- Defined Contribution Retirement Plan](#)

Submit your completed application as noted on the application for processing.