

Sick Leave Balloon Checklist
Bethalto Community Unit School District No. 8

To be completed by the employee, for consideration for the Sick Leave Balloon.

Article VIII - Leaves, Section 2c - Sick Leave Balloon

Sick Leave Balloon

Certified employees who have completed at least ten (10) years of full-time creditable service to Bethalto Community Unit School District No. 8 who provide five (5) years advanced notice of retirement shall be eligible for a sick leave balloon benefit. In order to receive this benefit, the employee shall provide the district with an irrevocable letter on or before May 1st effective five (5) years from the date of notification and be at least fifty-five (55) years of age by December 31st of the year of retirement with twenty (20) or more years of creditable service with the Illinois Teachers' Retirement System. Upon receipt of the employee's letter of resignation and acceptance by the board, the employer shall immediately add up to 170 days to the employee's accumulated sick leave, with the resulting accumulated sick leave not to exceed 340 days. In calculating whether an employee has twenty or more years of creditable service, as it relates to entitlement for this benefit, prospective future sick days in accordance with Article VIII, Section A, Number 1, which have not yet been earned, and prospective future personal days in accordance with Article VIII, Section D, Number 1, which have not yet been earned, cannot be counted. This sick leave balloon benefit expires on June 30, 2025.

Employee: _____ (Printed Name), _____ (Signature)

Date Retirement Letter Submitted to District: _____ (Date)
 (must be filed before May 1st, five years prior to retirement)

School Years Teaching Following Submission of Retirement Letter:
 (must be 5 years)

- _____ (School Year)
- _____ (School Year)
- _____ (School Year)
- _____ (School Year)
- _____ (School Year)

Age at Time of Retirement: _____ (Age) and **Date of Birth:** _____ (DOB)
 (must be at least 55 years old at time of retirement with at least 20 years of TRS credible service)

Service to BCUSD 8 at Time of Retirement: _____ (# Years)
 (must have at least 10 years of service to BCUSD8, accumulated sick days, balloon or otherwise, do not count as service to BCUSD8)

TRS Credible Service at Time of Retirement: _____ (# Years)
 (must be at least 55 years old at time of retirement with at least 20 years of TRS credible service)

Calculation for TRS Credible Service:
 (include all areas in which credible service will have been earned, including all districts and calculated accumulated sick leave)

Source	Years	Accumulated Sick Leave
_____ (District)	_____ (# Years)	_____ (# Days)
_____ (District)	_____ (# Years)	_____ (# Days)
_____ (District)	_____ (# Years)	_____ (# Days)
_____ (District)	_____ (# Years)	_____ (# Days)
	_____ (Total Years)	_____ (Total Sick Leave Service Credit Calculated in Years)
		_____ (Total Service Credit: Total Years + Total Sick Leave)

Documentation for Service:
 Please submit relevant documentation from TRS and any reciprocal service along with this document. TRS documentation should include, at a minimum, TRS Service Record - Active Service and TRS Service Record - Sick Leave Service.

Most Recent Date Employee has Reviewed Retirement Plans with TRS: _____ (Date)
 Employees are highly encouraged to have reviewed all retirement plans and calculations with TRS.

Disclaimer:
 It is the responsibility of the employee to verify eligibility for retirement with TRS. This document is for the sole purpose of determining eligibility for the Sick Leave Balloon. Neither the BEA nor the District are reviewing or approving retirement under TRS.

For Use by Review Committee	Updated: Spring 2023
Eligibility: YES / NO (Circle)	
Date of Review: _____, BEA Committee Member: _____, District Committee Member: _____	