



## **Annuity Retroactive Increases and Equalization Frequently Asked Questions**

### **ELIGIBILITY FOR ANNUITY ADJUSTMENT**

**Q: How do I determine if I am eligible for an adjustment to my final average salary and retroactive payment?**

A: If you were actively employed and covered under one of the collective bargaining groups listed in the table below, you should expect a retroactive payment.

<b>Collective Bargaining Group</b>	<b>Dates of Active Employment</b>
Council of School Officers	October 1, 2020 thru September 30, 2022
DC Fire & EMS – Union Group	October 1, 2020 thru September 30, 2022
Metropolitan Police Department – Union Group	October 1, 2020 thru September 30, 2022
Washington Teachers Union	October 1, 2019 thru September 30, 2022

**Q: Active police officers, firefighters, and teachers recently received a retroactive payment from the District due to the new collective bargaining agreements (CBA). Will my annuity be adjusted since I was an active employee under the years of the new contract?**

A: Yes, if you were an active employee during the years covered by the CBA then your final average salary at retirement will be adjusted. Your annuity will be recalculated using your new final average salary.

**Q: Will the adjustment to my final average salary change my monthly annuity payment?**

A: Yes, your gross monthly annuity payment may increase slightly. In addition, changing your final average salary will also increase your Basic Life insurance volume and your optional life insurance coverage, if you selected to continue Option B Life insurance at the time of your retirement.

### **RETROACTIVE PAYMENTS FOR ADJUSTED ANNUITY**

**Q: Once my annuity is adjusted, will I receive any retroactive money?**

A: Yes, you should expect to receive a lump sum payment retroactively based on your new final average salary. This will be included in the same payment as when your monthly annuity is adjusted.

**Q: Can you provide me with an estimate of my individual retroactive payment?**

A: Unfortunately, DCRB is not able to provide individual estimates.

**Q: When am I going to receive my retroactive payment?**

A: DCRB's overarching goal is to issue all retroactive payments by the September 1<sup>st</sup> payment date.

*Updated as of May 25, 2023*

**Q: Why must I wait so long to receive my retroactive payment?**

A: DCRB's ability to recalculate your annuity is contingent upon when DCRB receives the new salary information and additional contributions to the retirement plans from your previous employer agency. Based on the schedule agreed to by the Office of Pay and Retirement Services (OPRS), DCRB should receive the required information and contributions in time to process your retroactive payments as follows:

Collective Bargaining Group	Proposed Pay Date
Council of School Officers	June 1 <sup>st</sup>
DC Fire & EMS – Union Group	August 1 <sup>st</sup>
Metropolitan Police Department – Union Group	September 1 <sup>st</sup>
Washington Teachers Union	October 1 <sup>st</sup>

**Q: Will I receive a separate check, or will the retroactive payment be part of my regular monthly annuity payment?**

A: Separate checks will not be issued. The retroactive amount will be included in the same payment as when your monthly annuity is adjusted.

**Q: Will taxes be deducted from my retroactive payment?**

A: Taxes will be deducted from your gross monthly annuity. For example, if your regular gross monthly payment was \$3,800 and you received a retroactive payment of \$1,000, then taxes will be deducted from \$4,800.

EQUALIZATION MEMBERS

**Q: As a retired member of the police and firefighters' retirement plan who retired before February 15, 1980, I am eligible to receive equalization payments. Should I expect to receive an increase as well?**

A: Yes, if you retired before February 15, 1980, you are eligible for equalization pay in the same increase percentage as if you were still an active-duty police officer or firefighter. We anticipate equalization payments will be issued by the October 1<sup>st</sup> payment date.

**Q: How will I be notified when the adjustments have occurred?**

A: DCRB will use the monthly earning statements mailed via the United States Postal Service to communicate with you about the exact month of retroactive adjustments or equalizations.

**Q: I am a nonunion Police or Fire member. Are there any differences in what I receive under the equalization or annuity adjustment?**

A: Yes, this is dependent on the salary schedules provided by DCHR. Each salary schedule could be slightly different regarding adjustments for each grade or longevity level. A list of published salary schedules can be found at the following link: <https://dchr.dc.gov/node/1607036>

**Q: What classifications in Fire and Police are considered nonunion?**

A: "Police nonunion" includes Chief, Assistant Chief, Commanders, Inspector Captain, and Lieutenant.  
"Fire nonunion" includes Chief, Assistant Chief, Deputy Chief, and Battalion Chief.

**Q: Are survivors eligible to receive an increased benefit?**

A: If your spouse was an active employee during the years covered by one of the CBAs and he/she passed away after they retired, you may be eligible to receive a retroactive payment.