UConn Health Retirement Checklist and Guidelines

		Task	Website/Notes
3-6 months prior	☐	Read "A Guide to Retirement Benefits"	A Guide to Retirement Benefits
	☐	**SERS Retirees:** Review the State's online videos and workshops	https://www.osc.ct.gov/rbsd/stateretire.htm
	☐	**SERS Retirees:** Estimate your SERS pension benefit	Online Estimate Your Benefits Tool: https://www.osc.ct.gov/rbsd/stateretire.htm
	☐	**ARP Retirees:** Contact a Prudential representative to discuss distribution options	Under the Meet Your Counselor tab https://www.ctdcp.com/
3 months prior	☐	Read about the Required Proof Documents	Required Proof Documents at Retirement
	☐	Select retirement date, which must be the first of a month.	Last day of employment will be the last day of the prior month.
	☐	**SERS Retirees:** Select pension payment option	Options: Straight Life Annuity, 50% Spouse, 50% or 100% Survivor, 10- or 20-Year Period Certain
	☐	Complete the online Request for Retirement Initiation.	Request for Retirement Initiation
2-3 months prior	☐	Collect, make copies, prepare written statements, and return required items to Human Resources according to your plan checklist.	ARP Retirement Checklist SERS Tier I, II, and IIA and Hybrid Members Retirement Checklist
1-2 months prior	☐	**Participants Age 65 or older:** HR will send you forms to file for Medicare Part B.	You file the paperwork directly with your local Social Security office using a coverage effective date of the first of the month following retirement.
	☐	HR will prepare retirement forms for your signature and schedule a date and time for review.	The earliest employees can submit signed retirement paperwork is 3 months prior to retirement.
1 month prior	☐	Contact Prudential for information on how to defer the tax liability of any final payouts.	Your final paycheck will automatically include the payout of accruals and contract adjustments for faculty, such as pay through August 22.
½ - 3 months prior	☐	Sign, date, and return retirement forms to HR with Required Proof Documents	Forms require original signatures on single-sided pages.
Month of Retirement	☐	Employees generally receive two paychecks following retirement.	The first paycheck will be a standard biweekly check. The second check will be your final paycheck.
	☐	Receipt of new medical ID cards.	Retiree health benefits begin on the first of the month following retirement. During the first month of retirement, continue to use your active employee cards.
	☐	**SERS participants** will receive a letter from the Retirement Services Division regarding the monthly pension benefit.	Pension checks are dated on the last business day of the retirement month.