

OPTIONAL RETIREMENT PLAN

a guide for participants

Getting Ready to Retire from the University of Arizona



Human Resources

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INTRODUCTION

Congratulations on your upcoming retirement!

This handbook is designed to help you make important decisions and complete the steps for retiring from the University of Arizona. It includes information on the Optional Retirement Plan (ORP), Social Security, Medicare, retiree health insurance options, University retiree programs, and the Retiree Accumulated Sick Leave Program.

Remember: At least 30 days before you retire, submit written notification of your retirement to your supervisor and departmental business office in order to arrange for a smooth transition.

OPTIONAL PHASED RETIREMENT PROGRAM

The Phased Retirement Program offers a gradual transition to retirement. If you are eligible for this voluntary program, you can reduce your workload and hours over a period of up to three years, and concurrently access your Optional Retirement Plan retirement account.

To participate in the Phased Retirement Program, you must

1. Be at least 62 years old,
2. Be fully vested in the ORP, and
3. enter into a written Phased Retirement Agreement with the University.

During the phased retirement period, your FTE, salary, and workload are reduced. You negotiate the specific reduction or series of reductions with your dean/vice president, who retains the authority to balance the business needs of the college/division business with requests for phased retirement. Your negotiated agreement must be approved by the Executive Vice President and Provost. Once executed, your agreement is irrevocable.

Unless you request otherwise in your phased retirement agreement, your position will be no less than .50 FTE (40 hours/biweekly pay period) so that you retain benefits eligibility until you retire. If you have tenure or continuing status, you retain this status until you retire.

TENURE AND CONTINUING STATUS

In accordance with existing University policies, a tenured faculty member or academic professional with continuing status irrevocably relinquishes all status rights upon retirement.

RETIRING FROM THE ORP

The ORP defines normal retirement as age 65. If you want to retire before age 65, consult with your investment provider and tax professional regarding distribution options, and potential tax consequences or IRS penalties.

Your **separation date** with the University of Arizona (the last day you are at work) and your ORP **retirement date** cannot occur on the same day. Your ORP retirement date may be as soon as the next calendar day after your University separation date. For example, if you end your University employment on June 30, your ORP retirement date can be July 1, or any later date.

VESTING IN THE ORP

Vesting is the process by which you gain access to the University's contributions to your ORP account. You may have been immediately vested when you began University employment or became ORP eligible, if you had monies on deposit in a qualified defined benefit or defined contribution program with a prior employer. Otherwise, you are fully vested in the University's contributions and related earnings after five years of participating in the ORP. You are always fully vested in your own contributions and the related earnings.

LEARNING ABOUT RETIREMENT

We encourage you to attend two information sessions during the year before you retire. Also plan to meet with your ORP investment company representative at least six months before you retire.

PREPARING FOR RETIREMENT – PRESENTED BY UARIZONA HUMAN RESOURCES

This workshop covers retirement distributions, your retiree health insurance options offered by the Arizona Department of Administration (ADOA) and ASRS, Medicare and Social Security basics, the Retiree Accumulated Sick Leave Program, and Official University Retirement Status. You will receive email invitations when sessions are scheduled.

KNOW YOUR INSURANCE – PRESENTED BY ASRS

ORP participants are eligible for retiree health insurance with ASRS or ADOA. In this session, you will learn about the ASRS medical and dental insurance options and meet the network representatives. Find additional information, including dates, in-person session locations, webinar options, and how to register, on the ASRS website at azasrs.gov/content/member-education.

MEET WITH YOUR ORP INVESTMENT COMPANY REPRESENTATIVE

Six months before you retire, we encourage you to meet with the investment provider for your ORP (Fidelity or TIAA) to discuss distributions and rollover options. Your representative will complete your retirement distribution request with you.

- **Fidelity Investments:** Nick Maly, 480-933-5315, nicholas.maly@fmr.com, or C. J. Olsen, 208-400-0583, cj.olsen@fmr.com or schedule an appointment online at netbenefits.com/aus > Contact Us
- **TIAA:** Donn Fitch, CFP®, 480-350-3209 dfitch@tiaa.org, or schedule an appointment online at tiaa.org/arizona > Schedule Today

SUPPLEMENTAL RETIREMENT PLANS

If you have a Voluntary 403(b) Plan and/or 457 Deferred Compensation Plan account, contact your investment provider directly for information regarding distributions and rollovers.

403(b) Representatives

- **Fidelity Investments:** Nick Maly, 480-933-5315, nicholas.maly@fmr.com, or C. J. Olsen, 208-400-0583, cj.olsen@fmr.com or schedule an appointment online at netbenefits.com/aus > Contact Us
- **TIAA:** Donn Fitch, CFP®, 480-350-3209 dfitch@tiaa.org, or schedule an appointment online at tiaa.org/arizona > Schedule Today

457 Representative

- **Nationwide Investment Services:** Klark Krauter 520-262-0348 or 800-796-9753 or krautek@nationwide.com

SOCIAL SECURITY AND MEDICARE BENEFITS

Social Security and Medicare are US government programs subject to legislative change. This is a general overview to help you start exploring these programs.

SOCIAL SECURITY BENEFITS

The amount of your monthly Social Security benefit depends on your age when you begin receiving the benefit. Generally, the older you are, the greater your monthly benefit. For more information the SSA can be reached at:

- 800-772-1213 (TTY 800-325-0778) or 3808 N. First Ave., Tucson, AZ 85719 (local office)

Full Retirement Benefit

If you were born in or before 1937, the retirement age for full Social Security benefits is 65. If you were born in 1938 or later, the retirement age for full benefits ranges from 66 to 67. To determine when you are eligible to receive full Social Security benefits, visit the Social Security Administration website at ssa.gov/planners/retire/retirechart.html.

Early Retirement Benefit

You may be eligible for an early retirement Social Security benefit at age 62. The monthly benefit for early retirement is less than the monthly benefit for full retirement.

MEDICARE BENEFITS

Medicare is a four-part medical insurance program for individuals who are age 65 or older or disabled. For more information visit [Medicare.gov](https://www.Medicare.gov). You can also download a “Request for Employment Information” form to provide proof of prior creditable coverage. Portions of this form must be completed by the Division of Human Resources.

For personalized information and explanation of your options for Medicare benefits phone 800-Medicare or the local Medicare agency:

- Pima Council on Aging 520-790-7262 or pcoa.org/ways-we-help/medicare.html

Part A – Hospital Insurance

After a deductible and co-insurance, Medicare Part A helps pay for inpatient care in a hospital or skilled nursing facility (following a hospital stay), some home health care and hospice care. You do not have to pay a monthly premium for Part A if you (or your spouse) paid sufficient Medicare taxes while you were working. You can enroll in Medicare Part A at age 65, unless you wish to remain in the University’s high-deductible health plan until you retire.

Part B – Medical Insurance

After you pay a deductible and some co-insurance, Medicare Part B helps pay for medically necessary services like preventive services, doctors' services, outpatient care, home health services and other medical services. You pay a monthly premium for Part B insurance, and the premium amount normally changes every January 1. You should sign up for Medicare Part B within 30 days of your retirement, unless you will be covered under a spouse’s qualifying group health plan. If your spouse is employed at the University or another Arizona state agency, contact the Division of Human Resources at 520-621-3660 for additional information and options.

Part C – Medicare Advantage Plans

A Medicare Advantage Plan functions like an HMO or PPO. Medicare Advantage Plans are offered by private insurance companies. Each Medicare Advantage Plan can charge different out-of-pocket costs and have different rules for how you access services (like whether you need a referral to see a specialist or if you have to go to in-network providers). These rules can change each year.

If you join a Medicare Advantage Plan, it will provide all of your Part A (Hospital) and Part B (Medical) coverage. It may offer extra coverage, such as vision, hearing, dental, or health and wellness programs. Most plans also include Medicare prescription drug coverage (Part D).

Part D – Prescription Drug Coverage

Medicare Part D helps pay for prescription drugs. To get Medicare prescription drug coverage, you must join a plan run by an insurance company or other private company approved by Medicare. Each plan can vary in cost and

drugs covered. Joining a Medicare prescription drug plan is voluntary, and you pay an additional monthly premium for the coverage.

RETIREE HEALTH INSURANCE

As a State of Arizona retiree, you are eligible to participate in either the ADOA or ASRS retiree health insurance plans. You may also want to compare other options such as individual health plans, Medicare or other federal health plans, your spouse's/partner's group health plan, or a retiree group health plan with a previous employer.

Whereas the University offers health insurance to domestic partners of active employees, the State of Arizona does not recognize domestic partners as eligible dependents. Therefore, you will not be able to enroll a domestic partner in either the ADOA or ASRS retiree health insurance plans.

If you (or your eligible dependent[s]) are Medicare eligible and are enrolling in the ADOA or ASRS retiree medical insurance plan, you (and all Medicare-eligible dependents) must enroll in both Medicare Part A and Part B.

If your spouse is employed at the University or another Arizona state agency, contact the Division of Human Resources at 520-621-3660 for additional information and options.

ADOA RETIREE HEALTH INSURANCE PLANS

IMPORTANT DEADLINE: If you do not make a medical or dental election *within 30 calendar days* following your retirement date, you will permanently and irrevocably forfeit your option to enroll in any ADOA retiree health insurance plan.

The ADOA retiree medical insurance plan is the Triple Choice Plan offered to active University employees. To view your current benefits as an active employee, go to UAccess Employee at uaccess.arizona.edu and select Employee/Manager Self Service > University Benefits. As a retiree, you will be billed directly for the full retiree insurance premiums.

You may elect retiree medical and/or dental coverage. You may only elect retiree vision coverage in combination with medical or dental coverage.

If you are eligible for and enrolled in Medicare, it serves as your primary insurance coverage and pays your claims first. ADOA coverage is your secondary insurance and will be billed for amounts that Medicare does not pay. If you are not eligible for Medicare, ADOA coverage is your primary insurance coverage. For more information on primary and secondary coverage and payments, visit medicare.gov/supplements-other-insurance.

You may cancel your ADOA medical, dental, or vision insurance (or remove a dependent) at any time. You must submit a written request at least one month prior to the first day of the month of the desired change. Get more

information about ADOA health insurance, including current rates and how to enroll, by visiting benefitoptions.az.gov or calling 800-304-3687.

ASRS RETIREE HEALTH INSURANCE PLANS

IMPORTANT DEADLINE: If you do not make an election *within 30 calendar days* following your retirement date, you will not be able to enroll in the ASRS plans until the next Open Enrollment period, unless you experience a qualified life event during the plan year.

ASRS offers retiree medical insurance and dental insurance (which includes vision coverage); and a Medicare Advantage plan for Medicare-eligible retirees. ORP participants are eligible to enroll in this insurance. Find detailed information on the ASRS retiree health insurance at azasrs.gov/content/health-care. You can enroll in ASRS health plans online. For assistance, contact ASRS at 602-240-2000 or 800-621-3778. You will be billed directly for the full premiums.

You may cancel your medical or dental coverage (or remove a dependent) at any time. You must submit a written request at least one month prior to the first day of the month of the desired change.

LIFE INSURANCE

You may retain any group life insurance coverage that was in effect at the time you retired if you submit a completed application *within 30 calendar days following your separation date*. To view your coverage as an active employee, go to UAccess Employee at uaccess.arizona.edu and select Employee/Manager Self Service > Benefits > Benefits Summary.

SECURIAN LIFE INSURANCE – Policy #34681

Your basic \$15,000 coverage and any Securian supplemental life insurance in which you were enrolled at the time of retirement can be converted or ported.

- **Converting** allows you to convert your group coverage to an individual whole life policy.
- **Porting** allows you to continue your term life insurance coverage. You are only eligible for porting if you separate from University employment retire prior to your Social Security full retirement age.

The converted or ported coverage is issued without a medical examination. Contact Securian at 833-745-5517 for more information. If you wish to continue coverage, request an application form from Securian at 866-365-2374.

THE HARTFORD LIFE INSURANCE – Policy #GP-066050

Aetna has been rebranded The Hartford. If you were enrolled in Aetna/The Hartford supplemental life insurance at the time of retirement, your coverage can be converted or ported.

- **Converting** allows you to convert your group coverage to an individual whole life policy.
- **Porting** allows you to continue your (and your dependents') existing group term life coverage.

The University also offers a group life insurance plan for retirees. In order to be eligible, you must have been enrolled in the Aetna/The Hartford supplemental life plan when you were an active employee.

The converted or ported coverage is issued without a medical examination, but your coverage is automatically reduced at age 70. Contact Human Resources at hrosolutions@arizona.edu or 520-621-3660 for the form required to obtain information.

OFFICIAL UNIVERSITY OF ARIZONA RETIREMENT STATUS

The University offers specific privileges to retirees with Official University of Arizona Retirement Status. To qualify, you must meet *all* of the following requirements:

- Be considered in retirement status by receiving a distribution from any retirement program recognized by the State of Arizona.
- Be at least 50 years of age.
- Have completed five years of continuous, benefits-eligible employment in the Arizona University System (or approved leave of absence or long-term disability) immediately preceding retirement.
- Have not been terminated for cause by the University.

PRIVILEGES

Tuition Reduction: If you are eligible for the Qualified Tuition Reduction or Domestic Partner Tuition Program at the time of your retirement, you may continue to be eligible under the same terms and fee schedules that applied to you as an active employee. Students must meet admission requirements. For further details, visit hr.arizona.edu/employees-affiliates/benefits/educational-benefits.

Free Parking Permit: Contact Parking and Transportation Services at 520-626-7275 to obtain a retiree parking permit and more information on the defined retiree parking locations.

Email Privileges: You may retain your University email address as a CatMail account. Your employee email address will deactivate 60 days after you retire. Before you retire or during the 60-day grace period, log in to <https://account.arizona.edu/welcome> if you wish to retain a University email account.

University of Arizona Retirees Association (UARA): Membership fee is \$20 per year and includes a free e-newsletter. Call UARA at 520-626-6936 or visit uara.arizona.edu for more information.

Other Privileges

- University Library loan privileges
- Discounts at University Bookstores and University Athletic events, CatCard and membership at Campus Recreation

You may need your CatCard to receive some of these discounts and services. If you lose your CatCard, contact the CatCard Office at 520-626-9162 or visit catcard.arizona.edu.

RETIREE ACCUMULATED SICK LEAVE (RASL) PROGRAM

Upon retirement, you may be eligible to receive partial payment for your accumulated sick leave balance through the RASL program. To be eligible, you must:

- have an accumulated sick leave balance of **500 or more** hours on your date of separation from employment, *and*
- establish a retirement date with the ORP by applying for a distribution **within 31 calendar days** after your separation date.

PAYMENTS

Your RASL benefit value is calculated by multiplying your hourly pay rate at the time of retirement by your number of unused sick leave hours multiplied by the percentages below.

500–749 hours	750–999 hours	1,000–1,500 hours
25%	33%	50%

Regular RASL payments are paid in three annual installments and are considered taxable income. You have the option to direct your first year's RASL payment into a 457 Deferred Compensation Plan account to delay taxation. You must indicate this election on the application form.

The maximum total RASL benefit that you can receive is \$30,000, and the maximum number of sick leave hours that that you can be paid for is 1,500. Find your sick leave balance in UAccess Employee uaccess.arizona.edu. Select Employee/Manager Self Service > Time > Leave/Comp Time.

APPLYING

To apply for the RASL program, complete and submit the following forms according to the deadlines listed. Submit the completed forms directly to the Division of Human Resources in the University Services Building, 888 N. Euclid Ave., Room 114. Human Resources will complete the employer sections and forward your forms to the GAO. **Please allow sufficient time for processing by Human Resources.**

RASL Program Forms are available at gao.az.gov/payroll/rasl.

- RASL Program Application and Certification Form (GAO-SL-50)
- RASL University Employee Checklist
- IRS Form W-4 (withholding)
- Arizona Form A-4 (withholding)
- (Optional) Deferral Notification Form to direct your first year's RASL payment to your 457 Deferred Compensation Plan account

RASL - NOT ELECTING the 457 Deferred Compensation Plan	
Action	Deadline
Apply for a distribution from the ORP.	Within 31 calendar days after your separation date.
Submit the four required forms above to the Division of Human Resources.	GAO must receive within 180 calendar days after your separation date. Allow time for processing by Human Resources.

RASL - ELECTING the 457 Deferred Compensation Plan	
Action	Deadline
Contact Klark Krauter at Nationwide at 800-796-9753 to open a 457 account.	Prior to your separation date.
Submit a Deferred Compensation Notification form to Nationwide.	Prior to your separation date.
Apply for a distribution from the ORP.	Within 31 calendar days after your separation date.
Submit the four required forms above to the Division of Human Resources.	GAO must receive within 30 calendar days after your separation date. Allow time for processing by Human Resources.

The RASL program is a state employee benefit administered by the ADOA General Accounting Office (GAO). Find additional information, including frequently asked questions, by visiting the GAO website gao.az.gov/payroll/rasl or by calling 602-542-6222.

RETURNING TO WORK AFTER RETIREMENT

The ORP plan document and Internal Revenue Service regulations specifically bar you from pre-arranging your return to work with any Arizona University System employer at any time before your retirement date. After you have retired, the University may be interested in asking you to return to work, and you may apply for posted positions.

In no event shall a Participant be considered as having terminated employment if, as of such date of termination, the Participant has entered into an express or implied contract (whether written or oral) for re-employment of the Participant with any Employer at some future date.

—Arizona Board of Regents Optional Retirement Plan, Fifth Amendment and Restatement

SUMMARY OF RETIREMENT BENEFITS for ORP MEMBERS

BENEFIT	CONTACT INFORMATION	OTHER INFORMATION	TIME CRITICAL DEADLINES
<p>Medical Insurance ADOA Benefit Options - <i>BCBS or UnitedHealthcare</i> OR ASRS Retiree Healthcare - <i>UnitedHealthcare</i></p>	<p>ADOA 602-542-5008, Select Option 2 800-304-3687, Select Option 2 ASRS 602-240-2000</p>	<p>ADOA Medical: If you do not make an election of at least dental coverage within 30 days following retirement, you permanently and irrevocably forfeit the option to enroll. ASRS Medical: If you do not make an election within 30 days following retirement, you will not be able to enroll until the next Open Enrollment unless you experience a Qualified Life Event.</p>	<p>30 days after retirement date</p>
<p>Dental Insurance ADOA Benefit Options - <i>Delta Dental, Cigna DHMO</i> OR ASRS Retiree Healthcare - <i>Delta Dental, Cigna DHMO</i></p>	<p>ADOA 602-542-5008, Select Option 2 800-304-3687, Select Option 2 ASRS 602-240-2000 800-621-3778</p>	<p>ADOA Dental: If you do not elect at least dental coverage within 30 days following retirement, you permanently and irrevocably forfeit the option to enroll. ASRS Dental: If you do not make an election within 30 days following retirement, you will not be able to enroll until the next Open Enrollment unless you experience a Qualified Life Event.</p>	<p>30 days after retirement date</p>
<p>Vision Insurance ADOA Benefit Options - <i>Avesis</i> OR ASRS Retiree Healthcare - <i>Discount plans included with dental coverage</i></p>	<p>ADOA 602-542-5008, Select Option 2 800-304-3687, Select Option 2 ASRS 602-240-2000 800-621-3778</p>	<p>ADOA Vision: Must elect medical or dental to enroll. ASRS Vision: Vision coverage is included in the dental plans.</p>	<p>30 days after retirement date</p>

BENEFIT	CONTACT INFORMATION	OTHER INFORMATION	TIME CRITICAL DEADLINES
Supplemental Life Insurance ADOA Benefit Options: University of Arizona sponsored plans: - <i>The Hartford</i> - <i>Reliastar</i>	Securian 866-365-2374	You may convert or port coverage. Dependent coverage is available.	30 days after separation
	The Hartford 800-523-5065 hresolutions@arizona.edu	You may convert or port coverage. Dependent coverage is available.	30 days after separation
	Reliastar 800-955-7736 Ext. 3766	You may convert or port coverage.	30 days after separation
Short-Term Disability		Not available to retirees	
Flexible Spending Account (FSA) - <i>ASI</i>	ASI 800-659-3035	Health-Care FSA only: You may elect COBRA to continue contributing on an after-tax basis through the end of the current plan year. If no COBRA, you may submit claims for expenses incurred prior to your retirement date, up to the amount you contributed before your retirement date.	60 days from the date of the COBRA notification letter
Retiree Accumulated Sick Leave Program Administered by the ADOA General Accounting Office	Road Ahead website 520-621-3660 GAO website 602-542-5601	You must have a minimum of 500 sick hours. Pay particular attention to deadlines because the GAO strictly enforces them.	Open 457 before separation date. Apply for retirement within 31 days of separation. Submit RASL paperwork within 180 days.

FORMS

ASRS Health Insurance Enrollment Form

1. Online only: azasrs.gov/content/online-health-insurance-enrollment

Arizona Department of Administration Health Insurance Enrollment Form

1. State of Arizona Benefit Options Retiree/LTD Enrollment Form benefitoptions.az.gov/forms

Retiree Accumulated Sick Leave (RASL) Program Forms

1. RASL Program Application and Certification Form (GAO-SL-50) gao.az.gov/payroll/rasl
2. RASL University Employee Checklist gao.az.gov/payroll/rasl
3. IRS Form W -4 (withholding) gao.az.gov/payroll/rasl
4. Arizona Form A-4 (withholding) gao.az.gov/payroll/rasl
5. Deferral Notification Form to direct your first year's RASL payment to your 457 Deferred Compensation Plan account (if applicable) gao.az.gov/payroll/rasl

CONTACT INFORMATION

State of Arizona Benefit Options Benefits & Administrative office	602-542-5008, Opt 2 800-304-3687, Opt 2	Arizona Department Of Administration (ADOA) benefitoptions.az.gov
Health Insurance - ADOA		
BCBS of Arizona	866-287-1980	benefitoptions.az.gov
UnitedHealthcare	800-896-1067	
Health Insurance - ASRS		
UnitedHealthcare (with Medicare)	844-876-6161	uhretiree.com/asrs
United Healthcare (pre-Medicare)	800-509-6729	myuhc.com
Prescription Plans - ADOA		
MedImpact (pre-Medicare)	888-648-6769	mp.myrxinfo.com
Vibrant Rx (with Medicare)	844-826-3451	myvibrantrx.com/stateofaz
Dental Insurance - ADOA		
Delta Dental	866-588-2839	deltadentalaz.com/adoa
Cigna	800-968-7366	cigna.com/sites/stateofaz
Dental Insurance - ASRS		
Delta Dental	833-335-8201	deltadentalaz.com/asrs
	Vision Discount: 866-246-9041	eyemedvisioncare.com/deltadental
Cigna DHMO	800-244-6224	cigna.com/asrs
Vision Insurance - ADOA		
Avesis, Inc.	888-759-9772	avesis.com/arizona
ASI		
Healthcare Flexible Spending	800-659-3035	asiflex.com
Life Insurance		
The Hartford	800-523-5065 hrtolutions@arizona.edu	
Securian	Claims: 833-745-5517; Porting/Conversion: 866-365-2374	lifebenefits.com/plandesign/ Arizona
Reliastar	800-955-7736	ing-usa.com
Optional Retirement Plan AND 403(b)		
Fidelity Investments	800-343-0860	netbenefits.com/aus
Nick Maly	480-933-5315, nicholas.maly@fmr.com	
C. J. Olsen	208-400-0583, cj.olsen@fmr.com	
TIAA	800-842-2252	tiaa.org/arizona
Donn Fitch, CFP®	480-350-3209, dfitch@tiaa.org	

Arizona State Retirement System		
Areas outside Phoenix	800-621-3778	azasrs.gov
Phoenix	602-240-2000	
457 Supplemental Retirement Plan		
Nationwide	800-796-9753	arizonadc.com/iApp/tcm/
Klark Krauter	520-262-0348	arizonadc/index.jsp
Medicare		
Centers for Medicare & Medicaid	800-633-4227 (TTY 877-486-2048)	medicare.gov
Pima Council on Aging	520-790-7262; medicare@pcoa.org	pcoa.org/ways we help/medicare
Social Security		
Social Security Administration	800-772-1213	ssa.gov
Other Information		
Division of Human Resources	520-621-3660	hr.arizona.edu
Qualified Tuition Reduction & Domestic Partner Tuition Program	520-621-3232 520-621-3660	Bursar's Office (billing) bursar.arizona.edu Human Resources (approval) hr.arizona.edu
University of Arizona Retirees Association	520-626-6936	uara.arizona.edu
University Information Technology Services (UITS)	520-626-8324	uits.arizona.edu
Parking and Transportation	520-626-7275	1117 E. 6th St. parking.arizona.edu
Retiree Accumulated Sick Leave (RASL)	602-542-6222	gao.az.gov/payroll/rasl
CatCard Office	520-626-9162	catcard.arizona.edu
University Libraries	520-621-6406	new.library.arizona.edu/

Retirement Timeline and Checklist

Six Months to One Year Prior to Retirement

- Attend the Human Resources session “Preparing for Retirement.”
- Contact my investment company representative to discuss investments and distribution options.

Three to Six Months Prior to Retirement

- Attend the ASRS education session “Know Your Insurance.”
- Review ADOA and ASRS retiree health insurance options and determine whether to enroll in coverage.
- Meet with my tax advisor and/or financial planner to determine my tax liability and income sources after retirement.
- Apply for Social Security benefits and Medicare for myself and my spouse, if eligible.

One Month Prior to Retirement

- Submit written notification of my retirement to my department.
- Confirm with my department that my termination will be processed based on my letter of resignation.
- Contact my ORP investment company to begin the distribution process.
- Meet with the Deferred Compensation Plan 457 and/or Voluntary 403(b) Plan representative regarding my supplemental retirement plan(s) if applicable.
- If applicable, contact the Social Security Administration and Medicare to ensure that my applications were processed. Ensure that I have received my Medicare Card or a letter verifying the effective start date of insurance coverage. Ensure that I have received a letter from Social Security verifying the effective start date of my Social Security payments.
- Complete the application for my chosen (ADOA or ASRS) retiree health, dental and/or vision insurance.
- Contact my life insurance carrier directly for conversion or portability information.
- Consider electing COBRA for the Healthcare Flexible Spending Account.
- If eligible, apply for Retiree Accumulated Sick Leave (RASL). Contact Nationwide to open a 457 account if electing the Deferred Compensation option for my first RASL payment.
- If eligible for Official Retirement, opt in if I want to retain my email address.