Review Applicable Retirement Options During the Year Prior to Retirement

**Faculty:**
- Notify Dean or Department Chair at least one quarter prior to your retirement date.
- Arrange 40% rehire with Department and Academic Staff.

**Professional Staff and Librarians:**
- Notify your supervisor at least one quarter prior to your retirement date.

**Classified Staff:**
- Contract: Notify your supervisor according to your union contract provisions relating to resignation.
- Non-Contract: Provide as much notice as possible, but no less than two weeks.

3 – 6 Months Prior to Retirement

**DRS Plan Participants Only**
Request pension estimate and retirement packet from DRS; 800-547-6657 even if using online application to apply for retirement.

3 Months Prior to Retirement

**Medicare Enrollment (if applicable)**
Three months prior to age 65, enroll online at ssa.gov. Otherwise contact Social Security or go to local SS office to enroll in Medicare Part A and B. This is required if enrolling in PEBB retiree insurance at age 65 or older.

30 - 60 Days Prior to Retirement

**DRS Plan Participants Only**
Enroll for pension either online or by mailing forms to DRS. Application for Retirement Form, copy of birth date evidence, and other applicable forms.

Mail to or request from UW Benefits
- UW Application for Retirement Form
- VEBA enrollment Form (if applicable)

**Review Life Insurance**
- Request a Life Portability Information Form to continue term life insurance (optional)
- Request Life Conversion Information Form to convert term life insurance to whole life insurance (optional)

**Retiree Medical & Dental Enrollment**
Send to Health Care Authority:
- Completed PEBB Enrollment Form(s)
- Copy of Medicare card(s) if applicable
- First month’s premium(s) if not using DRS pension deduction

UW Retirement Checklist

During Month Prior to Retirement
- Review Post-Retirement Employment Rules at UW Benefits website if returning to work at UW or other Washington State agency. See “Returning to Work” under “Nearing Retirement” section of the Benefits website.
- Contact Transportation Services to stop deductions for bus pass or parking.
- Contact Combined Fund Drive to stop deductions or contribute as retiree: 206-616-3678 or uwcf@uw.edu
- Liberty Mutual – Change to direct bill if home or auto insurance is being paid via payroll deduction.
- Credit Union – Change to direct billing from automatic payments set-up (for car and/or mortgage payments).
- Contact Navia Benefit Solutions for options and directions about your FSA and/or DCAP benefits.

One or More Months After Retirement
The VEBA administrator will send a welcome kit to the address which you designated on your VEBA enrollment form. The VEBA account is funded by 25% of your unused sick leave at UW retirement (non-faculty).

Note: See reverse for numbered agency info.

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<td>1</td>
<td><strong>Affordable Care Act: Health Care Reform</strong>&lt;br&gt;Web: <a href="http://wahealthplanfinder.org">wahealthplanfinder.org</a></td>
<td>1-855-923-4633</td>
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<td>2</td>
<td><strong>Department of Retirement Systems (DRS)</strong>&lt;br&gt;Web: <a href="http://drs.wa.gov">drs.wa.gov</a></td>
<td>800-547-6657&lt;br&gt;360-664-7000</td>
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<td><strong>Fidelity Investments</strong>&lt;br&gt;Web: <a href="http://https://nb.fidelity.com/public/nb/uw/home">https://nb.fidelity.com/public/nb/uw/home</a></td>
<td>800-343-0860</td>
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<td><strong>Flexible Spending Account; Dependent Care Assistance Program</strong>&lt;br&gt;Web: <a href="http://pebb.naviabenefits.com">pebb.naviabenefits.com</a></td>
<td>425-452-3500</td>
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<td><strong>Health Care Authority (HCA)</strong>&lt;br&gt;Web: <a href="http://www.hca.wa.gov/public-employee-benefits">http://www.hca.wa.gov/public-employee-benefits</a></td>
<td>800-200-1004&lt;br&gt;360-725-0440</td>
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<td>6</td>
<td><strong>Internal Revenue Service (IRS)</strong>&lt;br&gt;Web: <a href="http://irs.gov">irs.gov</a></td>
<td>800-829-1040</td>
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<td>7</td>
<td><strong>Medicare</strong>&lt;br&gt;Web: <a href="http://medicare.gov">medicare.gov</a></td>
<td>800-633-4227</td>
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<td>8</td>
<td><strong>MetLife</strong>&lt;br&gt;<a href="http://www.mybenefits.metlife.com/wapebb">http://www.mybenefits.metlife.com/wapebb</a></td>
<td>866-548-7139</td>
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<td>9</td>
<td><strong>Social Security Administration (SSA)</strong>&lt;br&gt;Web: <a href="http://ssa.gov">ssa.gov</a></td>
<td>800-772-1213</td>
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<td>10</td>
<td><strong>Statewide Health Insurance Benefits Advisors (SHIBA)</strong>&lt;br&gt;Type “SHIBA” into search box at: <a href="http://insurance.wa.gov">insurance.wa.gov</a></td>
<td>800-562-6900</td>
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<td><strong>TIAA</strong>&lt;br&gt;Web: <a href="http://https://www.tiaa.org/public/tcm/washington">https://www.tiaa.org/public/tcm/washington</a></td>
<td>800-842-2273&lt;br&gt;206-529-2600</td>
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<td><strong>UW Academic Human Resources (AHR)</strong>&lt;br&gt;Web: <a href="http://ap.washington.edu/ahr/">http://ap.washington.edu/ahr/</a></td>
<td>206-543-5630</td>
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<td>13</td>
<td><strong>UW Benefits Office</strong>&lt;br&gt;Web: <a href="http://hr.uw.edu/benefits">http://hr.uw.edu/benefits</a>&lt;br&gt;Email: <a href="mailto:benefits@uw.edu">benefits@uw.edu</a></td>
<td>206-543-2800</td>
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<td>14</td>
<td><strong>University of WA Retirement Association (UWRA)</strong>&lt;br&gt;Web: <a href="http://www.washington.edu/uwra/">http://www.washington.edu/uwra/</a> or Email: <a href="mailto:retiremt@uw.edu">retiremt@uw.edu</a></td>
<td>206-543-8600</td>
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<td>15</td>
<td><strong>VEBA Plan Administrator</strong>&lt;br&gt;Web: <a href="http://veba.org">veba.org</a>; Email: <a href="mailto:customercare@veba.org">customercare@veba.org</a></td>
<td>888-828-4953</td>
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