

### Notifying UW of Your Retirement

Submit letter of retirement indicating your “Last day of work at the UW will be (date)...” using separation reason as “Retirement.”

#### Faculty:

- Notify Dean or Department Chair *at least* one quarter prior to your retirement date.
- Arrange 40% rehire with Department and Academic HR.<sup>12</sup>

#### 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.

### During the Year Prior to Retirement

#### Review Applicable Retirement Options

- Attend a UW Benefits Retirement Workshop to receive general information and most forms. [Find a course and register through UW Benefits site.](#)
- Department of Retirement Systems (DRS) Plans (PERS, TRS, LEOFF) - Review DRS “[Benefits Estimator](#)” tool on DRS website.<sup>2</sup>
- UW Retirement Plan (UWRP) – [Arrange a meeting](#) with a Fidelity<sup>3</sup> or TIAA<sup>11</sup> rep.
- [Voluntary Investment Program](#) (VIP) optional retirement savings plan – [Arrange a meeting](#) with a Fidelity<sup>3</sup> or TIAA<sup>11</sup> rep.
- WA State Deferred Compensation<sup>16</sup>
- Social Security<sup>9</sup> – Review “Retirement Income Calculator” available on [ssa.gov](#)

### 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.<sup>2</sup>

### 3 Months Prior to Retirement

#### Medicare Enrollment (if applicable)

Three months prior to age 65, enroll online at [ssa.gov](#). Otherwise contact Social Security<sup>9</sup> 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.<sup>2</sup>  
 Application for Retirement Form, copy of birth date evidence, and other applicable forms.

#### Mail to or request from UW Benefits<sup>13</sup>

- UW Application for Retirement Form
- VEBA enrollment Form (if applicable)

#### Review Life Insurance<sup>8</sup>

- Request a Life Portability Information Form to continue term life insurance (optional)<sup>8</sup>
- Request Life Conversion Information Form to convert term life insurance to whole life insurance (optional)<sup>8</sup>

#### Retiree Medical & Dental Enrollment

- Send to Health Care Authority:<sup>5</sup>
- Completed PEBB Enrollment Form(s)
  - Copy of Medicare card(s) if applicable
  - First month’s premium(s) if not using DRS pension deduction
  - [Electronic Debit Agreement Form](#) (optional) with 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<sup>13</sup> 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. 1320 NE Campus Parkway, Seattle, WA 98195, 206-221-3701; [ucommute@uw.edu](mailto:ucommute@uw.edu)
- Contact department regarding annual leave and sick leave questions (non-faculty).
- Contact [Combined Fund Drive](#) to stop deductions or contribute as retiree: 206-616-3678 or [uwcfcd@uw.edu](mailto:uwcfcd@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<sup>4</sup> for options and directions about your FSA and/or DCAP benefits.

### One or More Months After Retirement

The VEBA<sup>15</sup> 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.*

1	<b>Affordable Care Act: Health Care Reform</b> Web: <a href="http://wahealthplanfinder.org">wahealthplanfinder.org</a>	1-855-923-4633	Health insurance information for eligible individuals who are under age 65 and not covered under Medicare.
2	<b>Department of Retirement Systems (DRS)</b> Web: <a href="http://drs.wa.gov">drs.wa.gov</a>	800 547-6657 360-664-7000	For questions on your DRS pension including purchase of past service credit, tax forms changes of direct deposit & address.
3	<b>Fidelity Investments</b> Web: <a href="https://nb.fidelity.com/public/nb/uw/home">https://nb.fidelity.com/public/nb/uw/home</a>	800-343-0860	For questions on your UWRP and/or VIP accounts. To schedule an individual planning appointment, register online or call Fidelity at 800-642-7131.
4	<b>Flexible Spending Account; Dependent Care Assistance Program</b> Web: <a href="http://pebb.naviabenefits.com">pebb.naviabenefits.com</a>	425-452-3500	Flexible Spending Account (FSA) and Dependent Care Assistance Program (DCAP) benefits end the last day of the month in which you separate from UW. Contact Navia Benefit Solutions for options and direction for your account(s).
5	<b>Health Care Authority (HCA)</b> Web: <a href="http://www.hca.wa.gov/public-employee-benefits">http://www.hca.wa.gov/public-employee-benefits</a>	800- 200-1004 360-725-0440	Primary contact for retiree insurance questions. Processes retiree insurance benefits including changes during open enrollment.
6	<b>Internal Revenue Service (IRS)</b> Web: <a href="http://irs.gov">irs.gov</a>	800-829-1040	Information and forms for federal income taxes.
7	<b>Medicare</b> Web: <a href="http://medicare.gov">medicare.gov</a>	800- 633-4227	Information about Medicare benefits.
8	<b>MetLife</b> <a href="http://www.mybenefits.metlife.com/wapebb">http://www.mybenefits.metlife.com/wapebb</a>	866-548-7139	To continue basic and supplemental life insurance after retiring via group portability or group conversion option.
9	<b>Social Security Administration (SSA)</b> Web: <a href="http://ssa.gov">ssa.gov</a>	800-772-1213	Federal agency responsible for Social Security benefits and Medicare eligibility and enrollment.
10	<b>Statewide Health Insurance Benefits Advisors (SHIBA)</b> Type "SHIBA" into search box at: <a href="http://insurance.wa.gov">insurance.wa.gov</a>	800 562-6900	Under the Washington State Office of the Insurance Commissioner, SHIBA provides information about health insurance and Medicare information.
11	<b>TIAA</b> Web: <a href="https://www.tiaa.org/public/tcm/washington">https://www.tiaa.org/public/tcm/washington</a>	800-842-2273 206-529-2600	Phone for customer service or log in to access your UWRP and/or VIP accounts. To schedule an individual planning appointment, register online or call TIAA-CREF.
12	<b>UW Academic Human Resources (AHR)</b> Web: <a href="http://ap.washington.edu/ahr/">http://ap.washington.edu/ahr/</a>	206-543-5630	For questions regarding university and governmental policies for faculty, librarians and academic staff including questions on working after retirement and emeritus appointments.
13	<b>UW Benefits Office</b> Web: <a href="http://hr.uw.edu/benefits">http://hr.uw.edu/benefits</a> Email: <a href="mailto:benefits@uw.edu">benefits@uw.edu</a>	206-543-2800	Benefits Office, University of Washington, Box 359556, Seattle, WA 98195-9556
14	<b>University of WA Retirement Association (UWRA)</b> 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>	206-543-8600	Not-for-profit organization of UW retirees, employees, spouses, and domestic partners. Advocates on behalf of all UW retirees.
15	<b>VEBA Plan Administrator</b> Web: <a href="http://veba.org">veba.org</a> ; Email: <a href="mailto:customercare@veba.org">customercare@veba.org</a>	888-828-4953	The VEBA Administrator can answer questions after your VEBA account is established.
16	<b>Washington State Deferred Compensation</b> Web: <a href="https://savewithwa.empower-retirement.com/login.do?accu=DRSWR">https://savewithwa.empower-retirement.com/login.do?accu=DRSWR</a>	888-327-5596	For questions regarding this optional retirement program.