UNIVERSITY of WASHINGTON

RETIREMENT CHECKLIST

Preparing for and finalizing your retirement will be one of your biggest career decisions. Carefully review the timeline below before submitting an official letter of retirement. Your letter should indicate your termination date, which is your "Last day on payroll at UW" using "Retirement" as reason for termination. The proper time to submit your letter of retirement depends upon your position:

FACULTY:
- Notify dean or chair *at least one quarter* prior to your retirement date.
- Arrange 40% rehire with department *(if applicable).*

LIBRARIANS:
- Notify your supervisor *at least one quarter* prior to your retirement date.

PROFESSIONAL STAFF:
- Provide as much notice as possible, but no less than two weeks.

CLASSIFIED STAFF:
- **Contract:** Notify your supervisor according to your **union contract provisions** relating to resignation.
- **Classified non-union:** 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 the appropriate retirement workshop and register through UW Benefits site.[13]
- [ ] Department of Retirement Systems plan participants only (PERS, TRS, LEOFF): Review **"Benefits Estimator"** tool on Department of Retirement Systems (DRS) website.[2]
- [ ] UW Retirement Plan (UWRP) participants only: Arrange to **meet with a Fidelity[3] or TIAA[11] representative**.
- [ ] **Voluntary Investment Program** (VIP) optional retirement savings plan: Arrange to **meet with a Fidelity[3] or TIAA[11] representative**.
- [ ] WA State Deferred Compensation (DCP)[16]
- [ ] Social Security[9]: Review **"Retirement Income Calculator"** available on **ssa.gov**.

3–6 MONTHS PRIOR TO RETIREMENT

- [ ] ***(DRS plan participants only)*** Request an official pension estimate through your online DRS account (drs.wa.gov/oaa) or over the phone (800-547-6657). If you are not completing your retirement application through your online DRS account you will also want to request a paper copy the retirement application over the phone as well.[2]
- [ ] Create your ***my* Social Security** account online. Visit **ssa.gov** and select Sign In at the top right. Next select "Create an account".[9]

3 MONTHS PRIOR TO RETIREMENT

- ☐ **Medicare Enrollment** *(if applicable):* Three months prior to age 65, enroll online at **ssa.gov**. Otherwise contact Social Security[9] to enroll in Medicare Part A and B. This is required if enrolling in PEBB retiree insurance at age 65 or older. Contact the UW Benefits office for your "request for employment information form."[13]
- ☐ Complete the online **UW Retirement Application** found on the UW Benefits website.[19]
- ☐ If you have active student loans please apply for Public Student Loan Forgiveness at **studentaid.gov/pslf**.

30–60 DAYS PRIOR TO RETIREMENT

- ☐ ***(DRS plan participants only)*** Enroll for pension either online or by mailing forms to DRS[2] (Application for Retirement, copy of birth date evidence, and other applicable forms).
- ☐ **Retiree Medical & Dental Enrollment**—Submit the following to the Health Care Authority[5]
  - Completed PEBB Enrollment form(s)
  - Copy of Medicare card(s) if applicable
  - First month's premium(s) if not electing DRS pension deduction *(Not available to UWRP retirees)*
  - **Electronic Debit Agreement form** *(optional)* with first month's premium(s) if not electing DRS pension deduction

DURING MONTH PRIOR TO RETIREMENT

- ☐ If returning to work at UW or other Washington State agency, review post-retirement employment rules under **"Returning to Work"** on the UW Benefits website.[13]
- ☐ **Contact Transportation Services** to stop deductions for bus pass or parking. 206-221-3701 | **ucommute@uw.edu**
- ☐ ***(Non-faculty)*** Contact the UW Integrated Service Center with questions about unused vacation and unused sick time off. Email: **ischelp@uw.edu**
- ☐ **Contact Combined Fund Drive** to stop deductions or to contribute as a retiree: 206-616-3678 | **uwcfd@uw.edu**
- ☐ **Liberty Mutual**—Change to direct bill if home or auto insurance is being paid via payroll deduction.
- ☐ Other automatic payments—Contact your financial institution to change all other automatic payments (car, mortgage, etc.) to direct billing.
- ☐ **Contact Navia Benefit Solutions**[4] for options/directions concerning Flexible Spending Account (FSA) and/or Dependent Care Assistance Program (DCAP) benefits.
- ☐ **Contact HealthEquity**[17] for questions about your Health Savings Account (HSA).

ONE OR MORE MONTHS AFTER RETIREMENT

- ☐ Review the Welcome Kit that will be sent by the VEBA Administrator[15] to your address listed in Workday. This Welcome Kit will provide instructions on how to complete your VEBA enrollment. The VEBA account is funded by 25% of your unused sick leave at retirement *(non-faculty).*
- ☐ **Life Insurance Continuation Option through MetLife** *(forms available for completion after MetLife is provided your termination date and your coverage has ended).*[8]
  - Return a completed Life Insurance Portability Information Form to continue term life insurance *(optional)*[8]
  - Request and complete a Life Insurance Conversion Information Form to convert term life insurance to whole life insurance *(optional)*[8]

Refer to next page for resource information →

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RETIREMENT CHECKLIST — RESOURCE INFORMATION

1 Affordable Care Act: Health Care Reform
wahealthplanfinder.org | 855-923-4633
Health insurance information for eligible individuals who are under age 65 and not covered under Medicare.

2 Department of Retirement Systems (DRS)
drs.wa.gov | 800-547-6657 | 360-664-7000
For questions on your DRS pension including requesting your pension estimate, applying for your pension, purchase of past service credit, tax forms, changes of direct deposit and address.

3 Fidelity Investments
nb.fidelity.com/public/nb/uw/home | 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 Flexible Spending Account (FSA); Dependent Care Assistance Program (DCAP)
pebb.naviabenefits.com | 425-452-3500
FSA and 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 Health Care Authority (HCA)
hca.wa.gov/public-employee-retiree benefits
800-200-1004 | 360-725-0440
Primary contact for retiree insurance questions. Processes retiree insurance benefits, including changes during open enrollment.

6 Internal Revenue Service (IRS)
irs.gov | 800-829-1040
Information and forms for federal income taxes.

7 Medicare
medicare.gov | 800-633-4227
Information about Medicare benefits.
Online enrollment: ssa.gov/medicare

8 MetLife
mybenefits.metlife.com/wapebb | 866-548-7139
To continue basic and supplemental life insurance after retiring via group portability or group conversion option. When logging in use "PEBB-State of Washington" as your employer.

9 Social Security Administration (SSA)
ssa.gov | 800-772-1213
Federal agency responsible for Social Security benefits and Medicare eligibility and enrollment.

10 Statewide Health Insurance Benefits Advisors (SHIBA)
Type "SHIBA" into search box at insurance.wa.gov
800-562-6900
Under the Washington State Office of the Insurance Commissioner, SHIBA provides information about health insurance and Medicare information.

11 TIAA
tiaa.org/public/tcm/washington
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.

12 UW Academic Human Resources (AHR)
ap.washington.edu/ahr | 206-221-8927
For questions regarding university and governmental policies for faculty, librarians and academic staff including questions on emeritus appointments.

13 UW Benefits Office
hr.uw.edu/benefits | 206-543-4444 | benefits@uw.edu
Benefits Office, University of Washington, Box 354969
Seattle, WA 98195-4969

14 University of WA Retirement Association (UWRA)
washington.edu/uwra | 206-543-8600 | retiremt@uw.edu
Not-for-profit organization of UW retirees, employees, spouses, and domestic partners. Advocates on behalf of all UW retirees.

15 VEBA Plan Administrator
veba.org | 888-828-4953 | customercare@veba.org
The VEBA Administrator can answer questions after your VEBA account is established.

16 Washington State Deferred Compensation
drs.wa.gov/login
888-327-5596
For questions regarding this optional retirement program.

17 Health Savings Account Trustee
healthequity.com/PEBB | 877-873-8823
For questions regarding Health Savings Accounts (HSA)

18 UW Intergrated Service Center
isc.uw.edu | ischelp@uw.edu
For questions regarding leave distributions and UW retirement application.

19 UW Retirement Application
https://hr.uw.edu/benefits/retirement-plans/nearing-retirement/
Complete your UW retirement application no later than 60 days after terminating employment from UW.

20 UW Husky Card Office
hfs.uw.edu/Husky-Card-Services
For questions about obtaining your Retiree Husky Card.