

RETIREMENT CHECKLIST

FOR FACULTY SEEKING TO PARTICIPATE IN THE **VOLUNTARY RETIREMENT INCENTIVE (VRI)**

Preparing for and finalizing your retirement will be one of your biggest career decisions. Carefully review the timeline below before submitting your retirement application (remember to click the VRI checkbox).

KEY DATES (2025)

- **Election window:** October 15–November 12, 2025
- **Final date to return the VRI agreement:** By 5 p.m. on December 15, 2025
- **Last day of UW employment:** December 31, 2025
- **Payment timing:** January 9, 2026

► OCTOBER 1–14 (Goal dates — planning window)

- ☐ Check eligibility and understand VRI program requirements: hr.uw.edu/benefits/retirement-plans/nearing-retirement/voluntary-incentive-tenured-faculty-2025
 - Watch the recording of the VRI info session with Benefits Director Barry Nemeth.
- ☐ Notify your dean/chancellor as soon as possible of your request to participate in the VRI and seek their approval.
- ☐ Arrange to meet with a Fidelity¹ or TIAA² representative.
- ☐ WA State Deferred Compensation (DCP)³
- ☐ Social Security⁴: Review “Retirement Income Calculator” available on ssa.gov.

► OCTOBER 15–NOVEMBER 12

- ☐ Complete the online UW Retirement Application found on the UW Benefits website⁵. select “Yes” in the drop down indicating you are applying to retire under the VRI.
- ☐ Create your My Social Security account online. Visit ssa.gov and select Sign In at the top right. Next select “Create an account”.⁴
- ☐ Medicare Enrollment (if applicable): Three months prior to age 65, enroll online at ssa.gov. Otherwise contact Social Security⁴ 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.”
- ☐ If you have active student loans, please apply for Public Student Loan Forgiveness at studentaid.gov/pslf.
- ☐ Retiree Medical & Dental Enrollment: Submit the following to the Health Care Authority⁶
 - Completed PEBB Enrollment form(s)
 - Copy of Medicare card(s) if applicable
 - First month’s premium(s)
 - Electronic Debit Agreement form (optional)

► NOVEMBER 13–DECEMBER 31

- ☐ If returning to work at UW or other Washington State agency in a **non-faculty** position, review post-retirement employment rules under “Returning to Work” on the UW Benefits website.⁵
- ☐ If applicable, contact Transportation Services to stop deductions for bus pass or parking.
206-221-3701 | ucommute@uw.edu
- ☐ If applicable, 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.
- ☐ If you have automatic transfers tied to your UW paycheck—for example, a portion of your pay automatically deposited into a mortgage or loan account—contact your financial institution to arrange direct billing instead.
- ☐ If applicable, contact Navia Benefit Solutions⁷ for options/directions concerning Flexible Spending Account (FSA) and/or Dependent Care Assistance Program (DCAP) benefits.
- ☐ If applicable, contact HealthEquity⁸ for questions about your Health Savings Account (HSA).

► ONE OR MORE MONTHS AFTER RETIREMENT

Life Insurance Continuation Option through MetLife (forms available for completion after MetLife is provided your termination date and your coverage has ended).⁹

Refer to next page for resource information —→

RETIREMENT CHECKLIST – RESOURCE INFORMATION

- 1 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.
- 2 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.
- 3 Washington State Deferred Compensation**
drs.wa.gov/login
 888-327-5596
 For questions regarding this optional retirement program.
- 4 Social Security Administration (SSA)**
ssa.gov | 800-772-1213
 Federal agency responsible for Social Security benefits and Medicare eligibility and enrollment.
- 5 UW Benefits Office**
hr.uw.edu/benefits | 206-543-4444 | benefits@uw.edu
 Benefits Office, University of Washington, Box 354969
 Seattle, WA 98195-4969
- 6 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.
- 7 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).
- 8 Health Savings Account Trustee**
healthequity.com/PEBB | 877-873-8823
 For questions regarding Health Savings Accounts (HSA)
- 9 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.
- 10 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.
- 11 Internal Revenue Service (IRS)**
irs.gov | 800-829-1040
 Information and forms for federal income taxes.
- 12 Medicare**
medicare.gov | 800-633-4227
 Information about Medicare benefits. Online enrollment: ssa.gov/medicare
- 13 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.
- 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 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.
- 16 UW Human Resources**
hrhelp.uw.edu
 For questions regarding leave distributions and UW retirement application.
- 17 UW Husky Card Office**
hfs.uw.edu/Husky-Card-Services
 For questions about obtaining your Retiree Husky Card.
- 18 UW Retirement Application**
hr.uw.edu/benefits/retirement-plans/nearing-retirement/
 Complete your UW retirement application no later than 60 days after terminating employment from UW.
- 19 VEBA Plan Administrator**
veba.org | 888-828-4953 | customercare@veba.org
 The VEBA Administrator can answer questions after your VEBA account is established.

