

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 “Last day of work at the UW will be (date),” using “Retirement” as reason for separation. 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 and Academic HR<sup>12</sup> (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.
- Department of Retirement Systems plans (PERS, TRS, LEOFF): Review “**Benefits Estimator**” tool on Department of Retirement Systems (DRS) website.<sup>2</sup>
- UW Retirement Plan (UWRP): Arrange to **meet with a Fidelity<sup>3</sup> or TIAA<sup>11</sup> rep.**
- Voluntary Investment Program** (VIP) optional retirement savings plan: Arrange to **meet 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/or 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 a local Social Security office to enroll in Medicare Part A and B. This is required if enrolling in PEBB retiree insurance at age 65 or older.
- Complete online **UW Retirement Application**<sup>18</sup>

### ▶ 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, copy of birth date evidence, and other applicable forms).
- Submit **VEBA** enrollment form (*if applicable*): Mail to or request from UW Benefits<sup>13</sup>
- Life Insurance Continuation Option through MetLife<sup>8</sup>**
  - Request a Life Portability Information Form to continue term life insurance (*optional*)<sup>8</sup>
  - Request a Life Conversion Information Form to convert term life insurance to whole life insurance (*optional*)<sup>8</sup>
- Retiree Medical & Dental Enrollment**—Submit the following 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.

### ▶ 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<sup>13</sup>
- Contact Transportation Services** to stop deductions for bus pass or parking.  
206-221-3701 | ucommute@uw.edu
- (*Non-faculty*) Contact the Integrated Service Center with questions about unused vacation and unused sick time off.
- Contact Combined Fund Drive** to stop deductions or to contribute as a retiree:  
206-616-3678 | uwcfcd@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<sup>4</sup>** for options/directions concerning FSA and/or DCAP benefits.
- Contact HealthEquity<sup>17</sup>** for questions about your Health Savings Account

### ▶ ONE OR MORE MONTHS AFTER RETIREMENT

- Review the welcome kit that will be sent by the VEBA Administrator to the address designated on your **VEBA<sup>15</sup>** enrollment form. The VEBA account is funded by 25% of your unused sick leave at retirement (*non-faculty*).

Refer to next page for agency information →



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**RETIREMENT CHECKLIST – AGENCY INFORMATION**

- 1 Affordable Care Act: Health Care Reform**  
[wahealthplanfinder.org](http://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](http://drs.wa.gov) | 800-547-6657 | 360-664-7000  
 For questions on your DRS pension including purchase of past service credit, tax forms, changes of direct deposit and address.
- 3 Fidelity Investments**  
[nb.fidelity.com/public/nb/uw/home](http://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; Dependent Care Assistance Program**  
[pebb.naviabenefits.com](http://pebb.naviabenefits.com) | 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 Health Care Authority (HCA)**  
[hca.wa.gov/public-employee-benefits](http://hca.wa.gov/public-employee-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](http://irs.gov) | 800-829-1040  
 Information and forms for federal income taxes.
- 7 Medicare**  
[medicare.gov](http://medicare.gov) | 800-633-4227  
 Information about Medicare benefits.  
 Online enrollment: [ssa.gov/medicare](http://ssa.gov/medicare)
- 8 MetLife**  
[mybenefits.metlife.com/wapebb](http://mybenefits.metlife.com/wapebb) | 866-548-7139  
 To continue basic and supplemental life insurance after retiring via group portability or group conversion option.
- 9 Social Security Administration (SSA)**  
[ssa.gov](http://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](http://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](http://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](http://ap.washington.edu/ahr) | 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 UW Benefits Office**  
[hr.uw.edu/benefits](http://hr.uw.edu/benefits) | 206-543-4444  
 Benefits Office, University of Washington, Box 359556  
 Seattle, WA 98195-9556
- 14 University of WA Retirement Association (UWRA)**  
[washington.edu/uwra](http://washington.edu/uwra) | 206-543-8600 | [retiremt@uw.edu](mailto: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](http://veba.org) | 888-828-4953 | [customercare@veba.org](mailto:customercare@veba.org)  
 The VEBA Administrator can answer questions after your VEBA account is established.
- 16 Washington State Deferred Compensation**  
[savewithwa.empower-retirement.com](http://savewithwa.empower-retirement.com)  
 888-327-5596  
 For questions regarding this optional retirement program.
- 17 Health Savings Account Trustee**  
[healthequity.com/PEBB](http://healthequity.com/PEBB) | 877-873-8823  
 For questions regarding Health Savings Accounts (HSA)
- 18 UW Intergrated Service Center**  
[isc.uw.edu](http://isc.uw.edu) | 206-543-8000 | [ischelp@uw.edu](mailto:ischelp@uw.edu)  
 For questions regarding completing a UW Retirement Application.

