

RETIREMENT PROCESS OVERVIEW/ CHECKLIST

This checklist is designed to help guide you through the retirement process. Please note, not all items apply to all employees. Your designated Benefits Administrator will assist you with each step outlined below as it applies to your individual situation.

Retirement Process Overview			
	SCRS	PORS	ORP
Step 1	Determine Insurance Eligibility	Determine Insurance Eligibility	Determine Insurance Eligibility
Step 2	Submit Retirement Application via Member Access	Submit Retirement Application via Member Access	Contact Service Provider for Account Balance/Payment Options
Step 3	Submit Notice of Election/Tobacco Certificate	Submit Notice of Election/Tobacco Certificate	Submit Notice of Election/Tobacco Certificate
Step 4	Submit Medicare Part B Application to Social Security Administration	Submit Medicare Part B Application to Social Security Administration	Submit Medicare Part B Application to Social Security Administration
Step 5	Annual Leave: Payout or Deferral	Annual Leave: Payout or Deferral	Annual Leave: Payout or Deferral

Retirement Process Checklist

- Step 1 – Determine Insurance Eligibility**
 - Submit *Employment Verification Record* to PEBA
 - Determination received from PEBA
 - Insurance Eligibility Status: _____

- Step 2 – Retirement Application/Options**
 - SCRS/PORS – Submit Application via Member Access
 - ORP – Contact Service Provider

- Step 3 – Enroll in Retiree Insurance**
 - Submit *Notice of Election/Tobacco Certificate* to PEBA

- Step 4 – Apply for Medicare Part B**
 - Receive *Request for Employment Information* from Benefits Administrator
 - Submit *Request for Employment Information* and Medicare Part B Application to Social Security Administration

- Step 5 – Annual Leave Payout**
 - Cash – No further action necessary.
 - Deferral – Submit *Salary Reduction Agreement* to Benefits Administrator