RETIREMENT CHECKLIST FOR ALTERNATE RETIREMENT PLAN (ARP) MEMBERS
Must be completed at least 2-3 months in advance of retirement date

**Step 1**
Collect and make copies of the following items:

____ Copy of letter that has been submitted to Manager indicating retirement date *(must be the first of a month)*
____ Copy of employee’s birth certificate*
____ Copy of spouse’s birth certificate and social security number if married*
____ Copy of marriage license if married
____ Copy of birth certificate and social security number for any dependent child (up to age 26) covered on medical insurance*
____ Copy of Medicare A&B Cards for retiree and/or spouse if applicable**

**Step 2**
Prepare a written statement containing the following information and elections:

____ Home address, telephone number, and e-mail address to be used upon retirement
____ Choice of Retiree Medical and Dental Insurance – details regarding coverage options can be viewed in the [Retiree Health Insurance Options Planner](#) – *If taking early retirement, see below***

**Step 3**
Return all items outlined in Steps 1 and 2 to Human Resources at least 2-3 months in advance of your retirement date in one of the ways listed below:

- Fax: 860-679-4660
- E-mail: JVanAlstyne@uchc.edu
- Mail: UConn Health, Human Resources
  PO Box 4035
  Farmington, CT 06034-4035

**Step 4**
Upon receipt of your checklist items, Human Resources will prepare your retirement application, and will contact you to schedule a meeting to sign all prepared forms in the 2-3 weeks immediately prior to retirement. Please bring a photo ID with you to the meeting.
Step 5
In order to be eligible to enroll in retiree health insurance, upon retirement ARP members must use plan funds to immediately purchase a lifetime annuity in the minimum amount of $10,000. (Note to married individuals - to preserve spousal health benefits after the member’s death a married member of the ARP must purchase a minimum $10,000 two-life annuity naming his/her Spouse as co-annuitant.) The $10,000 annuity can be purchased through either TIAA-CREF (1-800-842-2776) or Prudential (844-505-7283). The annuity should take effect on the first of the month following retirement.

Additional Information

*B birth Certificates
If birth certificate is unavailable due to birth outside of the United States, there is an affidavit that must be completed and notarized in order to prove date of birth. Along with the affidavit, two additional forms of proof must be submitted (military record, passport, naturalization papers, hospital record of birth, religious record, letter from Social Security with date of birth).
*If birth certificate is not in English, a certified translated copy, as well as a copy of the original, must be submitted.

** Medicare
If an individual (retiree or spouse) is eligible for Medicare, s/he would need to enroll in Parts A&B for coverage effective the 1st of the month following retirement. Medicare’s website is http://www.medicare.gov.
The application form (received from Social Security) has an employer section that must be completed; please contact Jessica Van Alstyne (860-679-3073 or VanAlstyne@uchc.edu) to have the employer section completed.

***Retiree Health Insurance as an Early Retirement
If taking an early retirement, there will be additional premiums for retiree health insurance. According to the recent SEBAC agreement, individuals taking an early retirement will be responsible for an additional premium (see attachment C) of the plan’s total cost.

Accrual Payouts in Final Paycheck
Upon retirement, employees are eligible for lump sum payment of all compensatory time, all vacation time (up to a max of 60 days), and 25% of sick time (up to a max of 60 days). Employees wishing to defer these payouts on a pre-tax basis into a 403b or 457 plan must contact Prudential (844-505-7283) at least 3-4 weeks prior to retirement. Personal time is not paid out upon retirement.

Re-employed Retiree
If returning to employment as a re-employed retiree, you cannot do so until the $10,000 annuity has been established, which generally takes at least one month. While employed as a re-employed retiree, you will not be able to access your 401a account.