

# UConn HEALTH

---

## HUMAN RESOURCES

### Retirement Checklist for SERS Tier I, II, and IIA 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 (the card itself is not required) 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 birth certificate for anyone listed as a survivor if electing Option B or C (see details below)\*

#### **Step 2**

Prepare a written statement containing the following information and elections:

- Home address, telephone number, and e-mail address in effect as of retirement date
- Name, SSN, Address, and Relationship of Beneficiary (a beneficiary would receive a refund of any remaining contributions following the retiree and annuitant's death; multiple beneficiaries are permitted)
- Direct Deposit Information (Bank Name, Account Type, Account Number, Routing Transit Number)
- 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\*\**
- Election of Benefit Payment Option (A, B, C, or D) – see link below for details

[SERS Benefit Payment Options](#) (click for full description)

[Option D - Straight Life Annuity](#)

[Option A - 50% Spouse](#)

[Option B - 50% or 100% Contingent Annuitant](#)

[Option C - 10 Year or 20 Year Period Certain](#)

### **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:

- Fax: 860-679-4660
- E-mail: [HR-EmployeeResource@uchc.edu](mailto:HR-EmployeeResource@uchc.edu)
- Mail: UConn Health, Human Resources  
PO Box 4035  
Farmington, CT 06034-4035

### **Step 4 (If Medicare-Eligible or Covering a Medicare-Eligible Dependent)**

Any Medicare-eligible individual who will be covered on the retiree health plan must apply for [Medicare](#) Part A&B effective the month following retirement. For those who have already reached age 65, the application form can be downloaded from the following site - <https://www.cms.gov/Medicare/CMS-Forms/CMS-Forms/Downloads/CMS-L564E.pdf>. Please complete Section A, and submit the form to Human Resources for employer completion. This should be done well in advance of the retirement date. A copy of the Medicare A&B form, as well as documentation regarding the Medicare B premium, should be submitted to HR ([HR-EmployeeResource@uchc.edu](mailto:HR-EmployeeResource@uchc.edu)) upon receipt.

---

### **Retirement Planning Tools**

The Office of the State Comptroller has developed retirement counseling tools and estimators that can be found on their website: <http://www.osc.ct.gov/rbsd/howtoretire.html> or <http://www.osc.ct.gov/rbsd/stateretire.htm>. Employees may also wish to contact the Office of the State Comptroller's Counseling Services Unit at 860-702-3490 to attend an informational counseling session approximately 1 year before retirement.

### **Additional Information**

#### **\*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.

#### **\*\*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.

### **Next Steps**

Upon receipt of your checklist items, Human Resources will prepare your retirement application. Then, approximately 2-3 weeks prior to retirement, Human Resources will contact you to invite you to a group exit interview in order to sign the retirement application. Please bring a photo ID with you to the exit interview session.