UCONN HEALTH

HUMAN RESOURCES

RETIREMENT CHECKLIST FOR ALTERNATE RETIREMENT PLAN (ARP) MEMBERS

Provide the following to HR at least 2-3 months prior to retirement:

____ 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 certified marriage license if married

____ Copy of birth certificate* and SSN for any dependent child covered on insurance (up to age 26 for medical or age 19 for dental)

Return all items above to the HR Benefits Unit at least 2-3 months in advance of your retirement date:

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

Retirement Planning

Prudential's website can be accessed at www.ctdcp.com, or designated representatives can be reached as follows:

Scott Mann	860-937-7263	scott.mann@prudential.com
Giancarlo DiRoma	860-819-6972	giancarlo.diroma@prudential.com

Lifetime Annuity

In order to be eligible to enroll in retiree health insurance, ARP members must use plan funds to immediately purchase a lifetime annuity upon retirement, in the minimum amount of $10,000. (Note to married individuals - a married member of the ARP must purchase a minimum $10,000 joint and survivor lifetime annuity, naming his/her spouse as co-annuitant, to preserve spousal health benefits after the member's death.) 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.

Re-employed Retiree

Retirees who return to employment as a re-employed retiree cannot do so until the $10,000 annuity has been established, which generally takes at least one month. Re-employed retirees are not able to access their ARP 401a accounts while actively employed.

Birth Certificates

If birth certificate is not in English, a certified translated copy, as well as a copy of the original, must be submitted.
If birth certificate is unavailable due to birth outside of the United States, copies of two alternate documents must be submitted (military record, passport, naturalization papers, hospital record of birth, religious record, letter from Social Security with date of birth).

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 first of the month following the retirement date. For those who have already reached age 65, HR Benefits will complete the CMS-L564 form and forward it to the employee to submit it to Social Security Administration in advance of the retirement date. Copies of the Medicare A&B card and the letter from Social Security indicating the Medicare B premium must be submitted to HR (HR-EmployeeResource@uchc.edu) upon receipt.

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 4 weeks prior to retirement. Personal time is not paid out upon retirement.