



## Pre-Retirement Checklist

### ☐ Attend UTLearn Class: "Retiring from UT Austin"

This session provides an overview of retiree insurance enrollment, eligibility, premium billing and payment, Social Security, Medicare and coordination with UT insurance, returning to work after retirement, and getting started with TRS or ORP. Sessions are offered the 2nd Wednesday of every other month on the main UT campus and the 1st Friday of every other month on the Pickle Research Campus as space is available.

Register online at [utlearn.utexas.edu](http://utlearn.utexas.edu)

### ☐ UT Retiree Insurance Enrollment

Your insurance will not automatically continue when you retire. You must complete and submit forms to Human Resource Service Center (HRSC) prior to your retirement date (submit **31 days prior** is preferred). For eligibility and enrollment information, see "Retiree Insurance Benefit Overview,"

[hr.utexas.edu/insurance/retiree-insurance-overview](http://hr.utexas.edu/insurance/retiree-insurance-overview)

- For disability early retirement, disability retirees forfeit the right to retire under the normal-age eligibility requirements. A disability retiree will only receive UT Select medical insurance and optional insurances for the number of months in which they were employed in a benefits-eligible position at the University.

#### ⇒ Submit to HRSC:

- Insurance Enrollment/Change for Retirees
- Copy of proof of relationship documents
- Evidence of Eligibility Documents for Dependents
- Copy of TRS-30, Application for Service Retirement (TRS participants only)
- ORP Declaration of Retirement (ORP participants only)
- Automatic Payment Request Authorization (optional)

### ☐ Teacher Retirement System (TRS Members)

Contact TRS at [trs.state.tx.us](http://trs.state.tx.us) or phone 512-542-6400, **6 months prior** to retirement (preferred) to allow sufficient time for completion of TRS required forms.

### ☐ Optional Retirement Program (ORP Participants Only)

Contact your ORP provider **3 months before** retirement to review distribution options and beneficiary designations.

### ☐ Group Term Life Conversion

If converting coverage greater than \$50,000 to Individual Whole Life, contact HRSC for an application no later than **31 days** after your retirement date. Information and premiums at [dearbornnational.com](http://dearbornnational.com) or phone 800-538-0379.

### ☐ **Long Term Care**

Contact CNA at 800-262-4580 no later than **31 days** after your retirement date to request direct billing to your home address.

### ☐ **Personal Information**

Ensure your address and emergency contact information is current via UT Direct at [utdirect.utexas.edu/pnbiog](http://utdirect.utexas.edu/pnbiog) or submit *Personal Information Update* form to HRSC.

### ☐ **Beneficiary Designation**

Complete the secure online beneficiary designation form for your UT Group Term Life Benefits. Log into *My UT Benefits* with your EID and password: [utsystem.edu/benefits/myutbenefits](http://utsystem.edu/benefits/myutbenefits).

### ☐ **Medicare** (available at age 65 or younger if due to a disability)

Contact the Social Security Administration (SSA) at least **3 months before** you need benefits to begin. Enroll in Medicare Parts A and B at [medicare.gov](http://medicare.gov) or phone 800-772-1213. If over age 65 when you apply, request forms CMS-40B and CMS-L564. Take form CMS-L564 to HRSC to complete.

### ☐ **Social Security Benefits** (available at age 62 or older)

Contact the SSA about 3 months before the date you want your benefits to start. Apply online at [ssa.gov](http://ssa.gov), visit your local Social Security office or phone 800-772-1213.

### ☐ **UTSaver Program** (prior or current participants only)

Participants of UTSaver TSA 403(b) and UTSaver DCP 457(b) should contact their provider or financial advisor at least **3 months before** retirement to review distribution options and beneficiary designations.

⇒ Cancel current UTSaver participation as of the 1<sup>st</sup> of the month following employment separation.

### ☐ **Sick Leave Pool Donation**

Sick Leave balance is not paid to you. You may donate to Sick Leave Pool.

- Sick Leave Pool Donation Form: [hr.utexas.edu/forms/sick\\_leave\\_pool\\_transfer.pdf](http://hr.utexas.edu/forms/sick_leave_pool_transfer.pdf)

## **HUMAN RESOURCE SERVICE CENTER**

Website: [hr.utexas.edu](http://hr.utexas.edu)

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Campus Mail Address: HRSC, J5600

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Location: UT Administration Building, 1<sup>st</sup> Floor Lobby

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