Human Resources
Benefits and Leave

Pre-Retirement Checklist

☐ Attend "Retiring from UT Austin"

This two-hour class 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 month on the main UT campus and the **1st Friday** of every month on the Pickle Reseach Campus as space is available. For more information and to register online, see utlearn.utexas.edu.

☐ UT Retiree Insurance Enrollment

Your insurance will not automatically continue when you retire. You must complete and submit the appropriate forms to the Human Resource Service Center (HRSC) **31 days prior** to your retirement date (*preferred*). For more information, see hr.utexas.edu/retiree.

⇒ Submit to HRSC:

- Insurance Enrollment/Change for Retirees
- 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 or (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 or financial advisor **3 months before** retirement to review distribution options and beneficiary designations.

☐ Group Term Life Conversion

If converting coverage greater than $100,000 to Individual Whole Life, contact the HRSC for an application no later than **31 days** after your retirement date. For more information, see dearbornnational.com/products/employer_sponsored/group_life or call (800) 538-0379.

☐ **Personal Information**

Ensure your address and emergency contact information is current via UT Direct at utdirect.utexas.edu or submit a *Personal Information Update* form to HRSC. This form can be found at hr.utexas.edu/retiree.

☐ **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 at utsystem.edu/offices/employee-benefits.

☐ **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 or (800) 772-1213. If over age 65, request forms CMS-40B and CMS-L564. Take form CMS-L564 to the HRSC to complete.

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

Contact the Social Security Administration (SSA) **3 months before** the date you want your benefits to start. Apply online at ssa.gov. You can also visit your local SSA office or call (800) 772-1213.

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

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 effective the 1st of the month following employment separation.

☐ **Sick Leave Pool Donation**

Your Sick Leave balance is not paid to you upon separation. However, you can donate your unused Sick Leave to the Sick Leave Pool. Sick Leave can be donated up to 12 months after your retirement date.

- The Sick Leave Pool Donation Form can be found at hr.utexas.edu/current/forms

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