

RETIREE CHECKLIST

(Rev. 9/2009)

- _____ If TRS retiree, complete a TRS 18 form six months prior to retirement for an estimate of retirement benefits. The TRS 18 form is also available online at http://www.trs.state.tx.us/active.jsp?submenu=forms&page_id=/benefits/trs18. Once TRS receives the completed TRS 18, a retirement packet will be sent to your home.
- _____ If TRS retiree, provide Human Resources with your TRS 7 Notice of Final Deposit form which will come in the TRS retirement packet. Submit this form one month prior to your retirement.
- _____ If ORP retiree, contact your vendor representative(s) if you want to receive distributions from your ORP account.
Note: You must leave some funds in your ORP account in order to continue retiree insurance benefits.
- _____ If you are at least age 62 and want to receive Social Security, contact the Social Security Office at 900 Bugg Ln., Ste. 200, San Marcos, TX. Phone: 512-396-3972 or 800-772-1213.
- _____ If you are at least 65, contact the Social Security Office 3 months prior to retirement to inquire about Social Security and Medicare benefits. You must apply for Medicare Part B.
- _____ Contact Human Resources 30 days before your retirement date to set up a time to complete required paperwork.
- _____ If you have voluntary retirement programs (i.e. TexaSaver 457 Plan, or TDA 403b Plan) contact the vendors directly to start your distribution payments.
- _____ Notify your supervisor at least 2 weeks prior to your retirement date. Insure that your supervisor completes the “Separation Checklist” forms and a separation PCR.
- _____ After completion of the “Separation Checklist”, your supervisor will give it to you to bring to Human Resources and Payroll for the final checkout process.
- _____ You are eligible to keep your Texas State username active for e-mail use.
- _____ You are eligible for membership in the Retired Friends of Texas State organization. Applications are available through University Advancement at 245-2921. Refer to UPPS 04.04.53 Honors and Benefits for Retired Faculty and Staff for details.
- _____ Retirees are eligible to request a Texas State ID Card reflecting their retired status. Your current Texas State ID Card must be returned to ID Services to reprint the new card at no charge. Upon return to active status, the “retired status” Texas State ID Card can be returned and reprinted at no charge.

Phone numbers or e-mail addresses you may need:

1. TexaSaver 457 Plan – 1-800-634-5091
2. TRS – 1-800-223-8778 or www.trs.state.tx.us
3. Social Security – 1-800-772-1213
4. ERS – 1-877-275-4377 or www.ers.state.tx.us
5. ORP/TDA Vendor Representatives <http://www.hr.txstate.edu/benefits/orpvendors.html>
6. Texas State Special Projects Office – 512-245-2368
7. UPPS 04.04.53 Honors and Benefits for Retired Faculty and Staff - <http://www.txstate.edu/effective/upps/upps-04-04-53.html>