6 Months Prior to Retirement:

——— TRS Retirees Only: Request retirement packet online through myTRS at www.trs.texas.gov or complete for TRS 18 and submit directly to TRS. Once TRS receives your request, they will mail a retirement packet to your home address.

90 Days Prior to Retirement:

——— Schedule a meeting with Human Resources Benefits to complete insurance and other needed retirement documents. If you and/or your covered dependents are Medicare eligible, HR will provide you with the “CMS-L564 Request for Employment Information” form to take to Medicare for late enrollment in Medicare Part B.

——— If you are at least 65, contact the Social Security Office prior to retirement to inquire about Social Security and Medicare benefits. You must apply for Medicare Part B and will need “CMS-L564 Request for Employment Information”.

——— TRS Retirees Only: Provide Human Resources Benefits with your TRS 7 Notice of Final Deposit from your TRS Retirement Packet. Forms must be completed and submitted directly to TRS.

——— ORP Retirees: 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 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 have voluntary retirement programs (i.e. TexaSaver 457 Plan, or TDA 403b Plan) contact the vendors directly to start your distribution payments.

Month of Retirement:

——— Notify your supervisor at least 2 weeks prior to your retirement date. Complete Separation Checklist. Complete Request for Payment of Leave.

——— Review Special Privileges for Retired Faculty and Staff for information on these special privileges for Texas State retired faculty and staff.

Retirement Contacts you may find useful:

1. TexaSaver 457 Plan | 1.800.634.5091
2. TRS | 1.800.223.8778 or www.trs.texas.gov
3. Social Security | 1.800.772.1213
4. ERS | 1.877.275.4377 or www.ers.texas.gov
5. ORP/TDA Vendor Representatives http://www.hr.txstate.edu/benefits/Retirement-Programs-and-Information/orpvendors.html