

Retiree Checklist

September 2021

6 Months Prior to Retirement:

_____ TRS Retirees Only: Request a retirement packet online through myTRS at www.trs.texas.gov or complete a [TRS 18](#) and submit directly to TRS. Once TRS receives your request, they will mail a retirement packet to your home address within 90 days.

3 Months Prior to Retirement:

_____ No more than 90 days prior to your retirement date, please schedule a retirement meeting with Human Resources Benefits via our Pre-retiree website - [Retirees & Pre-Retirees : Office of Human Resources : Texas State University \(txstate.edu\)](#) During this meeting, you will 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" that HR provides along with the "CMS-40B Application for Enrollment in Medicare Part B".

_____ TRS Retirees Only: After your retirement meeting, please provide Human Resources with your TRS 7- Notice of Final Deposit from your TRS Retirement Packet. All other forms sent in the packet must be completed and submitted directly to TRS by the retiring employee.

_____ 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: 1.866.388.8515 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 the [Texas State University Exit Survey](#) here: www.hr.txstate.edu/exitsurvey. Complete the [Request for Payment of Leave form](#) with your department.

_____ If you are planning to defer any vacation or lump sum payouts, please ensure the Voluntary Retirement Savings Plan Authorization form found on the HR forms page has been filled out and turned in to HR **prior** to your retirement date.

_____ 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>