Retiree Checklist
May 2021

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: 1.866.388.8515 or 800.772.1213.

_______ If you have voluntary retirement programs (i.e. Texa$aver 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. Texa$aver 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