Employee Retirement Checklist

Updated January 13, 2016

There are 3 entities that all State of Utah retirees must contact when they are ready to begin the retirement process. This checklist provides a brief overview of the steps a retiree will complete with each entity.

A retiree may begin the retirement process 3 months prior to his/her desired retirement date.

Utah Retirement Systems (URS)
(801) 366-7770
(800) 695-4877

- Contact a Retirement Advisor and state your intention to retire and your retirement date
- Confirm that you are eligible to retire at your intended time
- Complete Application for Purchase of Future Service Credit (Section A), if applicable.
- Submit Application for Purchase of Future Service Credit to ERIC for Part B completion. ERIC will return the completed form to you and to URS on your behalf.
- Complete Retirement Application.
- Submit required proof-of-age documentation and marriage certificate
- Receive URS Monthly Benefit Estimate
- Make decisions regarding Partial Lump-Sum Payment Options (PLSO), Retirement Payment Options, and Life Insurance Options.
- Complete and return all applicable forms received in your brown URS folder.

*A detailed list of forms and explanations of options can be found at www.urs.org/mango/pdf/urs/pension/stepstoretire.pdf

Employee Resource Information Center (ERIC)
(801) 538-3742
employeegateway.utah.gov

- Submit your request to be assigned to a Retirement Specialist.
- You will be contacted by phone or email by your Specialist. The Specialist will gather information from you regarding your leave balances to prepare the most accurate leave benefits estimate possible.
- Work with Specialist to understand annual payout/deferral options and benefits provided by sick leave.
- Receive estimate worksheet from your Specialist.
- Schedule appointment to meet with your Specialist to sign final documents (listed below). This meeting should be scheduled to take place no sooner than 30 days before your retirement date, and normally within your final 2 weeks of employment.

Form Checklist

- Retirement Worksheet Part I
- Retirement Worksheet Part II
- URS Investment Contract (if applicable)
- Leave Transfer Authorization (if applicable)
- URS Employee Benefits Notification
- PEHP Employee Benefits Notification

Public Employee's Health Plan (PEHP)
Crystal (801) 366-7575 (A-G)
Kory (801) 366-7588 (H-O)
Jessica (801) 366-7730 (P-Z)

- Discuss how remaining sick leave is used as a retirement benefit.
- Discuss costs of post-retirement medical plans, including optional dental and vision.
- Discuss coverage options available at end of sick leave benefit period.
- Discuss Health Reimbursement Account (HRA) basic information.
- Complete Medical/Dental enrollment form for post-retirement plans.
- Complete Life Insurance enrollment form for potential State-paid basic life insurance.
- Discuss potential additional life insurance options.
- Complete Life Insurance enrollment form for optional additional life insurance.

Social Security/Medicare

If you are age 65 or older, you must be enrolled for Medicare A & B. Failure to enroll may result in financial penalties and cause problems with your PEHP Medicare Supplemental Coverage.

(800) 772-1213
www.ssa.gov/medicareonly