



Applying for service retirement

Please note, not all items apply to all employers.

Employer to-do's: insurance benefits

- Advise the employee that only PEBA can determine retiree insurance eligibility, and that eligibility for retiree group insurance is not the same as eligibility for retirement.
- Terminate the employee's coverage in EBS. Select Retired as termination reason and enter required dates.
- Provide a copy of the 18-month COBRA notice for employee and each covered dependent, if needed. Keep a copy of the notice in the employee's file.

Employer to-do's: retirement benefits

Employees may submit a retirement application as early as six months before their desired retirement date, but no later than 90 days after. State ORP participants should contact their service provider to request forms needed if they want to request a distribution from their State ORP account.

- Advise the employee not to terminate employment until PEBA has audited their service credit, and they receive official notice of retirement eligibility.
- Complete the Retirement Date Certification and Final Payroll Certification in EES. Provide the following:
 - Last day member earned compensation, date of termination and date of final paycheck;
 - Contract details;
 - Current annual rate of pay and number of normal paychecks per year;
 - Payment for and number of unused annual leave days and number of unused sick leave days (Class Two members only);
 - Earnings, contributions, months paid and contract length for final two quarterly reports; and
 - Earnings in addition to base salary for last four years of employment (last five years of employment for school districts), including reason for the additional payment(s).
- Complete the Final Payroll Certification in EES within 45 days of receiving notifications. View the [*Final payroll certification tasks in EES*](#) training document for more details.

Employee to-do's

- Review the [Get Set for Retirement](#) materials.
- If not yet applied for retirement, complete an [Employment Verification Record](#) and submit it to PEBA up to six months before retirement date to determine retiree insurance eligibility.
- Apply for retirement via [Member Access](#) as early as six months before, but no later than 90 days after, desired retirement date.
- If eligible for retiree insurance:
 - Review the [Insurance Benefits Guide](#) and [Insurance Coverage for the Medicare-eligible Member](#) handbook, if applicable.
 - Make coverage elections by completing a [Retiree Notice of Election](#) and a [Certification Regarding Tobacco and E-cigarette Use](#) form within 31 days of retirement date. Be sure to include any required documentation.
- Complete forms received from MetLife to continue or convert life insurance, if applicable.
- Review flyers and videos on the [Navigating Your Benefits](#) webpage.

- Gather information necessary to retire:
 - Full name, date of birth and Social Security number of each beneficiary. To name an entity as beneficiary, employee will need the entity's name and tax identification number.
 - Federal and state tax withholding designations.
 - Bank routing and account number to set up direct deposit for monthly benefit.
 - A copy of current driver's license or photo ID card issued by state's department of motor vehicles.
 - A copy of birth certificate, as well as a copy of each beneficiary's birth certificate, if applicable.
- Apply for retirement via [Member Access](#) as early as six months before, but no later than 90 days after, desired retirement date. Do not terminate employment until PEBA has audited service credit and sent official notice of retirement eligibility.
- If State ORP participant, [contact service provider](#) to request forms needed to request a distribution from State ORP account.
- Review and update life insurance, retirement plan, State ORP and Deferred Comp beneficiaries, if applicable.