



Applying for service retirement

This checklist can help guide you through the service retirement application process. Please note, not all items apply to all employees.

Employee to-do's: insurance benefits

- ☐ Review the [Get Set for Retirement: Insurance](#) materials.
- ☐ If you have not yet applied for retirement, complete an [Employment Verification Record](#) and submit it to PEBA up to six months before your retirement date to determine retiree insurance eligibility. Retirement eligibility does not guarantee eligibility for retiree health insurance. Only PEBA can determine retiree insurance eligibility.

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. Be sure to include any required documentation. Submit forms to PEBA within 31 days of your retirement date.
- ☐ Complete forms you receive from MetLife to continue or convert life insurance, if applicable.
- ☐ Contact The Standard to convert Supplemental Long Term Disability coverage, if applicable.
- ☐ Update life insurance beneficiaries.

Employee to-do's: retirement benefits

- ☐ Review the [Get Set for Retirement](#) materials.
- ☐ Gather information necessary to retire:
 - Full name, date of birth and Social Security number of each beneficiary. If you want to name an entity as your beneficiary, you 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 your monthly benefit. You must provide a voided check, current bank statement or signed letter from your bank that includes your name, account number and routing number. We cannot accept starter checks or deposit slips.
 - A copy of your current driver's license or photo ID card issued by your state's department of motor vehicles.
 - A copy of your 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, your desired retirement date. Do not terminate employment until PEBA has audited your service credit and you receive official notice of retirement eligibility.
- ☐ If you participate in State ORP, you can leave your balance in your account until you are ready to take a distribution or until required by the IRS to take annual minimum distributions. [Contact your service provider](#) to request forms needed to request a distribution from your State ORP account.
- ☐ Review and update State ORP and Deferred Comp beneficiaries, if applicable.