

Service retirement

Please note, not all items apply to all employers.

Employer to-dos: 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](#). The effective date is the first of the month following the retirement date.
- Provide a copy of the [18-month COBRA notice](#) for the employee and each covered dependent, if needed. Keep a copy of the notice in the employee's file.

Employer to-dos: retirement (cont.)

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 to receive 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 the number of normal paychecks per year;
 - Payment for and number of unused annual leave days and number of unused sick leave days (Class Two only);
 - Earnings, contributions, months paid and contract length for the final two quarterly reports; and
 - Earnings in addition to base salary for the last four years of employment (last five years of employment for school districts), including the reason for the additional payment(s).
- Complete the *Final Payroll Certification* in [EES](#) within 45 days of receiving notifications. View the *Final Payroll Certification* training video in [EES](#) for further assistance.

Employee to-dos

- Review the [Get Set for Retirement](#) preretirement materials.
- If you have not already submitted a retirement application, complete and submit to PEBA an [Employment Verification Record](#) to determine retiree insurance eligibility up to six months before your 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 you receive from [MetLife](#) to continue or convert life insurance, if applicable.
- Contact [The Standard](#) to convert Supplemental Long Term Disability coverage, 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.
- Review and update [State ORP](#) and [Deferred Comp](#) beneficiaries, if applicable.