

**6 Months Prior to Retirement:**

\_\_\_\_\_ **TRS Retirees Only:** Request a retirement packet online through MyTRS at [www.trs.texas.gov](http://www.trs.texas.gov) or complete a [TRS 18](#) and submit it directly to TRS. Once TRS receives your request, they will mail a retirement packet to your home address within 90 days

**3 Months Prior to Retirement:**

\_\_\_\_\_ No more than 90 days prior to your retirement date, please schedule a retirement meeting with Human Resources Benefits via our Pre-retiree website - [Retirees & Pre-Retirees: Office of Human Resources](#). During this meeting, you will 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 before retirement to inquire about Social Security and Medicare benefits. You must apply for Medicare Part B and will need the “CMS-L564 Request for Employment Information” form that HR provides, along with the “CMS-40B Application for Enrollment in Medicare Part B”.

\_\_\_\_\_ **TRS Retirees Only:** A Retirement Certification will automatically be routed to the Payroll Office via the online TRS portal. Once your retirement date has passed, the payroll office will have about 6 weeks to process the certification. Please note that the certification cannot be completed any sooner because the payroll office must confirm that all contributions for the entire University have been finalized. All other forms sent in the packet must be completed and submitted directly to TRS by the retiring employee.

\_\_\_\_\_ **ORP Retirees Only:** Contact your vendor representative(s) if you want to receive distributions in retirement.

**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 benefits, 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 the Texas State University Exit Survey here: [www.hr.txstate.edu/exitsurvey](http://www.hr.txstate.edu/exitsurvey). Complete the [Request for Payment of Leave form](#) with your department.

\_\_\_\_\_ If you are planning to defer any vacation or lump sum payouts, please ensure you have set up your account through Retirement@Work and that you have notified the Benefits office to ensure they have the necessary form to defer the payment.

\_\_\_\_\_ Review [Special Privileges for Retired Faculty and Staff](#) for information on these special privileges for Texas State University 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](http://www.trs.texas.gov)
3. Social Security | 1.800.772.1213
4. ERS | 877.275.4377 or [www.ers.texas.gov](http://www.ers.texas.gov)
5. [ORP/TDA Vendor Representatives Webpage](#)