Retirement Checklist  
AFSCME, PSSU

☐ Submit Letter of Intent to Retire  
Upon Retirement Decision

Resources are available to assist in determining your financial readiness for retirement.

☐ Medicare Enrollment  
90 days before retirement

If you or your spouse are Medicare eligible when you retire and you are enrolling in the REHP, contact Social Security to make sure you are enrolled in Medicare Parts A & B effective the first of the month in which you will retire.

☐ Meet With Your Retirement Vendor  
90 days before retirement

Meet with your specific university retirement representative to complete documents establishing your pension/annuity.

SERS - Fidelity, TIAA- PSERS

☐ Tax Deferral of Leave Payout(s), if desired  
90 days before retirement

Deferred Compensation Plan
There are TWO steps you must take in order to defer your sick/annual leave payout:

1) Enroll in the deferred compensation program.  
You must be contributing at least $5 prior to the pay in which you defer your sick and/or annual leave.

2) Meet with a deferred compensation representative to complete a Sick and Annual Leave Deduction Agreement.

Tax-Sheltered Annuity Plan
Employees must have an active Voluntary TSA 403b account with TIAA and/or Fidelity or have established an account by enrolling through the vendor. To open an account, you must navigate to the Retirement@Work to make your election.

Submit your completed TSA Leave Deduction Agreement directly to tsadeferral@passhe.edu or by fax to 717-720-4162.

View the TSA Deferral Handout for more information.

☐ Finalize Your Pension/Annuity Paperwork  
30 days before retirement

Finalization of your REHP enrollment and sick leave payout will not occur until the State System verifies your pension/annuity has been established.

☐ Retired Employees Health Program (REHP) Enrollment  
30 days before retirement

<table>
<thead>
<tr>
<th>SERS</th>
<th>PSERS/ARP</th>
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<tbody>
<tr>
<td>Enroll or Delay</td>
<td>Meet with a SERS counselor, complete and submit enrollment form (PEBTF-9) to SERS or if you are eligible but wish to delay your enrollment, complete the delayed enrollment form.</td>
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<tr>
<td>Monthly Premium Payment</td>
<td>Automatically deducted from your SERS pension check</td>
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<tr>
<td>Child Dependents</td>
<td>Dependent child may be covered up to age 26.</td>
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☐ Convert/Port Life Insurances  
Upon Retirement

Your employer-paid group life insurance coverage will cease on the last day of the month in which your employment ends. You will receive a conversion notice directly from MetLife. You have the option to convert the same or a lesser amount of your current group coverage into an individual insurance policy purchased at your own expense.

Your voluntary group life coverage will cease on your last day of employment. You will need to obtain a form from your human resource office to convert/port any existing coverage with CIGNA.

*This checklist is only intended as a guideline. To view more information, please refer to your retirement guide and university benefits office.

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