

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-dos: insurance benefits

- Review the [Get Set for Retirement](#) materials.
- If you have not yet completed your retirement application, complete and submit to PEBA an [Employment Verification Record](#) 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.
- Update life insurance beneficiaries with [MetLife](#).
- Contact [The Standard](#) to convert Supplemental Long Term Disability coverage, if applicable.

Employee to-dos: retirement benefits

- Review the [Get Set for Retirement](#) materials.
- Gather information necessary to retire:
 - The date you want to retire.
 - Full name, date of birth and Social Security number of each beneficiary. If you wish 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.
 - 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](#), contact your service provider to request forms needed to receive a distribution from your State ORP account.
- Review and update [State ORP](#) and [Deferred Comp](#) beneficiaries, if applicable.