

# UW RETIREMENT CHECKLIST FOR UWWRP

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**PLEASE FOLLOW ALONG ON YOUR CHECKLIST**



# **AGENDA**

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- > **UW Retirement Plan**
  - Retirement Eligibility Rules
  - UW Supplemental Retirement Plan Defined
- > **PEBB Retiree Health Insurance Eligibility**
- > **Medicare & Enrollment**
- > **PEBB Retiree Health Insurance Enrollment**
- > **Retiree Life Insurance**
- > **Annual leave and sick leave pay-out (VEBA)**
- > **Retirement Checklist**
- > **Working after retirement**
- > **UW Retirement Association**



# UW RETIREMENT CHECKLIST

## FACULTY:

- Notify dean or chair *at least one quarter* prior to your retirement date.
- Arrange 40% rehire with department and Academic HR<sup>12</sup> *(if applicable)*

## LIBRARIANS:

- Notify your supervisor *at least one quarter* prior to your retirement date.

## PROFESSIONAL STAFF:

- Provide as much notice as possible, but no less than two weeks.

## CLASSIFIED STAFF:

- **Contract:** Notify your supervisor according to your **union contract provisions** relating to resignation.
- **Classified non-union:** Provide as much notice as possible, but no less than two weeks.

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# UW RETIREMENT CHECKLIST

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## DURING THE YEAR PRIOR TO RETIREMENT

- > **Attend a UW Benefits Retirement Workshop**
- > **Arrange to meet with TIAA and/or Fidelity**
  - for UWRP plan
  - Voluntary Investment Program (VIP) *optional plan*
- > **WA State Deferred Compensation** *(optional plan)*
- > **Social Security – online Retirement Income Calculator**
- > **Contact the Department of Retirement Systems (DRS)** *(if applicable)*

# 3 MONTHS PRIOR TO RETIREMENT

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- > **Medicare Enrollment – (enroll if applicable)**
  - Required if enrolling in PEBB retiree health insurance at age 65 or older (including covered dependents)
- > **Department of Retirement Systems (if applicable)**
  - File for pension if applicable
  - If you previously participated in a DRS retirement plan (PERS, TRS, SERS):
    - > Contact DRS at 1-800-547-6657 to request a pension estimate and/or DRS retirement packet.
    - > Unsure? Contact DRS and ask if you still have funds or access your account:
      - [www.drs.wa.gov](http://www.drs.wa.gov)



# 3 MONTHS PRIOR TO RETIREMENT

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## > UW APPLICATION FOR RETIREMENT

- Complete online UW Retirement Application

- > Used to monitor benefits at time of separation

- > Required for Husky Retiree ID card

- > Become member of UW Retirement Association

- > Eligibility for VEBA

## > Life insurance continuation

- Contact MetLife for portability or conversion options



# 30-60 DAYS PRIOR TO RETIREMENT

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## FORMS TO SUBMIT

### > HEALTH CARE AUTHORITY (HCA)

- PEBB retiree coverage election form(s): (A for everyone), (B/C depending on plan selection)
- Declaration of Tax Status
- Dependent Verification
- Proof of Medicare coverage (Parts A and B if applicable)
- If you do have the ability to have premiums withdrawn from DRS pension include:
  - > First month's premium check
  - > Electronic Debit Service Agreement

# DURING MONTH OF RETIREMENT

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TURN IN TO YOUR DEPARTMENT

- > **keys, etc.**
- > **Husky card *without* U-Pass**
- > **Note: HMC: follow HMC procedures**



# DURING MONTH OF RETIREMENT

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TURN IN TO TRANSPORTATION SERVICES

- > **Husky card *with* U-Pass**
- > **Parking permit**
  - **Contact: 206-221-3701 or [ucommute@uw.edu](mailto:ucommute@uw.edu)**

# **DURING MONTH OF RETIREMENT**

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## **AUTOMATIC WITHDRAWALS/ DIRECT DEPOSITS**

- > Credit Union**
- > PEBB Long-Term Care**
- > Dues / Miscellaneous Deductions**
- > Husky card account:**
  - 206-543-7222**
  - [huskycrd@uw.edu](mailto:huskycrd@uw.edu)**

UNIVERSITY OF WASHINGTON

# COMBINED FUND DRIVE

OUR WORKPLACE GIVING CAMPAIGN

- > **As a UW retiree, support your favorite nonprofits!**
- > **It's easy! Give via check or through your pension**
  - contact the state CFD office at [cfid@sos.wa.gov](mailto:cfid@sos.wa.gov)
- > **You can make an incredible impact**
  - more than 5,000 nonprofits including UW programs
- > **If you are currently giving**
  - your contributions will continue into your retirement
  - Change you current pledge by contacting UWCDF
    - > [uwcfid@uw.edu](mailto:uwcfid@uw.edu)
- > **Visit [uw.edu/uwcfid](http://uw.edu/uwcfid) for more information.**



# **FLEXIBLE SPENDING ACCOUNT or DEPENDENT CARE ASSISTANCE PLAN**

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IF YOU HAVE EITHER OF THESE ACCOUNTS...

- > **Please contact Navia Benefit Solutions, the third party administrator for options and directions about your account(s).**
  - 1-800-669-3539 or
  - <http://pebb.naviabenefits.com/>
- > **May continue through end of calendar year via COBRA election.**

# **WHEN YOUR UW BENEFITS END**

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- > Workday sends an electronic notice that your UW insurance benefits have terminated.**
- > HCA will mail you a COBRA packet with information on how to continue your health care coverage.**
- > MetLife will mail you information on how to continue your employee life insurance. Contact MetLife for questions.**
- > VEBA Trust will mail information about the VEBA benefit to eligible UW retirees after your UW retirement.**



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# THANK YOU FOR ATTENDING!

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## UW Benefits office contact information:

**Web:** <http://hr.uw.edu/benefits/>  
**Email:** [totalben@uw.edu](mailto:totalben@uw.edu)  
**Phone:** 206-543-4444  
**Address:** 4300 Roosevelt Way NE , Box 354969, Seattle, WA 98195-4969

