

EMPLOYEE INFORMATION			
Employee Name: _____	Date: _____		
CHECKLIST			
Check	Item		
<input type="checkbox"/>	University of California Retirement Plan (UCRP) Election Information		
	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top; padding: 5px;"> <ul style="list-style-type: none"> › PERS, STRS and UCRP reciprocity process › Unused vacation leave / compensation time / sick leave › Post-retirement survivor continuance › Annual Cost-of-living adjustments (COLA) › UC Retirement Savings Program Distributions <ul style="list-style-type: none"> ○ 403(b) ○ 457 (b) ○ Defined Contribution Plan (DCP) ○ Taxes /Early Distribution Penalties </td> <td style="width: 50%; vertical-align: top; padding: 5px;"> <ul style="list-style-type: none"> › Capital Accumulation Payment (CAP) (if applicable) <ul style="list-style-type: none"> ○ Taxes/Penalties › Retirement elections are confidential, it is the employee responsibility to notify Manager/Supervisor and HR Business Partner of intent to retire. › Contact your department HR Representative for information about the Retirement Gift (if applicable) › Continue to monitor the retirement processing status on the UCRAYS Retirement Progress Chart. Monitor UCRAYS Messages for the retirement confirmation letter for the final details of your retirement. </td> </tr> </table>	<ul style="list-style-type: none"> › PERS, STRS and UCRP reciprocity process › Unused vacation leave / compensation time / sick leave › Post-retirement survivor continuance › Annual Cost-of-living adjustments (COLA) › UC Retirement Savings Program Distributions <ul style="list-style-type: none"> ○ 403(b) ○ 457 (b) ○ Defined Contribution Plan (DCP) ○ Taxes /Early Distribution Penalties 	<ul style="list-style-type: none"> › Capital Accumulation Payment (CAP) (if applicable) <ul style="list-style-type: none"> ○ Taxes/Penalties › Retirement elections are confidential, it is the employee responsibility to notify Manager/Supervisor and HR Business Partner of intent to retire. › Contact your department HR Representative for information about the Retirement Gift (if applicable) › Continue to monitor the retirement processing status on the UCRAYS Retirement Progress Chart. Monitor UCRAYS Messages for the retirement confirmation letter for the final details of your retirement.
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<input type="checkbox"/>	Key Date Information		
	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top; padding: 5px;"> <ul style="list-style-type: none"> › Separation Date: _____ › Retirement Date: _____ › First Monthly Payment: _____ </td> <td style="width: 50%; vertical-align: top; padding: 5px;"> <ul style="list-style-type: none"> › Retirement election decision is irrevocable. </td> </tr> </table>	<ul style="list-style-type: none"> › Separation Date: _____ › Retirement Date: _____ › First Monthly Payment: _____ 	<ul style="list-style-type: none"> › Retirement election decision is irrevocable.
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	<ul style="list-style-type: none"> › Expect retirement processing delays for: <ul style="list-style-type: none"> <li style="width: 50%;">○ Eligibility for reciprocity <li style="width: 50%;">○ Disability Crossover <li style="width: 50%;">○ Lump Sum Cash Out <li style="width: 50%;">○ Eligibility for Minimum Required Distributions (MRD) <li style="width: 50%;">○ UCRP service credit discrepancy <li style="width: 50%;">○ Plan 02, 401(a)(17) or 415 Limited <li style="width: 50%;">○ Multiple retirement tiers <li style="width: 50%;">○ Qualified Domestic Relations Order 		
<input type="checkbox"/>	Beneficiary Benefit and Information		
	<p>Beneficiaries for:</p> <ul style="list-style-type: none"> › UCRP Death Benefit (\$7,500) one-time payment (benefit not available with Lump Sum Option) <ul style="list-style-type: none"> ○ To review your beneficiary elections, visit the UCRAYS website: https://retirementatyour.service.ucop.edu <ul style="list-style-type: none"> – Login with your Username and Password – Click on “My Beneficiaries” ○ You may also contact the Retirement Service Administration Center at (800) 888-8267 ○ Review the RASC Call Tree for appropriate assistance › Retirement Savings Plans – DC Plan, 403(b) and/or 457(b) Plan(s) <ul style="list-style-type: none"> ○ To review your beneficiary elections, visit the Fidelity Investments website: http://www.netbenefits.com <ul style="list-style-type: none"> – Login with your Username and Password – Click on “Profile” then “Beneficiaries” ○ You may also contact Fidelity Retirement Services at (866) 682-7787 		
<input type="checkbox"/>	DC Plan, 403(b) and/or 457(b) Plans (Consultation is Available)		
	<ul style="list-style-type: none"> › Contact Fidelity Investments at (866) 682-7787 for retirement savings plan options (systematic withdrawal or distribution request). Must be separated for 31 days. At age 73, there is a minimum distribution requirement (MDR). Fidelity Investments will provide a detailed letter regarding the MDR when reaching eligibility. › If you have a current 403(b) loan, contact Fidelity Investments for payment options during retirement to avoid tax implications. › Schedule a 1:1 consultation meeting with Fidelity Investments at https://digital.fidelity.com/prgw/digital/wos/ Spanish speaking available. 		

	<ul style="list-style-type: none"> › Options <ul style="list-style-type: none"> ○ Leave money in plan(s) – minimum amount of \$2,000 is required ○ Rollovers/transfers ○ Total or partial distributions ○ Variable payments (systematic withdrawal) 	<ul style="list-style-type: none"> › Early distribution penalties › Minimum distribution requirement
<input type="checkbox"/>	Social Security	
	<ul style="list-style-type: none"> › If you did not participate in Social Security during your employment at UC, you may still be eligible from previous employers. You also may be eligible for Spouse Social Security benefits. › Contact the Social Security Office at (800) 772-1213 for assistance. 	
<input type="checkbox"/>	Health Benefits	
	<ul style="list-style-type: none"> › Medical/dental coverage continues <i>(if eligible)</i> › Disregard notifications for end of benefits and COBRA › UCR Benefits are extended to the last day of the month following retirement date. › UCR Benefits End Date: _____ 	<ul style="list-style-type: none"> › Vision coverage may be continued through COBRA or by contacting VSP directly at (866) 240.8344 to enroll in the retiree vision plan. › A 15-day blackout period applies for processing change to retiree benefits.
<input type="checkbox"/>	Other Insurance Plan Information	
	<ul style="list-style-type: none"> › Legal coverage continues <i>(if eligible or enrolled)</i> › Life and AD&D can be converted or you may enroll in AD&D at Open Enrollment › Disability, business travel insurance and Workers' Compensation will end on the last day worked 	
<input type="checkbox"/>	Certificate of Creditable Coverage	
	<ul style="list-style-type: none"> › When you retire from UCR, the certificate of creditable coverage will be mailed to your mailing address from your medical plan provider. › The certificate of creditable coverage will state your employer medical plan coverage is ending. › Please retain this document for your records 	
<input type="checkbox"/>	Medicare Eligibility	
	<ul style="list-style-type: none"> › If you and/or your Spouse/Domestic Partner are Medicare Eligible (65+), you must enroll in Medicare Part A & B only. When the Medicare card(s) are received, please email the Benefits Office at benefits@ucr.edu for instructions on updating UC medical coverage to avoid termination of your UC medical plan. If you and your spouse/eligible Domestic Partner are age 65, you will need the following items: <ul style="list-style-type: none"> ○ Copy of Medicare card(s) ○ UC Medicare Advantage enrollment form › Make your Medicare effective the month following your retirement effective date (i.e., Retire 7/1/XX, Medicare effective date is 8/1/XX) 	
<input type="checkbox"/>	Health Flexible Spending Account (Health FSA) and/or Dependent Care Flexible Spending Account (DepCare FSA)	
	<ul style="list-style-type: none"> › If you are contributing to the Health FSA and/or the DepCare FSA. If you retire immediately from UCR, your Health FSA coverage ends on the last day of the month in which separation occurs. i.e. 7/1/XX, HSA end date will be 7/30/XX. You may extend coverage through COBRA if your account has a positive balance. › You cannot file claims for out-of-pocket expenses incurred after this date unless you enroll in COBRA through WEX. › For COBRA enrollment, contact WEX directly at (844) 451-1338 for further assistance. 	
<input type="checkbox"/>	Home and Auto Insurance	
	<ul style="list-style-type: none"> ○ If you have auto, home, or renter's insurance through Farmers Insurance or California Casualty, contact them directly to discuss payment arrangements as a result of your retirement at: <ul style="list-style-type: none"> • Farmers Insurance – (877) 594-7899 (current UC systemwide vendor and new enrollment available) • California Casualty – (866) 680-5142 (former vendor and no longer available for new enrollment) › Farmers Insurance and California Casualty premiums cannot be deducted from your monthly retirement check; however, payments may be set up as an automatic deduction from your bank account. 	
<input type="checkbox"/>	UCR Emeriti/Retiree Association	
	<ul style="list-style-type: none"> › If you would like to join the UCR Emeriti/Retiree Association, we will connect you with the program administrator to further assist with the membership enrollment process. › We recommend you visit the http://retirees.ucr.edu/ website for Emeriti/Retirees updates. 	

☐	The Recreation Center
	<ul style="list-style-type: none"> › The UCR Recreation Center premiums cannot be deducted from your monthly retirement check; however, payments may be set up by contacting the UCR Recreation Center at (951) 827-5738.
☐	UC Retirement Administration Service Center (RASC) Contact Information
	<ul style="list-style-type: none"> › Contact RASC at (800) 888-8267 <ul style="list-style-type: none"> ○ Review the RASC Call Tree for appropriate assistance › Retiree benefits system changes from the UCPATH portal to UCRAYS › On UCRAYS under the “My Account” tab, you have access to all your retiree benefits and pension information. <p>RASC will assist you with the following questions:</p> <ul style="list-style-type: none"> › Change your mailing address › Change your Federal and State withholding taxes › Update your Direct Deposit › General assistance with your medical and dental plans › Retirement paycheck information › Open Enrollment › Please note: W2 forms (UCR earnings) will be issued from the UCPATH Center and 1099R (retirement income) will be issued will be issued from RASC. The following year and forward you will only receive 1099R’s for the retirement income. › Hours of Operation: Monday – Friday 7:00 a.m. – 4:30 p.m. closed all UC holidays.