

## Understanding the steps in your retirement process

As you complete the steps necessary to retire, the retirement application progress tracker will show you where you are in the process. Here's an overview of each stage, including any actions you need to take.

### **Retirement Initiated**

Congratulations! You have successfully begun the retirement process, and a Personal Retirement Profile (PRP) will be prepared and sent to you. Please note that your PRP will not be sent more than 90 days in advance of your retirement date.

### **UC Is Preparing Your Personal Retirement Profile (PRP)**

Your PRP is being prepared, with information about:

- Your retirement income projections
- Your eligibility for retiree health insurance, if any
- The percentage of UC's contribution to retiree health premiums you'll receive, if applicable

You can expect your PRP and retirement packet within 2-3 weeks.

### **PRP Is Ready – Complete Your Election Instructions**

Your Personal Retirement Profile (PRP) has been prepared, and should be received within the next week. Once you receive your PRP, it is time for you to make a few important decisions about your retirement. If you wish to proceed with retirement, please complete and submit your election instructions as quickly as possible.

### **PRP Expired**

Because you did not complete your election within 90 days after your retirement date, your PRP has expired. If you still wish to retire, you will need to restart the retirement process and create a new PRP.

### **Election Initiated**

UC has received your election instructions and is preparing your election form for signature. You can expect your election form within 2-3 weeks.

### **Sign and Submit Your Election Form**

Your election form is complete and has been sent to you to sign and submit. You should receive it within the next week. Please sign and submit your form, along with any required supporting documentation, as soon as possible. **Important:** If you are married or in a domestic partnership, your spouse or domestic partner must sign your retirement election form.

You may upload your signed election form and supporting documentation via UCRAYS, or submit it to the [UC Retirement Administration Service Center](#) by mail or fax.

### **UC Received Signed Election**

UC has received your signed election form and will contact you if you need to provide additional information or documentation.

**Submit Required Documentation**

Documentation is required to complete your retirement application. If you have not already done so, please submit all required documentation listed on page 2 of your retirement election form.

**UC Reviewing Documentation**

UC is reviewing your election form and the documentation you submitted to ensure we have the information we need to continue processing your retirement.

**UC Confirming Calculation**

UC is confirming your retirement benefit calculations.

**Retirement Completed; Confirmation Sent**

Congratulations! Your retirement election is complete. Your confirmation has been sent and should arrive within 7 days. You have until your retirement date, or 15 days after the date of your confirmation letter (whichever is later), to cancel your retirement election or make any changes, including a change in retirement or separation date, retirement option or distribution method.

**Important:** If you are an active UC employee, you must take action to separate from UC employment by the separation date noted on your retirement election. Your retirement payment may be delayed if we are unable to confirm your separation from employment.