

Required Documentation

In order to effectively complete the retirement election process, the following items will be required and readily available during your retirement meeting with the UCR Central Benefits Office:

UCRAYS Username and Password readily available to log in

- <https://retirementatyourservice.ucop.edu/UCRAYS/Account/LoginE?ReturnUrl=%2fUCRAYS>

- **Required supporting documents:**
 - **Birth Certificate or Passport** (if applicable) –Spouse/domestic partner (DP) or any other contingent annuitants
 - **Marriage certificate or IRS 1040 tax filing** page showing spouse/DP (if applicable)
 - Supporting documents can uploaded separately to your computer or emailed separately in a pdf format to be uploaded to UCRAYS system during the retirement meeting.
 - If eligible and electing the Lump Sum Option – no supporting documents are required.
- **For direct deposit purposes** - bank account information (routing number and account number available to verify system information).
- **Federal and State Tax** Withholding preferences
- **UC Retiree Health Benefits** Continuation (if applicable)
- Be prepared to decide which plan option you wish to select for **your lifetime benefit, survivor** (if applicable) and contingent option (i.e., Option BRI, A, B, C, D)
- Be prepared to decide **how to apply your CAP funds** (if applicable) i.e. roll over to 403(b), 457(b), DCP, IRA, cash out
- **Spouse or Domestic Partner electronic signature** will be required during the retirement election meeting. Please ensure spouse or domestic partner is available.

Please Note: Retirement elections are irrevocable once the retirement election is confirmed.