



Checklist for Retirement-ORP participants

RETIREES: Actions to accomplish BEFORE your STC retirement.

Retiring can be a simple process if you plan ahead. If you are an ORP member, contact your ORP representative nearing retirement. This will allow sufficient time for you to learn the process and, to complete and submit all required forms to the appropriate agencies.

Because retirement issues are complex, and individual situations differ, STC Benefits staff members are unable to advise employees about individual TRS, ORP, or Social Security retirement options or selections.

The following checklist is provided to assist you in making a smooth transition to retirement.

- 1. Submit a notice of resignation 45 days before your retirement date. (Policy 4922)
- 2. Do you qualify for retiree insurance through ERS (GBP)?
 - If no, go to #3.
 - If yes, fill out a Retiree Insurance Enrollment Form provided by Benefits Specialist. Go to #3.
- 3. Are you Medicare eligible?
 - If no, check off #3. **However, you will need to apply when you become eligible.**
 - If yes, Make your SSA appointment. Apply for Part A&B.
 - If you qualify for retiree insurance through ERS bring us your part A&B (if you are already on Medicare)
- 3. Contact your ORP vendor _____ and ask what is the retirement process on their end.
- 5. Schedule your exit interview in the Office of Human Resources-Benefits. (*Held on your last workday of employment*)
- 6. Sign an ORP Vesting/Termination Notice (*completed during Retirement Exit Interview*)

Policy 4922

Re-Employment of Retirees An employee of the College who has retired under the Teacher Retirement System (Subtitle C, Title 8, Government Code) or the Optional Retirement Program (Chapter 830, Government Code) may be re-hired if:

- 1) The person has been retired for at least 30 calendar days before the effective date of the employment; and
- 2) The person is eligible for re-employment.

Employees Retirement System –
Email: <http://www.ers.state.tx.us>
Phone: 1(877) 275-4377

Social Security Administration -
Email: <http://www.ssa.gov>
Phone: 1(800) 772-1213

STC WISHES YOU A HAPPY AND PROSPEROUS RETIREMENT!