

My Retirement To-Do List

- Determine eligibility – check PERS Handbook or go to www.drs.wa.gov then click on “members”.
- Plan Ahead - A minimum of three months is best. Determine retirement date – DRS will see you as retired the first of the month following your last month of employment.
- Call the Department of Retirement Systems and/or ICMA to request retirement information and papers at least **three months** before you plan to retire.
 - DRS – 1-800-547-6657 – PERS 1, 2 and 3
 - ICMA - 1-888-711-8773 – PERS 3
- Write a letter to your department informing them of the date you plan to retire and your last working day. Provide HRS a copy - campus zip 1014 or email hrs@wsu.edu.
- Is your Spouse/SSDP a WSU employee? You may be able to transfer to their medical/dental coverage and transfer a portion of your life insurance to their plan. Consult HRS for details.
- VEBA Account (Voluntary Employee’s Benefit Association) for sick leave cash-out contributions at retirement- 25% of total hours. Additional information and forms can be found at www.hrs.wsu.edu/VEBA. Normally 2-3 months after retirement before VEBA account is set up.
 - Teaching and research faculty are not eligible.
- Health Benefits – check the HCA/PEBB retiree guide to determine if you are eligible for retiree medical/dental/life coverage. As mentioned above, if your spouse/SSDP continues WSU employment or other employment you may be able to be added to their coverage and waive the retiree health coverage. You can receive forms from HRS or request them from the Health Care Authority at 1-800-200-1004 or www.pebb.hca.wa.gov.
 - Coverage is continuous – however, there may be a lag between the employee coverage ending and the retiree coverage activation.
- Medicare Eligible? (Age 65). Contact Social Security at least three months before you retire to get enrolled in Medicare Part B. Your effective date will be the same as your retirement date. Look in your telephone directory for the local Social Security phone number.
www.medicare.gov 1-800-772-1213 – National 1-877-405-9796 – Lewiston
- Forms can be left at HRS for review prior to being mailed. For questions please call 509-335-4521 or hrs@wsu.edu.
- Locate your birth certificate or passport – it will be needed to verify date of birth.
- Tax Deferred Investment Programs: TIAA-CREF and WA Deferred Compensation Plan. If you have an account and wish to increase contributions before retirement, contact HRS – 509-335-4521 or hrs@wsu.edu.
- Returning to Work After Retirement. Before returning to work, be sure you are aware of how it could impact your retirement benefit. Visit the DRS web page at www.drs.wa.gov or call 1-800-547-6657.