

# State University of New York at Potsdam

## Pre-Retirement Checklist

### OPTIONAL:

- \_\_\_ Meet with Retirement System Representative
- \_\_\_ Submit Requests for Estimates to retirement system (ERS/TRS)
- \_\_\_ Access SUNY website for Planning for Retirement, click [here](#).
- \_\_\_ Schedule exit meeting with Benefits Administrator.

### REQUIRED:

- \_\_\_ Schedule general information meeting with Benefits Administrator.
- \_\_\_ Decide on final workday. \_\_\_/\_\_\_/\_\_\_\_
- \_\_\_ Date of retirement (day after final workday). \_\_\_/\_\_\_/\_\_\_\_
- \_\_\_ Notify the President in writing, with a copy to your supervisor & HR.
- \_\_\_ File Retirement Application with your retirement system (NYS Retirement).  
**Must be filed 30-90 days prior to date of retirement.** (Must be notarized)  
  
ERS – Application for Service Retirement [RS 6037](#)  
TRS – Application for Retirement [RET-54](#)
- \_\_\_ Complete & return Sick Leave Credit Form ([PS-405](#)) to HR. Click [here](#) to use the Sick Leave Credit Calculator.
- \_\_\_ Complete & return Survivor's Benefit Program for ERS members ([RS-6355](#)) to HR. (Must be notarized)
- \_\_\_ SUNY ORP Members – contact Investment Provider.
- \_\_\_ If applicable, SUNY Voluntary Savings Plan 403(b) – contact Investment Provider.
- \_\_\_ If applicable, SUNY Voluntary Savings Plan 457(b)- AKA NYS Deferred Compensation Plan, More information, [here](#).
- \_\_\_ Complete steps as outlined in email received from Human Resources before your retirement date.

**MEDICARE:**

\_\_\_\_\_ If you or any of your dependents covered under your current NYSHIP health plan are age 65 or older or disabled, you must enroll in Medicare A & B via the Social Security Administration Office. NYSHIP recommends that you start this process at least three months prior to your retirement date. Do not enroll in Medicare part C or D. Your NYSHIP health insurance will be secondary to Medicare effective the first day of the month following the two-pay-period “run-out”. The Social Security Administration may be reached at (800) 772-1213. The [Medicare & NYSHIP Booklet](#) is an important resource to read for information on how Medicare & NYSHIP work together in retirement.

**MISCELLANEOUS INFORMATION:**

[CSEA Employee Benefit Trust Fund](#) (Retiree Benefits): (800)342-4146

[UUP Benefit Trust Fund](#) (Retiree Benefits)

M/C & PEF employees will automatically receive information from Civil Service via mail.

**THINGS TO REMEMBER:**

- Up to 30 days of vacation can be paid out.
- Accrued holiday leave and compensatory leave cannot be paid out.