Retirement Checklist

The HR Department has put this simple checklist together for those employees planning on or considering retiring. Simply follow these steps:

1. Employee needs to provide a letter of intent to retire to their Department Head. This letter will need to include their effective date of retirement.

2. The department will prepare a Retirement PAF (with letter from employee attached) and forward to the Personnel office. This PAF will note retirement effective date, any vacation, safety day accrual, wellness and comp leave balances to be paid if applicable; sick leave payment to be paid if applicable and/or sick leave available to be applied for retirement service credit. Remember to include any projected accruals until retirement date noted separately.

3. Employee will need to log into their TCRS account (TCRS Self-Service portal on their website) and follow the steps for Retirement. Contact HR Department and schedule an appointment to go over insurance options available as a retiree (auto draft of premiums), wellness program as a retiree, importance of maintaining current address info, etc.

4. Finance Department will complete Employer information and provide to HR office to process application through TCRS portal once Employee completes their portion.

5. Paperwork will need to be prepared for any insurance coverage options they elect/applicable COBRA notifications and set up auto draft with Finance Department.

TCRS encourages employees who are retiring to have their application completed and submitted online through the Self-Service portal a minimum of 60-90 days PRIOR to your last paid day of service. Please keep in mind that the end of the calendar year and end of school year are historically very busy times with TCRS and extra time for paperwork processing may be necessary.