

UAH Retirement Process During Limited Operations (7/2020)

During COVID-19, the University has limited in-person interaction with employees and below are instructions for you to follow to apply for retirement. UAH Human Resources can certify the employer section of the retirement application electronically in the Employer Self-Service (ESS Portal). Here are the steps you should take to apply for retirement during COVID-19:

- Contact a Benefits Employee Relations Representative listed below. The HR representative will answer any questions that you have and be your point of contact during the process.

Patricia Ackers 256-824-2275 | Connie Brand 256-824-6640 | Sandra Parton 256-824-6641

- Complete the TRS Service Application Packet: Part 1 (at least 90 days in advance but not less than 30). Here is the link to the application:

www.rsa-al.gov/uploads/files/TRS_RAP_Service_Retirement_Application_Packet_Part_I.pdf

Below are basic instructions to guide you:

Part 1: Complete TRS Application for Service Retirement

TRS Service Application (Page 1):

- Complete the top sections of the form that includes: *Your Information, Retirement Information, and Beneficiary Designation*
- *Member Authorization Section* –
 1. Take to Notary Public (usually available at your bank or credit union) to complete.
 2. While in the presence of the Notary Public, you will sign next to "Your Signature" and date.
 3. The Notary Public will complete the remainder of this section.
- The *Employer Certification* will be completed electronically with TRS by your UAH Human Resources Representative.

TRS Service Application: PEEHIP Authorization (Page 2):

- Complete your name and social security number at the top of the form.
- You are eligible to enroll in hospital medical insurance with pharmacy benefits through PEEHIP on your retirement.
- PEEHIP will send you an information packet and enrollment form once RSA receives your retirement application.
 - **NOTE:** You cannot enroll in PEEHIP Dental, Vision or other Optional Coverage plans at your retirement. Enrolling in these specific plans must be done during annual Open Enrollment.

RSA Direct Deposit Authorization (Page 7):

- The employee should complete page 1. If you are depositing in a joint bank account, the joint account holder(s) will need to sign the form.
- The Financial Institution Information and Certification (page 2) must be completed by your bank or credit union.

Part 2: Submit Completed Application to TRS

- Mail your completed Retirement application to the address listed in item #4 on the instructions page of the application packet.
- RSA will mail to your home address **Part II of the Retirement Application**. Part II is where you choose the Benefit Option Selection for retirement and complete a W-4P form for federal withholding tax purposes. *This form must be completed and returned to RSA prior to your effective date of retirement or your benefit will be defaulted to the Maximum retirement option.*
 - **NOTE:** The benefit election that you make is non-revocable and cannot be changed. The federal withholding tax election can be updated by completing a new form.