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.
- Since we are not currently members of PEEHIP, do not complete the Hospital Medical Information, Street Address, Employer Certification and Optional Coverage Plans sections.
- Go to the *Non-Participating Systems* (next to the last section) and next to *your signature* sign and date.
- **NOTE:** If you intend to enroll in PEEHIP hospital medical coverage, you need to complete the PEEHIP enrollment form. This form can be sent to you via email by your HR representative. The HR representative can prepare a letter for you or will need to complete the employer section of the PEEHIP enrollment form to certify current coverage.

**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.