

Steps to Retire-Staff

1. Notify manager within 4-6 weeks of anticipated retirement date
2. Department notifies Human Resources of retirement using a Personnel Action Form (PAF)
3. Receive retirement letter from Human Resources outlining benefit options (*sample letter*)
4. Review the letter, enroll in retiree medical if applicable, decide if want to maintain university email account
5. Return completed and signed letter to Human Resources with retiree medical payment if applicable
6. Separate COBRA and life insurance information will be sent to the home address
7. Review COBRA and life insurance options, complete any necessary forms, and return to vendors where appropriate
8. Contact TIAA-CREF and/or Fidelity regarding your 403(b) account
9. Contact your local Social Security Office to arrange Social Security Retirement Income. To find booklets online or locate the nearest office, visit www.ssa.gov.
10. If age 65 or older, or will soon reach age 65, contact Medicare at 1-800-MEDICARE to enroll in Medicare Parts A and B (also necessary for a spouse age 65 or older). This should be done within 6 months prior to retiring (or turning 65 if retiring prior to age 65). Please note that if you have medical coverage under another plan, other than DePaul's, you may not need to enroll in Medicare Part B.