Preparation for Retirement

Check off List for "Post-97 Retirees"

90 days before your date of separation, you must review the attached list and act accordingly:

Retirees Age 65 or older upon retirement

- **Eligibility is determined by the retiree age at retirement**
- **VEBA Trust**

1) Schedule an appointment with either CalPERS and/or CalSTRS agent to go over the service years, and obtain an estimate for your retirement income.
2) Submit your letter of resignation for the purpose of service retirement (SR) to the Division Dean or Manager, and a copy to District HR.
3) Submit Service Retirement Election Application to CalPERS and/or CalSTRS to initiate the retirement process.
4) To enable Survivor health coverage with CalPERS, you must select your retirement option other than Option #1. In other words, the survivor must be a survivor annuitant upon your death.
5) Plan to attend a mandatory "New Retiree Orientation", minimum 2-3 weeks prior to your exit from the District.
6) To transition from Active to Retiree status, you MUST be an ANNUITANT with either CalPERS/CalSTRS, complete all paperwork for CalPERS and enroll in a CalPERS Health Plan within 120 days from the date of retirement.
7) See Benefits Staff to request a Certification of Prior Coverage to avoid late enrollment fees for Medicare Premium Part B. You must enroll both Medicare Parts A & B at the nearest Social Security Administration (SSA) Office by schedule an appointment at 1-800-772-1213.
    - If you have already drawn social security pension prior to age 65, then SSA will auto-enroll you for Medicare Parts A & B. We are recommending you to verify with SSA.
    - DO NOT ENROLL IN MEDICARE PART D, UNLESS YOU WANT TO ENROLL IN OTHER MEDICARE SUPPLEMENT PLAN OF YOUR CHOICE. CalPERS has their own Medicare Part D.
    - CalPERS Medicare Supplement plan required Medicare ID card that show enrollment in both Parts A & B (no exceptions).

      Note: Medicare enrollment is mandatory for all Retirees and Spouses/DP age 65 and older upon retirement, this includes Article 19 retirees.

8) To transition from Active to Retiree status, you MUST be an ANNUITANT with either CalPERS/CalSTRS, complete all paperwork for CalPERS and enroll in a CalPERS Health Plan within 120 days from the date of retirement.
9) Provide alternative contacts including personal email, and all pertinent documentation such as power attorney, if necessary, to District Benefits.
10) To seek VEBA monthly subsidy, contact **United Administrative Services** at 408-288-4450.