



Human Resources



Transitioning from Employee to Retiree

Where to Start

Please notify a supervisor in writing about your intent to retire, and, where possible, give your supervisor sufficient notice to hire a replacement. For faculty positions, up to a year is recommended. For staff positions, between 3 and 6 months is recommended.

Early or Phased Retirement

If you're planning to take Early Retirement per [USU Policy 349](#) or Phased Retirement per [USU Policy 368](#), talk with your supervisor about your intent and have them send an email to Lisa Leishman at lisa.leishman@usu.edu. The email should indicate approval of your plan and the date you're planning to retire. An Early Retirement or Phased Retirement Agreement will then be drafted and distributed for signature approval.

Accessing Your Retirement Funds

Contact your retirement vendor(s) to discuss your retirement payment options. Each person's circumstance is unique, so it's best to discuss your situation with the vendor individually.

TIAA	Fidelity	URS
Customer Service: (800) 842-2252	Customer Service: (800) 343-0860	Customer Service: (800) 365-8772
To schedule an appointment with a member of TIAA's financial consulting team: call (800) 732-8353 or visit www.tiaa.org/schedule	Fidelity Representative: Teo Ngatuvai: (800) 642-7131 email: TEO.Ngatuvai@fmr.com	URS Representative: Benjamin Smedley: (801) 366-7382 email: Ben.Smedley@urs.org

Make Sure to Turn in	To Whom
Computers, tools, or equipment	Your supervisor
Keys and Key Cards	Facilities Building, Room 104 (Logan) or Business Manager for other campuses
Parking Permit	Parking and Transportation
CERT Equipment	USU Police
P-Card/Travel Card/All Card	Purchasing

Continuation of Medical and Dental Benefits

You will be eligible to continue USU's medical and dental benefits for up to 36 months through COBRA. Your monthly COBRA premiums will be based on the number of eligible dependents you enroll and which medical plan is elected. A 2% COBRA administration fee is included in your COBRA premium rate. An information packet regarding your right of continuation of medical and dental coverage will be sent from WEX to your mailing address in Banner, and you will pay your monthly premiums directly to WEX.

Social Security Administration

Contact the Social Security Administration at least three months prior to when you wish to start collecting payments - www.ssa.gov, 1-800-772-1213.

Medicare

Contact Medicare at least three months prior to turning 65 - www.medicare.gov, (800)-MEDICARE. USU offers Medicare Advantage plans for Medicare-eligible retirees. If you have questions regarding Medicare, contact Tina Davis, Medicare Retiree Specialist, Retiree Health Solutions at (801) 499-9695 or tina@retireehealthsolutions.org.

Flexible Spending Accounts (FSA)


Eligible health and dependent care expenses incurred through your last day of active employment may be reimbursed from your Health FSA or Dependent Care FSA. Requests for reimbursement must be submitted on or before September 15 following the end of each fiscal year. Amounts remaining in your account after that date will be forfeited.

Life Insurance

You may continue any life insurance coverage you have at the time of your retirement by porting it to an individual policy or converting it to a whole life policy (depending on your age). An information packet will be sent from The Hartford to your mailing address in Banner. If enrolled, you will pay your monthly premiums directly to The Hartford.

Vacation Leave

Vacation leave will be paid out to eligible employees upon retirement based on [USU Policy 345](#). Contact your leave manager or supervisor for more details.

 Staff or faculty members may enroll in the USU Emeriti and Retired Employees Association through the [Alumni Association](#) for \$15 per fiscal year. Membership provides scholarship support, invitations to social gatherings, and various campus benefits. Faculty members may be awarded the honorary rank of Emeritus preceding their final academic rank at the time of retirement and upon recommendation of the president and the approval of the Board of Trustees. An [Application for Emeritus Status form](#) is submitted to the department head or dean at time of retirement.



If you have a need to visit the Logan campus after retirement, Parking and Transportation offers free parking in non-gated areas and up to four hours in the Big Blue Terrace with an Emeriti parking permit. An Emeriti parking permit will be issued with proof of USU Emeriti and Retired Employees membership.



You'll be able to access your USU email address for 90 days after retirement. Faculty emeriti have continuous access to USU email accounts. You'll also have access to self-service banner (SSB) to view any paystubs or tax documents indefinitely, but you'll have to reset your SSB passwords after one year.



Upon retirement, you should obtain a new University ID card at the Card Office in the Taggart Student Center, room 212. If you're not in Logan, you can request and pay for a new card by visiting the [Card Office website](#). The card provides access to the Library and Employee Wellness Center.



Per [Policy 361](#), USU retirees are entitled to the following continuation of privileges and benefits:

- 1) Reduced tuition registration for retired employees, their spouses, and dependent children in classes offered by the University as outlined in the [University's Educational Benefits Policy 350](#).
- 2) Access to the University libraries and building facilities for personal study and research.
- 3) Access to USU's Employee Wellness program, including facilities.