



WOU Retirement Planning Checklist for ORP Retirees

<p>Review Retirement Eligibility</p> <p>A retired participant’s eligibility criteria, distributions and rehire provisions are outlined in the “How Retirement Affects your ORP Account” section of the Decision Making Guide (Link is external)</p> <p>Disability Retirement if you become totally disabled due to an injury or illness and are no longer able to work, you may be eligible to take distributions</p> <p>Phone: 541-346-5784 Fax: 541-346-5783 Email: opurp@uoregon.edu Website: Oregon Public Universities Retirement Plans (OPURP) Street Address: University of Oregon–Baker Center, 975 High Street, Eugene, OR 97403</p>	
6 months to 1 year before	<p>Working After Retirement outlined in the “Working after ORP Retirement” section of the Decision Making Guide (link is external).</p>
	<p>Tenure ONLY: Relinquishment Agreement (TRA) If interested in returning to a post-retirement position, begin discussions with your department/college.</p>
Consider Health Coverage	<p>PEBB Health Benefits and other Employee Benefits Email: pebb.benefits@odhsoha.oregon.gov Phone: 503-373-1102 Fax: 503-373-1654 Mailing Address: 500 Summer St NE Dept 89, Salem OR 97301-1094 Hours of Operation: 8:00 a.m. – 5:00 p.m. Monday – Friday</p>
2 Months before	<p>Tenure ONLY: Request Emeritus Status, work directly with your department/college</p>
At least 30 days to 2 weeks prior to your retirement date	<p>Submit letter of resignation/retirement to your supervisor/dean and cc: hr@wou.edu on the email.</p> <ul style="list-style-type: none"> • Departure Checklist • Departure Form • Schedule Exit Interview • Faculty Sick Leave Donation Form
Final Paycheck	<p>Vacation and Comp Time Paid Out, if applicable</p> <ul style="list-style-type: none"> • Unclassified Vacation: 180 hrs max • Classified Vacation: 250 hrs max <p>Final Check Form</p> <ul style="list-style-type: none"> • Unclassified • Classified • Faculty



	<ul style="list-style-type: none">• Hourly
Allow for a minimum of 30 days after you end service	ORP Distribution Payments Work directly with your plan sponsor: Fidelity: NetBenefits TIAA: TIAA Oregon Public Universities
Voluntary Retirement Savings Distribution – Responsibility of Fund Sponsor Work directly with your plan sponsor: Fidelity, TIAA and or Oregon Savings and Growth Plan	