



## WOU Retirement Planning Checklist for ORP Retirees

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| <b>Review <a href="#">Retirement Eligibility</a></b>                                                                                                                                                                                                                                                                                                                                                    |                    |                                                                                                                                                                                                                                                                                                                                                          |
| <b>A retired participant's eligibility criteria, distributions and rehire provisions are outlined in the "How Retirement Affects your ORP Account" section (page 15) of the <a href="#">Decision Making Guide</a> (Link is external).</b>                                                                                                                                                               |                    |                                                                                                                                                                                                                                                                                                                                                          |
| <b>Disability Retirement</b> 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 <ul style="list-style-type: none"><li>• Email: <a href="mailto:opurp@uoregon.edu">opurp@uoregon.edu</a></li><li>• Phone: 541-346-5784</li><li>• Website: <a href="#">Oregon Public Universities Retirement Plans (OPURP)</a></li></ul> |                    |                                                                                                                                                                                                                                                                                                                                                          |
| <b>6 months to 1 year before</b>                                                                                                                                                                                                                                                                                                                                                                        | <b>Tenure Only</b> | <b>Working After Retirement</b> Outlined in the "Working after ORP Retirement" section (page 14) of the <a href="#">Decision Making Guide</a> (Link is external).                                                                                                                                                                                        |
| <b>Consider Health Coverage</b>                                                                                                                                                                                                                                                                                                                                                                         |                    | <b>Tenure Relinquishment Agreement (TRA)</b><br>If interested in returning to a post-retirement position, begin discussions with your unit/college.                                                                                                                                                                                                      |
| <b>2 months before (at least)</b>                                                                                                                                                                                                                                                                                                                                                                       | <b>Tenure Only</b> | <b>PEBB Health Benefits and other Employee Benefits</b> <ul style="list-style-type: none"><li>• Email: <a href="mailto:employee.pebbbenefits@oregonstate.edu">employee.pebbbenefits@oregonstate.edu</a></li><li>• Phone: 541-737-2805</li><li>• Website: <a href="https://hr.oregonstate.edu/benefits">https://hr.oregonstate.edu/benefits</a></li></ul> |
| <b>At least 30 days to 2 weeks prior to your retirement date</b>                                                                                                                                                                                                                                                                                                                                        |                    | <b>Request Emeritus Status</b> , working with your unit/college                                                                                                                                                                                                                                                                                          |
| <b>Final Paycheck</b>                                                                                                                                                                                                                                                                                                                                                                                   |                    | <b>Submit Letter of Resignation/Retirement to your Unit/Supervisor/Manager and cc: <a href="mailto:hr@wou.edu">hr@wou.edu</a></b> on the email                                                                                                                                                                                                           |
| <b>Allow for a minimum of 30 days after you end service</b>                                                                                                                                                                                                                                                                                                                                             |                    | <b>Vacation &amp; Comp Time Paid Out, if applicable</b> <ul style="list-style-type: none"><li>• 12-mo Faculty (Unclassified) Vacation: 180 hrs max</li><li>• Staff (Classified) Vacation: 250 hrs max</li></ul>                                                                                                                                          |
| <b>ORP Distribution Payments</b><br>Work directly with your plan sponsor:<br>Fidelity: <a href="#">NetBenefits</a><br>TIAA: <a href="#">TIAA Oregon Public Universities</a>                                                                                                                                                                                                                             |                    |                                                                                                                                                                                                                                                                                                                                                          |
| <b>Voluntary Retirement Savings Distribution – Responsibility of Fund Sponsor</b><br>Work directly with your plan sponsor: Fidelity, TIAA, &/or Oregon Savings and Growth Plan                                                                                                                                                                                                                          |                    |                                                                                                                                                                                                                                                                                                                                                          |