

**Optional Retirement Plan (ORP) – Retirement Checklist**  
**3 months prior to retirement**

**Contact retirement company or financial advisor to coordinate your distributions**

- VOYA – 866-776-6704
- TIAA – 800-842-2252
- 401k, 457 – Empower Retirement 800-922-7772
- 403b (VOYA, TIAA)

**Continuing Health Insurance at Retirement – hired before 7/1/2015 (under 65 years old)**

**NOTE: Must have 10 years of creditable service**

For forms: [retirement@tennessee.edu](mailto:retirement@tennessee.edu) or <https://payroll.tennessee.edu/retirement/how-to-guide/>

- Application to Continue Insurance at Retirement
- Automated Clearing House (ACH) form for preauthorized payments to be debited
- Copy of voided check or bank letter showing account and routing number

**Continuing Medicare Supplement & Dental – hired before 7/1/2015 (65 years or older)**

**NOTE: Must be Medicare eligible to qualify for the TN Plan**

- Application to Continue Insurance at Retirement
- Automated Clearing House (ACH) form for preauthorized payments to be debited
- Copy of voided check or bank letter showing account and routing number
- Copy of Medicare A & B cards (when received)
- TN State Health Insurance Program (SHIP) – Medicare Info & Counseling – 877-801-0044
- Apply for Medicare 2 months prior to retirement <https://www.ssa.gov/medicare/sign-up>
- Contact the retirement office to complete the [Request for Employment Information CMS-L564 form](#). This form qualifies your late enrollment into Medicare without a penalty

**Additional Forms and Other Information**

- Email Account Retention – If the requirements are met, you may complete the [Email Retention Form](#) and return it to [retirement@tennessee.edu](mailto:retirement@tennessee.edu)
- Conversion of life insurance – contact Securian Financial at 866-881-0361 within 30 days
- [Temporary Employment Report Form](#) (if returning to work as a retiree)

Contact the Retirement Office at [retirement@tennessee.edu](mailto:retirement@tennessee.edu) or visit <https://payroll.tennessee.edu/retirement/> if you have any questions