

## OSU Retirement Planning Checklist for ORP Retirees

Retiring from OSU Website: <http://hr.oregonstate.edu/benefits/retiring-osu>

			Review <a href="#">Retirement Eligibility</a>
			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 (Link is external)</a> .
			<p><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</p> <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>
		6 months to 1 year before	<a href="#">Working After Retirement</a> Outlined in the "Working after ORP Retirement" section (page 14) of the <a href="#">Decision Making Guide (Link is external)</a> .
		6 months to 1 year before	<p><b>Tenure Relinquishment Agreement (TRA)</b> If interested in returning to a post-retirement position, begin discussions with your unit/college.</p>
		Consider Health Coverage	<p><b>PEBB Health Benefits and other Employee Benefits</b></p> <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>
		2 months before (at least)	Request <a href="#">Emeritus Status</a> , working with your unit/college
		At least 30 days to 2 weeks prior to your retirement date	<b>Submit Letter of Resignation/Retirement to your Unit/Supervisor/Manager and Complete the offboarding request through the Employee Service Portal</b>
		Final Paycheck	<p><b>Vacation &amp; Comp Time Paid Out, if applicable</b></p> <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>
		Allow for a minimum of 30 days after you sever service	<p><b>ORP Distribution Payments</b> Work directly with your plan sponsor: Fidelity: <a href="#">NetBenefits</a> TIAA: <a href="#">TIAA Oregon Public Universities</a></p>
			<p><b><a href="#">Voluntary Retirement Savings</a> Distribution – Responsibility of Fund Sponsor</b> Work directly with your plan sponsor: Fidelity, TIAA, &amp;/or Oregon Savings and Growth Plan</p>
			<a href="#">Stay Connected to OSU</a>

## LINKS FOR DOCUMENTS REFERENCES ON CHECKLIST

- **Retiring from OSU**  
<http://hr.oregonstate.edu/benefits/current-employees/retiring-osu>
- **Retirement Eligibility** <https://hr.oregonstate.edu/benefits/current-employees/retirement/retiring-osu/orp-retirement-process#eligibility>
- **OPURP – ORP**  
<https://www.opurp.org/>
- **Disability Retirement** <https://www.opurp.org/>
- **OSU Tenure Relinquishment Agreement (TRA)**  
<https://hr.oregonstate.edu/manual/tenure-relinquishment>
- **Health Insurance, Medicare, & Medicare Plans** <https://hr.oregonstate.edu/benefits/current-employees//retirement/retiring-osu/health-insurance-medicare-medicare-plans>
- **Working after retirement** <https://hr.oregonstate.edu/benefits/current-employees/retirement/retiring-osu/working-after-retirement>
- **OSU Emeritus Status** <https://hr.oregonstate.edu/manual/emeritus-status>
- **OSU Workshops & Events**  
<https://hr.oregonstate.edu/benefits/current-employees/workshops-and-events>
- **Voluntary Retirement Savings Contacts/Distribution – TDI (403b) & Oregon Savings Growth Plan (457b)**  
<https://hr.oregonstate.edu/benefits/current-employees/retiring-osu/retirement-process#tdi>
- **Staying Connected to OSU**  
<https://hr.oregonstate.edu/benefits/leaving-osu-service/retirement-resources/staying-connected-osu>

## CONTACTS

- **TIAA Investments:** Phone: 800-842-2252  
Schedule an appointment: [www.tiaa.org/schedulenow](http://www.tiaa.org/schedulenow)  
Log in to your online portal: <https://www.tiaa.org/public/plansponsors>
- **Fidelity Investments:** Phone: 800-343-0860  
Schedule an appointment: [www.fidelity.com/schedule](http://www.fidelity.com/schedule)  
Log in to your online portal: <https://sponsor.fidelity.com/pspublic/pca/psw/public/homepage.html>
- **Oregon Savings Growth 457(b) Plan with Voya Financial:** Phone: 800-365-8494  
Email: [OSGPCustSvc.PERS@pers.oregon.gov](mailto:OSGPCustSvc.PERS@pers.oregon.gov)  
Log in to your online portal:  
<https://login.voya.com/voyassoui/index.html?domain=osgp.voya.com#/login-pweb>

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