



UCF RETIREE CHECKLIST

AS SOON AS YOU HAVE A RETIREMENT DATE IN MIND

Gather Information About Your Retirement Income.

Take advantage of the many sources of information concerning your retirement income.

- Contact the Benefits Section of UCF Human resources at **407-823-6591** or benefits@ucf.edu.
- Consult MyFRS Financial Guidance Counselors at **1-866-446-9377**. This is a free service for all FRS members. ***ORP participants should contact their ORP company representative distribution options.***
- Visit the MyFRS website sponsored by the Florida Retirement System and the State Board of Administration at www.myfrs.com. Both FRS Pension Plan participants and FRS Investment Plan participants may select from a variety of on-line tools and resources.
- If you are an FRS Pension Plan participant, also visit the FRS Retirement On-Line services at <https://www.rol.frs.state.fl.us/> where you can calculate estimated retirement benefits and see information about your own retirement account. You may also view the publication “Preparing to Retire” (under the Publications link of this website) which contains important information on your retirement process.
- **FRS Second Election.** If you have not exercised your one-time option to switch FRS retirement plans (going from the Pension Plan to the Investment Plan, or Investment Plan to the Pension Plan) and would like to determine if doing so is right for your future, you can get more information by speaking to an unbiased Ernst & Young financial planner at the MyFRS Financial Guidance line toll free at **1-866-446-9377** and selecting prompt 1. You can also visit http://www.myfrs.com/content/fa/finguide_pcs witch.html. The 2nd Election Retirement Plan Choice Form can be found under “Enrollment” forms at <http://www.rol.frs.state.fl.us/myfrs/fm/SelectForm.asp>

Obtain an Estimate of Your State Retirement Income.

- If you are an FRS Pension Plan participant:
 - **Monthly Benefit Amount.** Obtain an estimate of your monthly FRS benefit. This can be done by scheduling an appointment with Paul Newman in the Benefits Section of Human Resources, by visiting FRS Retirement On-Line services at <http://www.myflorida.com/frs>, or by contacting the Division of Retirement (DOR) toll-free at **1-888-738-2252**. If applicable, ask about buying service credit for creditable periods such as military leave, out of state service, or leaves of absence without pay.
 - **Birth date verification.** The DOR does require proof of birth date (and for your spouse if you select payment option three or four). A Xerox copy of your birth certificate or Naturalization Papers will suffice. This is needed before you can be

added to the Retired Payroll. There are other documents that will be accepted. For details, contact the Benefits Section of Human Resources.

- **Deferred Retirement Option Program (DROP).** If you are entering DROP, review your current annual leave balance and (based on your accrual rate, anticipated usage, and whether any of it is subject to pro-ration upon payment) start planning how many hours you wish to have paid in cash versus carried over into continued DROP employment. Please note that payment of special compensatory hours is only creditable toward retirement if earned within 11 months of entering retirement (or DROP). Consult with your Agency HR Office to determine how many hours of leave you have eligible for payment when entering DROP. Be advised that if you do elect to be paid for your annual leave upon entering DROP, you have the option of deferring the payment into an existing 403(b) and/or 457 account(s).
- If you are an FRS Investment Plan participant:
 - **Review Your Plan Provisions.** Refer to the appropriate links at the www.myfrs.com website or contact the “My FRS Financial Guidance Line” at **1-866-446-9377**. If you select prompt 2, you will reach financial planning advisors with Ernst & Young. If you select prompt 4, you will reach Hewitt who, as the third party administrator can assist you in accessing your Investment Plan account.

Gather Information About Deferred Compensation (457, IRC).

If you are not already participating in the State Deferred Compensation Program, inquire as to any advantages to doing so now, such as catch up options you would have and how participation might help with your federal tax liability for any terminal leave payments you anticipate receiving. You may contact the State Employees’ Deferred Compensation Program Office toll free at **1-877-299-8002 293-3162**. You can also visit their website at <https://www.myfloridadeferredcomp.com/SOFweb/index.asp>

Gather Information About Social Security and Medicare Benefits. Contact the Social Security Administration at **1-800-772-1213 (TTY 1-800-325-0778)**, or visit their website at <http://www.ssa.gov/> to obtain information to help you decide when to apply for Social Security benefits and what you need to do to enroll in Medicare.

Gather Information About State Group Insurance Benefits. In general, FRS Pension Plan members who participate in the State Group Insurance Program may elect to continue coverage (health and life) if they enroll as a “retiree” within the prescribed window at the time they separate from active service. (Additional eligibility requirements apply to FRS Investment Plan participants in order to qualify as a “retiree”.) If you have any questions regarding your eligibility criteria for Continuation Coverage as a Retiree, contact the People First Service Center at **1-866-663-4735**.

ORP participants who meet the definition of retired are also able to continue health and life benefits. Contact the Benefits section of Human Resources for more details.

- **Continuation Coverage as a Retiree**

- State Health Insurance – If you meet the eligibility criteria for continuation of coverage as a “retiree”, start considering how much health insurance will cost after retirement. (**Note:** *for purposes of continuing health insurance, the definition of retiree is different for pension plan, investment plan and ORP*). The cost depends on the level of coverage you will need and whether your spouse is an active State employee and will continue to be, whether both you and your spouse are retiring from the State at the same time, or whether you and/or your spouse are Medicare eligible (thus making Medicare the primary plan). Note: There are two ways through the Internet that you can view the various retiree premium rates (a chart that displays retiree premium rates by county/HMO plan). If you are logged on People First (<https://peoplefirst.myflorida.com/logon.htm>), just click on the **Health & Insurance** tab at the top of the page. Once you are in the “Health & Insurance” home page, find the link to retiree premium rates on the left side of the screen. Otherwise, go to the Department of Management Services website at http://dms.myflorida.com/dms/workforce/state_group_insurance/forms/new_retiree_package_premiums. Please note that the premium chart is specific to the current calendar (plan) year. Cost information is not available for future years.
- State Life Insurance – Only retirees who meet the eligibility requirements for continuation coverage of health insurance may elect to continue life insurance coverage. There are two basic coverage amounts available to retirees; \$2,500 and \$10,000. Contact the Service Center for the premium amount. (Also, Special Life Insurance Provisions apply if your retirement is due to your having become totally disabled as defined by the State Life Insurance Plan. See additional information below).

- **Continuation Coverage Due to Qualified Status Change.** According to the regulations governing the State group health insurance plan, “retirement” is a qualified status change. Therefore, employees who are **not** currently enrolled in health insurance may enroll within 31 days prior to their termination of employment and may then continue such health insurance coverage as a “retiree”. If you are not currently covered by State Health Insurance, you must contact the People First Service Center at **1-866-663-4735** immediately to ensure you act within the prescribed window. (This provision does not apply to State life insurance.)

- **Continuation Coverage Under the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA)**

- For Health Insurance – Those employees who do not meet the State’s eligibility requirements for continuation coverage as a “retiree” may continue State health insurance coverage under the federal COBRA law, for up to 18 months. (This provision does not apply to State life insurance).
- For Dental and/or Vision Insurance -- All retirees who wish to elect continuation of State group dental and/or vision coverage must do so under COBRA (for up to 18 months).

THREE TO SIX MONTHS PRIOR TO RETIREMENT OR ENTRY INTO DROP

If you are an FRS Pension Plan participant:

- Apply for Retirement Benefits.** Complete the appropriate application form, depending on whether you are applying for service retirement (FR-11), disability retirement (FR-13), DROP retirement (DP-11 & DP-ELE), with the Benefits Section of Human Resources. As a rule, applications are not accepted earlier than six months before your retirement date.
 - HR must certify your retirement application before it is submitted to the DOR for processing. (Keep in mind that you are required to submit a letter of resignation to your department, stating that it is for the purpose of retirement and indicating your last day of employment.) When properly submitted, the DOR will acknowledge receipt, confirm your effective date of retirement, and let you know of anything else you need to submit. This information will be sent to your home address.
 - **Beneficiary Designation.** If your beneficiary is not designated on your retirement application, submit form FST-12 to the DOR. If you are selecting payment option 3 or 4, your beneficiary must qualify as a joint annuitant. A spouse is considered a joint annuitant. For information about other individuals who may qualify to be your joint annuitant, contact the DOR toll-free at **1-888-738-2252**.
 - **Benefit Option Selection.** The DOR will prepare an estimate of benefits and send an explanation of all the payment options for which you qualify. Once you have decided, submit form FRS-11o, Option Selection, to the Division of Retirement. (This is required before you are added to the Retired Payroll).
 - **Additional Service Purchase.** If you are purchasing additional creditable service for retirement credits, submit payment to the DOR. (Any monies owed to FRS must be paid in full before your name is added to the Retired Payroll).
 - **Special Life Insurance Provisions for Total Disability.** If your retirement is due to your having become totally disabled as defined by the State Life Insurance Plan (regardless of whether you elect service retirement or are approved for disability retirement), you may be eligible for extended death benefits. Contact People First at **1-866-663-4735** to inquire about qualifying/applying for these extended death benefits.

If you are an FRS Investment Plan participant:

- Initiate Process to Collect Distributions.** Contact the “MyFRS Financial Guidance Line” toll free at **1-866-446-9377**. If you select prompt 2 on the Guidance Line, you will reach financial advisors with Ernst & Young who can assist you with your financial planning. If you select prompt 4, you will reach Hewitt, the third party administrator that can assist you in accessing your investment plan.
 - **Special Life Insurance Provisions for Total Disability.** If your retirement is due to your having become totally disabled as defined by the State Life Insurance Plan (even though you are not in the State Pension Plan), and you qualify for continuation of health
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insurance as a retiree, you may also be eligible for extended death benefits. Contact People First at **1-866-663-4735** to inquire about qualifying/applying for these extended death benefits.

ONE TO THREE MONTHS PRIOR TO RETIREMENT OR END OF DROP

- Finalize Social Security/Medicare Plans.** If you have not already done so, contact the Social Security Office toll free at **1-800-772-1213 (TTY 1-800-325-0778)** or visit their website at [http://www.ssa.gov/](http://www.ssa.gov) if you intend to draw benefits and/or if you and/or your spouse are Medicare eligible.

IMPORTANT NOTE FOR THOSE WHO FIRST BECAME MEDICARE ELIGIBLE WHILE STILL EMPLOYED BY THE STATE:

If you did not take Medicare Part B when you were first eligible because you or your spouse were still working and had primary coverage through the State group health insurance plan, you have a “Special Enrollment Period” during which you can enroll in Part B coverage without having to wait for the next General Enrollment Period (January 1 through March 31 of each year) and possibly having to pay a higher Medicare Part B premium. Call the Social Security Administration at **1-800-772-1213** for more information about your enrollment options, so that Part B coverage can begin when you need it.

- Consider Investment of Terminal Leave Payments.** If you are a participant in the 403(b) program and/or the Deferred Compensation Plan and have not already done so, contact your investment plan provider(s) regarding your options for directing your terminal leave payments (if any) to the deferred compensation plan. Your investment provider(s) must coordinate this deferral and will advise you as to paperwork or deadlines you must meet.
- Initiate Process to Collect Distributions from the 403(b) and/or Deferred Compensation Plan.** If you are a participant and have not already done so, contact your investment provider(s) for advice on when and how you may choose to take distributions from your account(s).
- Turn In Health and Life Continuation Forms and Payments.** When you end employment, your “active” employee coverage carries you through the end of your first calendar month of retirement. For example, if you retire effective October 1, your active coverage carries you through October 31. The second month of your retirement (in this example, November) is when you start “retiree” coverage. You must submit your continuation forms and that first retiree payment no later than the 10th of the month in which you retired (in this example, the due date for November retiree coverage would be October 10th). The People First Service Center will send you the necessary paperwork and instructions at the end of your employment. However, if you do not wish to wait for the Retiree Insurance Package from the PF Service Center, you can find the necessary paperwork for “New Retirees” by going to the Department of Management Services website at http://dms.myflorida.com/dms/workforce/state_group_insurance/forms

If you do send in your forms and payments early, the People First Service Center will post the payment and keep the continuation forms in pending status until your agency has completed the employment separation action.

- **Election to Continue Coverage.** If you need assistance completing the Retiree Health & Life continuation form, contact People First toll free at **1-866- 663-4735** for further information and/or to verify the amount of the payments you must make.
- **Payment Instructions for the first month of “retiree coverage”.** Even if you are eligible to have retiree premium payments deducted from your retirement check, all first payments for retiree health and life insurance must be made by check or money order. Make them payable to the Division of State Group Insurance (or DSGI). You may write separate checks or money orders for health and life. On each check or money order, note your People First ID number and the coverage month for which you are paying (this is important to specify, since you are paying for a future month). ALSO: if you decide to submit a single check or money order for both your health and life premium, be sure to indicate that you are sending a combined payment. Submit the payment(s) to the People First lockbox in Orlando (address shown below). REMEMBER: you will be paying the retiree premium rates. Call the People First Service Center toll free at **1-866-663-4735** if you need to verify the premium amount. **Your election form and payment(s) must be submitted no later than the 10th of the month in which your retirement is effective. Submit to:**

**The People First Service Center
Post Office Box 863477
Orlando, Florida 32886-3477**

- **Disability Retirement Applicants.** If you have exhausted your paid leave while waiting for the Division of Retirement to make a determination on your eligibility for Disability Retirement, you need to contact your Agency HR Office to request that they place you on Leave Without Pay status until the Division makes a decision. During this time, you will be responsible for paying the full premium for your health and life insurance (at the active employee rate) and sending it to the address above. Note: separate payment provisions apply if you are on Workers’ Compensation. Contact your Agency HR Office to discuss your status.
- Convert From Spouse Program, If Applicable.** If you are currently enrolled in the Spouse Program and your spouse will continue active employment, you must ensure that your spouse contacts People First toll free at **1-866-663-4735** to obtain, complete, and submit the proper forms that will convert you to a dependent under your spouse’s enrollment. Under these circumstances, you do NOT need to submit an election form or payments to People First for retiree coverage.
- Close Out Flexible Spending Account (FSA) – Medical Reimbursements.** If you participate in Medical Reimbursement, you will need to complete a Termination of Employment form. You may find this FSA Termination form by logging on to People First at <https://peoplefirst.myflorida.com/logon.htm> and clicking on the **Health & Insurance** tab at the top of the page. Once you are in the “Health & Insurance” home page, find the links to Benefits Materials and click on the FSA/HSA plans link on the left
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side of the screen. Submit the completed form to your Agency HR Office, which will then forward the form to People First.

- Review Your Pre-Tax Supplemental Insurance.** Contact your pre-tax supplemental insurance providers (the supplemental plans that are part of the State Group Insurance Program) to clarify all your continuation options. (For example, if you want to continue dental/vision after the expiration of COBRA, or if you want to continue any supplemental hospitalization, cancer, or disability plan that you currently have). Ask about enrollment options and costs for individual, private post-tax contracts, and what payment methods are available. Contact information for the pre-tax supplemental insurance providers is available on the web at http://dms.myflorida.com/dms/workforce/state_group_insurance/provider_links or you may call the People First Service Center toll free at **1-866-663-4735** to request help in locating the customer service phone number for your particular company.
- Review Your Post-Tax Supplemental Insurance.** Contact any supplemental insurance provider that you currently pay through payroll deduction and which is not part of the State Group Insurance Program. (For example, auto, whole or universal life, long term disability, prepaid legal, etc.). Ask when your coverage will end, whether you have the option to continue or convert coverage, what it will cost, and what payment methods are available. Ask your Agency HR Office for assistance in locating your agent. These plans are not administered by People First.
- Update Your Home Address.** Ensure your home address is up to date in the People Soft System. This will be used to send your last W-2 statement the following January, and possibly other payments/correspondence. If you move or change addresses after your employment ends, contact People First and either the Division of Retirement or your ORP provider.
- Turn in Property.** If applicable, contact your department for instructions on returning items such as computers, credit cards, keys, cell phones etc., that may have been issued to you.
- Other tax sheltered plans.** Contact any 403(b) and/or 457 Deferred Compensation provider company(ies) in which you participate through payroll deduction and arrange for distributions or rollovers, as appropriate. These plans are not administered by People First.
- Miscellaneous Payroll Deductions.** Contact any other vendor that you pay through recurring payroll deductions (e.g., credit unions, creditors, university boosters, etc.) to make alternative arrangements for any payments that you still owe.

DROP Participants Terminating from DROP (i.e., Separating from Service):

- Obtain DROP Termination Forms.** If you are separating after completing your full DROP participation period (that is, the full 60 months of DROP or the date certain that you originally designated), then the Division of Retirement will automatically send these forms to your home address.

However, if you are separating earlier than your originally designated DROP termination date, contact Benefits at **407-823-6591** or benefits@ucf.edu to complete a revised form DP-ELE.

- Form DP-TERM.** Submit the completed Form DP-TERM, "Termination Notification", to Benefits and have them certify and forward it to the Division of Retirement. (This form must be notarized.)
- Form DP – PAYT.** Submit the completed Form DP-PAYT, "Selected Payment Method", directly to the Division of Retirement. Consult with the IRS or a tax advisor for information about the tax consequences of the different payout methods. (This form must be notarized.)
- FRS Investment Plan Rollover Option.** Effective July 2005, DROP participants can use the FRS Investment Plan for rollover of their DROP accrual. Contact the MyFRS Financial Guidance Counselors at **1-866-446-9377** for more information. See form IPDROP-AD-1, "FRS Investment Plan DROP Accumulation Direct Rollover Form for Current DROP Members", available on the www.MyFRS.com website.

UPON RETIREMENT / END OF DROP

(Most of the following activities have strict deadlines)

If you are an FRS Pension Plan participant:

- After your name has been officially added to the Retired Payroll, the "Retired Payroll Section" at the Division of Retirement will mail to your recorded home address, the "retiree packet" with these vital forms:
 - **W-4P Form/Withholding Certificate for Pension Payments.** Your previous tax withholding information on file with your employer will not be continued after retirement. Therefore, you must designate your tax withholding information applicable to your FRS retirement income. Complete the W-4P form that the Retired Payroll Section sends you in their "Retiree Packet". Until you file the Form W-4P with the Division of Retirement, the IRS requires that your monthly withholding be calculated based on "Married with 3 allowances".
 - **Direct Deposit Authorization Form.** Your monthly pension payments will not be directly deposited to the same account used for your UCF paycheck while you were actively employed. You do need to submit this banking information.
 - **Health Insurance Subsidy Certification (HIS-1).** The health insurance subsidy is an employee benefit of the Florida Retirement System. Retirees who carry any form of qualified health insurance receive a monthly supplemental payment based on years of service. As an FRS Pension Plan retiree, the HIS-1 form will be sent to you in the "Retiree Packet" from the Retired Payroll Section. Therefore, if you are

continuing your State health insurance as a retiree or if you are a covered dependent of State health insurance under your spouse, complete this form and submit it to the **People First Service Center at P.O. Box 6830, Tallahassee, FL 32314** or **(FAX) to 904-828-6092** as soon as possible. As administrators of your health plan, People First will process this form (to certify to FRS that you have health coverage) and return it to the Division.

Note: If your retiree health insurance coverage will be strictly through a private vendor or Medicare, send the HIS-1 to the appropriate vendor or Medicare contact. People First can only certify State coverage.

- Final Salary Certification.** Benefits is responsible for preparing final certification of your salary (Form FC-1 Final Salary Certification) and forwarding it to the DOR.
- Viewing Your Monthly Pension Payments.** Once you are on the Retired Payroll, you may also use the FRS Retirement On-Line Services at <http://www.rol.frs.state.fl.us/> to view your monthly retirement warrant and the deductions that are being taken.

If you are an FRS Investment Plan participants:

- Health Insurance Subsidy (HIS).** Investment Plan members are eligible for the HIS benefit only if they meet certain requirements. To learn about the requirements and obtain the required forms (HIS-IP/HIS IP-2) refer to: <http://www.myflorida.com/frs/forms/new/forms.htm#investmentplan> and follow the application process.

ALL RETIREES:

- Separation Action.** Contact your department to ensure that the appropriate person at your agency has completed the processing of your separation from service (ePAF). This is a critical step in the process and should be done no later than your last day of employment (last day paid), if not sooner.
- Retiree Health & Life Insurance.** By now, you should have already submitted your continuation election form and payments. However, if you have not, this is your **last** official opportunity to elect continuation of your health and life insurance as a retiree. Therefore, once your agency has finished processing your separation from service, by law the People First Service Center must send you an official Retiree Insurance Packet (even if you have already taken action). This packet will contain (in addition to the election form) a personal Benefits Statement showing all your current coverage under the State Health Insurance Program. More importantly, it will give you notice that you must respond no later than 31 calendar days from your last day of employment. **Note: if you are just now enrolling as a retiree, you need to call People First directly at 1-866-663-4735 to make your election by phone (which eliminates need to mail in the form). However, you will still need to promptly mail your payments to the People First Service Center at Post Office Box 863477 Orlando, Florida 32886-3477.**
- **FRS Pension Plan Premium Deductions start with second month of “retiree coverage”.** Generally speaking, no retiree health and life premiums are deducted from

your first monthly pension payment because you have already sent in this payment to People First (Orlando post box). Instead, automatic deductions start with your second monthly pension payment (assuming the amount of your pension payment, including your health insurance subsidy, covers the cost). Therefore, if you are an FRS Pension Plan participant and have received confirmation from the Division of Retirement that you have been added to the Retired Payroll, contact the People First Service Center at **1-866-663-4735** to verify that your retiree insurance enrollment information is being entered into the People First System as well as being forwarded to FRS, so that automatic deductions do start with your second monthly pension payment.

- **PRECAUTIONS WHEN PREMIUMS ARE NOT PAYROLL DEDUCTED.** If you are an FRS Pension Plan participant and your monthly pension payments will not be starting on time or are not sufficient to cover your premiums, **you must continue making premium payments directly to the Orlando post box (see above).** Likewise, if you are an FRS Investment Plan participant (which means your premiums cannot be payroll deducted), **you must pay your premium promptly to the Orlando post box every single month. Each payment should be submitted by the 10th of the month prior to the coverage month for which you are paying.** For example, if you are an FRS Pension Plan participant who is going to miss the November Retired Payroll, you need to send your payments by November 10 for December retiree coverage.

If you are going to be making direct payments on an ongoing basis, the People First Service Center will send you **payment coupons** to send in with your monthly payments.

- **VIEWING YOUR INSURANCE RECORDS ON-LINE VIA PEOPLE FIRST.** It is important that you note that there will be a short period during which your access to People First will transfer from “active” to “retiree” status. This period starts on your effective date of Separation from state service and ends on the first of the month in which your “retiree” coverage becomes effective. For example, if your last day of work is February 15 (which makes your effective date of Separation February 16) and your retirement is effective March 1, coverage as an active employee does not expire until March 31. Therefore, you will not be able to log on until April 1. During this period, if you have any questions or if you need to update your coverage due to a qualifying status change, etc., simply call the Service Center **1-866-663-4735** for assistance.

Alternative Way to Continue Health Insurance -- COBRA. In the event that you elect not to continue your health insurance coverage as a retiree, or do not meet the criteria for doing so, you still have the opportunity to continue group health coverage under COBRA for up to 18 months.

- **COBRA Enrollment.** By law, the Service Center must also send you a COBRA packet to your home address after you separate from service. This will contain the forms and instructions for electing health under COBRA. For COBRA, you must respond no later than **60 days** from the date of the notice you receive in the mail, or of the date your active employee coverage expires (whichever is later). Note: instead of mailing back the COBRA form, you can call People First directly at **1-866-663-4735** to make your election, but you will still need to send in your payments to the People First Service Center/Post Office Box 863477 Orlando, Florida 32886-3477.
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- **HIPPA Certificate of Creditable Coverage.** In the COBRA packet there will be a certificate that is presentable as proof that you had prior health insurance coverage (in the event you need documentation later to waive a pre-existing medical condition clause under another health plan). Keep this with your personal papers in case it's needed when COBRA expires.

Dental and/or Vision Insurance Under COBRA. All retirees wishing to continue current State dental and/or vision coverage must do so under COBRA. You will receive COBRA materials that include an election form and instructions regarding premium costs and where to send payments. Again, you must respond no later than **60 days** from the date of this notice, or of the date your active employee coverage expires (whichever is later). Send payments to the People First Service Center/Post Office Box 863477 Orlando, Florida 32886-3477.

Terminal Leave Payments. As a general rule, terminal leave payments are processed within 30 days of retirement. Contact UCF Payroll for details.

Reemployment After Retirement. If you plan to return to work with ANY local government or State agency that is also an FRS employer, you must comply with the FRS re-employment law. Contact the Division of Retirement in Tallahassee at **850-488-6491** or toll-free at **1-888 738-2252** for guidance.

Estate Planning, Living Wills, and Living on a Retiree Budget. Don't neglect financial planning after retirement.

Never too Late to Learn. Did you know that Florida law permits a state university to waive any or all application, tuition, and related fees for Florida residents age 60 or older who attend classes on a space available basis (not for academic credit)? Refer to Chapter 1009.26(4), Florida Statutes.

When you're ready, consider volunteer opportunities. The State of Florida invites you to mentor an under privileged child through the Florida Mentoring Partnership. For more information, visit www.flamentoring.org

The Florida Retirement System has developed retirement checklists for the [Pension Plan](#) and [Investment Plan](#).

We Welcome Your Feedback!
We want to know if this checklist was helpful or if there is anything else we can do to make it more useful for employees planning their State retirement.
Contact us at benefits@ucf.edu

HELPFUL CONTACTS

Division of Retirement

Contact information and forms are available online at their website: www.myflorida.com/frs. For questions prior to retirement, you may contact the Bureau of Retirement Calculations toll free at **1-888 738-2252**. After you retire, you may contact the Retired Payroll Section toll-free at **1-888-377-7687**.

People First Service Center

For information regarding state group insurance, call **1-866-663-4735** or log on to <https://peoplefirst.myflorida.com/logon.htm>

Social Security Administration

For Old Age, Disability, & Survivor Benefits, as well as Medicare coverage, call **1-800-772-1213** (the TYY Line is **1-800-325-0778**) or visit their website at <http://www.ssa.gov/>

State Deferred Compensation

<https://www.myfloridadeferredcom.com/SOFweb/index.asp>
