

Murray State Retirement Process – Human Resources

All Retirees:

1. Determine your retirement effective date
 - a) Must be the 1st of a month (ex. July 1, 2018).
 - b) You cannot be paid for any work after your retirement date.
 - c) All leaves and regular pay must occur prior to your retirement effective date.
2. Notify your department in writing that you are retiring from Murray State.
 - a) Be sure to include your retirement date in the letter.
 - b) Work with your department for the process to use all remaining vacation leave and to determine your last day worked.
3. Notify Human Resources of your retirement plans. Marcie Clark, Assistant Director of Benefits, will assist in the retirement process. In order to process the employer portion of the retirement application, a copy of your retirement letter to your department is needed (acknowledged – stamped or initialed by the department).
 - mclark23@murraystate.edu
 - 270-809-2158 or 2158 on campus

***Please note – None of the retirement systems notify Human Resources you are planning to retire. It is your responsibility to contact your department and Human Resources to complete the process.**

Human Resource's Recommendations:

Start the retirement process at least two months in advance.

- This allows plenty of time to complete paperwork/online application and respond to any requests from the retirement system.
- KERS requires more than one set of paperwork, so the process can take time.
- TRS utilizes the [Pathway](#) system for online retirement applications.

Steps to complete the retirement process:

- Specific to each retirement system.
- If you participated in both KERS and TRS, you must complete the process for both systems.

Kentucky Retirement System ([KERS](#))

Step 1 – KERS Form 6000

- You must complete the Notification of Retirement Form 6000 for KERS – Click – [Form 6000](#) for the direct link to download.
- KERS will require:
 - Completed Form 6000
 - Copy of your driver's license
 - Copy of your beneficiaries driver's license
- Bring Form 6000 and all supporting documentation to Human Resources – we can assist you with completing the paperwork if you would like us to.
- Human Resources will complete section H, you do not have to complete this section.
- Once the Form 6000 is completed, Human Resources can fax it to KERS or you can mail it in. We will return the original with a fax confirmation to you and keep a copy on record in Human Resources.
- Process for Murray State is complete.

Step 2 – KERS Packet

- KERS will mail you a packet after they receive the completed Form 6000. You will need to complete the forms and return to KERS in order to complete your retirement process.
- The packet normally contains your options for how you would like to draw your benefit and your health insurance form. If a notary is required, and you do not have access to one, contact Human Resources for assistance.
- KERS will **not** contact Human Resources for any of the information in this packet. It is **your responsibility** to return everything requested by the deadline noted.

Teachers' Retirement System ([TRS](#))

TRS Retirement Process

- Access TRS's website for guidance on completing your application by clicking on [Completing Your TRS Service Retirement Application](#).
- We highly recommend you complete the application through the employee self-service portal through TRS – [TRS pathway – Self Service Log-In](#). This is the preferred method of TRS and will greatly expedite the process.
- You must initiate the retirement process with TRS.
- TRS will require supporting documentation. The information is listed on the [application site](#) as well as within the Pathway Self Service portal.
- After completion of the process within Pathway - contact Human Resources to alert us to complete our part of the Pathway process.
- Once Human Resources has completed our section online, the process for Murray State is complete.

Optional Retirement Program (ORP) – TRS eligible employees only

ORP Retirement Process

- There are no documents required by Murray State to complete your retirement.
- If your 403(b) vendor requires a plan administrator signature for any step in their process, contact the Assistant Director of Benefits, Marcie Clark, for assistance.

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