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, 2016).
   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 the Human Resources Benefits Manager of your retirement plans - Susan Spier:
   - sspier@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 Resources’ Recommendations:
- Start the retirement process at least two months in advance.
  - This allows plenty of time to complete paperwork and respond to any requests from the retirement system.
  - KERS requires more than one set of paperwork, so the process can take time.

Steps to complete the retirement process:
- Specific to each retirement system.
- If you have participated in both KERS and KTRS, 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 here for direct link – Form 6000
KERS will require:
- Completed Form 6000
- Copy of your driver’s license
- Copy of your beneficiaries driver’s license
  • Both need to be increased in size and lightened, we can copy in HR if you would like.
- Bring Form 6000 and all your 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 that 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 HR.
- Process for Murray State is complete.

Step 2 – KERS Packet
- KERS will mail you a packet after they receive the completed Form 6000.
- Usually contains your options for how you would like to draw your benefit and your health insurance form.
  • If anything in the packet requires a notary, 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.

Kentucky Teachers Retirement System (KTRS)

Step 1 – Sick Leave Credit Form
- Murray State requires you to complete MSU’s Purchase of KTRS Sick Leave Credit (Acknowledgment Sheet) at least two months prior to your retirement date.
- Contact Human Resources to complete this Form.

Step 2 – KTRS Retirement Process
- Access KTRS’s website for guidance on completing your application (linked here) - Completing Your KTRS Service Retirement Application
- We highly recommend you complete the application through the employee self-service portal through KTRS - KTRS Pathway - Self Service Log-In.
  • This is the preferred method of KTRS and will greatly expedite the process.
- You must initiate the retirement process with KTRS.
KTRS will require supporting documentation. This information is listed on the application site - [Completing Your KTRS Service Retirement Application](#).

Once you have completed the process on Pathway or completed your form, contact Human Resources to alert us to complete our part of the process.

Once Human Resources has completed our section online, the process for Murray State is complete.

### Optional Retirement Program (ORP) – KTRS eligible employees only

#### Step 1 – Sick Leave Credit Form

- Murray State requires you to complete MSU’s Purchase of ORP Sick Leave Credit (Acknowledgment Sheet) at least two months prior to your retirement date.
- Contact Human Resources to complete this Form.

#### Step 2 – 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 Human Resource Benefits Manager for assistance.