

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 – Carol Downey the Assistant Benefits Manager 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).
 - cdowney3@murraystate.edu
 - 270-809-2237 or 2237 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](#))

Step 1 – Sick Leave Credit Form

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

Step 2 – 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

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 Resources Benefits Manager, Marcie Clark for assistance.
mclark23@murraystate.edu
270-809-2158 or 2158 on campus