Retirement Planning Packet Checklist

Thank you for your service to Durham Technical Community College. Please review the following checklist with resources and tasks that will aid you in the retirement process. The State Retirement System is the final authority regarding the retirement process.

Responsible Entity	Resources	Initials
Employee	Retirement Planning 101 ← Here is the link to a multi-year, multi-step resource that outlines the tasks and responsibilities during the retirement process.	
Employee	TSERS Retirement Planning Webinar ← Here is the link to register for live TSERS retirement planning webinars. Date/Time:	
Employee	Member Handbooks ← Here is the link to the retirement handbooks. Look for TSERS Retirement Handbook .	
Employee	ORBIT ← Here is the link to the Retirement Site (orbit.myncretirement.com). You may use this space to keep up with the username and password that you created. USERNAME: PASSWORD: PERSONAL EMAIL ADDRESS:	
Employee	<u>TSERS Forms</u> ← Here is the link to <i>downloadable</i> retirement forms (i.e. Form 6, Beneficiary forms, etc.)	
Employee	Address: North Carolina Department of State Treasurer Retirement Systems Division 3200 Atlantic Avenue Raleigh, NC 27604 Phone: 919-814-4590, 8:30 a.m 4:30 p.m. Fax: 919-855-5800 Date Representative Name	

Responsible Entity	Actions	Initials
Employee	 Initiate Form 6 (Retirement Application), no sooner than 120 days prior to retirement date. 	
	App Date: Ret Date:	
	How was the form submitted (online/mail/fax)?:	
	Form 6 may be completed directly online via ORBIT (HR will receive the online application via email from retirement system) or downloaded (from the forms page on ORBIT), completed, submitted to HR via mail, interoffice mail, hand delivery (Bldg. 1 – Suite 160, Main Campus), or HR fax 919-536-7293.	
Employee	 Employee schedules a meeting with HR & Payroll to discuss leave balances and other year-to-date financials. 	
Payroll	3. Payroll will audit leave balances and other year-to-date financials.	
Employee	4. The Employee must enter ALL LEAVE, to be taken between the application date and retirement date, in the leave system.	
Payroll	Payroll will complete the Employer portion of Form 6 and submit it to the retirement system.	
Retirement System	6. The Retirement System will confirm receipt and processing of Form 6 (via mail or email to the employee).	
Employee	7. Employee will submit their intent of retirement letter per the Employee Benefits and Retirement process in the Employee Handbook.	
Retirement System and Employee	 Retirement system will email/mail the employee forms, for example: Form 170 -Authorizing Direct Deposit and Form 290- Choosing Income Tax Withholdings Form 6E-Choosing Your Retirement Payment Option The employee will complete the forms they receive from the retirement system and return them as directed. 	
Employee	3. Contact the State Health Plan within (30) days of the retirement to ensure set-up for health insurance. Projected retirement date: Deadline for Health Insurance:	
		ı

I have reviewed the checklist and understand each entity's responsibilities in the retirement process, especially my own as the employee/retiree.				
Signatu	ure	Date		