

Checklist for University of Dayton Retirees

3 months prior	<p>If employee or spouse is age 65 or older, contact Medicare to begin coverage the first of the month following date of retirement.</p> <p>Note: Plan for all personal email to transition to personal account.</p>
2 months prior	<p>Complete retirement withdrawal/annuity paperwork with retirement plan carriers if you wish to withdraw funds.</p>
1 month prior	<p>Provide letter of intent to retire to supervisor or department chair (no less than 4 weeks prior to retirement date for exempt staff and faculty and no less than 2 weeks prior to retirement for clerical & technical employees). Please cc. Beth Schwartz</p>
1 month prior	<p>Confirm request to continue/cancel medical and/or dental coverage and complete any necessary paperwork.</p>
Last day	<p>Turn in keys and any University property to supervisor. At the end of your last day, your UD Gmail account will be turned off or, if needed for business continuity purposes, transferred to your supervisor.</p> <p>If there are contacts or messages you wish to retain, download or forward this information to your personal email account before your departure. If employed at WPAFB out-processing must be completed before the last day of work.</p> <p>Set an out of office message on your email that you are retired and list who to contact going forward.</p>
Within 30 days	<p>Contact The Hartford if there is a wish to convert any of the life insurance coverage that ended to individual policies</p>
After final pay	<p>Stop in the lobby of Kennedy Union to obtain retiree ID card. Must have retiree ID card in order to use the University Library after retirement.</p>