



## Roadmap to Retirement

Legend

Plan the route

Getting close

It's time to do it now

When to act	Take action	Contact	On the Web	Contact phone
<b>Plan the route</b>				
Within 5 years	Determine your eligibility	Human Resources	<ul style="list-style-type: none"> <li>❖ <a href="https://hub.selfservice.systems.state.mn.us/psp/hubss/ELFSERVICE/?cmd=login">https://hub.selfservice.systems.state.mn.us/psp/hubss/ELFSERVICE/?cmd=login</a></li> <li>❖ Log in to Self Service</li> <li>❖ Click Self Service</li> <li>❖ Click Need Assistance</li> <li>❖ Click Employee Contacts</li> </ul>	Phone numbers and e-mail addresses available in Self Service
		State Employee Group Insurance Program (SEGIP)	<a href="http://mn.gov/mmb/segip/">mn.gov/mmb/segip/</a>	651-355-0100
Within 5 years	Educate yourself	ETD Retirement classes	<a href="https://mn.gov/mmb/etd/retirement-seminars/">https://mn.gov/mmb/etd/retirement-seminars/</a>	ETD Help Desk 651-259-3646
		MSRS retirement classes	<a href="https://www.msrs.state.mn.us/webinar-opportunities">https://www.msrs.state.mn.us/webinar-opportunities</a>	MSRS 800-657-5757
1 -2 years		Which insurances can you continue	<a href="https://mn.gov/mmb-stat/segip/doc/continuation-ins-retirement-chart.pdf">https://mn.gov/mmb-stat/segip/doc/continuation-ins-retirement-chart.pdf</a>	651-355-0100
		Insurance rates	<a href="https://mn.gov/mmb-stat/segip/doc/combined-ret-rates.pdf">https://mn.gov/mmb-stat/segip/doc/combined-ret-rates.pdf</a>	651-355-0100
		Learn about Medicare	<a href="http://www.medicare.gov/">http://www.medicare.gov/</a>	1-800-MEDICARE (1-800-633-4227)
1 -5 years	If in a bargaining unit that provides special retirement provisions	Labor contract  SEGIP	<a href="http://mn.gov/mmb/employee-relations/labor-relations/Labor/">http://mn.gov/mmb/employee-relations/labor-relations/Labor/</a>	Your Human Resources or Union Representative or SEGIP 651-355-0100

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Within 2 to 6 months prior	Pick your retirement date and review your options...	Contact your appropriate Pension Administrator <ul style="list-style-type: none"> <li>❖ MSRS</li> <li>❖ TRA</li> <li>❖ PERA</li> </ul>	<a href="https://www.msrs.state.mn.us/">https://www.msrs.state.mn.us/</a> <a href="https://www.minnesotatra.org/">https://www.minnesotatra.org/</a> <a href="https://www.mnpera.org/">https://www.mnpera.org/</a>	1-800-657-5757  1-800-657-3669  1-800-652-9026
		Contact Human Resources	<ul style="list-style-type: none"> <li>❖ <a href="https://hub.selfservice.systems.state.mn.us/psp/hubss/ELFSERVICE/?cmd=login">https://hub.selfservice.systems.state.mn.us/psp/hubss/ELFSERVICE/?cmd=login</a></li> <li>❖ Log in to Self Service</li> <li>❖ Click Self Service</li> <li>❖ Click Need Assistance</li> <li>❖ Click Employee Contacts</li> </ul>	Phone numbers and e-mail addresses available on Employee Self Service
		Contact Medicare	Check eligibility and enroll in Medicare A & B for you and/or eligible spouse  <a href="http://www.medicare.gov">http://www.medicare.gov</a>	1-800-MEDICARE (1-800-633-4227)
		Contact Social Security	<a href="http://www.ssa.gov/">http://www.ssa.gov/</a>	1-800-772-1213
60- days prior to your retirement date	Consider changing Medical or Dental carrier  Complete a Qualified Status Change form with HR, in addition to the Continuation of Coverage upon Retiree form	BlueCross BlueShield MN, HealthPartners, State Delta Dental Grp 216, State Dental Plan HealthPartners  Human Resources or State Employee Group Insurance Program	<a href="https://mn.gov/mmb/segip/insurance-contacts/administrators-and-carriers.jsp">https://mn.gov/mmb/segip/insurance-contacts/administrators-and-carriers.jsp</a>  <a href="https://mn.gov/mmb-stat/segip/doc/qualifying-status-change-form.pdf">https://mn.gov/mmb-stat/segip/doc/qualifying-status-change-form.pdf</a>	Contact your current carriers by calling the customer service phone number on the back of your card.  For assistance locating phone numbers for other carriers, call your HR office or Employee Insurance at 651-355-0100
Prior to retirement & while Life Insurance is in place	Review Legacy Planning, Will Preparation, and Financial Consult following a claim	Minnesota Life/Securian	<a href="http://Securian.com/legacy">Securian.com/legacy</a>	1-877-494-1714
		Ochs Inc. Agency (3 <sup>rd</sup> Party Admin.)	<a href="http://LifeBenefits.com">LifeBenefits.com</a> <b>Password protected</b>	1-877-849-6034

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Within 2 months: but no later than 30 days from retirement	Complete the insurance paperwork	Human Resources or State Employee Group Insurance Program	<a href="https://mn.gov/mmb-stat/segip/doc/retire-continue-coverage.pdf">https://mn.gov/mmb-stat/segip/doc/retire-continue-coverage.pdf</a> <ol style="list-style-type: none"> <li>1) Continuation of Coverage Upon Retirement (Special and Early/Reg.)</li> <li>2) Post Retirement Optional Life employee</li> <li>3) Post Retirement Optional Life spouse</li> <li>4) ***Senior Plan application will be mailed to home address for retiree or retiree spouse 65 or older with Medicare A &amp; B. Must be completed and returned to carrier ASAP</li> </ol>	651-355-0100
Within 2 months	Determine eligibility for severance & maximum vacation payouts to HCSP	Labor contracts or your Human Resources/Payroll	<a href="http://mn.gov/mmb/employee-relations/labor-relations/Labor/">http://mn.gov/mmb/employee-relations/labor-relations/Labor/</a> <ul style="list-style-type: none"> <li>❖ <a href="https://hub.selfservice.systems.state.mn.us/psp/hubss/SELFSERVICE/?cmd=login">https://hub.selfservice.systems.state.mn.us/psp/hubss/SELFSERVICE/?cmd=login</a></li> <li>❖ Log in to Self Service</li> <li>❖ Click Self Service</li> <li>❖ Click Need Assistance</li> <li>❖ Click Employee Contacts</li> </ul>	Phone numbers and e-mail addresses available on Employee Self Service
	Complete the pension application if you want to begin collecting you pension benefits	Contact your appropriate Pension Administrator <ul style="list-style-type: none"> <li>❖ MSRS</li> <li>❖ TRA</li> <li>❖ PERA</li> </ul>	<a href="https://www.msrs.state.mn.us/">https://www.msrs.state.mn.us/</a> <a href="https://www.minnesotatra.org/">https://www.minnesotatra.org/</a> <a href="https://www.mnpera.org/">https://www.mnpera.org/</a>	1-800-657-5757 1-800-657-3669 1-800-652-6026
Prior retirement and annual review	Update Life Insurance Beneficiary	Ochs Inc. Agency (3 <sup>rd</sup> Party Admin.) Securian Financial (Minnesota Life)	<a href="https://web1.lifebenefits.com/content/lifebenefits/stateofmn/en/act-now/designating-a-beneficiary.html">https://web1.lifebenefits.com/content/lifebenefits/stateofmn/en/act-now/designating-a-beneficiary.html</a> Password protected	651-665-3789 1-800-392-7295 1-877-494-1714
	Update pension, MNDGP, HCSP Beneficiaries	MSRS	<a href="https://www.msrs.state.mn.us/">https://www.msrs.state.mn.us/</a>	1-800-657-5757
Congratulations on retirement!				