Service Retirement - Pension Plan - Checklist

Employee Name _____ People First ID# _____

Agency/Circuit _____ Termination Date _____

Service Retirement Forms Packet	☒	Date
Processed FR-11, Service Retirement Application	☐	_____
Processed FRS-11o, Option Selection Form	☐	_____
Processed SA-1, Spousal Acknowledgement Form	☐	_____
Processed Verification of Birth, Employee and/or Joint Annuitant	☐	_____
Faxed to the Division of Retirement or submitted to JAC	☐	_____

Payroll	☒	Date
Submitted Termination PAR to JAC, reason code "56" for "retirement"	☐	_____
Submitted PAR for annual leave and/or sick leave payout*	☐	_____

* Please indicate if the employee has elected to roll over a portion or all of their leave payout to their 457(b) Deferred Compensation account. This can be noted in the Comments Section of the PAR.

Notes:

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