

Service Retirement - Pension Plan - Checklist

Employee Name _____ People First ID# _____

Agency/Circuit _____ Termination Date _____

Service Retirement Forms Packet

	<input checked="" type="checkbox"/>	Date
Processed <u>FR-11</u> , Service Retirement Application	<input type="checkbox"/>	_____
Processed <u>FRS-11o</u> , Option Selection Form	<input type="checkbox"/>	_____
Processed <u>SA-1</u> , Spousal Acknowledgement Form	<input type="checkbox"/>	_____
Processed Verification of Birth, Employee and/or Joint Annuitant	<input type="checkbox"/>	_____
Faxed to the Division of Retirement or submitted to JAC	<input type="checkbox"/>	_____

Payroll

	<input checked="" type="checkbox"/>	Date
Submitted Termination PAR to JAC, reason code "56" for "retirement"	<input type="checkbox"/>	_____
Submitted PAR for annual leave and/or sick leave payout*	<input type="checkbox"/>	_____

* 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: