Process Guide for Retirement under the Optional Retirement Program (ORP)

1. Retired employee eligibility for UT Benefits insurance depends on your employment history. View the Retired Employee Eligibility requirements to determine if you are eligible to retire from UT Dallas and enroll in the UT Retiree Insurance.

2. At retirement from UT Dallas, you may be eligible for UT Retiree Benefits, if you meet the eligibility criteria for Retired Employee Insurance. Click here to view the Retired Employee Eligibility for Insurance requirements.

   UT Retiree Insurance includes continuation of coverage in Medical, Dental, Vision and Life insurance (EOI may be required). Basic Coverage includes $6,000 Group Term Life Insurance for Retired Employees for members enrolled in the UT Select/UT Connect medical plans.

   Note: UT Connect is only available for retirees under age 65. Therefore, if you are enrolled in the UT Connect plan, at retirement you will be switched to the UT Select Medical Plan.

   Enrollment Tools:
   - Enrollment Guide for Retiring Employees
   - Calculate Out-of-Pocket Cost (.pdf)
   - Interactive Calculator for Out-of-Pocket Cost

3. Notify your department’s Benefits Administrator of your intent to retire. Your BA will provide you with the required forms, which will need to be completed and submitted to the Benefits Office prior to your retirement date.

   - UT Benefits Enrollment Application
   - Direct Payment/Debit Authorization Agreement Form
   - UT Dallas Retiree Association Form (optional)
4. Notify your department of your intent to retire within 2 months prior to retirement date. Your department will submit a retirement ePAR, which will be reviewed and approved by your Benefits Administrator.

5. If you are or will be age 65+ at retirement, we recommend you schedule an appointment with the Medicare Office to enroll in Medicare Part A (Hospital) and Part B (Medical).

   **Do not enroll in Part D (Prescription Coverage).** You will DECLINE Part D, since you will be enrolled in the UT Select Medical Plan as a retiree, which includes prescription coverage via UT Select Medicare Part D administered by Express Scripts.

   At retirement, Medicare will be your primary coverage and the UT Select Plan will be your secondary coverage; the UT Select Medical Plan will serve as your supplemental insurance. We recommend you contact the Social Security Administration Office, three months prior to retirement to enroll in Part B (Medical) coverage.

   Notify your Benefits Administrator when you have scheduled your appointment, so we can provide you with a Form **CMS-L564 – Request for Employment Information**. The purpose of this form is so you can enroll in Medicare Part B due to a Special Enrollment Period, which is retirement. The form is used to show you have been enrolled in a group health care plan within the last 8 months. You will need to submit this form, along with your **Application for Enrollment in Medicare Form (CMS-40B)** to your local Social Security office.

6. You can sign up for Medicare at: [https://www.ssa.gov/benefits/medicare/](https://www.ssa.gov/benefits/medicare/).

   Scroll down to where it says Apply for Medicare Only:
To find out what documents and information you need to apply, go to the Checklist For The Online Medicare, Retirement, and Spouses Application.

Click here to view more information on the UT Select Medical Plan and Medicare for Retired Employees: https://www.utsystem.edu/offices/employee-benefits/ut-select-medical-plan-retired-employees/medicare

7. Prescription Drug Plan - a retiree who is 65 years of age or older, your coverage will transition from the UT Select Prescription Drug Plan (commercial plan offered to active employees), to the UT Select Medicare Part D Plan via Express Scripts.

You will receive a Welcome Kit from the UT Select Medicare Part D Plan. The Welcome Kit will be mailed to the address on file. It will include a Welcome Letter, a NEW UT SELECT Medicare Part D ID card, and a full description of the program. There is a slight delay in the transition between plans, however you will have coverage under the commercial plan until the transition to the Part D Plan. If you do not receive this information within 60 days of retirement, contact the UT Select Medicare Part D Plan to request your Welcome Kit at (800) 860-7849.

Prescription Drug Plan - Retired Employees: https://www.utsystem.edu/offices/employee-benefits/prescription-drug-plan-retired-employees

8. The first 2-3 month of benefit monthly premiums will need to be paid directly to UT Benefits Billing until your annuity deduction has been established.

UT Benefits Billing is responsible for processing insurance premiums for Retired Employees for all UT institutions. You may process payment for premiums using one of these payment options listed below.

Payment Options – Payment is due by the 10th of the month.

- **Major Credit Card/Debit Card payments** can be processed 24/7 at the Texas State Comptroller's UT Benefits Billing website: www.texas.gov/UTBB. Please enter the Retiree's Benefits ID number on the site. If you supply a valid email address, you will receive a confirmation receipt for your payment.

- **Credit Card payments accepted over the phone.** You can call UTBB’s toll-free number (855-6UT-BILL) at your convenience to pay for your Retiree insurance premiums. UTBB accepts MASTERCARD or VISA.

- **You can use the Bill Pay option through your bank.** Be sure to update your Payee information to include the correct mailing address:
  
  UT System Lockbox
  
  ATTN: UT Benefits Billing
  
  P.O. Box 732206
  
  Dallas, Texas 75373-2206
Be sure to use your Benefits ID as your Account Number. You can find the Benefits ID on your statement or feel free to call our office for assistance. You can expect to receive monthly statements if you have a monthly balance.

Once UT Benefits Billing processes the Direct Payment/Debit Authorization Agreement Form you will receive a Confirmation Letter notifying you that your Agreement has been completed. Until you receive this confirmation, you will pay for your benefits via one of the payment options noted above.

Click here to view more information regarding the UT Benefits Billing for Retirees.

9. The UT Dallas Benefits Office will continue to be your point of contact for all other Retired Employee services including:
   - Annual benefit enrollment activities
   - Explanation of benefit options or general questions regarding benefits
   - Changes in your marital or family status
   - Death notifications
   - Changes in your profile like a new permanent or temporary mailing address, email account, or emergency contacts

10. Once you are completely processed out of the system, we will send a Vesting Termination Form to your ORP Provider, so you may begin the distribution of your ORP retirement funds and voluntary retirement funds (if applicable).

11. Contact your UT Dallas ORP Provider to discuss your distribution options and beneficiary designations. Click here to find your retirement advisor.