Online Retirement Application Process





Start Your

Online

Retirement

Application







Submit All

Required

Documents



Retirement

Analyst

Processes

Your

Application





Get an **Estimate** of Your Retirement **Benefits**

This is the perfect

not sure whether

place to start if you're

you're ready to retire

and don't want to tell

your employer that

retiring just yet. Log

in to ORBIT to get a

customized estimate

of what you could

receive each month

at retirement. Then,

you can decide when

you're ready to start

your application.

you're thinking of

If you're a member of TSERS or LGERS, you can start your online application when you're about 120 days from your desired retirement date. In Step 1, your intent to retire is made official, so make sure you inform your employer before

starting your online

application.

Retirement Analyst/ **Employer Verify Your** Data

After clicking "Submit" in Step 1, an analyst will work with your employer to confirm your years of service, salary and any unused sick leave you may have. You'll receive an email when it's time to start Step 2. You'll also receive an email about options for any NC 401(k), NC 457 or NC 403(b) funds you may have.

Benefit Selections

Make Your

Retirement

In Step 2, you'll make all the big decisions: • Decide if you want another person to receive monthly payments after your death (you'll be able to recalculate to see how a different beneficiary affects your payments) • Determine your tax deductions Elect beneficiaries

for other important

retirement benefits

After you finish Step 2, you'll immediately start Step 3 where you will be asked to upload needed documents. A full list of all the documents we need from you will be provided in Step 3. If you would prefer to fax or mail in copies of your documents, you'll see instructions for that

as well.

Once all required documents have been received, a retirement analyst will review everything you've submitted and will process your completed application. You will if additional details or documents are

You Are **Notified that** Your Retirement is Approved!

Congratulations!

Your retirement

application has been

approved! At this

point you'll receive

an email confirming

your retirement. It's

time to celebrate!

Your first monthly

will be sent in the

form of a paper

retirement payment

check. Each payment

after the first one will

be direct deposited

into your account.

Make Your Health Benefit **Decisions**

be notified by email needed.

The confirmation email you receive will include details about your auto-enrollment in the State Health Plan. If you want to disenroll from coverage or want to add dependents, you have 30 days to make that decision. You will also receive information about supplemental dental, vision and identity theft protection available through Pierce Insurance.



