



Baylor University

Retirement Checklist

Two to Three Months Prior To Your Retirement Date

- Contact the Social Security Administration to complete [Medicare Part B Enrollment](#).
 - Contact x2000 to request Baylor HR to complete the Request for Employment Information form.
- Contact [VIA Benefits](#) to opt into the Health Reimbursement Arrangement (HRA) and to enroll into a Medicare Supplement Plan.

Prior To Your Retirement Date

- If applicable, file Health Savings Accounts reimbursement claims through [Benefit Wallet](#).
- Contact [TIAA](#) to initiate Retirement Plan Account distributions or rollover requests.
- Contact x2000 to request an [ID Card & Parking Permit Authorization](#). You will take this document to the ID Card and Parking office located in the Speight Parking Garage to receive your retiree and retiree spouse ID cards.
- Complete and return the [Separation Processing Form](#), [Technology Access Form](#).
- Return equipment (Cell phone, laptop, monitors, iPad, etc.) to your department or drop-off at the ITS Annex in the 5th St Parking garage Monday – Friday between 8:00am and 5:00pm.
 - Turn in your Baylor ID card (and spouse card, if applicable) to your supervisor or HR Consultant.
 - Return any keys that have been issued to you to the key shop located at 1919 South 1st street. The key shop will issue you a receipt of return that should be turned into your supervisor or HR Consultant.

If you are unable to return your keys and ID badge to your department, please mail them to:

**Baylor Human Resources
One Bear Place # 97053
Waco, TX 76798-7053**

After your retirement date, [Discovery Benefits](#) will send you a welcome letter to provide you with an opportunity to make Continuation of Insurance Coverage elections.

- If applicable, file Dependent Care Flexible Spending Account reimbursement claims through [WageWorks](#) within 30 days after your retirement date.
- If applicable, file Healthcare Flexible Spending Account reimbursement claims through [WageWorks](#) within 30 days after your retirement date, or an election through [Discovery Benefits](#) to continue your account through December 31, 2021.

Thank you for completing the [Exit Interview Survey](#).

HUMAN RESOURCES

One Bear Place #97053 • Waco, TX 76798-7053 • (254) 710-2000