

Murray State Retirement Process – Human Resources

All Retirees:

1. Determine your retirement effective date
 - a) Must be the 1st of a month (ex. July 1, 2023).
 - b) You cannot perform any work after your retirement date if you are a KPPA (KERS) or TRS participant.
 - c) All leaves and regular pay must occur prior to your retirement effective date.
2. Notify your department in writing that you are retiring from Murray State.
 - a) Submit your retirement letter to your direct supervisor.
 - b) Be sure to include your retirement date in the letter.
 - c) Work with your department for the process to use all remaining vacation leave, if applicable, and to determine your last day worked.
3. Notify Human Resources of your retirement plans.
 - a. Submit a copy of your retirement letter to Human Resources.
 - b. Mandy Lawson, Benefits Administrator, will assist in the retirement process. A copy of your retirement letter must be submitted to Human Resources before the employer portion of retirement forms or applications can be completed.
 - c. Sara Florence, Employee Relations Specialist, will assist with determining your last day and the clearance process.

Contact: Mandy Lawson | Benefits Administrator | alawson11@murraystate.edu | 270-809-2237

***Please note –it is your responsibility to contact your department and Human Resources to complete the retirement process.**

Human Resource’s Recommendations:

1. Start the retirement process at least two months in advance.
 - a. This allows plenty of time to complete paperwork/online application and respond to any requests from the retirement system.
 - b. KPPA (KERS) utilizes the [Member Portal](#) for online retirement applications, and requires paperwork be completed, so the process can take time.
 - c. TRS utilizes the [Pathway](#) system for online retirement applications.
2. Steps to complete the retirement process:
 - a. The steps are specific to each retirement system.
 - b. If you participated in both KPPA (KERS) and TRS, you must complete the process for both systems.

Kentucky Public Pensions Authority (KPPA):
Kentucky Retirement System ([KERS](#)) is a part of the KPPA system

Step 1 – KPPA Online Application

- Access KPPA’s website for guidance on completing your application by clicking on [Managing Your Retirement Account](#).
- We highly recommend you complete the application through the [employee self-service portal through KPPA](#). This is the preferred method of KPPA and will greatly expedite the process.
- You must initiate the retirement process with KPPA.
- KPPA will require supporting documentation:
 - Completed application
 - Copy of your driver’s license
 - Copy of your beneficiary’s driver’s license
- After completion of the process through the employee self-service portal, contact Human Resources to alert us to complete our part of the application process.
- Process for Murray State is complete.

Step 2 – KPPA Packet

- KPPA will mail you a packet after they receive the completed application. You will need to complete the forms and return to KPPA in order to complete your retirement process.
- The packet normally contains your options for how you would like to draw your benefit and your health insurance form. If a notary is required, and you do not have access to one, contact Human Resources for assistance.
- KPPA will **not** contact Human Resources for any of the information in this packet. It is **your responsibility** to return everything requested by the deadline noted.

Teachers’ Retirement System ([TRS](#))

- Access TRS’s website for guidance on completing your application by clicking on [Completing Your TRS Service Retirement Application](#).
- We highly recommend you complete the application through the [employee self-service portal through TRS. This is the preferred method of TRS and will greatly expedite the process](#). You must initiate the retirement process with TRS.
- TRS will require supporting documentation. The information is listed on the [application site](#) as well as within the Pathway Self Service portal.
- After completion of the process within Pathway, contact Human Resources to alert us to complete our part of the Pathway process.
- Once Human Resources has completed our section online, the process for Murray State is complete.

Optional Retirement Program (ORP)

- There are no documents required by Murray State to complete your retirement.
- If your 403(b) vendor requires a plan administrator signature for any step in their process, contact the Assistant Director of Benefits, Marcie Clark, for assistance.