

# RETIREMENT CHECKOUT FORM

Full-time Faculty, Administrative, and Staff Personnel  
Brigham Young University

This form will lead you through the retirement process, which begins with Benefits Services and ends with your department. If you are **terminating** employment rather than retiring, use the EMPLOYMENT TERMINATION CHECKOUT FORM online at <https://hrs.byu.edu/employees/ending-employment> or contact Benefits Services, ext. 2-4716

Name: \_\_\_\_\_

BYU ID: \_\_\_\_\_

Retirement Date: \_\_\_\_\_

Dept/College: \_\_\_\_\_

**STEP 1: EMPLOYEE** – no later than **THREE MONTHS** prior to retirement, the retiring employee should go to Benefits Services, D-240 ASB, or call ext. 2-4716, to initiate the retirement process.

- \_\_\_ Complete the appropriate [Commitment or Intent to Retire form](#), and submit it to D244 ASB
- \_\_\_ Update mailing address, email, and phone number in Personal Information (if needed)
- \_\_\_ For questions regarding post-retirement employment and research activity, contact Faculty Relations ext. 2-7017
- \_\_\_ Retiring faculty can retain rights to access some library databases from off campus for a limited time while research is continuing. Access can be requested at <https://lib.byu.edu/services/?categories=for-retirees> or by contacting library administration.
- \_\_\_ Email: work with your college CSR to forward your BYU email to another email provider and to migrate your Outlook archive to a personal computer.
- \_\_\_ Set up an appointment with Benefits Services to go through the retirement process, which includes:
  - Master Retirement Plan/pension selection
  - Medical/Dental/Life Insurance selections
  - BYU campus retirement benefits discussion
  - Medicare discussion/enrollment/forms (if needed)
  - Review of savings plans, including outstanding loans (DMBA/TIAA)

**BENEFITS SERVICES CLEARANCE:** \_\_\_\_\_ / \_\_\_\_\_  
(Authorized Signature) (Date)

**RETIRING EMPLOYEE:** \_\_\_\_\_ / \_\_\_\_\_  
(Signature) (Date)



## STEP 2: EXIT SURVEY:

**Staff/Admin:** Before you depart, we would appreciate receiving feedback regarding your employment experience. Please complete a survey at: <https://hrs.byu.edu/employees/ending-employment>

**Faculty:** Faculty desiring to schedule an exit interview should contact Faculty Relations, ext. 2-7017, D-341 ASB.

**STEP 3: DEPARTMENT:** Please return this form to your department when it is completed.

The department should then access the “Department Termination/Retirement Checklist” found at this link: <https://hrs.byu.edu/employees/ending-employment> and review the list of items to collect, systems to update, and things employees may need to resolve before leaving the university.