



Chaffey Joint Union High School District

Personnel Services

Pre-Retirement Checklist

This pre-retirement checklist is not intended to replace the steps prescribed by your individual retirement system; this list is intended to complement and guide you through our District's steps to transition into retirement.

Step 1- Contact Your Retirement System

Contact your retirement system for an estimate of your monthly benefit and related retirement information to help you decide when it's the right time for you to retire and what retirement option is best for you.

[California Public Employees Retirement System \(CalPERS\)](#)

[California State Teachers' Retirement System \(CalSTRS\)](#)

[Public Agency Retirement Services \(PARS\)](#)

Step 2 – Contact Social Security Office

Contact Social Security (if applicable) - [Social Security](#) benefits are generally available at age 62 or older. If eligible, you should [apply for retirement benefits](#) at least 3 months prior to the date you want your benefits to start.

Step 3 – Contact Personnel Services

Once you understand your retirement options with your retirement system, you need to contact the Personnel Services office to learn about your individual eligibility for District health benefits and your options related to your paid leave balances.

- To request a review of your service years with the District, contact:
 - Certificated staff - Ana Lucero at ana.lucero@cjuhsd.net
 - Classified staff - Gloria Trevino at gloria.trevino@cjuhsd.net
- To verify your paid leave balances contact Kate Pacheco at katherine.pacheco@cjuhsd.net
- To learn about your options and applicable cost for District health benefits, contact Vanessa Garcia at vanessa.garcia@cjuhsd.net.

Please note: Active Employee Benefits end on the last day of the month in which you retire (if your retirement date is between May and August, your health benefits end on September 1st).

[Medicare](#) is generally available at age 65. To avoid penalties or delays in coverage, if you and/or your covered dependents will be age 65 or older at the time of your retirement, you/they should contact the Social Security Office at least 3 months prior to your retirement date to discuss your/their Medicare enrollment options.

You and/or your covered dependents must be enrolled in Medicare Parts A and B no later than the first of the month following your retirement date. If you/they are not enrolled in Medicare, then you/they will be responsible for paying the portion of the health insurance claims costs that Medicare would have paid had you/they been enrolled.

[Step 4 – Submit your Retirement Application to your Retirement System](#)

When you have made your decision to retire and you have selected your retirement date, you need to complete and submit your retirement application to your retirement system ([CalPERS Retirement Application](#) or [CalSTRS Retirement Application](#), or [PARS Distribution Request](#), and/or [Social Security Retirement Application](#)).

Note: Some parts of your system's retirement application may need to be submitted to the Personnel Services office for verification; our office will complete and submit, as applicable, after your retirement date (this is usually for remaining unused sick leave balances upon retirement).

[Step 5 – Notify Supervisor](#)

Notify your supervisor of your decision to retire.

A courtesy notice will help your supervisor to plan for coverage until your position is filled.

[Step 6 – Submit your Retirement Notice](#)

Complete and submit your [District Retirement Notice Form](#).

Your retirement date is **the day after** your last workday or your last day employed by the District (not your last workday). For example, if your last workday/last day employed with the District is the last day of first semester, December 19th, your **retirement date is the day after**, December 20th.

Be certain of your decision to retire because once you have submitted your Retirement Notice, you cannot rescind it.

The Personnel Services office will contact you for any necessary clarification or additional information; to avoid any delays in processing your retirement, please make it a high priority to respond to any requests for additional information or clarification.

[Step 7 - Return District Property](#)

On your last workday, make sure to return all District property including but not limited to keys, access and communication devices (key fob, access cards, cell phone, laptop, radios), tools, equipment, uniforms, vehicles/bicycles, etc.

[After Retirement Reminders](#)

- If eligible for District benefits, meet with Vanessa Garcia, in the Benefits Office, for your specific retiree benefit enrollment and timeline options.
- Pay Your Premiums - Depending on your benefit eligibility, employees who pay for part or all of their benefits premiums will be responsible for their applicable portion. If you fail to pay your portion of the cost, your coverage and that of your eligible dependent(s) will be cancelled.
- Report any changes to your address, phone number, and personal email address to the Personnel Services office to ensure that you receive important benefits updates and other relevant information.
- Return to Work - Retirees may return to work in a non-contract capacity after completing the required 180-day waiting period. Retirees should review their retirement system for earning or work hours restrictions to avoid a negative effect to their retirement benefit.

