



UNIVERSITY SYSTEM OF GEORGIA RETIREMENT INQUIRY FORM

Complete this form to gather data when determining the Board of Regents retirement eligibility requirements to continue healthcare into retirement (8.2.8.2 or 8.2.8.4) and capture all years of service, if applicable. If your benefitted years of service began on or after January 1, 2013, the Employer Healthcare Contribution for Retirees Chart applies to either the amount you will pay for your retiree USG healthcare plan premium or the annual Health Reimbursement Account (HRA) contribution from USG. Once completed, use this data to populate the fields in the Premium Calculator.

EMPLOYEE INFORMATION

Campus Contact:

Institution:	Date of Meeting:
Employee Name:	Employee ID:
Benefits Service Date in PeopleSoft:	
Requested Date of Retirement: []	Age at Retirement:
State of Georgia sponsored retirement plan: <input type="checkbox"/> TRS <input type="checkbox"/> ORP <input type="checkbox"/> ERS	
USG healthcare plan enrolled in at time of retirement:	
Medicare Eligible and under 65: <input type="checkbox"/> Employee only or <input type="checkbox"/> Employee and Spouse or Family <input type="checkbox"/> Spouse or Child	
Complete the section below ONLY IF Benefits Service Date is on or after 01/01/2013.	
1. Any additional Years of Service in a State of Georgia sponsored retirement plan prior to current employment with USG: <input type="checkbox"/> Yes or <input type="checkbox"/> No	
2. Effective and end date of additional service time:	
3. Career State Only – (This means no break in service between current employment with USG and prior State of Georgia service) Was the hire date with the State of Georgia prior to 1/1/2013? <input type="checkbox"/> Yes or <input type="checkbox"/> No If no, add NB as the last two characters when entering Years of Service in PeopleSoft.	
4. Total Years of Service to be entered into PeopleSoft¹ by practitioner:	

¹The Total Years of Service is only entered for employees with a Benefits Service Date on or after 1/1/2013. This number is entered into PeopleSoft as a whole number or whole number with two decimal places, without rounding, as shown on the report. **Example:** If the number is 10, then enter 10 in PeopleSoft Years of Service field. If the number is 14.589, enter 14.58 in PeopleSoft Years of Service field.

- **TRS** - This number can be found on the TRS report.
- **ERS** - This number can be found on the ERS report.
- **ORP** - Practitioner will use PeopleSoft Job Panel – Job Summary to calculate total full-time years of service.