



BENEFITS

(520) 696-5184 • FAX (520) 696-5071

701 W. Wetmore Road • Tucson, AZ 85705 • (520) 696-5000 • www.amphi.com

Retirement Checklist

Required:	NOTES:		
<input type="checkbox"/> Please send letter, or email, of Intent to Retire to your Administrator as soon as you know your retirement date. You must indicate your last day of work. You must give at least two weeks' notice. For Certified jobs we prefer as much notice as possible to allow time for recruiting.			
<input type="checkbox"/> Complete the ASRS retirement application two months before retirement. ASRS has an online 'wizard' for the forms, or you can make an appointment to go to their office. The retirement date you use for ASRS should be at least one day AFTER your last day of work with us.			
What is the "Ending Payroll Verification form?" ASRS Ending Payroll Verification form: <u>This is completed by Payroll</u> , and is submitted to ASRS electronically once payroll completes all payouts.			
Other:			
<input type="checkbox"/> Access ASRS tools and webinars by visiting https://www.azasrs.gov/			
<input type="checkbox"/> If you want to return via a third party leasing company, Educational Services, Inc. (ESI), please reach out to John Hastings, Director of HR.			
<input type="checkbox"/> View the "Retiree Return to Work" video on the ASRS website			
<input type="checkbox"/> Access the "Retiree to Work" tool form - complete it online and submit to ASRS.			
<input type="checkbox"/> If you want to have your final pay (sick leave, vacation time) deposited in your 403(b) or 457(b) account, complete a TSA Salary Reduction Agreement at least one month before retiring. This is an online request through TSA Consulting Group's website. You must use an approved vendor. (See second page for additional information on this process.)			
<input type="checkbox"/> If you are enrolled in medical, dental, or vision with us, you will receive a COBRA notice from WEX/Leap at your home address. WEX/Leap is our COBRA vendor. <ul style="list-style-type: none"> • If you elect COBRA, you will send your enrollment form and payment directly to WEX/Leap. • If you are eligible for an ASRS subsidy, please complete sections 1-6 on ASRS form titled Health Insurance Premium Benefit Authorization. Once you complete your portion of the form, please forward to Benefits. ASRS's approval of a subsidy may take many (many) months. 			
If applicable: <ul style="list-style-type: none"> <input type="checkbox"/> If you want to learn about Medicare Plans, contact the Pima Council on Aging (www.pcoa.org). 520-790-7262 or attend one of their monthly seminars. <input type="checkbox"/> If enrolled in the HDHP, you may want to learn more about the interactions of a Health Savings Account with Medicare enrollment a minimum of 6 months in advance of your expected transition to Medicare. <input type="checkbox"/> If you want to learn about collecting Social Security, contact www.ssa.gov. 			
ASRS: 520-239-3100 www.azasrs.gov	ESI: 844-614-7784 www.educationalservicesinc.com	TSA: 1-888-796-3786 www.tsacg.com	Payroll Office: 520-696-5118 payroll@amphi.com



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Steps to have your sick leave and/or vacation pay put into a 403b or 457:

START/STOP/EDIT TSA: In order to start, stop or change the amount of your current allocations, utilizing our online system, employees of Amphitheater Public Schools should follow these steps:

1. Before completing the online 403(b) Salary Reduction Agreement (SRA) and 457(b) Participation Agreement process, you **MUST** have an account established with the 403(b) or 457(b) authorized Investment Provider of your choice.
 - To find a provider that partners with Amphi, visit:
<https://www.tsacg.com/individual/plan-sponsor/arizona/amphitheater-public-schools/>
 - Select “List of Agents” under “Forms” on the righthand side of the page
 - TSA provides a document with detailed instructions on how to use the SRA system listed under ****SRA Online Enrollment Process****
2. Navigate to the secure website: <https://sra.tsacg.com/index.php>
Note: The SRA information entered via the online system will supersede and replace all prior 403(b) and/or 457(b) elections, including the amounts, investment providers, and effective dates. Any election(s) you want to continue must be reflected or the election will be stopped.
3. If you previously entered SRA information, or TSACG has your demographic information, most of your personal information will pre-populate after confirming your identity with your date of birth and social security number. If your information is not currently in TSACG’s system, you will be able to add your record.
4. Once your personal information is confirmed, you will be able to start, change, or stop contributions. If you want to maintain an existing contribution, you will need to enter the information for that contribution in addition to any other changes you are making.
5. Once you click “Finished”, you will be asked to read and confirm that you read the SRA terms and disclosures. Then you can submit your SRA and print a copy for your records. Providing your account(s) is/are established with your investment provider, no further action is needed. TSACG will forward your contribution information to us, and we will coordinate it with the Payroll office.

If you have questions regarding the process, please contact TSACG’s SRA Department at 1-888.796-3786, option 5.

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**Enjoy Retirement! Send us a postcard. Thank you for
your service to Amphitheater Public Schools.**