

Retirement Checklist

In order to assist you in establishing a smooth transition from workforce to retirement, University Human Resources (UHR) has prepared the following checklist which may be used in planning for your retirement. Please note that the information presented below is intended for illustrative purposes only, and you should check with your department supervisor and divisional / departmental policies to determine if any other special requirements may exist.

Before You Leave:

Taking the following steps prior to retirement (time and circumstances permitting) will help facilitate a smooth transition for your retirement:

- [Enroll](#) in the next available Retirement Information Workshop. When you log in to register, select the "Benefits Seminars" option.
- Review your unused and accrued paid time off through the [Absence Reporting System](#) (legacy Rutgers) or your [Employee Self Service Portal](#) (legacy UMDNJ). Please review all current [Human Resources policies](#) and [negotiating agreements](#) to determine the appropriate disposition of unused accrued paid time off, and schedule time off, as appropriate, with your supervisor in order to avoid forfeiting accrued paid time off.
- Review the [Retiree Benefits](#) that are available to you.
- Review your files (electronic and hard copy); transfer and/or remove personal files from your office and work computer. Transfer business-related files only as appropriate.
- Notify applicable departments and individuals with details concerning the transition of responsibilities.
- Notify your supervisor of your retirement date and your [last working date](#) as soon as possible so that they can submit the appropriate documents to [Payroll Services](#) and [University Human Resources](#).
- Contact [Rutgers University Libraries](#) to ensure that all books and other library materials have been returned.
- Contact [Department of Transportation Services](#) regarding [reimbursement](#) for time remaining on a university parking permit.
- Contact [Payroll Services](#) if your home address will change before W-2 forms are mailed.

When You Leave:

The following steps will help ensure an orderly transition of functions:

- Turn in all keys to your supervisor.
- Turn in one-time password tokens (for example, Secure ID, SAFEWORD) to your supervisor.
- Update the documentation of work processes for which you had primary responsibility.

Special Circumstances:

The following are additional steps that should be taken if you have specific access to University property and financial resources.

- Return university equipment (pagers, cell phones, computers, tools, etc.) to your department.
- Return petty cash funds to your department.
- Check with your department to ensure all cash advances are cleared.

Special Materials:

If you work directly with Hazardous or Controlled Materials, these additional steps may be required.

- Ensure all chemicals, radioactive materials, and other hazardous materials or samples are properly labeled, stored, and/or disposed.
- Visually inspect your work area prior to separation for any hazardous or controlled materials that are not stored properly. Secure all hazardous materials. Contact [Rutgers Environmental Health and Safety \(REHS\)](#) if you have specific questions.
- Turn in any radiation dose monitoring badges and return to [REHS](#).

Please make sure to check with your department supervisor and divisional / departmental policies or practices to determine if any other special requirements may exist in order to create a seamless transition for yourself and the university.