



Roadmap to Retirement

Legend

Plan the route

Getting close

It's time to do it now

When to act	Take action	Contact	On the Web	Contact phone
Plan the route				
Within 5 years	Determine your eligibility	Human Resources	https://portal.s4web.state.mn.us/ps/por91ssap/SELFSERVICE/ENTP/h/?tab=MN_GUEST <ul style="list-style-type: none"> ❖ Click State of MN Self Service ❖ Click Need Assistance ❖ Click Employee Contacts 	Phone numbers and e-mail addresses available on Employee Self Service
		State Employee Group Insurance Program (SEGIP)	http://mn.gov/mmb/segip/	651-355-0100
Within 5 years	Educate yourself	5 year retirement class	https://mn.gov/mmb/eld/retirement-seminars/retirement-courses/	ELD Help Desk 651-259-3646
1 -2 years out		What can you continue	https://mn.gov/mmb/assets/Continue-Chart_tcm1059-126972.pdf	651-355-0100
		Rates	https://mn.gov/mmb/assets/2016-retiree-combined-rates_tcm1059-125400.pdf	651-355-0100
		Learn about Medicare	http://www.medicare.gov/	1-800- MEDICARE (1-800-633-4227)
1 -5 years out	If in a bargaining unit that provides special retirement provisions	Labor contract SEGIP	http://mn.gov/mmb/employee-relations/labor-relations/Labor/	Your Human Resources or Union Representative or SEGIP 651-355-0100

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Within 6 – 2 months prior	Pick your retirement date and...	Contact appropriate Pension Administrator to review options <ul style="list-style-type: none"> ❖ MSRS ❖ TRA ❖ PERA 	http://www.msrs.state.mn.us/ https://www.minnesotatra.org/ http://www.mnpera.org/	1-800- 657-5757 1-800-657-3669 1-800-652-9026
		Contact Human Resources	https://portal.s4web.state.mn.us/psp/por91ssap/SELSERVICE/EN TP/h/?tab=MN_GUEST <ul style="list-style-type: none"> ❖ Enter employee ID and password. ❖ Click State of MN Self Service ❖ Click Need Assistance ❖ Click Employee Contacts 	Phone numbers and e-mail addresses available on Employee Self Service
		Contact Medicare	Check eligibility and enroll in Medicare A & B for you and/or eligible spouse http://www.medicare.gov	1-800- MEDICARE (1-800-633-4227)
		Contact Social Security	http://www.ssa.gov/	1-800-772-1213
Consider changing Medical or Dental carrier	Within the 60 day period prior to your retirement date Complete an Application to Change Insurance Coverage form with HR, in addition to the Retiree form	BlueCross BlueShield, HealthPartners, PreferredOne, State Dental Plan-Delta, HealthPartners State of MN Dental Plan Human Resources or State Employee Group Insurance Program	https://www.mn.gov/mmb/segip/medical-dental/med-dent-newhire/get-started/ https://mn.gov/mmb/assets/change-app-0816_tcm1059-251320.pdf	Insurance Carriers Your HR or Employee Insurance Division at 651-355-0100

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Within 2 months: no later than 30 days from retirement	Complete the paperwork	Human Resources or State Employee Group Insurance Program	http://mn.gov/mmb/segip/medical-dental/retirees-med-dental/elect-your-benefits/index.jsp Continuation of Coverage Upon Retirement (Special and Early/Reg.) 1) Continuation of Coverage Upon Retirement (Special and Early/Reg.) 2) Post Retirement Optional Life employee 3) Optional Life spouse 4) COBRA ***Senior Plan application will be mailed to home address for retiree or retiree spouse 65 or older with Medicare A & B. Must be completed and returned to carrier ASAP	651-355-0100
Prior to retirement and annual review	Update Life Insurance Beneficiary	Minnesota Life	https://web1.lifebenefits.com/lbwcm/pd/stateofmn/Act+now/Designating+a+beneficiary (password protected)	651-665-3789 1-800-392-7295
Prior to retirement and while Life Insurance is in place	Review Legacy Planning, Will Preparation, Financial Consult following a claim	Minnesota Life OCHS Inc. Agency (3 rd Party Admin.)	http://www.securian.com/public/Securian/Home/Ochs/StateMNOE.html https://web1.lifebenefits.com/lbwcm/pd/stateofmn	1-800-392-7295 1-800-392-7295