

# Employer Checklist for Retirement



After an employee has decided to retire, use this quick reference checklist to help you get through the final steps without missing a beat. For more retirement details, visit the [employer page](#) on the KPERS website and the retirement sections (see green box) of the [employer manual](#).

**Have the employee get a retirement benefit estimate**

- Direct employee to calculator on his or her online KPERS account

**Enter employee's end date on the EWP as soon as you know it**

[How to enter an end date](#)

- End date must be earlier than retirement date

**Give or point employee to the [Application for Retirement Benefits, Related Forms and Information \(KPERS-15 Booklet\)](#)**

- Booklet has application, instructions, tax info, as well as forms for withholding, direct-deposit and designation of beneficiary
- Employee should submit application at least 30 days (encourage 60 to 90 days) before retirement date
- KPERS will process application and may send you a request to certify final pay

**Give life insurance conversion and portability forms to employee**

[The Standard Conversion Packet](#)

[The Standard Life Portability Insurance Application](#)

- Kansas law requires that you give employees notice of life insurance conversion rights at least 15 days before end of 60-day conversion period. Employers must certify to this on the retirement application.

**Go over working-after-retirement rules**

[Webpage for employees](#)

[Webpage for employers](#)

- 60-day waiting period
- No prearrangements
- Earnings limit and exemptions

**If employee is in a service purchase, have him or her contact KPERS as soon as possible**

- If doing lump-sum, purchase has to be complete before last day on payroll
- If doing payroll deduction, employee only gets credit for complete quarters that were purchased

**Complete retirement certification on the EWP**

[How to do a certification](#)

## Helpful Employer Resources

Retirement sections in Employer Manual

[Retirement – KPERS 1](#)

[Retirement – KPERS 2](#)

[Retirement – KPERS 3](#)

[Retirement – KP&F \(manual\)](#)

