

Tier I Traditional and Portable Retirement Process Timeline

The following is an average retirement claim where we have no issues receiving information from the member, employer or reciprocal system. We encourage you to have an up-to-date email address on file with SURS because we will send you email notifications when your claim is moving on to the next step. We also encourage retirees to view their retirement claim status on the SURS Member Website at www.surs.org.

Timeframe	Process
5-10 years prior to retirement	Attend a SURS retirement education seminar: www.surs.org/seminars-and-webinars
1-5 years prior to retirement	Contact SURS to request a counseling appointment. You are eligible for one appointment every 12 months prior to retirement.
1 year prior to retirement	Have your last counseling appointment with SURS and gather all required documentation needed for filing.
60 days prior to retirement	File your retirement application and all required documentation with SURS and any applicable reciprocal systems.
First of the month after you retire	You should receive your first Preliminary Estimated Payment (PEP) from SURS, which will be approximately 80%-90% of your SURS benefit. If you are retiring reciprocally, please contact the other system to inquire about any payments from them. You may not receive any payments from a reciprocal system for several months if they do not pay PEPs.
First month of retirement	<p>SURS will request the following information from your employer:</p> <ul style="list-style-type: none"> • Termination Date (last day of work) • Last Payroll Date • Vacation Payout (if applicable) • Unused, Unpaid Sick Days (if applicable) • Academic Contracts (if applicable) • Last five years of compensation or highest five years if they are not your last five • Part-time percentages (if applicable) <p>We will continue requesting all applicable information from your employer until it is received. This can typically take two to four months and in some cases can take longer.</p>
Within your 3 rd to 6 th month of retirement	SURS will be sharing information with any applicable reciprocal systems.
Within your 4 th to 6 th month of retirement	Once SURS has received all required information from all applicable parties, we will finalize your retirement and your make-up payment will be sent to you for the difference in what we were paying you in your PEP and your finalized claim.