

DEPARTMENT OF RETIREMENT SYSTEMS  
**Online Account Enhancements**  
Presentation to DRS Advisory Committee  
May 1, 2015



# Customer Feedback

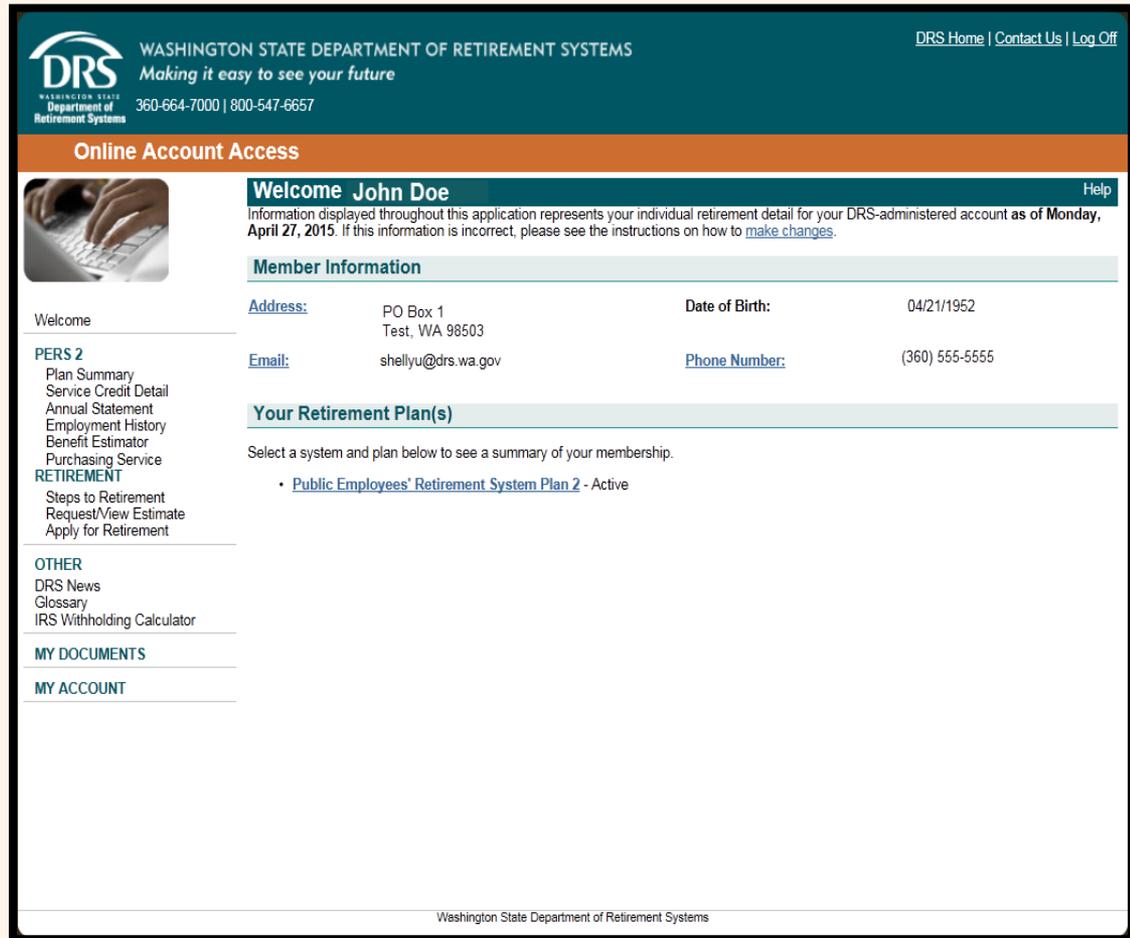
- The Online Retirement Application was really easy to use and the member stated she preferred to do everything online. **She just didn't like that it did not let her know she hadn't finalized her application.**
- Member was sometimes **confused by when they would hear back from DRS, like, how long would it take to process their application?**
- Member retired online, and she was surprised that she didn't get confirmations to keep her informed as her application was processed. She said she would have liked to see more communication regarding the status of her retirement. She said she worried about whether or not she'd really get her retirement check.
- Member said there was a **misunderstanding about the need for additional documents when applying for retirement online** and this caused some confusion.
- Member had **concerns about the lack of communication while waiting for their first payment.** They felt there was a lack of clarity of the application status “in process” when they check the website.

# Enhancements

- Steps to Retirement
- Left Hand Navigation
- Estimate Request Page
- Start Application Page
- Tracker Page
- Retirement Acknowledgement Letter
- Periodic Email Notification

# Left Hand Navigation

- Dynamic Links
  - Request Estimate
  - Request/View Estimate
  - Track Estimate
  - Continue Estimate
  - Apply for Retirement
  - Continue Retirement App
  - Track My Retirement



WASHINGTON STATE DEPARTMENT OF RETIREMENT SYSTEMS  
*Making it easy to see your future*  
360-664-7000 | 800-547-6657

DRS Home | Contact Us | Log Off

### Online Account Access

Welcome **John Doe** [Help](#)

Information displayed throughout this application represents your individual retirement detail for your DRS-administered account as of **Monday, April 27, 2015**. If this information is incorrect, please see the instructions on how to [make changes](#).

#### Member Information

<b>Address:</b>	PO Box 1 Test, WA 98503	<b>Date of Birth:</b>	04/21/1952
<b>Email:</b>	shellyu@drs.wa.gov	<b>Phone Number:</b>	(360) 555-5555

#### Your Retirement Plan(s)

Select a system and plan below to see a summary of your membership.

- [Public Employees' Retirement System Plan 2 - Active](#)

**Left Hand Navigation Menu:**

- Welcome
- PERS 2**
  - Plan Summary
  - Service Credit Detail
  - Annual Statement
  - Employment History
  - Benefit Estimator
  - Purchasing Service
- RETIREMENT**
  - Steps to Retirement
  - Request/View Estimate
  - Apply for Retirement
- OTHER**
  - DRS News
  - Glossary
  - IRS Withholding Calculator
- MY DOCUMENTS**
- MY ACCOUNT**

Washington State Department of Retirement Systems

# Steps to Retirement

- Replaced the “I Want To” page



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[DRS Home](#) | [Contact Us](#) | [Log Off](#)

**Online Account Access**



Welcome

---

**PERS 2**

- [Plan Summary](#)
- [Service Credit Detail](#)
- [Annual Statement](#)
- [Employment History](#)
- [Benefit Estimator](#)
- [Purchasing Service](#)

**RETIREMENT**

- [Steps to Retirement](#)
- [Request/View Estimate](#)
- [Apply for Retirement](#)

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**OTHER**

- [DRS News](#)
- [Glossary](#)
- [IRS Withholding Calculator](#)

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**MY DOCUMENTS**

---

**MY ACCOUNT**

**Apply For PERS 2 Retirement**

Steps to Retirement | 
 [Plan for Retirement](#) | 
 [Request/View Estimate](#) | 
 [Apply for Retirement](#)

We want to make applying for retirement as easy as possible. Below are some tools to assist you with planning for retirement.

<p><b>Step 1 Retirement Eligibility</b></p>	<p><b>Retirement Eligibility</b> Before you can retire you must meet certain eligibility criteria. The eligibility rules for your system and plan are:</p> <ul style="list-style-type: none"> <li>Unreduced benefit at age 65 if you have at least five service credit years; or</li> <li>Reduced benefit at age 55 if you have at least 20 service credit years. There is less of a benefit reduction for early retirement if you have 30 or more years of service credit.</li> </ul>
<p><b>Step 2 <a href="#">Plan for Retirement</a></b></p>	<p>Begin planning for your retirement early. Find out what things you can do to get prepared.</p>
<p><b>Step 3 <a href="#">Request/View Your Estimate</a></b></p>	<p>A Retirement Specialist has completed your estimate. You can apply for retirement or you can request an estimate for an alternative retirement scenario.</p>
<p><b>Step 4 <a href="#">Apply for Retirement</a></b></p>	<p>Start your retirement application.</p>

# Plan For Retirement

- Retirement Planning
- Retirement Seminar Registration
- Birth Certification Information
- Deferred Compensation Program
- Public Employees Benefits Board (PEBB)
- Healthcare/Medical Costs
- Social Security Link

**Online Account Access**



Welcome

**PERS 2**

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**RETIREMENT**

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- Request/View Estimate
- Apply for Retirement

**OTHER**

- DRS News
- Glossary
- IRS Withholding Calculator

**MY DOCUMENTS**

**MY ACCOUNT**

**Apply For PERS 2 Retirement**

[Steps to Retirement](#) | [Plan for Retirement](#) | [Request/View Estimate](#) | [Apply for Retirement](#)

As you near retirement, there are some important things to think about and make [plans](#) for:

- Do you know what your [retirement benefit](#) will be?
- How will your benefit change if you work past normal retirement age or you decide to retire early?
- Will you want to increase your benefit by [purchasing additional service credit](#)?
- What other income will you have available to you in retirement?
- How much will your [healthcare](#) cost?

**Retirement Planning**

If you haven't done so yet, it's important to review your [member handbook](#). It provides the most comprehensive details about your plan rules. The following resources will also assist with your retirement planning:

- [Military Service Credit](#)
- [Thinking About Retiring Early?](#)
- [Public Safety Officers Tax Savings on Health Insurance Premiums](#)
- [Thinking About Working After Retirement?](#)
- [Plan Choice Booklet](#)
- [Estate Planning Checklist](#)

It's important to always keep your [beneficiary form](#) on file with DRS up-to-date.

**Register For a Retirement Seminar**

If you're getting ready to retire within the next five years, you may want to sign up for a [retirement planning seminar](#).

**Help Obtaining a Birth Certificate**

- [Washington State Department of Health](#) - Birth Certificates for Washington born citizens.
- [State contacts for Birth Certificates - For U.S. Citizens \(Centers for Disease Control\)](#) - State Contacts for Birth Certificates for U.S. Citizens born outside of Washington State.

**Not all DRS employers participate in the following programs. You are encouraged to research eligibility with your employer.**

**Washington State Deferred Compensation Program**

As you near retirement you can maximize your DCP account. Options include catch up and adding annual and sick leave cash outs to your account.

- There are two catch-up options for DCP participants. Contact DCP at 800-547-6657 (select options 2, 5, 2) to verify your eligibility and/or sign up to participate.
- If you have not maximized your DCP contributions for the year, you may do so by adding your [annual and sick leave cash outs](#). Your employer must participate in DCP for you to be eligible for this opportunity. Contact DCP a month before your leave cash out date.

Although you have a variety of distribution options, keeping your money in the plan may provide you with better retirement opportunities.

**Public Employees Benefits Board (PEBB) Program Eligibility and Coverage Information**

The Health Care Authority (HCA) provides state-sponsored medical and dental coverage to people retiring from state agencies, higher-education institutions, school district and other select employers. If you're eligible, you have **60 days** to enroll in or defer PEBB coverage after the date your employment or continuous COBRA coverage ends. [Learn more now.](#)

**Help Finding Healthcare**

If you need help finding healthcare, contact the [Statewide Health Insurance Benefits Advisors \(SHIBA\)](#) for assistance.

**Help With Medical Costs**

# Request An Estimate Page

- Expandable Text

**Online Account Access**

**Estimate Request For PERS 2**

[Steps to Retirement](#) | [Plan for Retirement](#) | [Request an Estimate](#)

Compare the options available to you! Try our [benefit estimator](#).

**Information on Requesting an Estimate**

You can request a retirement benefit estimate if you:

- Are within two years of your anticipated retirement date; and
- Are separating from your employment within two years, or
- Have already separated from employment.

**After Requesting an Estimate**

If you need a benefit estimate due to dissolution of marriage please [contact us](#).

Based on our current work volume, the anticipated time to receive your estimate is 8 to 9 weeks from today (4/29/2015).

Separation Date:  /  /  The date you separate from all DRS-covered employment. Must be at least one day prior to your retirement date.

Retirement Date:  /  /

[Start Estimate](#)

**Eligibility**

You have no estimates prepared within the last twenty-five (25) months.

Washington State Department of Retirement Systems

# Continue Estimate Page

- Dynamic Link
  - Continue Estimate
- Expandable Text

**Online Account Access**

## Estimate Request For PERS 2

[Steps to Retirement](#) | [Plan for Retirement](#) | [Continue Estimate](#)

Compare the options available to you! Try our [benefit estimator](#).

**Information on Requesting an Estimate**

You can request a retirement benefit estimate if you:

- Are within two years of your anticipated retirement date; and
- Are separating from your employment within two years; and
- Have already separated from employment.

**After Requesting an Estimate**

If you need a benefit estimate due to dissolution of marriage please [contact us](#).

**Estimate Request**

You have an Estimate Request in progress.

*Application Details*  
Retirement Date: Aug 1, 2015  
Separation Date: Jul 31, 2015

If you wish to start a new estimate request delete your current request and you will be able to start the process over.

Based on our current work volume, the anticipated time to receive your estimate is 8 to 9 weeks from today (4/29/2015).

**Eligibility**

You have no estimates prepared within the last twenty-five (25) months.

Washington State Department of Retirement Systems

# Track Estimate Page

- Dynamic Link
  - Track Estimate
- Expandable Text

**Online Account Access**

## Estimate Request For PERS 2

[Steps to Retirement](#) | [Plan for Retirement](#) | [Track Estimate](#)

Compare the options available to you! Try our [benefit estimator](#).

➤ [Information on Requesting an Estimate](#)

➤ [After Requesting an Estimate](#)

If you need a benefit estimate due to dissolution of marriage please [contact us](#).

Your estimate request was **successfully submitted on 04/29/2015** and should be **completed within 8 to 9 weeks** (this timeframe can vary).

Once a Retirement Specialist completes your estimate, you will be notified by email.

Please note that submitting your estimate request does not complete your retirement process.  
*Don't forget to apply online once you've received your estimate!*

➤ [Eligibility](#)

You have no estimates prepared within the last twenty-five (25) months.

Washington State Department of Retirement Systems

# Request/View Estimate Page

- Dynamic Link
  - Request/View Estimate
- Expandable Text
- Expanded Estimate List

Online Account Access



Welcome

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**MY ACCOUNT**

**Estimate Request For PERS 2**

[Steps to Retirement](#) | [Plan for Retirement](#) | **[Request/View Estimate](#)** | [Apply for Retirement](#)

Compare the options available to you! Try our [benefit estimator](#).

▼ **Information on Requesting an Estimate**

You can request a retirement benefit estimate if you:

- Are within two years of your anticipated retirement date; and
- Are separating from your employment within two years; or
- Have already separated from employment.

► **After Requesting an Estimate**

If you need a benefit estimate due to dissolution of marriage please [contact us](#).

Based on our current work volume, the anticipated time to receive your estimate is 8 to 9 weeks from today (4/28/2015).

Separation Date:  /  /

The date you separate from all DRS-covered employment. Must be at least one day prior to your retirement date.

Retirement Date:  /  /

► **Eligibility**

**Estimates Prepared (5 estimates total)**

If you have an estimate for a date within 3 months of your actual retirement date, you may not need to request an additional estimate. Select an estimate below to see if you are eligible to adjust the date.

Estimate ID: 80015324 Prepared On: 12/22/2014	Estimate ID: 80015323 Prepared On: 12/22/2014	Estimate ID: 80015322 Prepared On: 07/01/2014
Retirement Date: 05/01/2015 Separation Date: 04/2015 Average Salary: \$4,861 Survivor Birth Date: 03/28/1958	Retirement Date: 05/01/2015 Separation Date: 04/2015 Average Salary: \$4,861 Survivor Birth Date: 03/28/1958	Retirement Date: 05/01/2017 Separation Date: 06/2015 Average Salary: \$4,848 Survivor Birth Date: 03/28/1958
Option 1 Estimated Benefit <b>\$3508</b>	Option 1 Estimated Benefit <b>\$3298</b>	Option 1 Estimated Benefit <b>\$3515</b>
Option 2: \$2,659 Option 3: \$3,027 Option 4: \$2,894	Option 2: \$2,499 Option 3: \$2,846 Option 4: \$2,720	Option 2: \$2,664 Option 3: \$3,033 Option 4: \$2,900
<input type="button" value="Start My Application"/>	<input type="button" value="Start My Application"/>	No Start Button? <a href="#">[Explain this]</a>

# Apply for Retirement

- Step Timeline
- Expanded Estimate List

### Online Account Access



Welcome

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**MY DOCUMENTS**

**MY ACCOUNT**

## Apply For PERS 2 Retirement

[Steps to Retirement](#) | 
 [Plan for Retirement](#) | 
 [Request/View Estimate](#) | 
 [Apply for Retirement](#)

Before deciding on your intended retirement scenario, you may want to consider how [Cost of Living Adjustments \(COLAs\)](#) may impact your ongoing benefit.

**Compare the options available to you! Try our [benefit estimator](#).**

**STEP 1**  
Create Estimate

**STEP 2**  
Start Retirement Application

**STEP 3**  
Complete and Submit Retirement Application

**STEP 4**  
Complete and Submit Additional Forms

You Are Done!

### DRS Calculated Retirement Estimates

**Instructions to apply online**

1. Use the left and right arrow indicators to see all estimates prepared for you in the last twenty-five (25) months;
2. Locate the Estimate that matches your retirement criteria;
3. Use the green 'Start My Application' button to start your online retirement application.

**Estimates Prepared (5 estimates total)**

If you have an estimate for a date within 3 months of your actual retirement date, you may not need to request an additional estimate. Select an estimate below to see if you are eligible to adjust the date.

Estimate ID: 80015322 <small>Prepared On: 07/01/2014</small>	Estimate ID: 80015321 <small>Prepared On: 07/01/2014</small>	Estimate ID: 80015320 <small>Prepared On: 07/01/2014</small>
Retirement Date: 05/01/2017 Separation Date: 06/2015 Average Salary: \$4,848 Survivor Birth Date: 03/28/1958	Retirement Date: 07/01/2015 Separation Date: 06/2015 Average Salary: \$4,848 Survivor Birth Date: 03/28/1958	Retirement Date: 07/01/2015 Separation Date: 06/2015 Average Salary: \$4,848 Survivor Birth Date: 03/28/1958
Option 1 Estimated Benefit \$3515	Option 1 Estimated Benefit \$3321	Option 1 Estimated Benefit \$3515
Option 2: \$2,664 Option 3: \$3,033 Option 4: \$2,900	Option 2: \$2,517 Option 3: \$2,866 Option 4: \$2,740	Option 2: \$2,664 Option 3: \$3,033 Option 4: \$2,900
No Start Button? <a href="#">[Explain this]</a>	Start My Application	Start My Application

**Requesting an Estimate**  
Not seeing an estimate that matches your intended retirement scenario? You may be able to choose a retirement date that is within 3 months of your estimated retirement date. Select an estimate to see the available options. If you need to request an additional estimate you can do so [online](#).

If you are unsure of your retirement date, try our online [benefit estimator](#).

**Dissolution of Marriage or Qualified Domestic Partnership**  
If you need a benefit estimate due to dissolution of marriage or qualified domestic partnership, please [contact us](#).

**Retirement Planning**  
Learn more about [retirement planning](#).

January 27, 2015 11 11

# Tracker Page, Saved Application

- Dynamic Link
  - Continue Retirement Application
- Expandable Text
- Step Timeline
- Application/Retirement Timeline
- Updated Application Status'

**Online Account Access**



Welcome

**PERS 2**

- Plan Summary
- Service Credit Detail
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- Purchasing Service
- RETIREMENT**

**Apply For PERS 2 Retirement**

[Steps to Retirement](#) | 
 [Plan for Retirement](#) | 
 [Request/View Estimate](#) | 
 Continue Retirement App

➤ **After you submit an application, what to do next**

➤ **What you can expect from us**

<b>STEP 1</b>	<b>STEP 2</b>	<b>STEP 3</b>	<b>STEP 4</b>	You Are Done!
Create Estimate	Start Retirement	Complete and Submit Retirement Application	Complete and Submit Additional Forms	

7/1/2015 Date of Retirement	07/31/2015 First Scheduled Payment
--------------------------------	---------------------------------------

**Saved** - Your application has been started on the web and has not been submitted.

**Submitted** - Your application has been submitted to DRS for review and processing.

**In-Review** - DRS is processing your application and you can no longer make changes to it, or cancel it without contacting DRS.

**Cancellation Requested** - You canceled your application. We will notify you when your cancellation request has been processed.

**Calculated** - Your benefit has been calculated and your first payment will be issued the last day of your retirement month.

Forms required for your retirement request will be displayed here after you submit

January 27, 2015 12 12

# Tracker Page, Submitted Application

- Dynamic Link
  - Track My Retirement
- Expandable Text
- Step Timeline
- Application/Retirement Timeline
- Updated Uploaded Document Status'

Online Account Access



Welcome

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**RETIREMENT**

- Steps to Retirement
- View Estimates
- Track My Retirement**

**OTHER**

- DRS News
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- IRS Withholding Calculator

**MY DOCUMENTS**

**MY ACCOUNT**

Apply For PERS 2 Retirement

[Steps to Retirement](#) | [Plan for Retirement](#) | [View Estimates](#) | [Track My Retirement](#)

• Application has been successfully submitted.

➤ [What to do next](#)

➤ [What you can expect from us](#)

**STEP 1**

Create Estimate

**STEP 2**

Start Retirement Application

**STEP 3**

Complete and Submit Retirement Application

**STEP 4**

Complete and Submit Additional Forms

You Are Done!

04/28/2015	forms/documents from you to process your retirement application	07/01/2015	07/31/2015
Date Retirement Application		Date of Retirement	First Scheduled Payment

Retirement Tracker

**Retirement Application**

*Application Details*

**Retire Date:** 05/01/2015

**Submitted Via:** Web

**Date Submitted:** 04/28/2015

**Status:** Submitted [Explain This](#)

**In addition to your application please submit the following:**

*Forms or Documents Still Required*

Form or Document	Date Received	Status
Photocopy of Evidence of Birth Date	04/28/2015	Accepted
Photocopy of Evidence of Birth Date for Survivor Beneficiary	04/28/2015	Received (In Review)
<a href="#">Spousal/Domestic Partner Consent</a>		Not Received

# Application Timeline

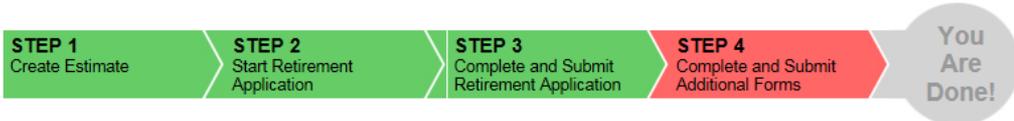


## Apply For PERS 2 Retirement

[Steps to Retirement](#) | [Plan for Retirement](#) | [View Estimates](#) | [Track My Retirement](#)

➤ **What to do next**

➤ **What you can expect from us**



**04/28/2015**  
Date Retirement Application Submitted

**04/28/2015**  
Without the additional required forms/documents, we may not be able to process your retirement.  
Please see documents list in tracking section below.

**05/01/2015**  
Date of Retirement

**05/31/2015**  
First Scheduled Payment

### Retirement Tracker

**Retirement Application**

*Application Details*

**Retire Date:** 05/01/2015

**Submitted Via:** Web

**Date Submitted:** 04/28/2015

**Status:** Submitted [Explain This](#)

**In addition to your application please submit the following:**

*Forms or Documents Still Required*

Form or Document	Date Received	Status
Photocopy of Evidence of Birth Date	04/28/2015	Accepted
Photocopy of Evidence of Birth Date for Survivor Beneficiary	04/28/2015	Received (In Review)
<a href="#">Spousal/Domestic Partner Consent</a>		Not Received

Washington State Department of Retirement Systems

# Application Timeline, Continued

**Online Account Access**



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**Apply For PERS 2 Retirement**

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➤ **What to do next**

➤ **What you can expect from us**

**STEP 1**  
Create Estimate

**STEP 2**  
Start Retirement Application

**STEP 3**  
Complete and Submit Retirement Application

**STEP 4**  
Complete and Submit Additional Forms

**You Are Done!**

04/28/2015 Date Retirement Application Submitted	04/28/2015 All additional forms/documents have been received.	05/01/2015 Date of Retirement	05/31/2015 First Scheduled Payment
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**Retirement Tracker**

**Retirement Application**

*Application Details*

**Retire Date:** 05/01/2015

**Submitted Via:** Web

**Date Submitted:** 04/28/2015

**Status:** Submitted [Explain This](#)

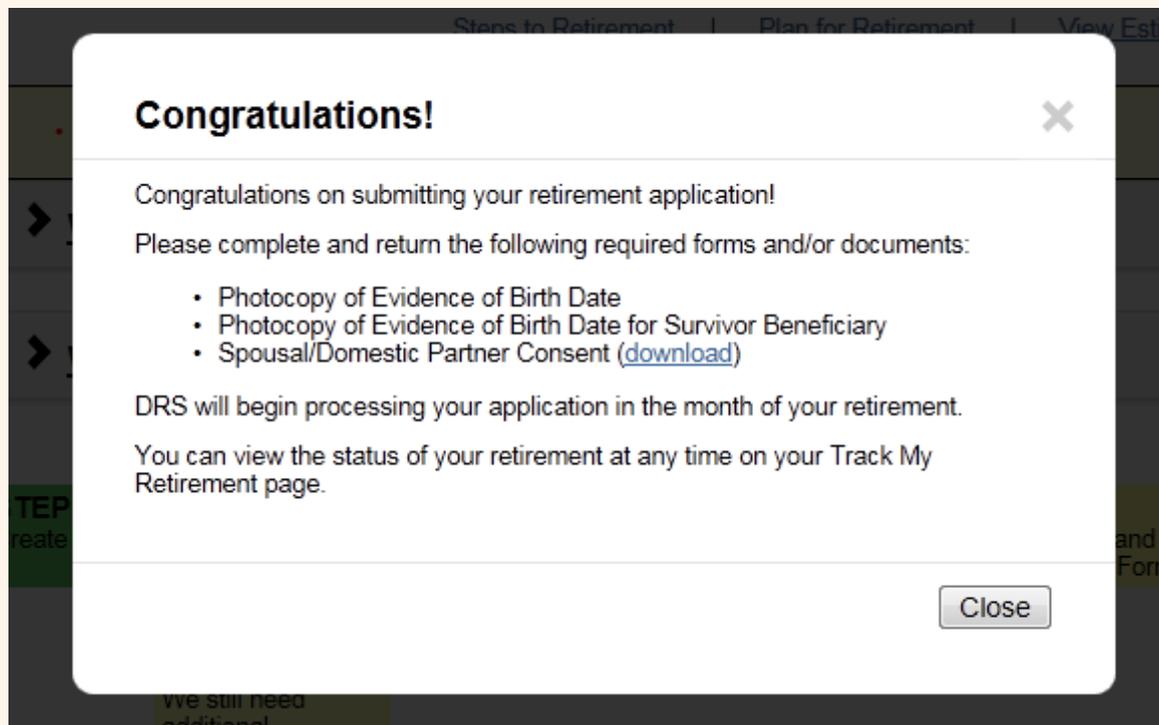
**In addition to your application please submit the following:**

*Forms or Documents Still Required*

Form or Document	Date Received	Status
Photocopy of Evidence of Birth Date	04/28/2015	Accepted
Photocopy of Evidence of Birth Date for Survivor Beneficiary	04/28/2015	Accepted
Spousal/Domestic Partner Consent	04/28/2015	Accepted

# Retirement Acknowledgement Letter

- Discontinue printing with online retirement application submission
- Replaced with pop-up once application is submitted



# Periodic Email Notifications

Dear

We have received your retirement application, but our records indicate that we still need additional forms or documents for us to complete your benefit calculation. Please log into your [online account](#), complete and return the forms and/or documents indicated below, without them we may not be able to process your retirement.

## Retirement process status

04/22/2015 Date Retirement Application Submitted	<p><b>04/29/2015</b> We still need additional forms/documents from you to process your retirement application.</p> <p>Please see forms list in tracking section below.</p>		07/01/2015 Date of Retirement	07/31/2015 First Scheduled Payment
--	--	--	-------------------------------------	---

## Forms or documents still required

- Spousal/Domestic Partner Consent - **Not Received**

## What to do next

- If you have not already, log into your [online account](#) and print a copy of your submitted application for your records

# Periodic Email Notifications

Dear

We have received your retirement application, and our records indicate that we have received all necessary forms and documents. We will begin calculating your benefit in the month of your retirement.

## Retirement process status

04/22/2015 Date Retirement Application Submitted	04/29/2015 All additional forms/documents have been received.	07/01/2015 Date of Retirement	07/31/2015 First Scheduled Payment
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## What to do next

- If you have not already, log into your [online account](#) and print a copy of your submitted application for your records.
- If you have changed your address in your retirement application, and you are actively employed with a DRS covered employer, please notify them so they can update their records.
- [Contact us](#) if you have questions or need assistance.

## What you can expect from us

### We will:

- Calculate your benefit amount in the month that you retire and mail you an award letter outlining your benefit.
- Send your benefit payment to your financial institution for direct deposit into your account. Payments are available the last working day of the month.

# Periodic Email Notifications

Dear

We have received your retirement application and our records indicate that we have received all necessary forms and documents. We will begin calculating your benefit this month and will send you an award letter outlining your benefit calculation once it has been completed.

## Retirement process status

04/22/2015 Date Retirement Application Submitted	04/29/2015 All additional forms/documents have been received.	07/01/2015 Date of Retirement	07/31/2015 First Scheduled Payment
--	---	-------------------------------------	---

## What to do next

- If you have not already, log into your [online account](#) and print a copy of your submitted application for your records.
- If you have changed your address in your retirement application, and you are actively employed with a DRS covered employer, please notify them so they can update their records.
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## What you can expect from us

### We will:

- Calculate your benefit amount in the month that you retire and mail you an award letter outlining your benefit.
- Send your benefit payment to your financial institution for direct deposit into your account. Payments are available the last working day of the month. Your first payment may be mailed to your financial institution, so it could arrive a day or two later.

# Periodic Email Notifications

Dear

You started a retirement application for a 07/01/2015 retirement date. The application has not yet been completed. If you intend to retire on 07/01/2015 please log into your [online account](#), complete the application and submit any necessary forms and or documents.

## Retirement process status

04/29/2015

Your retirement application has been started, but not submitted.

7/1/2015  
Date of  
Retirement

07/31/2015  
First  
Scheduled  
Payment

## After you submit your application

- Log into your [online account](#) and print a copy of your submitted application for your records.
- Complete and return the required forms and/or documents identified above and be sure to include your name and SSN.
- Revisit the [DRS website](#) before your retirement date to assure we have received the necessary documents..
- Keep in mind if you do not provide the necessary forms/documentation to DRS, it may result in a delay processing your application or possibly result in a temporary suspension of your benefit payments.
- If you have changed your address in your retirement application, and you are actively employed with a DRS covered employer, please notify them so they can update their records.
- [Contact us](#) if you have questions or need assistance.

## What you can expect from us

### We will:

- Calculate your benefit amount in the month that you retire and mail you an award letter outlining your benefit.
- Send your benefit payment to your financial institution for direct deposit into your account. Payments are available the last working day of the month. Your first payment may be mailed to your financial institution,

# Periodic Email Notifications

Dear `

We have received your retirement application, but our records indicate that we still need additional forms or documents for us to complete your benefit calculation. Please log into your [online account](#), complete and return the forms and/or documents indicated below, without them we may not be able to process your retirement.

## Retirement process status

04/29/2015 Date Retirement Application Submitted	04/29/2015 Without the additional required forms/documents, we may not be able to process your retirement.	05/01/2015 Date of Retirement	05/31/2015 First Scheduled Payment
Please see documents list in tracking section below.			

## Forms or documents still required

- Spousal/Domestic Partner Consent - **Not Received**

## What to do next

- If you have not already, log into your [online account](#) and print a copy of your submitted application for your records.
- Complete and return the required forms and/or documents identified above and be sure to include your name and SSN.
- Keep in mind if you do not provide the necessary forms/documentation to DRS, it may result in a delay processing your application or possibly result in a temporary suspension of your benefit payments.
- If you have changed your address in your retirement application, and you are actively employed with a DRS covered employer, please notify them so they can update their records.
- [Contact us](#) if you have questions or need assistance.

## What you can expect from us

### We will:

- Calculate your benefit amount in the month that you retire and mail you an award letter outlining your benefit.
- Send your benefit payment to your financial institution for direct deposit into your account. Payments are available the last working day of the month. Your first payment may be mailed to your financial institution, so it could arrive a day or two later.

# Enhancements

- Display plan choice information
- Display 12 months of benefit summary information
- Ability to update beneficiary designation information online
- Ability to update direct deposit information online

# Questions?