

Retirement Insurance Checklist:

- Ask the prospective retiree to attend a Pre-Retirement seminar. Dates and times are located at the [“2010 Pre-Retirement Health Insurance Seminars”](#) listing.
- Direct the member to the Pre-Retirement packet at www.sib.ok.gov or www.healthchoicook.com, located under [“Planning for Your Retirement”](#).
- Verify Retirement/Vest/Non-vest/Defer – Eligibility: Education - ten years of full time service through TRS (1-405-521-2387 or toll-free 1-877-738-6365). State and local government - eight years of service through OPERS (1-405-858-6737 or toll-free at 1-800-733-9008).
- Have the member complete a [Retiree/Vest/Non-Vest/Defer Insurance Application](#).
 1. A completed application must be sent to OSEEGIB within 30 days of the termination of service. *
 2. Make sure the form is signed, dated, and includes a current phone number.
 3. Retirement is not an eligible event to change carriers. Changes to carriers can be made at the next annual Option Period.
- If the member is enrolling in an MA-PD (Medicare Advantage Prescription Drug Plan), he/she must also contact the current carrier directly to get an MA-PD application.
- An education employee may continue or begin any benefits, except life, that the school participates in with OSEEGIB. Any life insurance in effect while actively employed may be retained as a retiree.
- If the retiree is keeping life insurance, make sure the [Beneficiary Designation Form](#) is current.
- If the member or spouse is Medicare eligible, remind them they must be enrolled in Medicare Part A and Part B (Social Security 1-800-772-1213).
- If the member/spouse has delayed Medicare Part B, he/she must contact the Social Security administration office to begin their Part B coverage.

* If the member is Medicare eligible, the *Retiree/Vest/Non-Vest/Defer Insurance Application* must be received by OSEEGIB prior to the termination date.