

Responsible Entity	Actions	Initials
Employee	1. Initiate Form 6 (Retirement Application), no sooner than 120 days prior to retirement date. App Date: _____ Ret Date: _____ How was the form submitted (online/mail/fax)?: _____ Form 6 may be completed directly online via ORBIT (HR will receive the online application via email from retirement system) or downloaded (from the forms page on ORBIT), completed, submitted to HR via mail, interoffice mail, hand delivery (Bldg. 1 – Suite 160, Main Campus), or HR fax 919-536-7293.	
Employee	2. Employee schedules a meeting with HR & Payroll to discuss leave balances and other year-to-date financials.	
Payroll	3. Payroll will audit leave balances and other year-to-date financials.	
Employee	4. The Employee must enter ALL LEAVE, to be taken between the application date and retirement date, in the leave system.	
Payroll	5. Payroll will complete the Employer portion of Form 6 and submit it to the retirement system.	
Retirement System	6. The Retirement System will confirm receipt and processing of Form 6 (via mail or email to the employee).	
Employee	7. Employee will submit their intent of retirement letter per the Employee Benefits and Retirement process in the Employee Handbook.	
Retirement System and Employee	1. Retirement system will email/mail the employee forms, for example: <ul style="list-style-type: none"> • Form 170 -Authorizing Direct Deposit and Form 290- Choosing Income Tax Withholdings • Form 6E-Choosing Your Retirement Payment Option 2. The employee will complete the forms they receive from the retirement system and return them as directed.	
Employee	3. Contact the State Health Plan within (30) days of the retirement to ensure set-up for health insurance. Projected retirement date: _____ Deadline for Health Insurance: _____	

I have reviewed the checklist and understand each entity's responsibilities in the retirement process, especially my own as the employee/retiree.

Signature _____ Date _____