



For State Executive Branch Employees- **GUIDE for Retirement**

This GUIDE is intended as a checklist of offices you need to contact and some important forms you may need to file when you decide to retire from State government. It does not constitute a binding legal document or contract. It lists only some of the benefits that may be available. State benefits vary by type of employment appointment and collective bargaining agreement and are subject to change. It does not supersede laws, rules, collective bargaining agreements, executive orders, policies and procedures, or benefit plan documents pertaining to the benefits covered, and is subject to change. For more information, contact your departmental Human Resources Office (HRO) designee or refer to the applicable rules, laws, collective bargaining agreements, executive orders, or benefit plan documents.

Forms You May Need to Complete

Agencies You May Need to Contact

Employees' Retirement System ERS	<p><i>For Regular Service Retirement</i>, you must file the ERS Form 18 (Service Retirement Application) for retirement.</p> <p>Your retirement date must be the 1st of the month except for December, which can be the 1st or the 31st. You may file your Retirement Application not more than 150 days and not less than 30 days prior to your retirement date.</p> <p><i>For Disability Retirement</i>, you must contact the ERS to ensure you meet the eligibility requirements to file for:</p> <ul style="list-style-type: none"> • Ordinary Disability Retirement (unrelated to work), or • Service-Connected Disability Retirement (work-related). 	<p>Contact the ERS for further guidance due to the various retirement plans.</p> <p>ERS Oahu office: 808-586-1735</p> <p>Neighbor island members may call the office in their county: Hawai'i: 808-974-4077, 808-974-4076 or 808-974-4074 Kaua'i: 808-274-3010 or 808-274-3011 Maui/Moloka'i/Lāna'i: 808-984-8181 or 808-984-8282</p> <p>Website: https://ers.ehawaii.gov Retirement Planning can be found under the "Members" drop-down tab.</p>
Hawai'i Employer-Union Health Benefits Trust Fund EUTF	<p><i>To enroll yourself, your spouse/civil union/domestic partner, and/or dependents in the medical/ drug, dental, vision and life insurance (Retiree only) plans upon retirement, submit the following forms:</i></p> <ul style="list-style-type: none"> • EC-2 EUTF Enrollment Form for Retirees • ERS Retirement Estimate Letter • If you and/or your dependent(s) are Medicare eligible when you retire, you must enroll in Medicare Part B to be eligible for EUTF medical and/or drug plans. Submit a copy of your and/or your dependent's Medicare Part B ID card, Medicare Part B Premium Reimbursement Direct Deposit Agreement Form and Social Security Administration letter indicating the Medicare Part B premium amount within 60 days from the date of your retirement. Upon retirement, EUTF will reimburse your Medicare Part B premium (less any penalty) beginning the later of the date all documents are received or the effective date of your Medicare Part B coverage. <p><i>The EUTF can assist you in enrolling in EUTF retiree health benefits. Please call or visit the EUTF website for more information pertaining to retirement.</i></p>	<p>EUTF Mailing address: 201 Merchant Street, Suite 1700 Honolulu, Hawai'i 96813 808-586-7390 or 1-800-295-0089</p> <p>Website: www.eutf.hawaii.gov</p>

Securian Financial Group, Inc. Group Life Insurance	<p><i>Group Term Life Insurance Beneficiary Designation Form</i></p> <p>If you need to change your beneficiary, download the Beneficiary Designation Form, complete, sign, date and return to Securian Life Insurance Company. Your designations are not valid until received and accepted by Securian.</p> <ul style="list-style-type: none"> Fax: 1-651-665-4827 Mail: 400 Robert Street North, St. Paul, MN 55101-2098 	Securian Life 808-536-9890 or 1- 877-291-8466 Website: www.lifebenefits.com/eutf
Union Sponsored Benefit Plans, including Life Insurance	Contact your Union Plan Administrator or union office for more information.	
Island Savings Plan (ISP) State Deferred Compensation Plan IRC 457(b)	<p>To discuss your distribution options, contact the local Honolulu office.</p> <p><u>Deferral of Pay for Unused Vacation:</u> To request an early partial payout of your accumulated vacation, leave credits or a post separation payout of your accumulated vacation leave credits for a deferral into the Plan, contact your HRO designee about 4 months prior to your retirement date to receive an informational packet. Refer to the packet for processing deadlines.</p> <p><u>Distribution Options:</u> You are not required to take a distribution upon separation from service or retirement. You have the following pay-out options for taking the money out of the plan:</p> <ul style="list-style-type: none"> Partial or total lump sum Installment payments (systematic withdrawals) Rollover 	<p>Contact Information for requesting a distribution: Island Savings Plan 1-888-71-ALOHA (1-888-712-5642) Press “1” to speak with a Call Center Representative Press “2” to contact a local ISP Retirement Plan Advisor 1100 Alakea Street, Suite 1550, Honolulu, HI 96813 Website: www.empower.com/islandsavings</p> <p>If you would like to schedule a counseling session with an Empower Retirement Plan Advisor, go to the Plan’s website and click on the <i>Meet Your Retirement Plan Advisors</i> section.</p>
National Benefit Services Tax-Sheltered Annuity (TSA) Plan 403(b) Applicable to employees of: Department of Education (DOE) University of Hawai’i (UH)	<p>To cancel your salary authorization, complete the 403(b) Salary Reduction Agreement Form and submit it to National Benefit Services, (NBS). Forms are available at the website below:</p> <p>Department of Education website: www.hawaiidoe403b.com</p> <p>University of Hawai’i website: www.nbsbenefits.com/uh403b</p>	Contact Information for National Benefit Services (NBS): 1-800-274-0503, extension #504 FAX: 1-800-597-8206
National Benefit Services <i>Island Flex</i> Flexible Spending Accounts Plan (FSA)	Notify National Benefit Services (NBS) of your retirement plans to cancel your enrollment in the <i>Island Flex</i> program.	National Benefit Services (NBS) Toll-free: 1-855-399-3035 (option 2) or local office at 808-465-2284 Fax: 808-465-3712 Email: islandflex@nbsbenefits.com Website: www.nbsbenefits.com/islandflex

Other Voluntary Payroll Deductions	<p><i>Parking:</i></p> <p><input type="checkbox"/> DAGS Parking Control: File DAGS Form AMD-PC-001, revised 01/23, with the Parking Control Branch at least 20 calendar days prior to the cancellation of your parking assignment to avoid any forfeitures.</p> <p><i>Pre-Tax Transportation Benefit Pilot Program (PTBP)</i></p> <p><input type="checkbox"/> See your Departmental Coordinator. File the cancellation form at least 35 days prior to the first day of the month in which cancellation is to be effective.</p> <p><i>Direct Deposit:</i></p> <p><input type="checkbox"/> See your HRO designee. File a cancellation form to cancel your direct deposit to prevent any problems with future pay.</p> <p><i>Union Dues and Other Union Payroll Deductions:</i></p> <p>Call your union office: Notify them of your decision to either continue or cancel your membership and/or other services.</p>	<p>DAGS Parking Control 869-A Punchbowl Street Honolulu, Hawai'i 96813 808-586-0343</p>
---	--	---

For more information, please contact your **Departmental Human Resources Office**.

Accounting and General Services	808-586-0369		Hawaiian Homelands	808-620-9540
Agriculture & Biosecurity	808-973-9481		Health	808-586-4512
Attorney General	808-586-1236		Human Resources Development	808-587-1150
Budget and Finance	808-586-1598		Human Services	808-586-5003
Business, Economic Development and Tourism	808-586-2562		Labor and Industrial Relations	808-586-9043
Commerce and Consumer Affairs	808-586-2838		Land and Natural Resources	808-587-0180
Corrections and Rehabilitation	808-587-1221		Law Enforcement	808-587-5015
Defense	808-369-3580		Lieutenant Governor's Office	808-586-0255
Education - Employee Benefits Unit	808-441-8311		Taxation	808-587-1503
Governor's Office	808-586-0718		Transportation -Administration -Highways -Airports -Harbors	808-587-4556 808-587-2230 808-838-8614 808-587-1933
Hawai'i State Public Library System	808-831-6860		University of Hawai'i	808-956-8458