

## Retirement Checklist

This checklist is intended to serve as a general guide for employees who are retiring from Multnomah County. Please note that this is not an exhaustive list and not all items on this checklist may pertain to your situation. If you have questions regarding retiree health or life insurance, contact Retiree Benefits in the Employee Benefits Office at 503-988-5651 or [retiree.benefits@multco.us](mailto:retiree.benefits@multco.us).

### PERS Retirement Pension

[www.oregon.gov/PERS/](http://www.oregon.gov/PERS/)

- When you are more than 3 years from PERS retirement, attend an **Introduction to PERS Retirement** (Tier 1 & 2 members) or **All About OPSRP** (OPSRP members) presentation
- When you are within 3 years of PERS retirement:
  - Attend a **Retirement Readiness** (Tier 1 & 2 members) or **All About OPSRP** (OPSRP members) presentation, and
  - Read the [PERS](#) or [OPSRP](#) Preretirement Guide
- When you are within 90 days of PERS retirement, schedule a [Retirement Application Assistance Session](#) to meet with PERS staff for a one-on-one review of your PERS retirement application

### Deferred Compensation Account

<https://multnomah.beready2retire.com/>

- When you are within 3 months of retirement, contact a Deferred Compensation representative to discuss your existing deferred compensation account
- When you are within 1 month of retirement, Contact a Deferred Comp representative to use Deferred Comp funds to purchase PERS waiting time or forfeited credit, if applicable
- If you are electing to make a final contribution to your existing deferred compensation account with your vacation leave payout, submit the required paperwork to [deferred.comp@multco.us](mailto:deferred.comp@multco.us) at least 30 days prior to separating from County service

### Separation from Multnomah County Employment

- Contact your Human Resources Department for instruction on the process your department follows when employment with Multnomah County ends, including providing notice of separation from County employment
- Contact Payroll at 503-988-3309 or at [central.payroll@multco.us](mailto:central.payroll@multco.us) with questions regarding final paycheck and what happens to unused accrued leave (vacation, comp time, holiday and personal holiday)

### County Retiree Health and/or Life Insurance

- Read the [Multnomah County Guide to Retirement](#)
- At least 30 days before your last working day, submit a [Retiree Benefits Information Request](#)
- Before your last working day, submit all required retiree health and/or life insurance enrollment forms to [retiree.benefits@multco.us](mailto:retiree.benefits@multco.us)

### Medicare

<https://www.ssa.gov/medicare>

If you delayed enrolling in Medicare Parts A and/or B due to continuing County employment and active County employee medical insurance coverage:

- Within 90 days of your retirement date, contact [retiree.benefits@multco.us](mailto:retiree.benefits@multco.us) to ask for a completed "Request for Employment Information" form

## Retirement Checklist

- Within 90 days of your Medicare coverage effective date, submit a [Medicare application](#) and the completed “Request for Employment Information” form to the Social Security Administration
- Schedule an appointment with a [Senior Health Insurance Benefits Assistance](#) if you need additional assistance with Medicare

If you are retiring when you are first becoming eligible for Medicare:

- Within 90 days of your Medicare coverage effective date, submit a [Medicare application](#) to the Social Security Administration
- Schedule an appointment with a [Senior Health Insurance Benefits Assistance](#) if you need additional assistance with Medicare

### County-Sponsored Life Insurance

- If you are applying to continue your employee and/or supplemental life insurance, return the completed portability form to the Standard Insurance within 31 days from separation of County employment

### HRA VEBA

<https://www.hraveba.org/>

- If you are setting up an automatic reimbursement of retiree insurance premiums through your HRA VEBA account:
  - Request a benefit statement that shows your current monthly rate from [retiree.benefits@multco.us](mailto:retiree.benefits@multco.us) (or whoever will administer your retiree health coverage), and
  - Set up your automatic reimbursement through your HRA VEBA online account or through the HRA VEBA mobile app
- Contact HRA VEBA at 1-888-659-8828 for additional information about accessing your HRA VEBA account after retirement

### Long Term Care Insurance

- If you are enrolled in Long Term Care Insurance (LTC) through Trustmark, you must completed the online LTC continuation application within 30 days after separation of Multnomah County Employment
- Multnomah County will send you a communication about the continuation (portability) process shortly after your employment with Multnomah County ends

### Social Security Retirement Income

<https://www.ssa.gov/>

- If you will be initiating your Social Security retirement income benefits, submit a [Social Security Benefits](#) application

### Rehired to Multnomah County Employment

- If you will return to County employment as an “on call” or “temporary” employee, you will need to complete the appropriate [Return to Work Memorandum of Understanding](#) document with your hiring department HR
- If you will return to County employment as a “Regular” or “Limited Duration Assignment” employee, contact [retiree.benefits@multco.us](mailto:retiree.benefits@multco.us) to discuss the impacts to your retiree insurance coverage

## Benefit Vendor Contact Information

### **Multnomah County Retiree Benefits**

Walk-Ins: Multnomah Building, Room 300  
Mailing: 501 SE Hawthorne Blvd, Suite 320  
Portland, Oregon 97214  
Phone: (503) 988-5651  
Fax: (503) 988-6257  
Email: [retiree.benefits@multco.us](mailto:retiree.benefits@multco.us)  
<https://multco.us/info/retiree-benefit-information>

### **Kaiser Permanente**

*Medical and Dental Insurance*  
Address: 500 NE Multnomah Street, Suite 100  
Portland, OR 97232  
Phone: (800) 813-2000  
<http://www.kp.org/>

### **PacificSource Administrators**

*COBRA*  
Address: PO Box 2797  
Portland, OR 97208  
Phone: (877) 355-2760

### **The Standard Insurance Company**

*Life and Disability Insurance*  
Phone: (800) 368-2859 (Disability)  
(800) 628-8600 (Life and AD&D)  
<https://www.standard.com/>

### **Agis for Trustmark VB**

*Long Term Care (LTC) Insurance*  
Phone: (877) 485-2318  
email: [LTCHelp@agis.com](mailto:LTCHelp@agis.com)  
<https://multnomah.caregivingexchange.com/>

### **Array Rx (Moda)**

*Moda Pharmacy Benefit*  
Phone: (800) 913-4284  
[www.ArrayRxSolutions.com](http://www.ArrayRxSolutions.com)

### **VSP Vision Care**

*Moda Vision Benefit*  
Phone: (800) 887-7195  
[www.vsp.com](http://www.vsp.com)

### **Moda Medical & Delta Dental**

*Medical and Dental Insurance*  
Address: 601 SW Second Avenue  
Portland, OR 97204  
Phone: (888) 445-7413 (Medical)  
(888) 447-8194 (Dental)  
<http://www.modahealth.com/>  
<http://www.deltadental.com/>

### **Willamette Dental Group**

*Dental Insurance*  
Phone: (855) 433-6825  
<https://willamettedental.com/>

### **Gallagher, Inc.**

*HRA VEBA*  
Address: PO Box 4389  
Clinton, IA 52733  
Phone: (888) 659-8828  
[www.hraveba.org](http://www.hraveba.org)

### **BenefitHelp Solutions**

*Flexible Spending Account (FSA)*  
Email: [benefithelpsolutionsCDHSupport@healthaccountservices.com](mailto:benefithelpsolutionsCDHSupport@healthaccountservices.com)  
Phone: (855) 378-0197  
<https://www.benefithelpsolutions.com/members>

### **CompPsych**

*Employee Assistance Program (EAP)*  
Phone: (866) 483-1493  
<https://www.guidanceresources.com/>

### **VOYA Financial**

*457(b) Deferred Compensation Plan*  
Address: 6500 S. Macadam Avenue, Suite 125  
Portland, OR 97239  
Phone: (503) 937-0378  
<https://multnomah.beready2retire.com/>

### **Oregon PERS Public Services**

*PERS or OPSRP Retirement Plan*  
Address: PO Box 23700  
Tigard, OR 97281-3700  
Phone: (503) 598-PERS (7377)  
<http://www.pers.state.or/>