If you’re thinking of retiring or have decided to retire from KCSOS, this information is provided to assist you with making the transition as smooth as possible. The checklist below will help guide you toward retirement by identifying the steps, timelines, and documents needed to complete the process.

1) The year before you plan to retire:

- Visit your retirement system’s website to review your annual statement and learn about your benefits.
  - California Public Employees Retirement System (CalPERS): https://my.calpers.ca.gov/
  - California State Teachers’ Retirement System (CalSTRS): www.mycalstrs.com
- Schedule an appointment to attend a workshop, webinar, or individual appointment with a benefits specialist.
  - For an appointment in Bakersfield, call the appropriate number listed below:
    - CalPERS: 888-225-7377
    - CalSTRS: 800-228-5453
- Contact Human Resources at 661-636-4747 to determine:
  - Eligibility for office-provided medical benefits.
  - Rates for continuing medical benefits at your expense.
  - Rates for dental and vision coverage at the KCSOS group rate.
  - If any additional insurance you may have elected to purchase (i.e., supplemental life insurance) can be continued in retirement.

2) Three to six months before retirement:

- Submit your retirement application to CalSTRS/CalPERS:
  - CalPERS: (No form required)
  - CalSTRS: Express Benefit Report
- Discuss with your supervisor/manager the status of current job duties/projects and tasks that need to be reassigned, and disposition of e-mail and network files.
- You will be contacted by Human Resources to arrange an exit interview during your last few weeks of work.

3) Two weeks to one month before retirement:

- Submit the portion of your retirement application requiring your employer's signature to Human Resources.
  - CalPERS: [No form required]
  - CalSTRS: Express Benefit Report
- Discuss with your supervisor/manager the status of current job duties/projects and tasks that need to be reassigned, and disposition of e-mail and network files.
- You will be contacted by Human Resources to arrange an exit interview during your last few weeks of work.

4) One week to one day before retirement:

- Return office property (electronics, keys and cardkeys) to your supervisor.
- Pack and remove all personal items from computer and work area.
- Delete or transfer your e-mail and computer files as instructed by your supervisor.
- Set up voicemail and e-mail automatic responses as directed by your supervisor.

5) Post-retirement

- Update your address with Human Resources, if necessary.