

Information provided to ERS is maintained for managing your benefits. If you have questions about your information, or believe that information provided to ERS may be incorrect, please notify ERS.

Please send this completed form to:  
**Employees Retirement System of Texas**  
P.O. Box 13207  
Austin, Texas 78711-3207  
Fax: (512) 867-7438

## SECTION A: ENROLLEE INFORMATION (To be completed by the retiree)

<b>Employee Name: First, MI, Last</b>		<b>Last 4 digits of Social Security Number (SSN)</b>		<b>ERS Employee ID</b>	
		XXX-XX-			
<b>Mailing Address</b> Check if new		<b>City</b>		<b>State</b>	<b>ZIP Code</b>
<b>Eligibility County</b>	<b>Email Address</b>	<b>Phone Number</b> Home      Cell	<b>Date of Birth</b> (mm/dd/yyyy)	<b>Gender</b>	
				M      F	

## SECTION B: MEDICARE INFORMATION (To be completed by the retiree)

### Member Medicare Information (If applicable)

<b>Physical Address for Medicare (if Mailing Address is a PO Box)</b>		
<b>Medicare Number</b>	<b>Part A Effective Date</b>	<b>Part B Effective Date</b>

### Eligible Dependent's Medicare Information (If applicable)

<b>Physical Address for Medicare (if Mailing Address is a PO Box)</b>			
<b>Medicare Eligible Dependent's Name</b>	<b>Medicare Number</b>	<b>Part A Effective Date</b>	<b>Part B Effective Date</b>

### Out-of-Pocket Premiums (for the retiree):

- Premiums for coverage that have an out-of-pocket cost must be paid directly to ERS by either sending in a monthly check/ money order, or by signing up for automatic withdrawal.
- Please visit the ERS website at [www.ers.texas.gov/Retirees/Forms/](http://www.ers.texas.gov/Retirees/Forms/) to download an Automatic Withdrawal Cancellation of Insurance Premiums form. Accounts must be current before the Automatic Withdrawal can be set up. This means you may need to send in a premium payment along with the Automatic Withdrawal Cancellation of Insurance Premiums form.
- If you are a TRS retiree, once your TRS annuity has been set up, you may request that your out-of-pocket premiums be deducted from your TRS annuity. Please send a written request to ERS if you want your premiums deducted from your TRS annuity. Accounts must be current before your request can be processed. This means you may need to send in a premium payment along with your written request.

## SECTION C: AUTHORIZATION SECTION (To be completed by retiree)

- Because service with an Independent School District (ISD) is not with an employer whose employees are eligible for the GBP, it is not included in the calculation to determine if a TRS or ORP retiree has 10 years of eligible service credit. ISD service is also not included in the calculation to determine if a retiree who is under age 65 meets the GBP's Rule of 80, which is age plus years of eligible service credit for an employer whose employees are eligible for the GBP. TRS service that is transferred to ERS through an ERS retirement is subject to ERS retiree insurance eligibility requirements.
- I understand that premiums will not be deducted from my monthly annuity.
- I agree to make premium payments when due.
- If I do not pay the required premiums when due, any coverage subject to out-of-pocket costs will be cancelled.
- I authorize any provider to release information about covered persons when such information is deemed necessary to determine eligibility or for the proper disposition of a claim or complaint.
- I certify all information provided above is valid and true to the best of my knowledge.

Retiree Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**SECTION D: AUTHORIZATION AND CERTIFICATION** (To be completed by Benefits Coordinator)

Agency Name	Agency No.	Fund No.	Last Date on Payroll	Retirement Date	Applied for Disability Retirement
					Yes No

The total years of eligible service credit/participation include at least 10 years of GBP eligible service credit as an eligible employee at an agency/higher education institution authorized to participate in the GBP. Yes No

During any portion of the three consecutive months prior to retirement, was the employee classified as a part-time employee? Yes\* No

\*Employees who are grandfathered for tiered insurance and classified as part-time during the three months prior to retirement will receive 50% of the retiree health insurance premium contributions, and 25% for eligible dependent health insurance premium contributions.

Tiered Insurance: If the employee had five full years of GBP eligible service credit as of September 1, 2014 they will be grandfathered and not subject to tiered insurance. They will receive the appropriate state contribution based on their classification prior to retirement. If the employee did not have five full years of GBP eligible service credit as of September 1, 2014 they will be subject to tiered insurance premium cost, and their state contribution will be dependent on their years of eligible service credit at retirement.

If the employee has 10 years of GBP eligible service credit but does not meet the Rule of 80, you will need to send this form for the retiree to continue their optional benefits before age 65. Once the retiree turns 65, they would need to contact ERS to elect medical benefits.

**I hereby affirm that I am the individual authorized to validate GBP eligible service credit. I further affirm that all statements above are true and correct to the best of my knowledge. I understand that any discrepancies may invalidate this document and have an adverse effect on benefits to the member.**

Benefits Coordinator Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_  
(mm-dd-yyyy)

Benefits Coordinator Name (printed): \_\_\_\_\_ Contact Number: \_\_\_\_\_

**For Higher Education Institutions Only:**

The employee's last place of employment cannot be an Independent School District (ISD). If the last place of employment is an ISD the employee is not eligible for GBP retiree insurance.

Because service with an Independent School District (ISD) is not with an employer whose employees are eligible for the GBP, it is not included in the calculation to determine if a TRS or ORP retiree has 10 years of eligible service credit. ISD service is also not included in the calculation to determine if a retiree who is under age 65 meets the GBP's Rule of 80, which is age plus years of eligible service credit for an employer whose employees are eligible for the GBP. TRS service that is transferred to ERS through an ERS retirement is subject to ERS retiree insurance eligibility requirements.

**Important Information:**

- Forms can be mailed or emailed to ERS up to 90 days prior to the retirement date. If emailing, please email to **Directpay@ers.texas.gov**
- Incomplete forms will not be processed and will be mailed or emailed back to the Benefits Coordinator. This could result in a delay in setting up the retiree's insurance.