

Notice of Intent to Retire

Procedure to Complete NOI eForm

Access the Notice of Intent to Retire page in a web browser by logging into [myHR](#) with your university credentials.

1. On the myHR: Employee Self Service home page, click the Notice of Intent to Retire tile.

2. The Benefits Self Service landing page appears.

a. Read the **Employee Instructions**.

b. Click the **Add a NOI eForm** link in the lefthand menu.

UM SYSTEM
myHR: Employee Self Service

Notice of Intent to Retire

EMPLOYEE INSTRUCTIONS

Who should submit a Notice of Intent To Retire?

- Only employees in either the [Defined Benefit Plan or Hybrid Plan](#) who will meet the minimum retirement eligibility requirements (at least age 55 with at least 10 years of age 60 with at least 5 years of service) are required to submit a Notice of Intent to retire.
- It is recommended that before you submit your notice, you visit the [Pension Benefits](#) page to get an estimate of your retirement pension benefits.
- For more information on how to initiate other retirement benefits through Fidelity, visit the [Retirement Planning Checklist](#).

Steps to submit your Notice of Intent to Retire (please read through all steps before proceeding):

- Schedule time to meet with your supervisor to review and discuss your retirement plan.
- Approximately 60-90 days prior to your planned retirement date, log into MyHR and complete sections 1-3 of the Notice of Intent to Retire form.
- To process your retirement, the plan requires proof of marriage documentation based on your **current marital status** (document copies must be legible). If you are:
 - Married: please provide a copy of your recorded marriage certificate (also known as a certified copy; this can be obtained from the county clerk or State Vital Statistics department after the marriage took place)
 - Divorced: and were married during your employment, please provide a copy of your Divorce Decree.
 - Widowed: and were married during your employment, please provide a copy of your spouse's death certificate.
- You will be able to upload electronic versions of the required documents (as outlined in Step 3) when you submit the Notice of Intent to Retire form.
- If, at the time of your retirement, you or any of your dependents will be Medicare-eligible and covered on a medical plan in retirement, we recommend you contact your local Social Security office to enroll in Medicare Part A and Part B approximately 60-90 days prior to your retirement date.*

*Enrollment in Medicare Part A and Part B is required to enroll in the Group Medicare Advantage plans sponsored by the University of Missouri. Even if you are not eligible to enroll in a University plan, it is important to know that failure to enroll in Medicare timely, when eligible, may result in lifetime penalties from Social Security. Visit [Medicare.gov](#) for more information.

What happens after an employee submits their Notice of Intent to Retire form in MyHR?

3. The **Notice of Intent to Retire** screen appears.
 - a. The **Employee Instructions** from the previous screen are displayed again here for your convenience.
 - b. In the **Retirement Eligibility** section, read the acknowledgement. If you meet the requirements, click the **toggle button** to add a checkmark.

If you do not meet the requirements, you will not be able to proceed with the form. Contact your [campus HR generalist](#) for more information.

The **Personal Information** section appears if you added a checkmark in step 3B to acknowledge the Retirement Eligibility statement.

- c. A **Home Telephone** is required.
 - d. In the field that asks, “**Do you want your applicable insurance and pension election forms sent to your work or post retirement email address?**” expand the field and select either **Post Retirement** or **Work**.
 - e. The **Post Retirement Email Address** is important to ensure continued communication from the University after you retire. This email address should be the email address you plan to use in retirement. Keep in mind, retirees do not retain their university email address except under a few exceptions. More information is available in the [Email Management Policy](#).
 - f. Expand the **Opt-in to share your contact information with your retiree association** field and select **Yes** or **No**.

The screenshot shows the 'Notice of Intent to Retire' form. At the top, it says 'Notice of Intent to Retire : Notice of Intent to Retire' and 'Form ID 3960423'. Below this is a section titled 'Steps to submit your Notice of Intent to Retire (please read through all steps before proceeding):' with five numbered steps. Step 3 is highlighted with a green circle 'a'. Below the steps is a section titled 'Retirement Eligibility' with a paragraph of text and a toggle button with a checkmark, highlighted with a green circle 'b'. Below that is a section titled 'Personal Information' with a paragraph of text and several form fields. Fields for 'Home Telephone', 'Do you want your applicable insurance and pension election forms sent to your work or post retirement email address?', 'Post Retirement Email Address', and 'Opt in to share contact information with your retiree association' are highlighted with green circles 'c', 'd', 'e', and 'f' respectively. Other fields include Name, Marital Status, Empl ID#, Date of Birth, Work Location (UMSYS), Department, Work Email Address, and Employee Classification (1 Other Faculty & Staff).

- g. Enter your expected **Retirement Date** or click the calendar icon to select the expected retirement date.
- h. The **Spouse Name** and **Spouse Birth Date** fields are auto populated if you have a spouse. If your spousal information is incorrect, please contact your [HR Generalist](#).
- i. The **Reason** code is automatically assigned based on the Retirement Date entered.
- j. The **Age** field will display your retirement age based on the Retirement Date entered.

NOTE: If the information you provide in the Personal Information section changes during retirement, you may visit [myHR](#) to update.

- k. The **Home Address After Retirement** section is auto populated. If you need to change the address, click the link in the paragraph above the address for instructions.
- l. The **Required Questions** section asks two questions. The default answer for each is unchecked, indicating No. If you add a checkmark to the first question, a **Dates of prior service** field appears, and you must enter the appropriate dates.
- m. Read the **Retirement Acknowledgement** section. To submit your intent to retire, you must click the **Acknowledgement** toggle to display a checkmark.

The screenshot shows the 'Notice of Intent to Retire' form. Callouts g through m highlight specific fields and sections:

- g:** Retirement Date field.
- h:** Spouse Name and Spouse Birth Date fields.
- i:** Reason field.
- j:** Age field.
- k:** Home Address After Retirement section, including Address Line 1, Address Line 2, City (Columbia), State (MO), and Postal Code (65201-3601).
- l:** Required Questions section, with callouts to the first question (Do you think you may have prior periods of UM System employment of at least one year or more?) and the second question (At any time during your employment with UM System did you participate under the Civil Service Retirement System, Federal Employee Retirement System, or Missouri State Employee Retirement System?).
- m:** Acknowledgement toggle at the bottom of the form.

Home Address After Retirement

If the address below is incorrect, please update your personal information in myHR before moving forward. Instructions can be found [here](#). After retirement, please remember to update your address in myHR as soon as you move to ensure state taxes are withheld correctly. If you have any questions, please call the HR Service Center at 573-882-2146.

Address Line 1
Address Line 2
City Columbia
State MO
Postal Code 65201-3601

Required Questions

Do you think you may have prior periods of UM System employment of at least one year or more?

At any time during your employment with UM System did you participate under the Civil Service Retirement System, Federal Employee Retirement System, or Missouri State Employee Retirement System?

Retirement Acknowledgement

I hereby elect to retire in accordance with the terms and conditions of the University of Missouri System Retirement, Disability & Death Benefit Plan or Employee Retirement Investment Plan ("the Plan") as stated in the Collected Rules & Regulations of the University of Missouri System. I acknowledge that I have estimated retirement benefits and accessed sufficient other information to make this decision to retire, and if applicable am relinquishing any rights to which I am entitled under the academic tenure regulations (Section 310.010 et. seq. of the University of Missouri System Collected Rules & Regulations).

No Plan participant has the right to receive or retain benefit payments from the Plan prior to the time the Plan permits distribution or benefit payments that exceed the amounts to which a participant is entitled (each an "impermissible payment"). Subject to applicable laws, the university makes every reasonable effort to recover an impermissible payment plus interest. Upon discovery, the university ceases all future pension benefit payments under the Plan, and will either collect a lump sum repayment from you or adjust future benefit payments to correct the impermissible payment. The university is required to take the aforementioned actions to protect the Plan and participants from any adverse tax consequences relating to impermissible payments from the Plan.

BY ELECTRONICALLY SUBMITTING THE NOTICE OF INTENT TO RETIRE FORM, I ACKNOWLEDGE THAT I HAVE READ THE FOREGOING NOTICE AND CONSENT TO ANY CORRECTIVE ACTION TAKEN BY THE UNIVERSITY WITH RESPECT TO ANY IMPERMISSIBLE PAYMENT TO ME UNDER THE PLAN.

Acknowledgement

- n. If you are married and have any of the required documents in digital format, you can submit them in the **File Attachments** section.

(You do not have to upload your attachments here. As noted in the Employee Instructions section, you can submit hard copies to your Retirement Generalist if preferred.)

Select the type of document in the Description field, then click the **Upload** button and follow the onscreen instructions.

Once uploaded, the **File Name** field will display the file name.

You can click the **Delete** button if you need to remove an attachment.

Click the **Add** button if you have more files to attach.


- o. **Comments** are optional.
- p. When you are finished completing the form, click the **Submit** button at the bottom of the page.

(If you are not finished, you can click the **Save** button and return to finish later by clicking the **Update an NOI eForm** link in the menu.)

The screenshot shows the 'File Attachments' section of a web form. It features a table with columns for Status, Action, Description, File Name, and Delete. A single row is visible with the number '1' in the Status column, an 'Upload' button in the Action column, a dropdown menu in the Description column, and a 'Delete' button in the Delete column. Below the table is an 'Add' button. Underneath is a 'Comments' section with a text input field. At the bottom of the form are 'Save' and 'Submit' buttons. Three green circles with letters 'n', 'o', and 'p' are overlaid on the image to indicate specific callout points: 'n' is over the 'Status' column header, 'o' is over the 'Comments' text input field, and 'p' is over the 'Submit' button.

- Upon submitting, the **Results page** appears, confirming that your eForm has been successfully submitted. The next step in the process is performed by the person whose name appears after “The eForm has been routed to the next approval step.”

The **Transaction / Signature Log** section displays information about each completed step in the process.

 **Notice of Intent to Retire : Results page**
Form ID 3960423


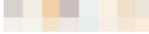
You have successfully submitted your eForm.

The eForm has been routed to the next approval step.

[multiple approvers.](#)

View Approval Route

Transaction / Signature Log 1 row

Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1 05/20/2025 4:16:54PM	Initiated			Submit	

Refresh Log

- Your HR Generalist will contact you to schedule a time to review your submission. If you have any additional questions, you can contact your [HR Generalist](#) directly.

End of Training and Reference Guide