



County of Sonoma Retiree Health Benefits Checklist

3 or More Years Before Retiring

- Employees who are within three years of normal retirement age and who may have under-contributed to the 457 Deferred Compensation plan in prior eligible years may be eligible to increase their 457 contributions for three consecutive years. Contact [ACTTC's Deferred Compensation Unit](#) for more information.

1 or More Years Before Retiring

- Review the [Sonoma County Employees' Retirement Association \(SCERA\) Pre-Retirement Checklist](#).
- Review the [Social Security Retirement Checklist](#).

1 Year Before Retiring

- Sign-up for a Ready to Retire Class through [Sonoma Higher Ed](#).
- Request a [Pre-Determination for Retiree Health Benefits Eligibility](#).

2-3 Months Before Retiring

- Review [Benefits Upon Separation](#) for information on what happens with your active employee benefits when you retire.
- Determine your Retirement Date.
- Complete and return the [Retirement Medical Insurance Information and Disclosure Authorization](#) Form to the Human Resources Benefits Unit.
- If you or your spouse/registered domestic partner are Medicare eligible, apply for Medicare with the [Social Security Administration](#) and provide the County of Sonoma Human Resources Benefits Unit [CMS-L564: Request for Employment Information form](#) with Section A completed (Benefits Unit will complete Section B and return it to you).
- If you have questions about plan designs or need help comparing medical and dental plans contact CareCounsel, the County's Healthcare Advocacy expert at (888) 227-3334.

1 Month Before Retiring

- If you would like to defer your vacation payout to your 457 Deferred Compensation account, complete the [Sonoma County Deferred Compensation Plan Accrual/Lump Sum Deferral Form](#).
- If you are participating in Deferred Compensation, review the [Distribution Options for 457 Plans](#) and/or [Distributions Options for 401\(a\) Plans](#).

You're Retired

- When you receive the Human Resources Benefits Unit's congratulations on your retirement email, schedule a phone or in-person appointment to review your retiree health benefit options.
- Complete and return your [Retiree Benefits Enrollment/Change Form](#) to the Human Resources Benefits Unit no more than 31 days following your retirement date. Other form(s) may be necessary depending on the medical plan you select and Medicare eligibility of the enrollees. If you are covering a dependent, submit a copy of the official marriage certificate, proof of State of California Registered Domestic Partnership, and/or official birth certificate(s), and copy of Medicare card (if applicable).
- If you have a Retiree Health Reimbursement Account, request a Retiree Benefits Statement from the Human Resources Benefits Unit.
- Review your 457 Deferred Compensation account and reach out to [ACTTC's Deferred Compensation Unit](#) with any questions.

1-3 Months After Retirement

- Review your first [SCERA advice of deposit](#) to ensure your health benefit deductions are correct (will include at least two months' worth of deductions). The combined deduction for medical, dental, and life insurance is listed as one line item entitled "County Benefits".