

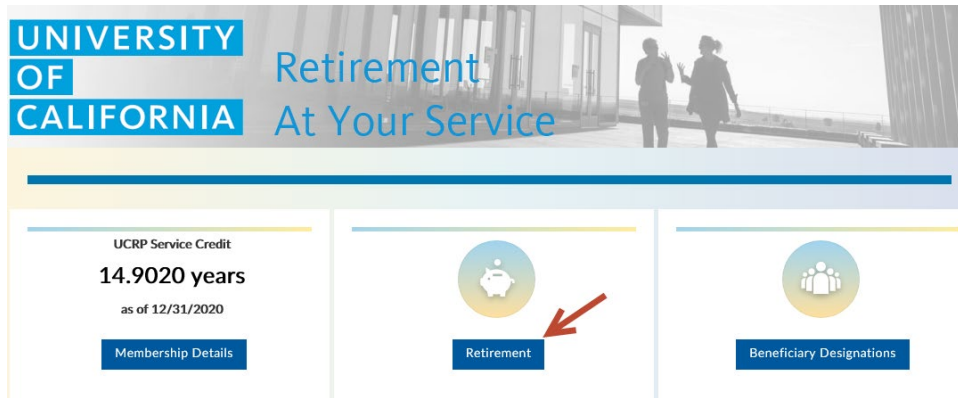
University of California Retirement System

UCRAYS Retirement

v.2.1 April 15, 2021

UCRP members can complete their retirement process – from retirement estimates through election – using UCRAYS <https://retirementatyourservice.ucop.edu/>

Click 'Retirement' on your UCRAYS dashboard to begin.



To learn more about how to register, log in and use UCRAYS, visit [Frequently Asked Questions about UCRAYS](#)

Create your Personal Retirement Profile

Within 90 days of your retirement date, initiate your retirement by creating your Personal Retirement Profile (PRP) on UCRAYS.

From the 'Retirement Estimates, Initiation, and Election' page, select 'Initiate & Elect UCRP Retirement,' then 'Create a New PRP.' Follow the prompts to provide the necessary information.

Retirement Estimates, Initiation, and Election

To help prepare for your University of California Retirement Plan (UCRP) retirement, you may:

- View your basic retirement estimates below.
- Create a more detailed retirement estimate by clicking on Create a Retirement Estimate. This will allow you to select your own retirement date, view alternate payment options, and adjust estimates created will be saved here for your review at a later time.
- Begin and complete the process of electing your UCRP retirement benefits by selecting Initiate & Elect UCRP Retirement.

Learn More about UCRP Retirement

For more information on preparing for your retirement, including details on the steps to initiate your retirement from the University of California Retirement Plan (UCRP), please visit [UCNET](#).



Saved Retirement Estimates

Click a transaction number to review an estimate.

Transaction Number	Retirement Date	Separation Date	Estimate Created
██████	07/01/2021	06/27/2021	10/21/2020 09:57 AM
██████	07/01/2023	06/27/2023	04/10/2020 01:35 PM
██████	07/01/2023	06/27/2023	04/10/2020 01:31 PM

PRP and Retirement Election

Click Create a New PRP to prepare a new Personal Retirement Profile. Any active PRPs you create will be saved here for you to view or elect UCRP retirement at a later time.

Create a New PRP



Create a new Personal Retirement Profile (PRP)

A PRP provides your personal UCRP retirement information, including your retirement income projections, your eligibility for retiree health insurance and the percentage of UC's contribution to retiree health premiums you'll receive, if applicable.

To create a new PRP, complete the following steps.

Step 1: Review Membership Account(s), Salary and Service Details

Step 2: Enter retirement details

Step 3: Verify Address

Step 4: Enter Eligible Spouse/Domestic Partner details

Step 5: Review/Add Other Eligible Survivors

Step 6: Enter contingent annuitant details

Step 7: Review current insurance details

Step 8: Review retirement details and create PRP

Create PRP



Follow the steps

Personal Retirement Profile

- 1 Membership Account(s), Salary, and Service
- 2 Retirement Details
- 3 Address
- 4 Eligible Spouse/Domestic Partner
- 5 Other Eligible Survivors
- 6 Contingent Annuitant
- 7 Insurance
- 8 Create PRP

After you complete the steps and review your PRP, select 'Create PRP' (or select 'Cancel' to begin again). Click the hyperlinks if you need to return to a step.

Retirement Details

Retirement Date	Separation Date	Age at Retirement	Unused Sick Leave Hours
05/01/2021	04/29/2021		

Address

Address Type	Address
Home	

Eligible Spouse/Domestic Partner

Not Applicable

Other Eligible Survivors

Not Applicable

Contingent Annuitant

Not Applicable

Insurance

Enrollee	Relationship	Date of Birth	Medical Plan	Dental Plan	Legal Plan
	Member		UC Blue & Gold HMO	Delta Dental PPO	ARAG Legal Plan

I agree the information above is true to the best of my knowledge and understand the retirement options provided are based on available data (including data I provided) and not a guarantee of eligibility or benefit amounts.

Cancel

Previous

Create PRP



If your PRP was successfully created, you will receive a transaction number. You can choose to print the PRP or send it to your UCRAYS account as a secure message.

Personal Retirement Profile

Transaction Number: 3700501

Created Date/Time: 04/09/2021 / 03:47 PM

Retirement Date: 05/01/2021

Your personal retirement profile has been provided to help you make decisions about your University of California Retirement Plan (UCRP) benefits. The information is based on available data (including data you may have provided) and is not a guarantee of eligibility or benefit amounts.

In order to retire under this profile, you must complete the retirement election tool on UCRAYS or [contact a RASC](#) retirement counselor to prepare a retirement election form for your signature. Once the RASC has received your signed retirement election form along with all required documentation, we will process your retirement.

Your signed election form and all required documentation must be received by the RASC within 90 days of your intended retirement date. Upon receipt, the RASC will send you an acknowledgement from which will indicate whether any documents are missing.

REQUIRED DOCUMENTATION AND SPECIAL SITUATIONS

Below you will find the personal data as well as your salary and service credit details used in the projections and calculations of your estimated retirement income options. If you notice any discrepancies, please [contact the RASC](#) or your retirement counselor immediately.

Personal Data

Calculation Data & Details

UCRP Retirement Income Options Estimates

Capital Accumulation Payment (CAP)

UC Sponsored Retiree Health Benefits

UCRP Beneficiary Designation

If you would like a copy of your PRP, you can select "Send PRP" below to have an electronic copy sent to your UCRAYS inbox or "Print PRP" for a printed copy.



If your PRP requires additional review, you will receive a UCRAYS secure message notifying you that your PRP is available within 5-7 business days.

Personal Retirement Profile

PRP Cannot be Created

YOUR REQUEST REQUIRES ADDITIONAL REVIEW FROM THE RETIREMENT ADMINISTRATION SERVICE CENTER (RASC) TO PROCEED TO THE NEXT STEP. ONCE RASC VERIFICATION IS COMPLETED, YOUR DOCUMENT WILL BE SENT TO YOU VIA UCRAYS MESSAGE IN THE NEXT 5 - 7 BUSINESS DAYS. YOU DO NOT NEED TO TAKE FURTHER ACTION AT THIS TIME.

Please do not submit more than one request – multiple requests may slow down your retirement process.

Electing your retirement

In UCRAYS, select the PRP with your desired retirement date (go to 'Retirement' > 'Initiate & Elect Retirement' > 'View PRP/Elect Retirement')


PRP and Retirement Election

Your saved PRPs are below. Select a PRP to view and/ or elect UCRP retirement. Or, click Create a New PRP to calculate a new PRP.

[View PRP/Elect Retirement](#)

<input type="checkbox"/>	Transaction Number	Retirement Date	Separation Date	Status	PRP Created	Election Initiated
<input checked="" type="checkbox"/>	██████████	06/01/2021	05/29/2021	PRP Is Ready - Complete Your Election Instructions	03/16/2021 09:40 AM	

Then click 'Elect UCRP Retirement'

UCRP Beneficiary Designation 


If you would like a copy of your PRP, you can select "Send PRP" below to have an electronic copy sent to your UCRAYS inbox or "Print PRP" for a printed copy.

[Send PRP](#) [Print PRP](#)

Elect UCRP Retirement

To elect UCRP retirement, click the button below.

Please note that the retirement details used to generate your PRP cannot be edited as part of your retirement election. Making changes to your retirement details will require a new PRP.

[Elect UCRP Retirement](#) 


Next, review the steps you need to take before you confirm your retirement election (which may be different from those shown below depending on the member's individual data). For example, you may be asked to upload required documentation if you have a spouse/domestic partner (such as a spouse/domestic partner's birth certificate, marriage certificate).

Elect UCRP Retirement

The details outlined in your UCRP retirement election are pulled directly from your Personal Retirement Profile (PRP) and c
new PRP.

To elect UCRP Retirement, complete the following steps:

- Step 1: Review retirement details and select payment option(s)
- Step 2: Contact Information and Consent
- Step 3: Review Survivors and Contingent Annuitants (if applicable)
- Step 4: Enter Payment Details
- Step 5: Review health insurance details (if applicable)
- Step 6: Upload required documentation (if applicable)
- Step 7: Review and elect UCRP retirement

[Elect UCRP Retirement](#) 

As you proceed through the election, you will be asked to provide information and make important decisions about your retirement benefits. If you do not have a required document on hand, you can proceed with your retirement election and submit it later.

Once you have completed the steps, review the details. Click the hyperlinks if you need to return to a step.

Elect UCRP Retirement

1 Retirement Details and Payment Option(s) 2 Contact Information and Consent 3 Lump Sum Cashout 4 Elect UCRP Retirement

Review and Elect UCRP Retirement

Review your retirement election details. To make any changes, select the details you wish to change. Click Initiate My Election to elect UCRP retirement.

[Retirement Details and Payment Option\(s\)](#)

Retirement Date : 06/01/2021

Separation Date : 05/29/2021

Age at Retirement : [REDACTED]

Benefit Type	Benefit Option
1976 Tier with SS	Lumpsum Cashout

[Contact Information and Consent](#)

Address Type	Address	Payment Address
[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>

Personal Email : [REDACTED]

I consent to the release of my personal email to the UC retiree association/center : No

[Lump Sum Cashout](#)

Full or Partial Rollover

Rollover Option	Rollover Type	Pre-Tax Percentage	Financial Institution Name
Percentage	UC Plan	10.00%	[REDACTED]

All Paid to Me

Bank Account	Account Type	Percentage to this Bank
[REDACTED]	[REDACTED]	[REDACTED]

You can submit your election with an electronic signature or print and sign your election form and use Upload Documentation to submit it on UCRAYS or send it to the RASC via fax or mail. Either way, your spouse or domestic partner (if you have one) will need to sign as well. (Do not send multiple documents as this will delay processing.)

Do you want to e-sign your election letter?

Spouse/domestic partner Email : *



I agree the information above is true to the best of my knowledge. I further understand my agreement to initiate my election does not constitute a valid retirement election. I must sign my retirement election form, along with my spouse or domestic partner's signature, if applicable, and must submit my signed election form with all supporting documents to the RASC within 90 days of my elected retirement date. If my signed election form is not received within 90 days of my retirement date or my signed election is received after my death, I understand my retirement election will not be valid and processed. I also agree I must separate from my UC employment by the date indicated on my election form.

If you opt for electronic signature, your spouse or domestic partner will receive an email with details about the secure process.

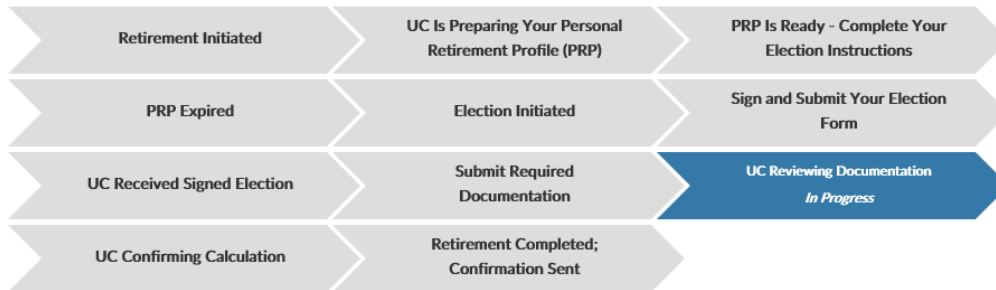
Once again, submitting more than one election form (via any method) may delay your retirement process.

Finalizing your retirement election

RASC will review your signed election form and supporting documentation and will reach out to you if additional documentation is needed. The Retirement Application Progress tracker provides updates on where you are in the process.

Retirement Application Progress

Review the [Retirement Progress Glossary](#) for more information on each of the indicators below.



Once you have successfully submitted all required documentation, RASC will finalize the calculation of your benefit, prepare your retirement confirmation letter and send it to you via UCRAYS secure message. This process typically takes 60-90 days from the date RASC receives all required documentation, but it may take more time if your retirement requires additional steps.

To change or cancel your election

If you want to change or cancel your retirement election, select 'Cancel Election' on the 'Initiate and Elect UCRP Retirement' page.

PRP and Retirement Election

Your in-progress retirement election and previously-run PRPs are listed below. You may resume your retirement election or cancel it. You must cancel your in-progress retirement election to create a new PRP or view any previously-run PRPs.

[Resume Election](#) [Cancel Election](#)

<input type="checkbox"/>	Transaction Number	Retirement Date	Separation Date	Status	PRP Created	Election Initiated
<input type="checkbox"/>	[REDACTED]	05/01/2021	04/29/2021	Election Initiated	02/27/2021 10:56 AM	02/27/2021 11:01 AM

Your election cannot be changed after your retirement date or 15 days from the date of your confirmation letter, whichever is later.