

Termination Checklist

DO NOT submit this checklist to IMRF—for employer's use only.



Use this checklist as a reference or place a copy in the member's file. The completed checklist then provides documentation of the termination process and should **not** be submitted to IMRF.

To avoid possible delay of benefits or refunds:

An IMRF Online Employer Access **Notice of Termination of IMRF Participation** is always required regardless of the reason for termination.

Termination Checklist

Complete and file with IMRF

- File an IMRF Online Employer Access **Notice of Termination of Participation of IMRF Participation (Form 6.41)** (If employer has Internet access, file form 6.41)
Online Termination form or Paper 6.41 if no internet access must be filed regardless of the reason for termination

Use one of the four following check lists depending on the member's reason for termination:

A. Separation (employee quits or is terminated from his or her position)

Member is not required to apply for a separation refund

- For a refund of contributions, the member files an Application for Separation Refund (Form 5.10) with IMRF. (Member can apply for a refund online via Member Access.) (To be eligible for a refund, the member must terminate employment as well as IMRF participation. The member is not eligible for a refund if he or she will continue working for the same unit of government in a position that is not eligible for IMRF or in a position that will participate in a reciprocal or local police or fire fund.)
- Employers should discuss COBRA with the member, see IMRF Manual for Authorized Agents

B. Retirement (see Retirement Checklist)

- A retiring member files an Application for Retirement Annuity (Form 5.20) with IMRF (Member can apply for retirement online via Member Access)
- Employers should discuss Health Insurance Continuation with retiring members, see IMRF Manual for Authorized Agents

C. Death (see Death Benefit Checklist)

- Employer must file Notice of Termination (Form 6.41) (Submit via Employer Access)
- Advise survivors to contact IMRF at 1-800-ASK-IMRF (1-800-275-4673)
- Discuss COBRA with surviving spouse (and dependents); see IMRF Manual for Authorized Agents

D. Disability (See Disability Checklist)

