

Required Documentation

In order to effectively complete your retirement election process, the following items will be needed during the online process. If you need assistance, contact a Retirement Counselor at [RASC](#) at (800) 888-8267 or the UCSB HR Benefits Office via [HR ServiceNow](#).

[UCRAYS \(a.k.a. UC At Your Service\) Username and Password](#) (be prepared to log in)

- <https://retirementatyour.service.ucop.edu/UCRAYS/Account/LoginE?ReturnUrl=%2fUCRAYS>

- **Required supporting documents:**

- **Birth Certificate or Passport** (if applicable) –Spouse/domestic partner (DP) or any other contingent annuitants
 - **Marriage certificate or IRS 1040 tax filing** page showing spouse/DP (if applicable)
 - Supporting documents can be uploaded separately to your computer or emailed separately in a pdf format to be uploaded to the UCRAYS system.
 - If eligible and electing the Lump Sum Option – no supporting documents are required.
- **For direct deposit purposes** - bank account information (routing number and account number available to verify system information).
 - **Federal and State Tax** Withholding preferences
 - **UC Retiree Health Benefits** Continuation (if applicable)
 - Be prepared to decide which plan option you wish to select for **your lifetime benefit, survivor** (if applicable) and contingent option (i.e., Option BRI, A, B, C, D)
 - Be prepared to decide **how to apply your CAP funds** (if applicable) i.e. roll over to 403(b), 457(b), DCP, IRA, cash out
 - **Spouse or Domestic Partner electronic signature** will be required during the retirement election process. Please ensure a spouse or domestic partner is available.

Please Note: Retirement elections are irrevocable once the retirement election is confirmed.