

Checklist of Documents for Compulsory/Optional Retirement

Name:	Unit:	
Position:		
Documentary Requirements	No. of copies	Assessed by/Date
1. Letter of Intent to Retire (approval thru channels)	2	
2. GSIS Application for Retirement/Separation/Life Insurance Benefits	2	
3. Application for PAG-IBIG Provident Benefit	2	
4. Application for Terminal Leave	2	
5. Application for UP ID for retiree	2	
6. Statement of Assets, Liabilities and Net Worth	2	
7. Photocopy of retiree's two (2) valid government IDs with Date of Birth and three (3) specimen signatures on each IDs. (UP Employee ID not applicable)	2	
8. PSA Marriage Contract for married female employees.	2	
9. Declaration of Pendency/Non-Pendency of Case to be notarized and submitted to GSIS after receipt of confirmation message from GSIS.	2	
10. Exit Interview	2	
11. Application for Service Recognition Pay	2	
12. Application for Faculty Cumulative Leave Benefit	2	
13. Authority to Deduct	2	
14. Certificate of Last Remittance in PAG-IBIG (c/o Accounting Office)	1	
15. Special Power of Attorney (for PAG-IBIG processing c/o UP Manila Liaison Officer)	2	
16. Photocopy of two (2) valid IDs of the SPA witnesses with three (3) specimen signatures		
17. Certificate of Part-time/Full-time (for College of Medicine Faculty)	2	
18. Certificate of Not Connected to Other Government Agency (for College of Medicine Faculty)	2	
19. Service Record of Residency in PGH or any other Government agencies (for College of Medicine Faculty)	2	
20. Service Record from other government agency (for Part-time employees; for employees previously employed to other government agencies)	2	
21. Approved Succession Plan*	2	
22. University Clearance (shall be accomplished up until IV. ACCOUNTABILITIES MANAGEMENT)*	2	
For Agency Accredited Cooperative Members, they must submit the following documents to HRDO:		
1. Application for UP Provident Benefit Claim (with photocopy of ATM)	2	
2. UP Provident Withdrawal of Membership form	2	
3. UP Provident Bank Authorization Form	2	
4. UP Credit Cooperative Affidavit of Undertaking (if with loan obligations)	2	
5. UP Credit Cooperative Bank Deposit Authorization	2	
6. PGH Bayanihan Withdrawal of Membership form	2	
7. PGH Bayanihan Continuation of Membership form	2	

For fill-up instructions: <https://sites.google.com/up.edu.ph/upmhrdo-leavesandbenefits/separation-and-retirement/retirement-requirements>

*for Optional Retirees' completion and submission.