Creating a Pension Request
Quick Reference Guide

For assistance, please create a ticket.

Overview

This guide outlines the process for creating a pension packet request within Union Pacific's pension system. Use this guide if you are ready to begin your pension benefit within the near future.

How to create a pension request:

1. Start by logging into our pension system. If you have never registered before, click "Register as a new user." Click "Forgot User ID/Password" if you have registered before, but do not know your password.

   https://ipas.mercer.com/psp/uppension_ess/EMPLOYEE/HRMS/c/MHR_PA_ESS_MENU.HP_PA_HOME_PG.GBL?cmd=login&languageCd=ENG&

   If you experience any technical difficulties logging in to the system, please send an email to hrsc@up.com or create a ticket: https://www.uprr.com/hrm/hrsc-submit-inquiry/index.html#/pension/create

2. Once logged in, click "Let's Get Started" at the bottom of the list of options.

3. From the menu on the left-hand side of the screen, select the 3rd option in the list- "Request Retirement Packet (Paper Election)."

4. Click "Start Activity Guide."

5. Step 1- Welcome: The system will launch the steps you need to complete in order to submit your pension request. Read all instructions carefully and click "Next" to advance through the steps after providing all required information.

6. Step 2- Verify Employee Type: Select the option that best describes your employee status.

7. Step 3- Verify Contact Information: Review the contact information currently on file. If you need to update anything, you can do so in Step 4.

8. Step 4- Verify Personal Information: If any personal information is incorrect, use the form provided in this step to enter in the correct information. If all information was correct, simply click "Next."

9. Step 5- Verify Marital Status: Select the option that best describes your marital status.

10. Step 6- Verify QDRO Status: Select whether or not you have a Qualified Domestic Relations Order (QDRO) as a result of a divorce which awards a portion of your pension benefit to a former spouse. This must be completed so that we can accurately calculate your pension benefit.

11. Step 7- Verify Dates: Enter your last day of employment, pension start date, and if applicable, your return to agreement date. Please note that your last day of employment includes all compensated days, which includes working days and any vacation you are taking prior to your retirement. Your pension start date must be the first of a month and you cannot begin your pension in the same month that you have any compensated days. For example, if you last day worked is February 15th, the earliest you could begin your pension is March 1st.

Verify the Following Dates

Please confirm your last day of employment. This includes any vacation days you may be taking.

Please enter the date you would like to start your pension. This date can only be on the first of the month, (i.e. 10/01/2018). The date must be at least ten business days from the date of the request.

If you are currently a nonagreement employee and plan to return to an agreement position before retiring, please state your anticipated return to agreement date.

Last Date of Employment with Union Pacific*	[📅]
Pension Start Date*	[📅]
Return to Agreement Date	[📅]

12. Step 8- Verify Railroad Work History: Please provide any details of work history with a Union Pacific subsidiary or another railroad.

Have you ever worked for a Union Pacific subsidiary (e.g., Transcentric, UP Tech, etc.) or another railroad (e.g., SP, MP, CNW, Amtrak, BNSF, etc.)? If yes, please describe the details below:

[ ]

13. Step 9- Closing: In order to complete your pension request, you must click "Save and Exit." If you close out without clicking "Save and Exit," the pension team will not receive your request.

Submit your Paper Pension Calculation Request

To complete your request click 'Save and Exit'. Provided that this request was created with adequate advance notice, your pension calculation, election form and other supporting documents will be mailed to you approximately 45 days prior to your requested pension start date.

Thank you for using the Union Pacific Pension System.

[Save and Exit]

14. Once you have finished all of the above steps, you will have completed the process to request a pension calculation and can exit the system. Provided that this request was created with adequate advance notice, your pension calculation, election form, and other supporting documents will be sent to you approximately 45 days prior to your requested pension start date.