




Membership and enrollment: changes after enrollment

Retirement Benefits Training
Fiscal year 2023

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Updating beneficiary designations

- Encourage members to update beneficiaries at any life change:
 - Marriage;
 - Divorce;
 - Birth; or
 - Beneficiary death.
- Encourage members to complete updates online through Member Access.
 - Can also use applicable form(s).
- Provide appropriate [member life event checklist](#).
- Provide [Designating Active Member Beneficiaries](#) flyer.

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Name, address changes

- Members can change address in [Member Access](#).
 - Can also use [Name/Address Change Form](#) (Form 1239) and [upload to EES](#).
- For name changes, member must provide:
 - Copy of marriage license or divorce decree;
 - Copy of a filed court order;
 - Copy of driver's license or state-issued ID card;
 - Copy of Social Security card; or
 - Copy of valid U.S. passport.
- State ORP participants should contact chosen service provider about updating contact information.

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State ORP open enrollment

- Annually January 1 through March 1.
- Changes effective April 1.
- During the open enrollment period, State ORP participants may change service providers.
- During the open enrollment period, eligible State ORP participants may irrevocably elect to enroll in SCRS.
 - A participant is eligible if at any point during the open enrollment period it has been at least one year, but not more than five years, since the participant's initial enrollment in State ORP.
- Look for details in *PEBA Update*.

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Changing service providers during State ORP open enrollment

- State ORP participants may change service providers by:
 - Logging in to Member Access only if they don't work for a Comptroller General (CG) employer; or
 - Completing and submitting State ORP Notice of Termination or Change (Form 1162), which can be uploaded to EES.
- PEBA provides enrollment details to new service provider.
- Employee must also complete investment elections and beneficiary designation with new service provider.

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Electing SCRS membership during State ORP open enrollment

- Eligible State ORP participants may irrevocably elect to enroll in SCRS by:
 - State ORP participants can elect to enroll in SCRS by logging in to Member Access only if the employer initiates the transaction in EES; or
 - Completing and submitting Retirement Plan Enrollment (Form 1100), which can be uploaded to EES.

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