




# Retirement processes: assisting members

Retirement Benefits Training  
Fiscal year 2023

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## Publications, presentations

- Refer members to the following helpful publications:
  - SCRS Member Handbook and PORS Member Handbook.
  - Applying for disability retirement and Applying for service retirement member checklists.
  - Manage Your Retirement Account with Member Access flyer.
- Encourage members to review Get Set for Retirement preretirement presentations at [peba.sc.gov/bap](http://peba.sc.gov/bap).

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## Applying for retirement

- Disability retirement: Retiring Member's Disability Application Checklist (Form 6352).
  - Page 2 instructions for employers.
- Service retirement: Retiring Member's Service Application Checklist (Form 6302).
- Encourage members to apply for service retirement online with Member Access.
- State ORP members contact chosen service provider to apply.

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### SCRS, PORS benefit estimates

- Members can create a benefit estimate in Member Access using:
  - Retirement account data;
  - Potential average final compensation (AFC); and
  - A selected retirement date.
- Use *Benefit Estimate* option in EES to:
  - Calculate average final compensation (AFC);
  - Project benefit estimate; and
  - Calculate taxes for benefit payments.
- Estimates are only an estimated calculation and are not a guarantee of member monthly benefits.

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### Designating beneficiaries

- Active SCRS and PORS members designate beneficiary in Member Access for:
  - Monthly retirement benefit; or
  - Refund of contributions.
- To designate existing trust as beneficiary, use paper application.
  - Member must submit *Certification of Trust* (Form 1113) with application.
- State ORP members designate beneficiary for State ORP account with chosen service provider.
- Members should designate beneficiary for incidental death benefit, if covered.

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### Disclaimer

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