


# Retirement processes: assisting members

Retirement Benefits Training  
Fiscal year 2024



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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.
  - [Your Retirement Plan Payment Options](#) flyer.
  - [Your Monthly Retirement Benefit and Taxes](#) 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

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



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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); and
  - Project benefit estimate.
- 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 balance with chosen service provider.
- Members should designate beneficiary for incidental death benefit, if covered, with PEBA.



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