




Retirement processes: disability retirement

Retirement Benefits Training
Fiscal year 2024




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SCRS, PORS disability retirement eligibility

- Member must be in service with covered employer, meaning:
 - They are not yet retired (or for SCRS, have not been retired for more than one year); and
 - They are actively employed (including unpaid leave) or were on payroll less than one year ago.
- Unless injury is job-related, member must have:
 - Five years earned service if Class Two.
 - Eight years earned service if Class Three.

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SCRS disability retirement eligibility

- Member must be approved for disability benefit by the Social Security Administration.
- Generally requires incapacity of member to perform any gainful occupation.
- SCRS application must be filed while the member is in service with a covered SCRS employer even if the member has not yet been approved for Social Security disability benefits.
 - Members should not wait for Social Security approval before applying for SCRS disability retirement.

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SCRS disability before age 65

- Member must provide documentation each year of continued Social Security disability.
- Requirement ends at age 65.



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PORS disability retirement eligibility

- Member must be found permanently disabled from performing job duties by the PORS medical board composed of three physicians.
 - Social Security Administration approval is not required.
- Generally, member must be permanently incapacitated for job duties.



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PORS disability before age 55

- Reexamination may be required for member:
 - Annually for first five years; and
 - Once every three years thereafter.
- Requirement ends at age 55.



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SCRS, PORS disability retirement monthly benefit

- SCRS disability benefit based on average final compensation and service credit at retirement.
- PORS disability benefit based on average final compensation and service credit projection to age 55 or 25 years of service credit, whichever is less.



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SCRS disability effective date

- Once approved, becomes effective the later of two dates:
 - Social Security disability onset date; or
 - Day after covered employment termination.
- Retroactive benefits paid back to effective date.
- Social Security disability onset date can be no later than one year after employment termination.



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PORS disability effective date

- Once approved, becomes effective the later of two dates:
 - 30th day after PEBA receives application; or
 - The day after member's last day on employer's payroll.



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Applying for disability retirement

- PEBA must receive application within one year of date of termination from covered employment.
 - For SCRS disability applicants, member should not wait for Social Security approval before applying.
- In urgent cases, you may submit application on behalf of member.
 - Member must select payment plan option.
 - Member must designate beneficiaries.



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Disability application urgent cases

- Fax application to PEBA at 803.740.1354.
- Member must still submit signed application to:
 - Select payment plan option; and
 - Designate beneficiaries.



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Applying for service and disability retirement

- Member may apply for both service and disability retirement, when eligible.
 - If eligible, member can draw service retirement benefit while waiting on disability determination.
- Member will receive disability benefit amount if approved for disability.
- Member can receive service benefit amount if not approved for disability.



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Member forms

- [SCRS Application for Disability Retirement](#) (Form 6151S).
- [PORS Application for Disability Retirement](#) (Form 6151P).
- [Withholding Certificate for Pension or Annuity Payments](#) for federal withholdings (Form W-4P).
- [Withholding Certificate for Monthly Benefit Payments](#) for state withholdings (Form 7202).
- [Direct Deposit Authorization](#) (Form 7204).
- PORS only:
 - [Member's Disability Report](#) (Form 6251).
 - [Authorization for Release of Information](#) (Form 6255).



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Employer forms

- Upload these forms in [EES](#).
 - [Employer's Disability Employment Status Report](#) (Form 6253).
 - PORS only: [Employer's Description of Disability Applicant's Job](#) (Form 6254).
- Monitor the [Required Employer Forms Report](#) in [EES](#) under Reports & Documents.



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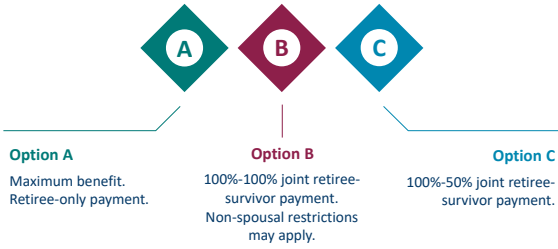
Employer actions

- You will receive an EES Task List notification once PEBA receives an application for one of your employees:
 - [Retirement Date Certification](#).
 - [Final Payroll Certification](#).
- Termination and separation from employment is required.
- Do not estimate or project final payroll information.
- Final payroll certification task cannot be completed prior to the retirement date.
 - Prevents erroneous payroll data and benefit calculations.
 - Refer to the [Final payroll certifications tasks in EES](#) training resource.
- Refer to the [Disability retirement](#) employer checklist.



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SCRS, PORS monthly payment plan options



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