

## Using EES for retirement enrollment elections

Participating employers can use [EES](#) to initiate and submit retirement enrollment elections. Submitting retirement enrollments through EES is a secure way to send confidential employee information, and it eliminates the use of [paper forms](#) (Forms 1100, 1104 and 1107) .

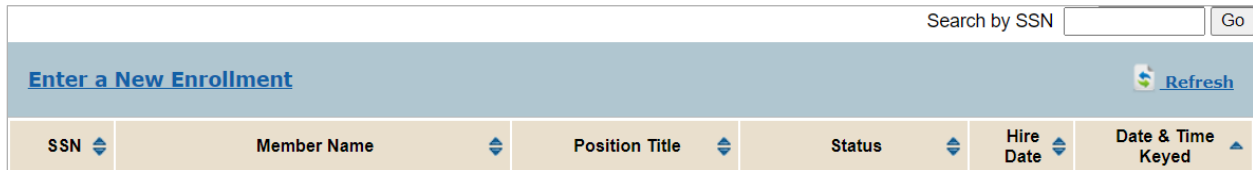
The online enrollment process requires a valid email account that an employee can access. Provide employees with the [Retirement Enrollment Guide for New Hires](#) flyer for more information.

For state agencies that process their payroll through the Comptroller General’s office, the hiring information you submit into SCEIS is shared with PEBA on a daily electronic file. No additional forms are required, unless PEBA staff specifically requests a document.

### Initiating enrollments

To begin, select the *Retirement Plan Enrollment* link.

A history and status of retirement enrollments processed through EES is displayed. Completed and rejected enrollments are displayed for 45 days. Deleted enrollments are displayed for 15 days. To view older EES enrollments or to search for a particular Social Security number, use the *Search by SSN* box. The columns can be sorted by selecting the various blue arrows in the column headers.



In the blue taskbar of the enrollment browser, select *Enter a New Enrollment*.

Certain positions are not eligible for retirement enrollment. These are listed in the tan box on the left side of the screen. If the employee is retired and currently receiving a monthly benefit from PEBA, EES will request that a retiree return-to-work date be entered instead of an enrollment.

Note: This process requires an email address that can be accessed by the employee.

Do not enter an enrollment for the following positions:

- Independent Contractors
- Student Employment
- Employees working on a VISA without a tax identification number
- Employees whose compensation is for services solely limited to per diem payments. For example: a school board member who doesn't receive a salary and only receives a per diem

SSN:

Last Name:

Date of Birth:

Enter the SSN, last name and date of birth. Select *Continue*.

If an account exists for the SSN, the last name and date of birth must match the information on file with PEBA. If you are unable to resolve an error, contact PEBA’s Customer Service. Otherwise, review the demographic information and make changes if necessary.

If the SSN does not have an existing retirement account, reenter the SSN. Select *Continue*. Complete the demographic information.

Demographic Information	
SSN:	xxx-xx-0000
First:	TEST MI: A
Last:	ENROLLMENT Suffix: <input type="text"/>
Gender:	<input type="radio"/> Male <input checked="" type="radio"/> Female
Date of Birth:	05-19-1977
Street:	1200 Main Street
Apt/Suite/Other:	Apt 19
City:	Columbia State: SC Zip: 29201
Phone:	(803) 555-1234 Ext: <input type="text"/>
Email:	testenrollment@employer.com

Complete the position information. Position title, annual salary and the hire date are required. The salary information will not be shown to the employee.

Check the appropriate boxes if any of the following applies to the position:

- Non-permanent position;
- Optional membership authorized by the Retirement Act; or
- Elected official earning \$9,000 or less per year.

Position Information	
<input type="radio"/> Yes <input checked="" type="radio"/> No	Is this a Police, Firefighter, Magistrate, Full-time Coroner, Full-time Deputy Coroner, or Probate Judge position?
Position Title:	Financial Rep II
Annual Salary:	49500
Hire Date:	07-01-2021
An employee has 30 days from the hire date to elect a retirement plan. After 30 days, if a plan is not elected, membership in the Retirement Systems is required and the enrollment is automatically applied.	
<b>Please check if any apply to the position.</b>	
<input type="checkbox"/>	Non-permanent position
<input type="checkbox"/>	Optional Membership - Exemptions authorized by the Retirement Act
<input type="checkbox"/>	Elected official earning \$9,000 or less per year

If *Other Employer Information* is displayed, view the Other employment section of this document for more information.

Other Employer Information	
Please indicate if the employee has terminated or will terminate employment from the following employer(s) as of the date of hire keyed.	
Public Employee Benefit Authority (SCRS)	Terminated? <input type="radio"/> Yes <input checked="" type="radio"/> No
Will Public Employee Benefit Authority be the main (primary) employer?	<input type="radio"/> Yes <input type="radio"/> No

If the enrollment is for a Police Officer's Retirement System (PORS) position, view the PORS positions section of this document for more information.

Position Information	
<input checked="" type="radio"/> Yes <input type="radio"/> No	Is this a Police, Firefighter, Magistrate, Full-time Coroner, Full-time Deputy Coroner, or Probate Judge position?

If you do not have all the information needed to complete the enrollment, you may save and complete the enrollment at a later time. You may also cancel the enrollment if needed. Once the information for the enrollment is complete, select *Submit*.

The employee will receive an email to elect a retirement plan. He must select the link, *Make a retirement plan election*, in the email to begin the election process.



The screenshot shows the PEBA logo and tagline "Serving those who serve South Carolina". Below the logo, it says "TEST Employee Name" and "TEST Employer Name". A paragraph of text explains that the user began enrollment for a retirement plan administered by the South Carolina Public Employee Benefit Authority (PEBA) and provides a deadline for the election. A blue link "Make a retirement plan election" is visible. At the bottom, it states "If you make no election, you will be automatically enrolled."

The employee is required to validate his last name and date of birth. After selecting *Continue*, the employee reviews his demographic information, as well as the employer name, position title and hire date. Demographic information can be updated at this time, too.

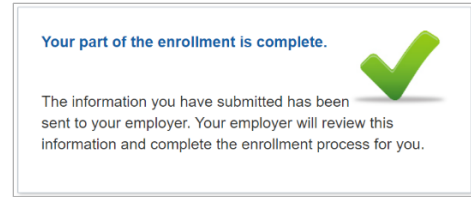
The employee can learn more about the retirement plan option or options available to him by selecting the *Learn more* link.

Additional help on the page informs the employee of the election deadline. Per the S.C. Code of Laws, an employee has 30 days from his hire date to make a retirement plan election. If no election is made, the employee's membership will default to the plan listed.

Elect a Retirement Plan Option <a href="#">Learn more</a>
<input type="radio"/> South Carolina Retirement System (SCRS)
<input type="radio"/> Non-Membership
<input type="radio"/> State Optional Retirement Program (State ORP)
<input type="button" value="Continue"/>

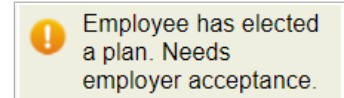
The EES enrollment feature ensures that an employee adheres to the enrollment rules set forth in the S.C. Code of Laws. If the employee is eligible for non-membership or the State Optional Retirement Program (State ORP), information about these options will be included on the webpage.

To make an election, the employee must select the appropriate option, then select *Continue*. If the employee elects State ORP, he must also select a service provider.



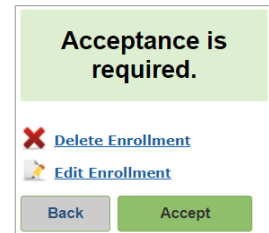
The employee must review his enrollment and election. The employee may use the *Back* button to make any changes or corrections. If no corrections are needed, the employee selects *Confirm* to complete the enrollment.

Once the employee makes his election, the enrollment status in EES will change to *Employee has elected a plan. Needs employer acceptance*.



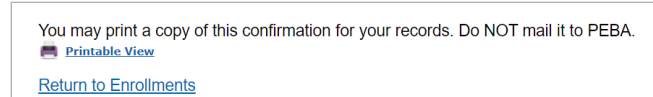
Select the enrollment to review the information and employee election. If you choose to edit the enrollment, the employee will receive another email to review the changes, and he may be required to make an election decision again. You may also delete the enrollment if necessary.

Review the retirement plan election and notify your payroll department of the election. A non-membership election does not require retirement contributions be withheld from an employee's wages. SCRS, State ORP and PORS elections require a percentage be withheld from an employee's wages for retirement contributions. State ORP elections also require that retirement contributions be forwarded to the selected service provider.



You must accept the enrollment. At this time, the employee is successfully enrolled in the plan he has elected. Be sure to take note of the important reminders. In EES, the status of the enrollment is now complete.

Select the *Printable View* option to view a PDF of the enrollment (Form 1100M). Demographic information, position summary and the retirement plan are summarized on Form 1100M. Retain a copy for employer or employee records only. Do not mail this document to PEBA. If you view the PDF, select the *Back* button to return to the completed enrollment.



The employee will receive another email confirming that his retirement enrollment is complete. The email will include a link to [Member Access](#) and directions for employees who selected State ORP.

You should also advise the employee to update beneficiary designations on file with PEBA through [Member Access](#). Share the [Designating Active Member Beneficiaries](#) flyer.

## PORS positions

There are statutory requirements a position must satisfy for it to be eligible for membership in PORS.

Select *Yes* if the employee is hired in a police, firefighter, magistrate, full-time coroner, full-time deputy coroner or probate judge position. Select one of the position types that meets the eligibility requirements.

Position Information	
<input checked="" type="radio"/> Yes <input type="radio"/> No	Is this a Police, Firefighter, Magistrate, Full-time Coroner, Full-time Deputy Coroner, or Probate Judge position?
<b>Select one of the following for PORS eligibility.</b>	
<input type="radio"/> Police or Firefighter required by the terms of their employment to give time to: <ul style="list-style-type: none"> <li>a) the preservation of public order, the protection of life and property and the detection of crimes</li> <li>b) the prevention and control of property destruction by fire.</li> </ul>	
<input type="radio"/> Magistrate	
<input type="radio"/> Full-time Coroner	
<input type="radio"/> Full-time Deputy Coroner	
<input type="radio"/> Probate Judge	

If the position is a magistrate, full-time coroner, full-time deputy coroner or probate judge, enter the annual salary and hire date. The position title is pre-populated.

If the position is police or firefighter, answer the additional question. Select *Yes* if the position meets these requirements.

<input type="radio"/> Yes <input type="radio"/> No	Required to devote at least 1,600 hours per year of active duty performing the police or firefighter duties listed above and receives at least \$2,000 salary per year for these duties in accordance with Section 9-11-40(4) or Section 9-1-660.
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The S.C. Code of Laws requires that a PORS-eligible position devote at least 1,600 hours per year of active duty performing police or firefighter duties and receive at least \$2,000 in salary per year for these duties. Select *No* if the position does not meet these requirements. The position is not eligible for PORS; however, the employee may have additional election options.

Previously approved positions by PEBA will be included in the position title drop-down box. Select the position and enter the annual salary and hire date.

If the position has not been previously approved by PEBA for PORS eligibility, select *Other* and enter the position title in the box below *Other*.

<input checked="" type="radio"/> Yes <input type="radio"/> No	Required to devote at least 1,600 hours per year of active duty performing the police or firefighter duties listed above and receives at least \$2,000 salary per year for these duties in accordance with Section 9-11-40(4) or Section 9-1-660.
Position Title:	<input type="text" value="Other"/> <input type="text" value="New PORS position title"/>
Annual Salary:	<input type="text" value="48000"/>
Hire Date:	<input type="text" value="07-01-2021"/>
An employee has 30 days from the hire date to elect a retirement plan. After 30 days, if a plan is not elected, membership in the Retirement Systems is required and the enrollment is automatically applied.	

After the employee completes his portion of the enrollment, accept the enrollment, and PEBA will review the position for PORS eligibility. The enrollment status will show as *Held for PEBA staff review*. PEBA may request additional information.

If the position is approved for PORS, the enrollment status will show as *Complete*. This position will now be available for selection in the drop-down box of PORS-eligible positions for future enrollments. If the position is not approved for PORS, the enrollment status will show as *Rejected by PEBA staff*. Select the enrollment to view the rejection reason. You may edit the enrollment or delete the enrollment at this time. It's important to note that the employee has not been enrolled in a retirement plan if this occurs.

## Other employment

The S.C. Code of Laws requires that a contributing member of SCRS remain a contributing member while under employment with an employer covered by SCRS. A member of SCRS who accepts an additional concurrent position with an employer participating in SCRS must enroll in SCRS with respect to that position.

A State ORP participant who accepts an additional concurrent position with an employer participating in SCRS must enroll in State ORP for the second position if the second position is eligible to participate in State ORP.

If PEBA's records indicate that an employee is employed or actively working with another covered employer, the hiring employer must indicate if the employee has terminated or will terminate employment from the other employer or employers. Please contact the employee for information regarding his other employment. Select *Yes* or *No* for each employer listed.

Other Employer Information	
<b>Please indicate if the employee has terminated or will terminate employment from the following employer(s) as of the date of hire keyed.</b>	
Public Employee Benefit Authority (SCRS)	Terminated? <input type="radio"/> Yes <input checked="" type="radio"/> No
Will 199.55 be the main (primary) employer?	<input type="radio"/> Yes <input type="radio"/> No

If the employee was terminated from your employment and is now being rehired, indicate that *Yes*, the employee terminated, then enter the termination date.

If the employee has not terminated all other employment, PEBA needs to determine the primary employer. Select *Yes* or *No* if your employer will be the primary employer.

If you have any questions, please contact your employer reporting representative or PEBA's Customer Service at 803.737.6800, 888.260.9430 or [customerservice@peba.sc.gov](mailto:customerservice@peba.sc.gov).