


Membership and enrollment: changes after enrollment

Retirement Benefits Training
Fiscal year 2025



Serving those who serve South Carolina

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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 the 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 (member signature is required).
- 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 signed Social Security card; or
 - Copy of valid U.S. passport.
- State ORP participants should also 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*.
- View more information in the State ORP chapter of the *Covered Employer Procedures Manual*.

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Changing service providers during State ORP open enrollment

- State ORP participants may change service providers by:
 - Logging in to Member Access¹; or
 - Completing and submitting *State ORP Notice of Termination or Change* (Form 1162), which can be uploaded in EES.
- PEBA provides enrollment details to new service provider.
- Participant must also complete investment elections and beneficiary designation with new service provider.

¹Available only to employees who don't work for an Office of the Comptroller General state agency.

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Electing SCRS membership during State ORP open enrollment

- Eligible State ORP participants may irrevocably elect to enroll in SCRS by:
 - Requesting their employer initiate an enrollment transaction in EES¹, which will send an email to the employee to finalize the election in *Member Access*; or
 - Completing and submitting *Retirement Plan Enrollment* (Form 1100), which can be uploaded in EES.

¹State agencies that report their payroll through the Office of the Comptroller General cannot use EES and must submit Form 1100.

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