

1

Updating beneficiary designations Encourage members to complete updates online through Member Access. Can also use applicable form(s). • Provide appropriate member life event checklist. Provide the <u>Designating Active Member</u> <u>Beneficiaries</u> flyer.

2

Name, address changes

- Members can change address in <u>Member Access</u>.
 Can also use <u>Name/Address Change Form</u> (Form 1239) and <u>upload to EES</u> (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 a filed court order;
 Copy of order'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 $\underline{\text{updating contact}}$ $\underline{\text{information}}.$

3

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 <u>Covered Employer Procedures Manual.</u>

4

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 <u>State ORP Notice of Termination or Change</u> (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.

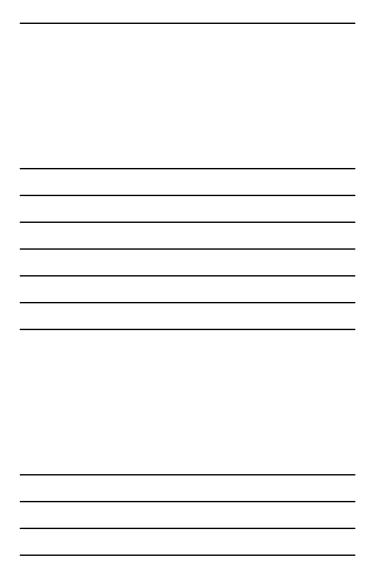
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5

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 <u>Member</u> <u>Access</u>; or
 - Completing and submitting Retirement Plan Enrollment (Form 1100), which can be uploaded in EES.

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