
 **PEBA Academy**

**Retirement processes:
assisting members**

Retirement Benefits Training
Fiscal year 2026

**PEBA**
SC Retirement System
and State Health Plan

Serving those who serve South Carolina

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Publications and 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.
 - Designating Active Member Beneficiaries flyer.
- Encourage members to review Get Set for Retirement preretirement presentations at 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 their chosen service provider to apply for distributions.

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SCRS, PORS benefit estimates¹

- 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 a projected calculation and are not a guarantee of member monthly benefits.

¹Not available for members with correlated accounts.

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Designating beneficiaries

- Active SCRS and PORS members designate beneficiaries in Member Access for:
 - Monthly retirement benefit; or
 - Refund of contributions.
- To designate existing trust as beneficiary, active members 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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