



Employer Training Workshop

Division of Retirement



Today's Presenter



- Bobby Feldman
- Outreach and Audit

Division of Retirement

Department of
**MANAGEMENT
SERVICES**

▶ Division of Retirement



- Receives **all retirement reporting** for the Florida Retirement System (FRS)
- Administers the FRS **Pension Plan**
- Administers **disability benefits** for the FRS
- Manages **FRS Online**

Workshop Presentations

Today's presentations include:

1. FRS Online Employer Services
2. Enrollment in the FRS
3. Reporting Retirement Contributions
- Ten Minute Break
4. Active Member Services
5. Introduction to Disability Retirement
6. DROP Termination and Refunds
7. Introduction to Survivor Benefits



Question and Answer



Virtual attendees: Write questions in the Q and A section. Appropriate questions will be answered live at the end of each presentation. All others will be answered via email.

In-person attendees: Hold your questions until the end of each presentation.



FRS Online Employer Services

Understanding FRS Online



Today's Presenter



- Samantha Starks-Harrison
- Enrollment Section



Summary

In this presentation, you will learn about:

- Navigating FRS Online Employer Services
- Agency Reporting Screens
- Personnel Reporting Screens
- Payroll Reporting Screens
- FRS Online Manual

Navigating FRS Online Employer Services

What is Employer Services and how do I use it?



FRS Online Welcome Page



[Who We Serve](#) ▾ [Forms](#) ▾ [Publications](#) ▾ [FAQs](#) ▾

We Serve Florida's FRS **PENSION MEMBERS**

Are you a first-time user?

[Register Here](#)

[Looking for the FRS Investment Plan?](#)



Log in Securely To Your **Pension** Account

Username

Password

By logging in, you agree to the terms.

[Log in Securely](#)

[Forgot Login](#) | [Create Account](#)

Welcome to FRS Online

If you are a member of the Florida Retirement System (FRS) Pension Plan you can access your personal retirement account information including service history, service credit, salary data, beneficiaries and more.

Employer Services Page

Employer Services

The Employer Services pages provide access to your retirement related payroll and personnel activities. Do not forget to check your My Inbox regularly. We look forward to serving you.

Employer Handbook

Read the agency guide for matters related to the Florida Retirement System (FRS) and state-administered plans.

FRS Online Manual

Read the agency guide to navigating FRS Online Employer Services.

Employer Training Videos

View the library of Employer focused how-to training videos.

Employers Page

View the Employers page of the Division of Retirement website for information releases, forms, and other resources.

Retirement Report Submission Dates

The table below contains the dates that your agency's retirement data file, contributions and contribution summary must be received by the Division of Retirement.

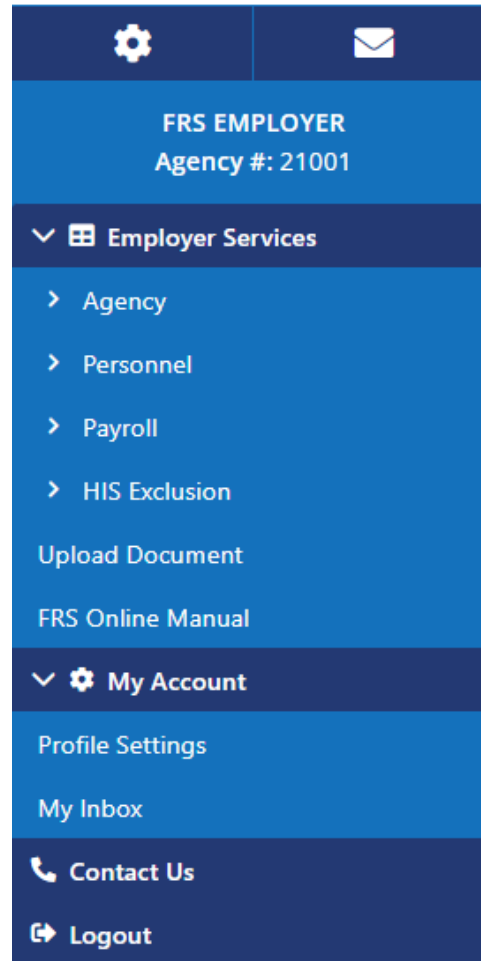
Report Month	Department of Revenue Deadline by 5:00 p.m. ET	Due Date
Dec 2023	Jan 05, 2024	Jan 08, 2024
Jan 2024	Feb 06, 2024	Feb 07, 2024
Feb 2024	Mar 06, 2024	Mar 07, 2024
Mar 2024	Apr 04, 2024	Apr 05, 2024
Apr 2024	May 06, 2024	May 07, 2024
May 2024	Jun 06, 2024	Jun 07, 2024
Jun 2024	Jul 05, 2024	Jul 08, 2024
Jul 2024	Aug 06, 2024	Aug 07, 2024
Aug 2024	Sep 06, 2024	Sep 09, 2024
Sep 2024	Oct 04, 2024	Oct 07, 2024
Oct 2024	Nov 06, 2024	Nov 07, 2024
Nov 2024	Dec 05, 2024	Dec 06, 2024
Dec 2024	Jan 07, 2025	Jan 08, 2025

The data file must be in the correct format and be able to be processed, and the contributions must match the data submitted. Retirement Report submissions that cannot be processed or that are received after the due date will be considered delinquent and a fee will be assessed to the agency in accordance with Florida Statutes.

If using the Department of Revenue to remit contributions, this process must be initiated by 5:00 p.m. ET on the fourth business day of the month in order for the Division of Retirement to receive funds by the due date.

Reminder: Termination dates should be reported when employees terminate FRS covered positions within your agency. After the termination date has been reported, the employee should be deleted from your monthly Retirement Report.

Employer Services Page Menu



Agency Reporting Screens

What information is reported on the agency screens?



Agency Screens

▼  **Employer
Services**

▼ Agency

Users

Contacts


Authorized
Signers

File Share

Users Screen

Users

Below are your agency's FRS Online users and the modules they have access to.

 Add User

1254



Approved Modules:

Last Login:

HARRY JAMES POTTER



Approved Modules: ELECTION INFO, FINANCIAL SUMMARY, HIS EXCLUSION, INVOICES, MEMBER INFO, ORP INFO, PAYROLL ERRORS, REPORTING, RETIREE INFO, SURVIVOR BENEFITS

Last Login: 10/22/2021 12:43:35 PM ET

HR00004



Approved Modules: AGENCY INFO, FINANCIAL SUMMARY, MEMBER INFO, ORP INFO, PAYROLL ERRORS, SURVIVOR BENEFITS

Last Login: 10/12/2021 01:48:04 PM ET





Contacts Screen

Contacts

Below are your current agency contacts.

 Add Contact Person

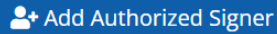
 Contacts  Locations









Name ↑	Phone Number ↑↓	Contact Type / Location ↑↓	
GOLDY SHINE	(444) 444 - 4444	ACCT / PERS MAIN / RETCOORD	 
TESTTEST TEST	(123) 456 - 7890	ACCT / INVOICE MAIN / INVOICE	 

Authorized Signers

Authorized Signers

Below you can designate an Authorized Signer for retirement forms and documents.

 Add Authorized Signer

Name 	Phone Number 	
TEST M TEST S	(123) 456 - 7890	 
TEST TEST S	(123) 456 - 7890	 
TEST TEST S	(123) 456 - 7890	 

File Share

File Share

Below you can securely upload documents, or review documents provided by the Division of Retirement.

Select a file to upload.








The Retirement Report should not be uploaded using this feature. To upload your agency's Retirement Report, access the Payroll module.

Select File

Choose File No file chosen

Upload File

Downloadable Files

File Name 	Uploaded Date 	Size 
 Current Estimate.pdf	11/09/2021	6K
 DROP Estimate.pdf	11/09/2021	11K
 Member Annual Statement.pdf	11/09/2021	379K
 RP610	10/28/2021	10K

Personnel Reporting Screens

What information is reported on the personnel screens?



Personnel Screens

▼ Personnel

Create Estimate

Global Member Search

Submit Death Notice

➤ Reports

Create Estimate Screen

Estimate Results Criteria

Retirement Date: 12/01/2021
Retirement Age: 81 years 11 months
Average Final Compensation (AFC): \$61,491.97
Accrued Percentage: 62.58%
Option 1 Annual Benefit: \$38,481.67

Monthly Benefit Options

OPTION 1 ⓘ Factor: 1.0	\$3,206.81
OPTION 2 ⓘ Factor: 0.7643	\$2,450.96

Global Member Search Screen

Search for Member by SSN

To search for an individual member, input the SSN below and click "Search".

SSN (999999999)

Search

Search for Member(s) by Uploading Flatfile

To upload a file, select the file and then click "Submit File". View the [FRS Online Manual](#) for file format information.

Select File

Choose File No file chosen

Submit File

Submit Death Notice

Submit Death Notice

Below you can submit a death notice. If you wish to make any changes to a death notice already submitted, call the Division of Retirement at (844) 377-1888 or (850) 907-6500 to speak with the Survivor Benefits Section. Do not submit another death notice as this will delay processing.

Submit a Death Notice

SSN (999999999)

Continue

Personnel Reports Menu

▼ Reports

Active Employees

Corrected Plan Notification

DROP Participants

DROP Termination Memo

Elections

Missing Email Addresses

Missing Beneficiary Designations

Optional Retirement Program Reports

Retired Employees

Retirement Distributions

Service History

SMSC Positions

Payroll Reporting Screens

What information is reported on the payroll screens?



Payroll Screens

▼ Payroll

Submit Contribution Summary

Enter Leave of Absence Dates

Enter Termination Date

Enter Early DROP Resignation Date

Submit Error Information

Pay Invoices

› Reports

Enter Retirement Report

Enter Retirement Report

Below you can edit or view your Retirement Report.

Report Month	Salary	Employer Contributions	Employee Contributions	Net Amount	Count	Status	Submission Date
10/01/2021	\$97,275.04	\$18,603.09	\$2,653.77	\$21,256.86	22	CRTD	

Display All

Submit Retirement Report

Submit Retirement Report

Below you can view and upload contribution reports.

Report Month	Status Code	Submission Date	Report Type	Action
10/01/2021	CRTD		FRS	

Display All

Upload Report

- 1. The submitted file will be renamed to the Division of Retirement format (CO050MMYYYY).
- 2. If the submitted file has been encrypted with PGP, please be sure your file name has the ".PGP" extension.
- 3. Report Months for which there are no corresponding Contribution Summary will not appear as a Report Month value to select from.

NOTE: The submitted file must be in the correct format and able to be processed by the fifth business day of the month in order to be considered on time. Files that are not able to be processed or files that are received after the due date will be considered delinquent and a fee will be assessed to the agency in accordance with Florida Statutes.

Select Report Month

Choose your Retirement Report file.

Submit



Submit Contribution Summary

Contribution Summary

Report Month	Report Type	Employer Contribution	Employee Contribution	Invoice Amount	Personal Remit Amount	Net Amount	Status	Status Date
10/01/2021	FRS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	CRTD	10/01/2021 07:07 PM ET

Display All

The Contribution Summary must be submitted no later than 5pm EST on the fifth business day of the month to be considered timely. Summaries not submitted timely will be considered delinquent and a fee will be assessed to the agency in accordance with Florida Statutes.

Note: When Status changes to update (UPDT), you can select the report month and "view printable report" to see the breakdown between the FRS Investment Plan and FRS Pension Plan for the salary and contributions submitted on the FRS contribution summary report.

Below you can enter leave of absence dates for employees that are on a leave (including military leave).

Submit Leave of Absences

Below you can enter termination dates for employees that have terminated employment that were not included on previous Retirement Reports.

Submit Termination Date



Enter Leave of Absence Dates

Enter Leave of Absence Dates

Below you can submit and download leave of absence (LOA) information.

Choose how you want to enter or retrieve information.

Submit Employee LOA

Upload Employee LOA File

Update LOA End Date

Download LOA Report

Submit Employee LOA

To submit a single-employee LOA, fill in the fields below and click "Submit". If an end date for the LOA has not been determined, enter the projected date. Information may be updated once an official end date has been determined.

All fields marked with * are required

SSN (999999999) *

First Name *

Last Name *

Start Date (mm/dd/yyyy) *

End Date (mm/dd/yyyy) *

Submit

Enter Termination Date

Enter Termination Date

Below you can submit termination dates that were omitted from the Retirement Report. A termination date cannot equal a month in which a Retirement Report is due. For example, in the month of May, the April Retirement Report is due, so an April termination date cannot be submitted here. The April termination date should be submitted on the next Retirement Report or entered on June 1 (when the May report is due).

Choose how you want to enter information.

Submit Termination Date

Submit Termination Date File

Submit Member Termination Date

To submit a single-member termination date, fill in the fields below and click "Submit".

All fields marked with * are required

SSN (999999999) *

Last Name *

Termination Date (mm/dd/yyyy) *

Submit

Enter Early DROP Resignation Date

Enter Early DROP Resignation Date

Below you may submit an employee's early DROP resignation date.

Submit Employee Early DROP Resignation Date

Use this screen to report early DROP resignation dates for employees who resign sooner than stated and acknowledged on *Form DP-ELE, Notice of Election to Participate in the DROP and Resignation of Employment*.

Note: If the employment termination has already occurred, report the termination date on your monthly Retirement Report or the Enter Termination Date page.

All fields marked with * are required

SSN (999999999) *

Last Name *

Termination Date (mm/dd/yyyy) *

Submit

Submit Error Information

Submit Error Information

Below you can view and edit errors to be worked.

Investment Plan errors should be given priority. Contributions do not transfer to your employees' accounts to be invested until the errors are cleared and any resulting invoice is paid. All errors below must be reviewed.

No IP Payroll Error reports found.

Select Error Type and Report Month.

■ DROP Split Error Module

Investment Plan

Select a Report Month

Submit Corrections

Pay Invoices

Pay Invoices

Below you can view submitted Payment Summaries or initiate a new Payment Summary.

Transaction Date	Net Invoice Amount	Net Check/EFT Amount	Status ⓘ	Status Date
10/11/2021	\$39.63	\$39.63	SUBM	10/11/2021
10/11/2021	\$48.61	\$8.65	CRTD	10/18/2021
10/13/2021	\$17.17	\$11.65	CRTD	10/13/2021
10/15/2021	-\$57,092.26	\$0.00	CRTD	10/15/2021
10/18/2021	\$22.52	\$22.52	SUBM	12/01/2021
10/18/2021	\$39.63	\$0.00	CRTD	10/18/2021
10/12/2021	\$21.26	\$10.00	CRTD	10/12/2021
10/12/2021	\$39.63	\$20.00	CRTD	10/12/2021
10/11/2021	\$50.32	\$50.32	SUBM	10/23/2021
10/26/2021	\$60,886.21	\$15.00	CRTD	10/26/2021

Showing 1 to 10 of 103 entries << < 1 2 3 4 5 > >> 10 ▾

Start New Payment Summary

Display Current

Payroll Reports

- ✓ Reports

 - Completed Error Information

 - Contribution Information

 - Invoices

 - Monthly Retirement Report Errors

 - Outstanding Loss of Service Errors

Upload Document

Upload Document

Below you can upload a document for your employee.

The employee must be reported to the Division of Retirement on your agency's Retirement Report prior to uploading a document

Select Document Type

To upload an employee document, you must select the document type.

Upload Document

Document Type

Select a Document Type

Next

Upload Document History

Search keyword

SSN

Employee Name

Document Type

File Name

Upload Date

Username

Showing 0 to 0 of 0 entries

10

FRS Online Manual

What information is contained in the FRS Online Manual?



FRS Online Manual



EMPLOYER SERVICES

FRS ONLINE MANUAL

Employer Training Videos

What training is available to employers?



Employer Training Videos

Employer Training Videos

This library contains Employer Training Videos that are designed to provide information and instructions on employer-related reporting processes, tools, and forms completion.

Video	Description
▶ FC-1 Form	This video demonstrates how to complete the FRS Pension Plan Salary Certification form (FC-1) . The Division of Retirement uses an FC-1 form to calculate a member's Average Final Compensation. An FC-1 form should be submitted when an employee is retiring and has salary reported in the last 4 months.
▶ DROP Split Error Module	A DROP Split Error occurs when an agency has advised the Division of Retirement that it pays its employees in a way other than monthly, and the salary reported for the employee's first month of DROP was reported under a single plan code when it may need to be split between two plan codes. This video demonstrates how to process DROP Split errors using the FRS Online module.
▶ Upload Document	The Upload Document page allows for the secure upload of documents to the Division of Retirement. This video demonstrates how to use the document upload feature to submit documents to the Division of Retirement.

Workshop Presentations

Today's presentations include:

- ~~1. FRS Online Employer Services~~
2. Enrollment in the FRS
3. Reporting Retirement Contributions
Ten Minute Break
4. Active Member Services
5. Introduction to Disability Retirement
6. DROP Termination and Refunds
7. Introduction to Survivor Benefits





Enrollment in the FRS

Presented by the Division Enrollment Section



Today's Presenter



- Samantha Starks-Harrison
- Enrollment Section

Summary

In this presentation, you will learn about:

- Florida Retirement System (FRS)
- FRS Participation
- Positions
- Membership Classes

Florida Retirement System (FRS)

What is the Florida Retirement System?



Florida Retirement System

- Created on December 1, 1970
- Chapter 121, Florida Statutes
- Provides a retirement and survivor benefit program
- State and local public employees participate
- Multiple-employer governmental plan
- Qualified under section 401(a) of the Internal Revenue Code

- FRS membership compulsory for all employees filling a regularly established position.
- All members of the FRS have social security coverage.



FRS Participation

What plans does the FRS offer?



FRS Participation

- Pension Plan (PP) is a defined benefit plan.
- Investment Plan (IP) is a defined contribution plan.

New FRS members have two elections:

- First election available for an 8-month period.
- Second election available during FRS career.

Active vs. Default Elections

Membership Class	Default Election
Special Risk Class Members	Pension Plan default
All other membership classes	Investment Plan default

The Election Information module provides the member's active and default plan information

*New FRS members reported in Pension Plan.

Positions

What are regularly established and temporary positions?



Regularly Established Positions

State Agency

- A position that is authorized and established pursuant to law and is compensated from a salaries and benefits appropriation pursuant to section 216.011(1)(rr), Florida Statutes.

State University

- An established position that is authorized pursuant to section 216.262(1)(a) and (b), Florida Statutes, and is compensated from a salaries account as provided in section 216.011(1)(ss), Florida Statutes.

Local Agency

- Per section 121.021(52)(b), Florida Statutes, a position that will be in existence **beyond six consecutive months**.
- Participation is determined by the length of time the position will be used.
- One day in a month is considered service for an entire month.
- Less than six calendar months is not creditable.

Temporary Positions

Temporary positions are an exception to the six-calendar month employment rule.

Examples

- Student Positions
- Temporary Instructional Personnel
- Temporary Employee Positions
- Persons on Call
- Substitute Teachers
- Other Personal Services (OPS for state agencies)

Membership Classes

What are the five membership classes?



Membership Classes

- Regular Class
- Senior Management Service Class (SMSC)
- Elected Officers' Class (EOC)
- Special Risk Class
- Special Risk Administrative Support Class (SRASC)

Chapter 1, FRS Pension Plan Employer Handbook



Contact Enrollment

Email: Enrollment@dms.fl.gov

FRS Online: frs.fl.gov

Call the Division of Retirement – Enrollment Section

Employer Line:

Toll Free: 877-377-1266

Local: 850-907-6540



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Reporting Retirement Contributions

Presented by the Contributions Section



Today's Presenter



- Hobart Lawrance
- Contributions Section



Summary

In this presentation, you will learn about:

- Retirement Reporting
- Eligible Compensation
- Workers' Compensation
- Reporting Errors

Retirement Reporting

What, when, and how?

Non-State Agencies:

Three components of the monthly retirement submission:

- Data File
- Contribution Summary
- Contributions

All three components are due by the 5th business day of the month and must balance.

- Contributions and Contribution Summary should be submitted the same day.
- One Retirement Report per month.
- Enroll new employees through the Retirement Report.
- Demographic changes on Retirement Report.

Delinquent assessment of 1% if any part of the submission is late or cannot be balanced by the due date, in accordance with section 121.78, Florida Statutes

State Agencies:

Retirement File is generated by the Department of Financial Services (DFS), Bureau of State Payrolls.

- Based on data entered in People First (or otherwise provided to DFS).
- Important to maintain accurate and current data in People First.

Remit Contributions via:

- Wire
- ACH
- EFT – Department of Revenue (DOR) Portal Enrollment and Authorization for e-Services:
floridarevenue.com/Forms_library/current/dr600.pdf
- Check

Contributions Due Dates:

- 5th business day of the month
- 4th business day if using EFT via DOR

REMINDER:

Delinquent assessment of 1% if any part of the submission is late or cannot be balanced by the due date, in accordance with section 121.78, Florida Statutes

Waiver of Delinquency Fees:

Only Delinquent Agency Contribution Report (DACR) invoices can be waived

- Provide detailed explanation of the cause and the measures being implement to prevent future recurrence.
- Submit to RET.RevenueSection@dms.fl.gov.

Eligible Compensation

What should be reported for retirement?

Eligible Compensation Includes

Per Chapter 121, Florida Statutes:

- Regular Salary
- Supplemental Pay for Active Military Service
- Used Annual or Sick Leave
- Lump Sum Annual Leave Payments (up to 500 hrs.)
- Lump Sum Compensatory Time Payments
- Salary Incentive Pay for Law Enforcement and Correctional Officers
- Certain Educational Incentive Pay
- Workers' Compensation
- Salary Additives

Salary Additives

A **Salary Additive** is a payment made in addition to the base rate of pay that begins early in a member's career and continues until retirement. Because of permanence and duration, this type of payment more closely resembles base pay than bonus.

The following criteria must be met in order to qualify:

1. Payment made pursuant to a formal written policy that applies to all eligible employees equally,
2. Payments begin no later than the 11th year of employment,
3. Once begun, payments continue through the duration of employment, and
4. Payment made at least annually.

Excluded Compensation

- Bonuses
- Expense Reimbursements for Workshops/Stipends
- Lump Sum Annual Leave payments in excess of 500 hours
- Lump Sum Sick Leave Payments
- Third Party Payments
- Lump Sum Compensatory Leave Payments, if not paid out within 11 months of being earned

Work Period Codes

9, 10, 11	Educational employers
12	All employers
21	Lump sum Annual Leave payments
23	Lump sum payments of overtime, compensatory or holiday time
38	Voluntary employee contributions (SUSORP/SMSOAP only)
88	Workers' Compensation

Reporting Salary and Plan

- Normal salary when paid not when earned
- Settlements and retroactive payments reported as prior-month adjustments

Adjustment Codes: A (Audit), E (General), R (Reinstatement)

- One plan per month (except for DROP-effective month)

Important Reporting Information

- Valid SSN
- Date of Hire
- Annualized Salary
- Date of Termination
- Email Address

Public Records Exemption Indicator

All retirement records are available to the public pursuant to Florida's Public Records Law, Chapter 119, Florida Statutes, with the exception of those records specifically exempted by law under sections 121.031(5), 121.4501(19), and 119.071, Florida Statutes.

House Bill 781 – Effective July 1, 2021, a notarized request for exemption with a statement under oath attesting to the statutory basis for the exemption must be provided.

Workers' Compensation

Who is eligible and when it is due?



Workers' Compensation

FRS members are entitled to retirement service credit for the periods of temporary total or temporary partial workers' compensation provided that the member:

- **Returns to work** with an FRS participating employer for a full calendar month;^{*} or
- Retires on **disability**.

**Example: To be eligible, an employee who returns to work on April 10 must work through the whole month of May. Adjustments should appear on the May or June retirement report.*

Reporting Workers' Compensation

- The employer pays **both** the employee and the employer contributions and then reports the total in the **employer** contribution field.
- Use the employee's monthly rate of compensation **paid before receiving** WC payments.
- Use work period code 88 for WC payments received on or after July 1, 1990.

State agencies should refer to the Bureau of State Payroll's *Payroll Preparation Manual* for information on reporting workers' compensation.

Workers' Compensation Adjustments

Salary and contributions should be reported for periods when an employee:

- received WC payments for temporary total, or partial disability.
- remained in an employee/employer relationship.

Adjustments are made up to the **Maximum Medical Improvement (MMI) date**.

Failing to report contributions for workers' compensation properly and timely will result in a 1% penalty (section 121.125, Florida Statutes).

Reporting Errors

Why is accurate retirement reporting important?



Importance of Accurate Reporting

- Delinquency Fees and Loss of Earnings
- Invoices
- Member Self-Service Options
- Member Annual Statements
- Retirement Process

Loss of Service Errors (LOSE) and Non-LOSE Errors:

- Errors are identified when the retirement submission is balanced.
- Email sent to the Retirement Coordinator (RC).
- Error reports found on the **Monthly Retirement Report Errors screen**.
- Information on errors may be found in Chapter 5 of the **FRS Employer Handbook**.

Data Reporting Requirements

- Errors occur when the submitted data is incorrect, does not conform with the data reporting requirements, or when certain types of reported data require additional review.
- The reporting requirements can be found in chapters 2 through 4 of the **FRS Employer Handbook**.

Loss of Service Errors (LOSE) and Non-LOSE Errors:

LOSE Errors are deleted from the FRS database and must be re-reported on the next month's file to avoid a delinquency fee.

Contributions are returned (or billed) via invoice.

Agency responses on **Non-LOSE Errors** should be sent to contributions@dms.fl.gov except for:

- Investment Plan errors – information may be provided online through the *Submit Error Information* screen.
- DROP Split errors – may be corrected online through the *Submit Error Information* screen.



Contact Contributions

Email: Contributions@dms.fl.gov

FRS Online: frs.fl.gov

Call the Division of Retirement - Contributions Section

Employer Line:

Toll Free: 877-377-1266

Local: 850-907-6540



Contact Accounting

Email: RET.RevenueSection@dms.fl.gov

Phone: 850-488-6883

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Ten Minute Break

Employer Training Workshop Resource Map



Division of Retirement Employer Line

Local: 850-907-6540
Toll Free: 877-377-1266

Select from the prompts below:

- 1 Retirement Reporting
- 2 ABC Invoices
- 3 DEF Membership Classes or Position Coverage
- 4 GHI Employee Service Credit, Estimates, Amount Due, DROP Entry
- 5 JKL Optional Retirement Programs and Optional Annuity Programs or 850-778-4696



Email

Contributions@dms.fl.gov
Enrollment@dms.fl.gov
ORPData@dms.fl.gov
RET.RevenueSection@dms.fl.gov

FRS Online - frs.fl.gov

FRS Online Employer Services is the secure website for employers who participate in the Florida Retirement System (FRS). Employers can use the site to access personnel and payroll-related reporting features and reports.



Click or scan the QR code to view the Employer Services FRS Online Manual.

Division of Retirement Website - frs.myflorida.com

The Division of Retirement website has helpful resources for employees, including the following:

- The "Employers" page for the Employer Handbook, contribution rates, and information releases.
- The "Forms" page for links to division forms.
- The "Publications" page for division publications, including retirement guides.
- The "Active Members" page to find qualified domestic orders and active member forms and for information on the Deferred Retirement Option Program (DROP).
- The "Retirees" page to find retiree forms, information about retirement payment schedules, and more.



Click or scan the QR code to view the Employer Handbook.

MyFRS Financial Guidance Line and MyFRS.com

The MyFRS.com website and the MyFRS Financial Guidance Program provide educational resources to FRS members and employers. MyFRS.com is sponsored by the State Board of Administration, who administers the FRS Investment Plan. The MyFRS Financial Guidance Line can be reached toll-free at:

Members: 1-866-446-9377
Employers: 1-866-377-2121

We Value Your Feedback

Click or scan the QR code to complete the post workshop survey.



Ten Minute Break

Feel free to review the Resource Map.



Active Member Services

Bureau of Retirement Calculations



Today's Presenter



- Jake Armstrong
- Bureau of Retirement Calculations

Summary

In this presentation, you will learn about:

- Beneficiary Designations for Active Members
- Member Annual Statements
- Vesting Requirements and Normal Retirement Date
- DROP
- Purchasable Service
- Agency Required Forms
- Forms Requiring Agency Representative Signature
- Termination and Reemployment

Beneficiary Designations

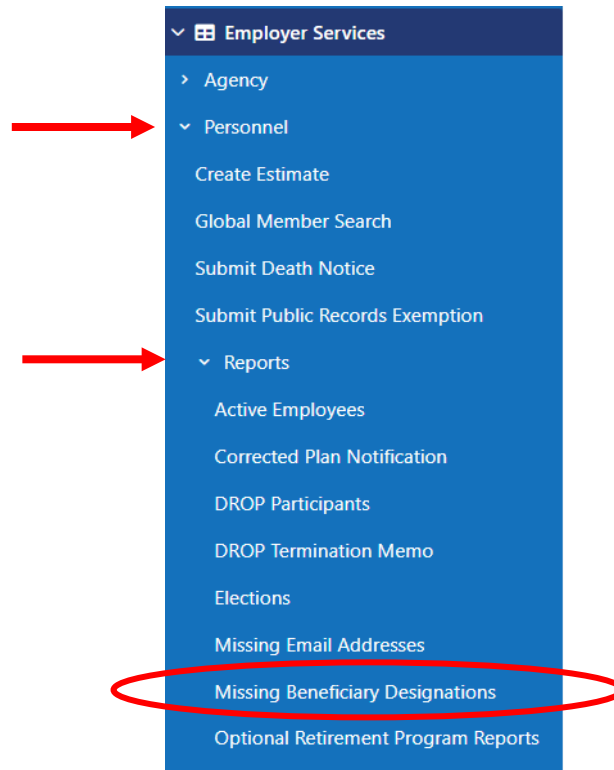
Why designate a beneficiary?



Beneficiary Designation

- All active members should designate a beneficiary and keep designation current.
- Beneficiaries are updated through the member's FRS Online account at frs.fl.gov.

Employer FRS Online Missing Beneficiary Designations Report



Member Annual Statement

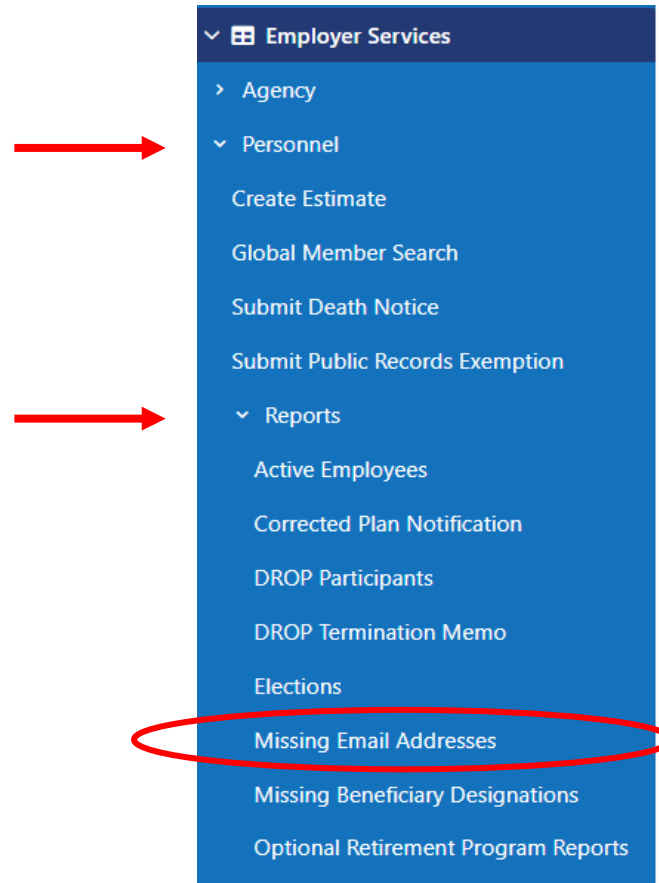
What does the employer need to communicate to employees regarding the Member Annual Statement?



Member Annual Statement

- Generated once a year in the member's birth month
- Placed in the member's FRS Online account:
 - Near the 20th of the month
 - Email notification sent to member

Employer FRS Online Missing Email List



Vesting and Normal Retirement Date

What are the vesting requirements for FRS Pension Members?



Vesting Requirements

Initial Enrollment in FRS	Vesting Provisions	Membership Tier
Members enrolled prior to July 1, 2001	Seven, eight, or 10-year vesting requirement (Contingent on Membership class)	1
Members enrolled on July 1, 2001, through June 30, 2011	Six-year vesting requirement	1
Members enrolled on or after July 1, 2011	Eight-year vesting requirement	2

Normal Retirement Date

All membership classes except Special Risk

Members enrolled before July 1, 2011 – Tier 1 members:

- Vested and age 62; or
- 30 years of service, whichever occurs first

Members enrolled after July 1, 2011 – Tier 2 members:

- Vested and age 65; or
- 33 years of service, whichever occurs first

Normal Retirement Date

Special Risk Classes

Tier 1 and Tier 2 members:

- Vested and age 55; or
- 25 years of Special Risk Class service, whichever occurs first

DROP

Let's discuss DROP entry and DROP extensions.



Form DP-ELE

- Notice of Election to Participate in the DROP and Resignation of Employment ([DP-ELE](#)).
- This form serves as a postdated resignation, authorized by the employer, with the authorized termination date.
- Form DP-ELE is required to update a participant's current DROP end date or to begin participating in DROP.

Application/Option Selection Forms

FRS members must also complete and return these forms before participating in DROP.

- Application for Service Retirement and the Deferred Retirement Option Program ([Form DP-11](#))
- Retired Member and DROP Participant Beneficiary Designation ([Form FST-12](#))
- Option Selection ([Form FRS-11o](#))
- Spousal Acknowledgement ([Form SA-1](#))



When are Forms Due?

**Initially applying to participate in DROP;
DP-ELE, DP-11, FST-12, FRS-11o, SA-1**

No earlier than six months prior to vested members normal retirement date or desired DROP entry date

**To take advantage of additional months; DP-ELE
To extend DROP participation; DP-EXT**

No later than the members DROP end date

DROP Entry

First eligible to enter DROP at Normal Retirement date

FRS Pension Plan Members:

- Can enter DROP at Normal Retirement or any time after and participate in DROP for 96 months

DROP Extensions – K-12 Instructional Personnel

Eligible for DROP extension beyond 96 months:

- **Florida School for the Deaf and the Blind** instructional personnel.
- **Charter School and District School Board K-12** Instructional Personnel as defined in section 1012.01(2)(a)-(d), Florida Statutes.
 - Extension must be authorized by the district school superintendent.
- **Developmental research school** instructional personnel as defined in section 1012.01(2)(a), Florida Statutes.

Extension period up to 24 calendar months. The participant may extend through the last day of the last calendar month of that school year.

DROP Extensions – K-12 Administrative Personnel

As defined in section 1012.01(3), Florida Statutes, **eligible for DROP extension beyond 96 months** as follows:

- If the DROP termination date occurs in the middle of a school year, the district school board may grant a DROP extension to the last day of the last calendar month of that school year.

Purchasable Service

Can a member purchase service?



Military Leaves of Absence – Eligibility

- Member leaves covered employment within 60 days of entering the military.
- Member applies for employment with **same** employer within 90 days of his or her honorable discharge from military.
- Member returns to FRS-covered employment with **same** employer.

Military Leaves of Absence – Employer Responsibility

Submit DD-214 and [DPR-100M](#)

- Division of Retirement will calculate the cost
- Employer payment mandatory
- Employee payment optional

Other Types of Purchasable Service

- Refunded Service – [FR-9](#)
- Leaves of Absence – [FR-28](#)
- In-State/Out-of-State Service
 - [FR-30](#)
 - Military service as Out-of-State service – DD-214
 - [In-State and Out-of-State Service](#)

Agency Required Forms

What forms are required from the Agency?

Final Salary Certification – FC-1

Received by the division no later than the fifth of the month following the member's termination or DROP begin date.

Service Retirement:

- Certify the last four months of salary earned up through the date of termination.

DROP Retirement:

- Certify the last four months of salary earned through the day before DROP participation begins.

Other Required Forms

- New Employee Certification Form – [CERT](#)
- Certification of Monthly Salaries – [DPR-100](#)
- Certification of Monthly Salaries (MILOA) – [DPR-100M](#)
- Statement of Disability by Employer – [FR-13a](#)

Forms Requiring Agency Representative Signature

What forms should agency representatives sign?



Forms Requiring Agency Signature

- Application for Service Retirement – [FR-11](#)
- Application for Service Retirement and DROP – [DP-11](#)
- Notice of Election to Participate in the DROP and Resignation of Employment - [DP-ELE](#)
- Notice of Reemployment for Suspension of Retirement Benefits - [FR-23](#)

FRS Termination and Reemployment

What are the termination and reemployment requirements for FRS members?

Termination Requirement

- The first six calendar months of retirement.

Reemployment Limitation Period

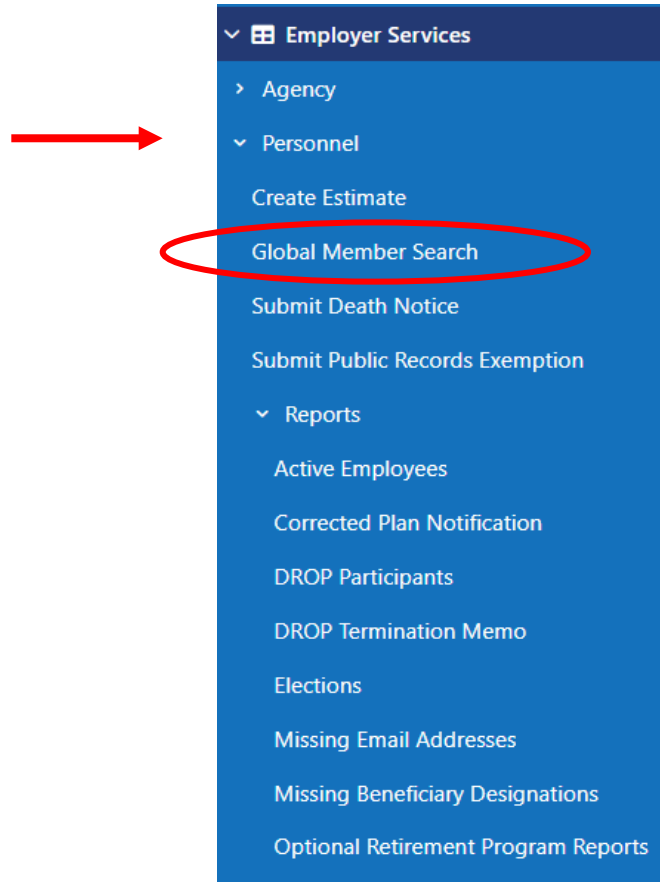
- Seventh through the 12th calendar months.
- Must suspend benefits – using form [FR-23](#)
Notification of Reemployment for Suspension of Retirement Benefits



Volunteer Services

- Beginning July 1, 2023, Volunteer Services in accordance with section 121.091(15), Florida Statutes do not constitute employment by or provision of services to an FRS employer.
- Employers and their retirees must maintain adequate records to document adherence to the statute.

FRS Online – Global Member Search



Search for Member by SSN

Global Member Search

Below you can search for an individual member or upload a file to search multiple members. This will provide members' retirement status and last reported plan code if they have participated in the FRS.

How would you like to search for members?

Search by SSN

Search by Flatfile Upload

Search for Member by SSN

To search for an individual member, input the SSN below and click "Search".

SSN (999999999)

Search

FRS Global Member Search

Global Member Search

Below you can search for an individual member or upload a file to search multiple members. This will provide members' retirement status and last reported plan code if they have participated in the FRS.

Member Details

SSN	Employee Name	Plan Code	Last Check Date	Retirement Date	Receiving Pension Benefit	Mandatory Renewed DC	HIS Benefit *	Public Records Exemption
XXX-XX-XXXX	[REDACTED]	DP	02/01/2003	02/14/2003	Y	N	N	N

* Investment Plan members receiving a Health Insurance Subsidy (HIS) benefit are governed by the same reemployment provisions as Pension Plan retirees. Members receiving HIS may not be reemployed during the first 6 calendar months after they take a distribution and must suspend the HIS benefit during the 7th-12th calendar months

[Back to SSN Search](#)

Workshop Presentations

Today's presentations include:

- ~~1. FRS Online Employer Services~~
- ~~2. Enrollment in the FRS~~
- ~~3. Reporting Retirement Contributions~~
~~Ten Minute Break~~
- ~~4. Active Member Services~~
5. Introduction to Disability Retirement
6. DROP Termination and Refunds
7. Introduction to Survivor Benefits





Introduction to Disability Retirement

Presented by Division Disability Section



Today's Presenter



- Jake Armstrong
- Disability Determinations Section

Summary

In this presentation, you will learn about:

- Types of FRS Disability Retirement Benefits
- Eligibility
- Disability Retirement Application
- Denial Process

Types of FRS Disability Retirement Benefits

What types of Disability Retirement are offered?

Types of Disability Retirement

Regular Disability Retirement

- For members that become disabled NOT due to work injuries or injuries that are job related.

In-Line-of-Duty (ILOD) Disability Retirement

- For members that become disabled due to an illness or injury that arises out of and during the performance of their FRS employment.

ILOD Presumptions

Hepatitis, Meningococcal Meningitis, or Tuberculosis

- Effective 1/1/1996 – Firefighters, Paramedics, EMTs, LEOs, and COs

Tuberculosis, Heart Disease, or Hypertension

- Effective 7/1/1999 – State LEOs and Firefighters
- Effective 7/1/2002 – Local LEOs and COs were included

Eligibility

Who is eligible for FRS Disability benefits?

Eligibility Guidelines

To be eligible, a member must be:

- Totally and permanently disabled.
- Employed most recently by an FRS employer.
- Meet the disability vesting requirement.

**Totally and
Permanently
Disabled**

+

**Recent FRS
Employment**

+

**Meet Disability
Vesting
Requirement**

Not Eligible

- Members who are not permanently disabled.
- Retirees of both the Pension Plan and the Investment Plan.
- Renewed members.
- Members who have been or are employed with any employer after termination from the FRS.
- Members who do not live past their effective retirement date.

Vesting Requirements

Date of Enrollment	Regular Disability Benefits	In-Line-of-Duty Disability Benefits
Before July 1, 2001	10 years	Member is covered from the first day of employment
On or After July 1, 2001	8 years	

Disability Retirement Application

What is needed to apply for Disability Retirement?

Required Documents

- **Application for Disability Retirement**
 - **[FR-13 – Pension Plan](#)**
 - **[PR-13 – Investment Plan](#)**
- **Employer’s Statement of Disability, [FR-13A](#)**
- **Two Physician Reports, [FR-13B](#)**
- **The Option Selection Form**
 - **[FRS-11o – Pension Plan](#)**
 - **[PR-11o – Investment Plan](#)**
- **Spousal Acknowledgment Form**
 - **[SA-1 – Pension Plan](#)**
 - **[SA-2 – Investment Plan](#)**



Supporting Documents

Line-of-Duty applications

- A copy of the notice of injury, any workers' compensation settlement agreements, and pre-employment physical for presumption claims.


Denial Process

What can be done if an application is denied?

Intent to Deny Letter

An Intent to Deny letter is sent to the member via certified mail.

- The member has 21 days from the date of receipt to submit additional medical information to support their claim.



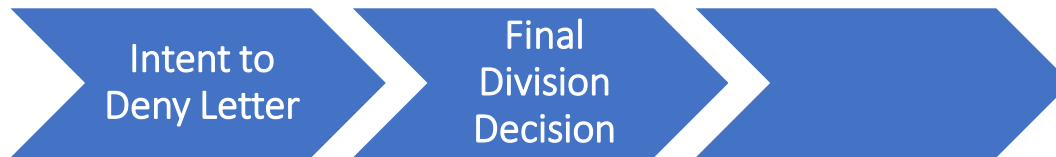
Intent to
Deny Letter



Final Division Decision

If nothing is received, the division will send a Final Division Decision (FDD) letter, via certified mail.

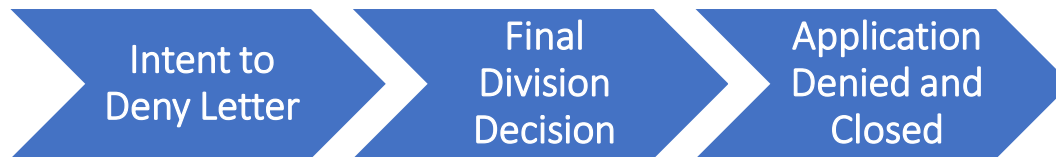
- The member has another 21 days from the receipt of the FDD letter to file an appeal with the State Retirement Commission Clerk.



Application Denied and Closed

If nothing is received from the member 21 days after receipt of the FDD letter, the application will be denied and closed.

- If the member wishes to apply for disability again, a new disability application will need to be submitted.



Workshop Presentations

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DROP Termination and Refunds

Presented by the Division DROP Termination and Refunds Section



Today's Presenter



- Camron Brunson
- DROP Termination and Refunds Section



Summary

In this presentation, you will learn about:

- DROP Termination End Dates
- Early DROP Termination Dates
- Required DROP Termination Forms
- Tools to Monitor DROP Participants
- Employee Contribution Refunds
- Refund Requirements

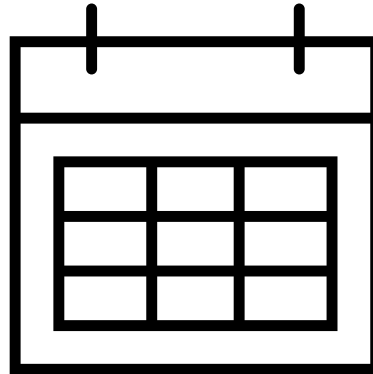
DROP Termination End Dates

When does DROP End?

DROP Termination End Dates

DROP participation ends on:

- The end of the division-approved date
- Can end earlier, but not later



Early DROP Termination Dates

How do I report an early DROP termination date?



Early DROP Termination Dates

The division sends termination packets three calendar months prior to DROP termination dates.

Email DROP_Term@dms.fl.gov to provide early termination dates for employees who are **within three months** of their division-approved DROP Termination date and are terminating DROP in a **different calendar month**.

The division will send an updated packet for the new date in the new month.

Early DROP Resignation Date Module

The division will not accept Early Term Dates more than three calendar months in advance.

Employers can use the FRS Online Module to submit **eligible** early DROP termination dates for employees that are **not within three calendar months** of their division-approved DROP termination dates.

The division will send out the DROP Termination packet for the early DROP term date.

Required DROP Termination Forms

What forms are required to complete a DROP termination?

Required forms include:

- Form DP-TERM – Termination Notification
 - Requires employer certification of termination date.
- Form DP-PAYT – Selected Payout Method
 - If no selection within 60 days, it defaults to lump sum.
- Form DP-JOINT – Joint Annuitant Verification

All require the participant's notarized signature.

Tools to Monitor DROP Participants

What reporting information is available to employers?



Tools to Monitor DROP Participants

FRS Online offers reports for employers to monitor their DROP participants:

- DROP Termination Memo
 - Lists participants terminating within three months.
 - Retirement Coordinators receive monthly email notifications.
- DROP Participant List
 - Lists all participants currently in DROP.

Employee Contribution Refunds

How do members apply for a refund of their employee contributions?

Employee Contribution Refunds

There are two ways a member can apply for a refund:

- Through Member's FRS Online account
 - Members can apply by clicking Refund Application
- Form FRS-M81
 - Available online under Active Member Forms
 - Either the [Refund Packet](#) or [FRS-M81](#)

Refund Requirements

What is required for a member to receive their refund?

Refund Requirements

Employer must report termination date

- Cannot process if date not reported

Termination from employment is required

- Eligible three calendar months after termination
- Termination required from ALL FRS Employers

Workshop Presentations

Today's presentations include:

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~~Ten Minute Break~~
- ~~4. Active Member Services~~
- ~~5. Introduction to Disability Retirement~~
- ~~6. DROP Termination & Refunds~~
7. Introduction to Survivor Benefits





Introduction to Survivor Benefits

Presented by the Division Survivor Benefits Section



Today's Presenter



- Kiera Brown
- Survivor Benefits Section



Summary

In this presentation, you will learn about:

- Who can be a Beneficiary
- What a Joint Annuitant is
- How to complete the FST-12 Form
- Who Qualifies for In-Line-of-Duty
- How to Report a Death

Beneficiary Designations

What is a Beneficiary?



Beneficiary Defined

A beneficiary is the joint annuitant or other person, organization, estate, or trust designated by the member to receive the benefits, if any, which may be payable in the event of the member's death or the death of another beneficiary.

Beneficiary Designation

Active Members – Name primary and contingent beneficiaries using [BEN-001](#) Form

Marriage Rule – The current spouse of an FRS Pension Plan member who dies before retirement is automatically the member's beneficiary, unless the member designated a different beneficiary after his or her most recent marriage.

Retired Members – Name primary and contingent beneficiaries using [FST-12](#) Form

Joint Annuitant

Who can be a Joint Annuitant?



Joint Annuitant Defined

A joint annuitant is a designated beneficiary who is:

- A spouse.
- A child under the age of 25 or disabled.
- A parent or Grandparent – Financially dependent.
- Anyone for whom the member was the legal guardian at time of death – Financially dependent.



JA-1 and JA-NUL Forms

Members can use JA-1 form to change Joint Annuitant.

Under certain conditions, members can use JA-NUL form to nullify Joint Annuitant.

Members can request JA-1 and JA-NUL forms from the Division of Retirement Survivors Benefits Section

FST-12 Beneficiary Designations

How to designate a beneficiary using the FST-12 form?

Beneficiary Designation for Retired/DRDP Participants

Members selecting Option 1 or 2

Use [FST-12](#) form to designate or change beneficiaries.

Members selecting Option 3 or 4

DRDP Participants – Designate contingent beneficiaries for DRDP accumulation balance only.

Retired members or DRDP participants who chose Option 3 or Option 4 and want to change their joint annuitant should use Form JA-1 instead of the Form FST-12.

Identifying Primary and Contingent Beneficiaries

1. **Primary Beneficiary(s)** - Indicate percentages if naming more than one primary beneficiary. Percentages should total 100 percent. After the death of all primary beneficiaries, any remaining benefits are paid to the contingent beneficiary(s).

A. %

Name of Primary Birthdate Gender Relationship Percentage

SSN of Primary Primary Address Primary Phone

B. %

Name of Primary Birthdate Gender Relationship Percentage

SSN of Primary Primary Address Primary Phone

Primary beneficiary percentages should total 100%.

Contingent beneficiary percentages should total 100%.

In-Line-of-Duty

Who Qualifies for In-Line-of-Duty?



In-Line-of-Duty (ILOD)

In-Line-of-Duty (ILOD) Death, is defined in section 121.021 (14), Florida Statutes, as:

“A death arising out of and in the actual performance of duty required by a member’s employment during regularly scheduled working hours or irregular working hours, as required by the employer.”

ILOD Death with Presumption provisions is defined in section 112.181, Florida Statutes, and provides that certain deaths will be “presumed” to have been suffered in the line of duty, unless competent medical evidence proves otherwise.

ILOD Beneficiaries

- Spouse
- Unmarried children under the age of 18

Special Risk Class – if the child is unmarried and a full-time student, the benefit continues until age 25.

ILOD Benefits

Special Risk Class:

Monthly benefits are equal to 100% of the member's base monthly salary.

All other classes:

Monthly benefits are equal to 50% of the member's base monthly salary

Benefits are not taxable

Reporting Member Deaths

How to report the death of a member?



Reporting the Death of a member

Pension Plan Members

Retiree	Active member
Re-employed Retiree	Joint Annuitant of FRS option 4, retiree
DROP participant	Any payee receiving pension benefits

Investment Plan Members

Report ILOD death to Division of Retirement, Survivors Benefits section and the Investment Plan.

Report to Investment Plan Administrator, Alight Solutions at 866-446-9377, option 4.

Report to Division of Retirement, Survivors Benefits section for potential HIS eligibility.

What is Needed to Report a Death

Information About the Member

- Date of the member's death.
- If the member's termination was due to death.
- Date of the member's last salary.
- Whether the member was on a leave of absence on the date of death.
- Whether the member had any military service.
- Name of the member's spouse, address, date of birth and date of marriage.
- Name and birth date of member's children under the age of 25.

What is needed to Report a Death

Information About the Informant and Person to Contact

- Informant's name and phone number.
- Whether informant has been in contact with the family.
- Name, relationship, and address of person to contact.

Submitting a Death Notice via FRS Online

The screenshot displays the FRS Online interface. On the left, a navigation sidebar includes options like 'Agency #', 'Employer Services', and 'My Account'. The 'Submit Death Notice' option is highlighted with a red circle. The main content area features a header 'Submit Death Notice' and a sub-header 'Submit a Death Notice'. Below this is a form with a text input field containing 'SSN (999999999)' and a green 'Continue' button. A note above the form provides contact information for the Division of Retirement.

FRS Online
Florida's Pension Plan

Who We Serve ▾ Forms ▾ Publications ▾ FAQs ▾

Agency #

Employer Services

- Agency
- Personnel
- Create Estimate
- Global Member Search
- Submit Death Notice**
- Submit Public Records Exemption
- Reports
- Payroll
- HIS Exclusion

FRS Online Manual

My Account

- Profile Settings
- My Inbox
- Contact Us
- Logout

Submit Death Notice

Below you can submit a death notice. If you wish to make any changes to a death notice already submitted, call the Division of Retirement at (844) 377-1888 or (850) 907-6500 to speak with the Survivor Benefits Section. Do not submit another death notice as this will delay processing.

Submit a Death Notice

SSN (999999999)

Continue

Workshop Presentations

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Conclusion

Contacting the division for assistance

FRS.FL.gov



Who We Serve ▾ Forms ▾ Publications ▾ FAQs ▾

We Serve Florida's FRS PENSION MEMBERS

Are you a first-time user?

[Register Here](#)

[Looking for the FRS Investment Plan?](#)



Log in Securely To Your **Pension** Account

Username

Password

By logging in, you agree to the terms.

[Log in Securely](#)

[Forgot Login](#) | [Create Account](#)

Welcome to FRS Online

If you are a member of the Florida Retirement System (FRS) Pension Plan you can access your personal retirement account information including service history, service credit, salary data, beneficiaries and more.

Member Information

Employer Handbook

frs.myflorida.com

The screenshot displays the Florida Department of Management Services website. At the top left is the logo for the Department of Management Services, featuring a stylized sun and the state of Florida. To the right of the logo are links for "DMS CUSTOMER SATISFACTION SURVEY", "SITE MAP", "CONTACT DMS", and "MYFLORIDAHOME". Below these are social media icons for Facebook, Twitter, and LinkedIn. A navigation bar contains links for "Business Operations", "Workforce Operations", "Agency Administration", "Other Programs", "About Us", and "Opportunities at DMS".

The main content area is titled "Employers" and includes a breadcrumb trail: "Florida Department of Management Services > Workforce Operations > Retirement > Employers". The "Employers" link in the breadcrumb is circled in red. A red arrow points to the "Employers" link in the left-hand navigation menu. The main text describes the Employer Handbook page, which is provided for payroll staff and retirement coordinators. It also mentions other resources like Contribution Rates, Information Releases, Florida Retirement System (FRS) Employer Training Workshops, Employer Forms, and Renewed Membership Effective July 1, 2017.

On the right side, there is a "Notice of Change" section titled "Newly Redesigned FRS Online:". The notice states that the FRS Online for Employer Services is being redesigned and will be launched on November 15, 2021. It highlights improvements in user experience and security features. A link is provided to learn more about the FRS Online upgrade.



Division of Retirement

FRS Online: frs.fl.gov

Division website: frs.myflorida.com

Call the Division of Retirement

Toll-free Phone:

Members: 844-377-1888

Employer Line: 877-377-1266

Local Phone:

Members: 850-907-6500

Employer Line: 850-907-6540



Contact Center

- Most member calls are directed to the division's Contact Center.
- The Contact Center is available Monday through Friday from 8 a.m. to 5 p.m., Eastern time, except on designated state holidays.
- The Contact Center is available to walk members through applying for service retirement, DROP, accessing their FRS Online accounts, and more.

Thank you!

- Thank you for participating in today's workshop.
- We would love to hear your feedback.
- You will receive an email with a link to a brief survey where you can share your thoughts and suggestions.