

Coordinating VRS Benefits

Course Topics and Materials

Membership

Pre-requisite: VRS Resources

Class Preparation: None

- Benefits
- Eligibility
- Employer and member contributions
- [Designation of Beneficiary \(VRS-2\)](#)

Refunds

Pre-requisite: Membership

Class Preparation: None

- Eligibility
- Tax implications and rollovers
- Deferred and inactive membership status
- [Request for Refund \(VRS-3\)](#)

Purchase of Prior Service

Pre-requisite: Refunds

Class Preparation: None

- Eligibility
- Types of eligible prior service
- Cost calculations
- Payment options
- Purchase of prior service forms
- Certification process

Service Retirement

Pre-requisite: None

Class Preparation: Bring a hand-held calculator

- Unreduced and reduced benefit eligibility
- Benefit payout options
- Basic benefit calculations
- Service retirement application forms and processes
- Common post-retirement issues for members

Disability Retirement

Pre-requisite: Service Retirement

Class Preparation: Bring a hand-held calculator

- Eligibility for regular and work-related disability retirement
- Benefit payout options
- Calculating regular and work-related disability retirement
- Coordinating with Workers' Compensation and Social Security disability benefits

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- Disability retirement application forms and processes
- Common post-retirement issues for members

Basic and Optional Group Life Insurance

Pre-requisite: None

Class Preparation: None

- Basic and optional group life insurance coverage
- Eligibility
- Benefits
- Changing and waiving coverage
- Tax liability and imputed income

Death-in-Service Benefits

Pre-requisite: None

Class Preparation: None

- Benefits for designated beneficiaries
- Benefit payout options
- Calculating death-in-service benefits
- Assisting beneficiaries with completion of death claims