

Chapter 1. General Information

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General Information

The Virginia Retirement System (VRS) is an independent agency of the Commonwealth of Virginia that administers pension plans, group life insurance and disability programs for most of Virginia's public sector employees. The system provides a foundation for the financial future of more than 342,000¹ members and their families and pays benefits to more than 148,000 retirees and their beneficiaries. There are approximately 826 public sector employers, whose employees are covered by VRS retirement benefits.

VRS is a defined benefit plan. Eligible VRS members also may participate in employer-sponsored defined contribution plans, including the *Virginia Deferred Compensation Plan* for state employees and participating political subdivisions. Eligible VRS members are also covered for basic and *optional group life insurance* plans and the *Virginia Sickness & Disability Program* for state employees. In addition, VRS members may participate in a voluntary long-term care plan. All VRS benefits are established and modified by the General Assembly through the legislative process.

VRS has adopted the following vision statement to guide the agency in its role as steward of the funds it administers:

To be the trusted leader in the delivery of benefits and services to those we serve.

¹ 2010 Comprehensive Annual Financial Report

VRS RETIREMENT PLAN

VRS is a qualified 401(a) defined benefit plan.

The VRS retirement plan is a qualified 401(a) defined benefit plan, as classified by the Internal Revenue Code. A defined benefit plan pays eligible members a lifetime benefit amount based on years of service, age and compensation. The plan provisions are contained in Title 51.1 of the Code of Virginia.

In addition to VRS, the agency administers the following defined benefit plans for eligible members:

- *State Police Officers' Retirement System (SPORS)*
- *Virginia Law Officers' Retirement System (VaLORS)*
- *Judicial Retirement System (JRS)*

MEMBERSHIP

Participation in VRS is a condition of employment for eligible members. The VRS membership totals more than 342,000 and is composed of the following groups:

- State employees, including employees of institutions of higher education
- *Political subdivision* employees, including employees of local governments and other entities that choose to join VRS. (Non-professional employees of public school boards, including cafeteria workers, bus drivers or maintenance workers, are included in the political subdivision group.)
- State police officers
- Law enforcement officers
- Judges
- Public school board employees, including teachers, administrators, supervisors, managers, nurses and clerical personnel

*Covered Employees:	Total
State Employees	78,613
Political Subdivision Employees	104,385
State Police Officers	1,766
Virginia Law Officers	9,620
Judges	408
Teachers	147,817

*Source: 2010 Comprehensive Annual Financial Report

The VRS membership includes active members and members no longer working in VRS-covered positions who retain their benefits. Benefits can be retained when the *member* does not take a *refund* upon termination or when employer-paid retirement contributions remain in the member's record. These terminated members are eligible for a refund or deferred retirement benefit when they reach retirement age, provided they have at least five years of service credit.

VRS TRUST FUND

VRS benefits are funded by employer and member contributions.

The VRS Trust Fund is the foundation of the retirement system and the means of providing future benefits. This pool of money consists of retirement contributions by both employers and members. A member's pension benefit is guaranteed by the employer's continued payment of the required employer and member retirement contributions.

The funds of the retirement system are separate from all other funds of the Commonwealth, and are invested and administered solely in the interests of members and beneficiaries.

Employer and member retirement contributions are invested by VRS in order to accumulate sufficient assets to pay future pension benefits. Most retirees exhaust the contributions and interest in their accounts within three years after retirement, but they continue to receive retirement benefits for life. The majority of a retiree's lifetime benefit is funded through earnings

generated by the VRS investment program. Strong investment earnings enable the board to keep employer retirement contribution rates stable as well as to improve VRS' overall funding status.

VRS BOARD AND LEGISLATIVE OVERSIGHT

Primary responsibility for governing VRS is delegated through statute to the *Board of Trustees*. Nine members serve on the VRS Board of Trustees and are appointed by the executive and legislative branches of state government. Five members, including the chairman, are appointed by the governor and four are appointed by the Joint Rules Committee of the General Assembly. All nine members are confirmed by the General Assembly. Of the nine board members, four are investment experts; one is experienced in employee benefit plans; one is a local government employee; one is an employee of a state-supported institution of higher education; one is a state employee and one is a public school teacher. Each board member is appointed to a five-year term and may not serve more than two consecutive terms.

*VRS is governed
by a nine-member
Board of Trustees.*

The board appoints a director to serve as the chief administrative officer of the retirement systems. In addition, the board employs a chief investment officer to direct, manage and administer the investment of the systems' funds. Standing committees and an investment advisory committee also assist the board by making recommendations regarding investments and asset allocation issues.

The Joint Legislative Audit and Review Commission (JLARC) provides legislative oversight of VRS. JLARC is required to oversee and evaluate VRS on a continuing basis and to perform special studies and publish reports as requested by the General Assembly.

The Auditor of Public Accounts (APA) conducts an annual financial audit of VRS to evaluate the retirement system's overall financial reporting and assesses the financial principles used. The APA reports the findings of the

annual audit to the Governor, the General Assembly, JLARC and the VRS Board of Trustees.

ORGANIZATIONAL STRUCTURE

VRS benefits have become increasingly complex and membership has experienced tremendous growth. VRS' organizational structure is relationship-based, which focuses VRS' services and operational support on customers. The goal is to build relationships and create opportunities for interaction that result in services that are need-specific and value-centered.

The employer services and finance areas continuously look for ways to streamline the VRS reporting processes and to improve financial reporting. Member and retiree service areas continue to improve processing time for retirement, refund and purchase of service applications. The technology areas focus on improving existing systems and creating automated tools. The public relations department manages employer, member and retiree communications including the Web site and publications, providing you with the most current information. This department also provides direct assistance to employers through the Employer Representative Program, which is described in detail in the next section. The Customer Relationship Division provides you with different ways to obtain information, either through online applications, e-mail, training programs, walk-in counseling sessions, or the Customer Contact Center. The Employer Support team serves as the key contact for employers. The team is available by phone and e-mail to answer employer inquiries related to VRS benefits, including employer reporting questions. Please note that the Employer Support team will provide confidential payroll-related information only to the primary contact listed for Payroll on the Authorization of Employer Contacts (VRS-67).

Since education is key to a successful retirement, VRS has structured training programs to target members at different stages of their careers and to provide content that is relevant to their needs. In this effort, VRS has

partnered with the Virginia Community College System to facilitate Retirement Education Seminars and Group Counseling sessions.

EMPLOYER REPRESENTATIVE PROGRAM

The Employer Representative Program is a service designed to focus on the unique needs of the employers who are providing their employees with one or more of the VRS benefits. Each employer has access to a representative at VRS who specializes in issues unique to each of the three types of VRS employers: state agencies, school divisions and political subdivisions. Employer representatives offer professional and technical assistance regarding benefit coverage and plan design.

Employer representatives travel throughout the state to meet with governing bodies and decision-makers who are considering joining VRS or changing their employee benefit plans. The representatives counsel one-on-one with employers about actuarial studies, employer contribution rates, tax laws and legal requirements and legislative changes. Employer representatives also host forums where employers learn of new VRS initiatives, provide feedback and network with others. VRS third-party administrators often participate in these forums.

EMPLOYER CONTACTS

A total of 826 employers contribute to the various VRS Trust Funds, effective June 30, 2010. These employers include state agencies, school boards and political subdivisions.

*Covered Employers:	Total
State Agencies	235
School Boards	144
Counties/Cities/Towns	253
Special Authorities	194

**Source: 2010 Comprehensive Annual Financial Report*

Each employer must complete an Employer Certification of Authority (VRS-67A) to certify the administrative contacts for the agency. The employer then designates individuals to serve as primary VRS contacts using the Authorization of Employer Contacts (VRS-67). These contacts are sources of VRS benefits information for employees within their agencies. These contacts form a vital connection that links the VRS administration, members and employers.

As an employer contact, you are a frontline communicator. You have an important responsibility to counsel members and to distribute VRS newsletters, handbooks and brochures to employees. Your knowledge of VRS benefits and your willingness to share that knowledge with employees are the basis for effective communications about VRS benefits.

Keep contact information up-to-date.

It is very important to keep your employer contact information up to date to ensure the proper individuals receive employer newsletters, annual benefits statements and publications for members. You can update employer contact information by completing the Authorization of Employer Contacts (VRS-67). If you are an authorized Payroll or Human Resources employer contact, you can review employer contact information through *myVRS* for Employers, a secure application found on the VRS Web site (www.varetire.org), or by calling VRS. (See “Completing the Authorization of Employer Contacts Form” at the end of this chapter for instructions.)

The VRS-67 allows you to add or delete staff from the VRS database of official contacts who receive publications and have access to VRS information. The administrative authority may designate six types of contacts. They are:

- **Accounting** – Provides a contact person to obtain Accounting-related information such as employer statements, contribution rate letters and actuarial valuations.
- **Info. Systems/Technology** – Provides a contact to which VRS may direct questions about the agency’s information system and electronic submission of monthly reports. (Not required)
- **Publications** – Identifies a contact person who receives and distributes VRS publications.

- **Optional Retirement Plan** – Identifies a contact person who manages VRS-approved Optional Retirement Plans for the agency’s employees. (Not required)
- **Human Resources** – Allows a contact person to obtain benefits-related information about a member and use *myVRS* for Employers.
- **Payroll** – Allows a contact person to obtain payroll-related information, receive payroll reports, and use *myVRS* for Employers.

For all required contacts, one primary contact for each category must be designated, and multiple secondary contacts may be designated. To access *myVRS* for Employers, each contact must be authorized on the VRS-67. Sharing usernames and passwords is not allowed. Shared access is a security violation and could result in suspension of your access. A new VRS-67 will need to be submitted by the administrative authority.

While VRS needs to provide information to members, it must also collect important data. VRS collects member information such as age, salary, service, Social Security number, marital status, employment status and membership classification. Without this fundamental information, benefits cannot be calculated or paid. In general, this data is collected through payroll reports and from the forms that employer contacts complete or assist members to complete. The accuracy of this information greatly determines the quality of VRS data and services.

VRS MODERNIZATION PROGRAM

The Virginia Retirement System is undertaking a multi-year Modernization Program to upgrade our technology systems and business processes. This initiative coincides with requests employers have made through focus groups and surveys for more online benefit administration information and tools.

One of the top priorities of the Modernization Program is expanding the web-based environment started with *myVRS*. As an employer, you will be able to access a consolidated view of your employees, including all the VRS benefits for which they are eligible. VRS also is streamlining monthly

reporting requirements and designing more intuitive employee data reports available through your online employer account. Online employer access is scheduled for early 2012.

VRS will keep employers up-to-date on all the changes through letters, webinars and other communications.

TECHNICAL RESOURCES

VRS provides technical resources that allow both you and your employees access to important information. These resources include a Web site, *myVRS* (an online application for active and deferred members), *myVRS* for Employers, *myVRS* for Retirees (for your employees once they retire), an interactive voice response system (VIPS), and WebER.

Web Site

The VRS Web site can answer many questions about VRS benefits and services. All official VRS publications and forms are posted to the Web site, as well as general information and answers to frequently asked questions. Schedules for member and employer training events are also posted to the site.

Blank forms can be downloaded and printed or members may complete the forms on-line and print the completed form. Employers are encouraged to consult the site often for current news, legislative actions and upcoming training opportunities.

The employer portion of the VRS Web site includes checklists, job aids and employer communication tools. In addition, the Web site includes a *myVRS* e-learning presentation and articles you can use in your agency newsletters to educate employees about their VRS benefits and services.

*The fastest way to
get VRS
information is
www.varetire.org.*

myVRS

Members may access *myVRS*, a secure on-line application, from the VRS Web site. This application allows VRS members to establish an on-line view of their VRS information. Using *myVRS*, active and deferred members may update personal information, view employment history, view salary history reported to VRS from participating employers, and view and print the Member Benefit Profile (MBP). The application provides members an opportunity to create their own retirement estimates with up-to-date information. Members may also use *myVRS* to check the status of open requests, such as applications for service retirement, the purchase of prior service credit or refunds. In addition, members can use the retirement planner to create retirement planning scenarios that include income and expenses.

Members can access *myVRS* using the *myVRS* Access drop down on the VRS Web site homepage (www.varetire.org). After selecting “Log-in,” the following screen will display:

The screenshot shows the myVRS website interface. At the top, there is a green banner with the myVRS logo and the tagline "at your service". Below this, the text reads "Welcome to myVRS" and "Make the most of your membership in the Virginia Retirement System". On the right side of the banner, there is a "myVRS Help" link.

The main content area is divided into several sections:

- New User?**: A section with a "Register Now" button.
- Why Register?**: A section with a list of benefits:
 - View your member information, including service credit and compensation reported to VRS by your employer.
 - Check the status of an application for retirement, purchase of prior service or refund.
 - Estimate your retirement benefit using current information.
 - View and update your personal contact information online.
- Announcements**: A section with a yellow warning icon and the text "myVRS Down for Maintenance: All day Saturday, April 14, 2007".
- Registered Users**: A section with a "Forgot Username or Password?" link.
- Secure Log-In:**: A section with a "Secure Log-In:" heading, "Username:" and "Password:" labels, input fields, and a "Log In" button.
- Privacy, Security & Other Policies**: A section with a link to "Privacy, Security & Other Policies".

At the bottom of the page, there is a footer with the text "myVRS Help | Contact Us | VRS Home" and a copyright notice: "Copyright © 2007 Virginia Retirement System".

A member new to *myVRS* will need to register before viewing the details of his or her member account.

After successfully registering, the member may review account information such as the compensation being reported to VRS, eligibility for purchasing service credit, and employment history. *myVRS* also includes the benefit estimator where the member can create benefit estimates and plan for retirement using current member account information. The member may also update personal information such as his or her address.

To assist members when viewing each page, a link to “Explain this Page” is available on each page being viewed. This information details many of the terms and provides other helpful benefit information.

VRS encourages all members to register for *myVRS* to view their VRS member account and to use the benefit estimator to plan for retirement. By checking account information regularly, the member may identify inconsistencies in the record. Issues can be resolved before retirement to ensure a smoother and faster retirement process.

myVRS for Employers

Employers have their own secure on-line application that provides authorized benefit administrators with retirement planning tools, contact and coverage information and direct access to member records.

myVRS for Employers allows authorized contacts to:

- Create service retirement, disability retirement, Workforce Transition Act (WTA) and Transitional Benefits Program (TBP) estimates.
- Save retirement estimates in your employees' *myVRS* online accounts.
- Check the status of applications such as service retirement, purchase of prior service or refunds.
- View current employee information, including service credit and retirement contributions posted to the member's account.
- View employment and compensation history for deferred members as well as former employees who are reported by other employers.
- Certify certain types of prior service for current and previous employees.
- Update current employees' addresses.

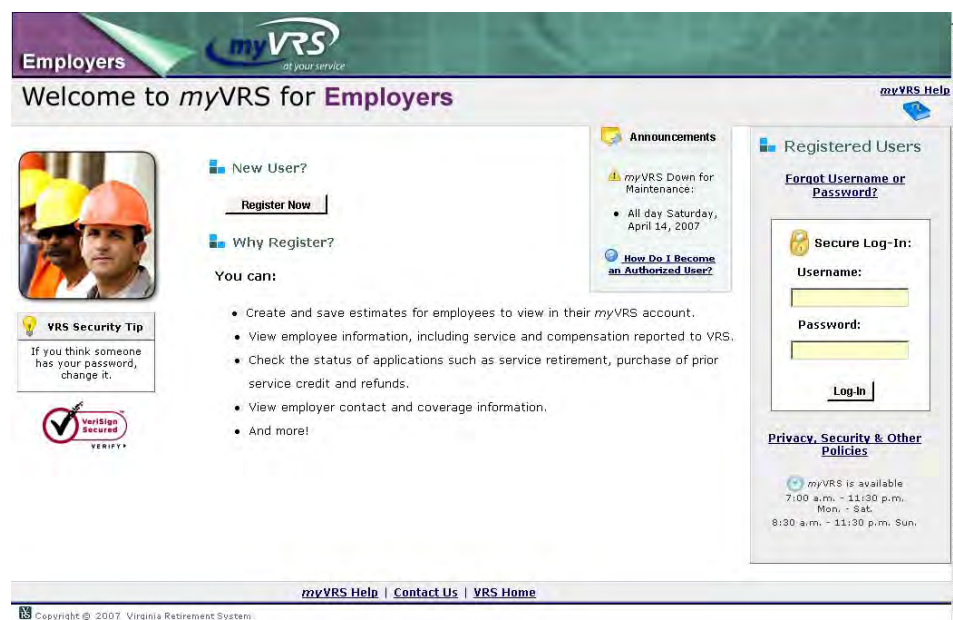
*myVRS for
Employers is
fast and
convenient.*

- Download the Member Benefit Profile (MBP) for your employees.
- Double check the type of coverage offered to your employees.
- Determine a member's Plan 1 or Plan 2 status.
- Review employer contacts currently authorized to obtain information from VRS.

myVRS for Employers includes an on-line reports tool that allows you access to certain reports that VRS sends to you each month. The reports can be viewed on-line, or downloaded into Excel, CSV or PDF formats.

myVRS for Employers is restricted to authorized human resources, and payroll contacts designated on the Authorization of Employer Contacts (VRS-67). If your access is authorized, you will receive a one-time access code and information about registering for myVRS for Employers. The access code will expire within 30 days, so use it to register as soon as you receive it. If the access code expires, a new VRS-67 must be submitted. Each authorized contact receives his or her access code to set up an account. Passwords and usernames must not be shared.

Employers can access myVRS using the myVRS Access drop down on the VRS Web site homepage (www.varetire.org). After selecting "Log-in," the following screen will display:



myVRS for Employers is a tool that allows you access to up-to-date information about your employees. Having consistent information assists you in the counseling process.

myVRS for Retirees

When an employee submits a retirement application and it is processed, access to *myVRS* changes. The retiree will register in *myVRS* for Retirees to access the new view of the account. Retirees will be able to view benefit payment information and cost-of-living adjustments. In addition, health insurance coverage and health insurance credit information is also available. Retirees can use this information to ensure they receive the maximum health insurance credit for which they are eligible. Retirees can print income verifications and even change their tax withholdings using *myVRS* for Retirees.

New retirees are sent an authentication code at retirement, which is used to register for the on-line account. To ensure the retiree's account is secure, he or she must register even if previously registered for a *myVRS* member account.

Virginia Informational Phone System (VIPS)

The Virginia Informational Phone System (VIPS) is an interactive voice response system (IVR) that provides a quick and easy way for a member to get information about VRS benefits. VIPS is operational seven days a week from 7 a.m. to midnight. Callers can get information about their retirement account balance, amount of service credit, and general information about *service retirement*, *disability retirement* and life insurance benefits. In addition, a member may check on the status of a submitted refund request or learn the amount of the refund.

A member may register for VIPS by calling 888-VARETIR (827-3847), Option 2. During the first call, the member is asked to provide the Social Security number and date of birth. The system prompts the member to

select a four-digit personal identification number (PIN). The PIN is of the member's own choosing; VRS does not issue PIN numbers.

Employer WebER

The VRS WebER allows payroll officers to electronically transmit their monthly payrolls directly to VRS using the Internet. Electronic reporting eliminates the need to complete paper forms. It reduces errors, saves staff time and agency resources. VRS strongly encourages employers who are not already using WebER to convert to electronic reporting. For instructions on using WebER, call the Employer Support team in the Customer Contact Center at 888-VARETIR (827-3847).

EDUCATIONAL RESOURCES

VRS provides a variety of educational resources, including publications, forms, retirement planning programs, individual and group counseling, e-learning, webinars, benefits and payroll officers' training.

Publications

VRS publishes a variety of communications for employers, members and retirees. The Code of Virginia allows VRS to communicate required information to its members electronically. All of these publications can be found on the VRS Web site.

Virginia law allows VRS to communicate required information electronically.

Employer Publications

- **Code of Virginia** – Sections of the Code of Virginia that govern VRS benefits cited in this manual are available on the Legislative Information Services Web site at <http://legis.state.va.us/>.
- **Employer Manual** - This Employer Manual is the authoritative source for information on VRS benefit plans and payroll processing. It is updated on a regular basis to reflect legislative changes and changes in policies or procedures.
- **Employer Update** - The employer newsletter is published monthly and e-mailed to subscribers. It is a primary source of information on policies, procedures, legislative changes and important benefits developments. It is posted to the VRS Web site and employers are notified of its availability.

*Publications
keep members
informed of VRS
benefits.*

Member Publications

- **Member News** - The primary communication for members is the electronic Member News. VRS publishes the member e-newsletter on the third Tuesday of August, January and May. The individual listed as the employer Publications Contact receives an e-mail with a link to the latest issue, which they can then forward to their employees or post on their internal Web site. Member News also is available on the VRS Web site.
- **Handbooks for Members** - VRS creates separate handbooks, or summary plan descriptions, for members of VRS (both Plan 1 and Plan 2), SPORS, VaLORS, JRS and hazardous duty employees of political subdivisions. Plan 1 handbooks are only available from the VRS Web site. Plan 2 handbooks are printed and can be ordered or downloaded from the VRS Web site.
- **VSDP Handbook** – This handbook describes the benefits available to state employees who are covered under the Virginia Sickness and Disability Program (VSDP). Handbooks are available to order or print from the VRS Web site.
- **Member Benefit Profile** - This annual benefit statement, which provides a record of account balance and projected future retirement benefits, is an important planning tool for members. For employees who have a deferred compensation plan balance in the Commonwealth of Virginia 457 Plan, this information will also be displayed. Employees may view or download the MBP from *myVRS* or the employer may download from *myVRS* for Employers.
- **Getting Ready to Retire Guide** - This guide provides an overview of retirement benefits and the process for applying for retirement benefits. It contains all the necessary forms and instructions for completing them, as well as timeframes. Guides are available to order or print from the VRS Web site.
- **VRS Disability Retirement Handbook** - This booklet explains the disability retirement process and the various payout options and benefits available. It contains all the necessary forms and instructions for completing them. Handbooks are available to order or print from the VRS Web site.

Retiree Publications

- **Retiree News** - The retiree newsletter is published twice a year and is mailed directly to the homes of VRS retirees.
- **Retiree Handbook** - A retiree handbook is mailed to all new retirees, along with the retirement certificate. The handbook includes important information about such topics as *direct deposit*, taxation of benefits, cost-of-living adjustments, health insurance credit, life insurance and survivor benefits after retirement.

In addition to these regularly scheduled publications, VRS publishes booklets and brochures on various benefits topics. All of these publications can be found on the VRS Web site.

Retirement Education Seminars

Retirement planning opportunities are available.

VRS-sponsored retirement education seminars are offered through the Virginia Community College System at locations around the state. These half-day seminars include information about:

- financial management,
- estate planning,
- long-term financial planning, and
- use of available benefits, such as deferred compensation, to increase retirement income.

The following community colleges partner with VRS to present these programs:

- Northern Virginia Community College, Annandale
- Lord Fairfax Community College, Warrenton
- Tidewater Community College, Chesapeake & Virginia Beach
- Virginia Western Community College, Daleville
- Central Virginia Community College, Lynchburg
- Mountain Empire Community College, Big Stone Gap
- Wytheville Community College, Wytheville
- John Tyler Community College
- Blue Ridge Community College, Weyers Cave
- Germanna Community College, Fredericksburg
- Thomas Nelson Community College, Hampton
- Virginia Highlands Community College, Abingdon

Group Counseling

In addition to Retirement Education Seminars, VRS offers Group Counseling Sessions for members who plan to retire within the next five years. These half-day sessions provide practical advice about:

- Purchasing service credit to increase retirement benefits,
- Tips on how to complete the retirement application process,
- Retiree health insurance,
- Life insurance after retirement, and
- Social Security benefits.

Members within 18 months of retirement should bring an estimate of their VRS retirement benefit with them to the counseling session. You should prepare the estimate for the member by using *myVRS* for Employers. Members also have the option of requesting an estimate from VRS. They can request the estimate by completing the Request for Estimate of Service Retirement Benefits (VRS-60), or they may prepare their own estimates by using the member version of *myVRS*. Members should also bring their last Member Benefit Profile, which can also be obtained from *myVRS*.

Schedules for the Retirement Education Seminars and Group Counseling Sessions are published in the Member Bulletin and are posted on the VRS Web site. Members who wish to register for either the Retirement Education Seminar or a Group Counseling Session should complete and fax the registration form to the college contact listed on the form or register on the VRS Web site.

Because of the increasing popularity of these training and counseling programs, members should register at least 15 days prior to the program date.

Employer Training

VRS provides training programs for employers through traditional classroom instruction, e-learning and live and recorded webinars. Training includes instruction on VRS benefits, *myVRS* and other topics. The training schedule and links to training are found on the “Employer” tab of the VRS Web site.

COMMUNICATING WITH VRS

You can communicate with VRS in a variety of ways, including phone, fax and e-mail. Separate addresses have been set up for e-mail, depending on whether the individual is an employer, a member or a retiree.

E-mail

Employer: employer-info@varetire.org
Member: member-info@varetire.org
Retiree: retiree-info@varetire.org
Modernization Inquiries: modernization@varetire.org

Phone (General Inquiries)

Toll Free: 1/888/VARETIR (827-3847)
Fax: 804/786-1541
TDD: 1/888/VARETIR (827-3847)

Virginia Informational Phone System (VIPS)

Toll Free: 1/888/VARETIR (827-3847)

Mail

Virginia Retirement System
1200 East Main Street
P.O. Box 2500
Richmond, VA 23218-2500

FORMS

Following is a complete list of all official VRS forms. Most of these forms are fillable or can be downloaded and printed from the VRS Web site, or you can order them by email, phone or through the Virginia Information Phone System (VIPS).

You can find most VRS forms on the VRS Web site.

Form No.	IVR No.	Form Title
VRS-2	1002	Designation of Beneficiary
VRS-2A		Designation of Beneficiary Continuation
VRS-3	1003	Request for Refund
VRS-3A	1203	Name and Address Declaration for Deferred Members
VRS-3ORP		Request for Plan-to-Plan Transfer to ORP
VRS-3S	n/a	Signature Authorization – Member Contribution Refund
VRS-5	1005	Application for Service Retirement (The VRS-15 and VRS-57 are also provided when you order this form.)
VRS-5A		VSDP Conversion of Disability Credits
VRS-5B		Request for Estimate of Retirement Benefit Payout Option Change
VRS-6	1006	Application for Disability Retirement
VRS-6A		Explanation of Disability
VRS-6B		Physician's Report
VRS-6C		Request for Estimate of Disability Retirement Benefits
VRS-6D		Employer Information for Disability Application
VRS-7	1007	Request for Termination of Monthly Benefit
VRS-7ORP		Notice of Return to Covered Employment Optional Retirement Plan Retiree
VRS-8	1008	Certification of Exception from General Early Retirement Provisions
VRS-9	1009	Election of Employer for VRS Reporting
VRS-11	1011	Employer Certification of Involuntary Separation under WTA
VRS-11A		Employer Certification of Basic Group Life Insurance Coverage under WTA
VRS-11B		Employer Certification of Involuntary Separation Under TBP
VRS-11C		Employer Certification of VRS Basic Group Life Coverage Under TBP
VRS-15	1015	Request for Income Tax Withholding
VRS-19		Employee Election to Join the VRS
VRS-26	1026	Application for Purchase of Prior Service Credit
VRS-26C	1426	Authorization for After-Tax Payroll Deduction to Purchase Service Credit

Form No.	IVR No.	Form Title
VRS-26E	1626	Agreement for Salary Reduction to Purchase Service Credit
VRS-26F	1726	Employer Certification of Accumulated Sick Leave Eligible for Conversion to Service Credit
VRS-26G		Request for Trustee-to-Trustee Transfer or Rollover of Funds to Purchase Service Credit
VRS-27	1027	Waiver of Group Life Insurance Coverage
VRS-29		Contingent Annuitant's Certification of Health Status
VRS-31		Accidental Dismemberment and Loss of Sight
VRS-32		Group Life Evidence of Insurability
VRS-35E		Conversion of Group Life Insurance Enrollment
VRS-37		Absolute Assignment Group Life
VRS-38		Assignees Change of Beneficiary
VRS-39	1039	Application for Optional Life Insurance
VRS-39A		Request for Change Under Optional Group Life Plan
VRS-39R		Retiree Optional Life Continuation
VRS-45	1045	Request for Health Insurance Credit
VRS-48	1048	Request for Member Information Change
VRS-49	1049	Change to Certification for Retirement
VRS-52	1052	Monthly Contribution Worksheet
VRS-54		Request for Travel Reimbursement (Disability Applicants)
VRS-57	1057	Authorization for Direct Deposit of Monthly Benefit
VRS-58	1058	Name and Address Declaration for Retirees
VRS-60	1060	Request for Estimate of Service Retirement Benefits
VRS-65	1065	Election to Participate ORP for Higher Education
VRS-65B		Certification of Eligibility to Participate in ORPPA
VRS-65D		Termination Certification Form – ORP for Higher Education
VRS-65E		Termination Certification Form - ORPPA
VRS-67	1067	Authorization of Employer Contacts
VRS-67A		Employer Certification of Authority
VRS-70	1070	Request for Review of Membership Records

Form No.	IVR No.	Form Title
VRS-71A		Certification of Eligibility to Participate in Optional Retirement Plan for School Superintendents
VRS-71B		Termination Certification Form - ORPSS
VRS-75	1075	ORP/ARP Health Insurance Credit Employer Certification of Service
VRS-76	1076	Certification of Employment for Health Insurance Credit Eligibility
VRS-77	1077	Certification of Hazardous Duty (VaLORS)
VRS-78		Authorization to Deduct Insurance Premiums and Application for Health Insurance Credit
VRS-83		Certification of Eligibility to Participate in the Virginia Supplemental Retirement Plan
VRS-101		Request for Transfer of Funds from ORPPA to Purchase VRS Service Credit
VRS-160		Certification of Eligibility for Critical Shortage Teachers and Administrators
VRS-160A		Certification of Non-Participation of Critical Shortage Teachers and Administrators
VRS-170		VSDP Long Term Care Plan Authorization of Coverage Retention
VRS-171		VSDP Long Term Care Plan Protection Against Unintentional Lapse
VRS-900		Authorization to Discuss VRS Account Information
VRS-901		VRS Durable Power of Attorney
VRS-1500	1500	Monthly Membership Report
VRS-1500A		New Member Enrollment
VRS-1501	1501	Error Adjustment Report
VRS-1502	1502	Certification of Service Not Reported by Employer
VSDP-2		Enrollment in VSDP for College and University Faculty

COMPLETING THE AUTHORIZATION OF EMPLOYER CONTACTS (VRS-67)

In this field:	Enter the following:
Employer Code	Your five-digit employer code
Employer Name	Your employer name
Administrative Approval	<p>The name, title, agency mailing address, telephone number, fax number, and e-mail address of the administrative authority (person responsible for agency oversight) designated on the Employer Certification of Authority (VRS-67A).</p> <p>The administrative authority must initial each page and sign the form after all employees are listed as “Contacts.”</p> <p>An interim administrative authority can only be added for up to 6 months.</p>
Contact Designation	<p>Identify any other individuals in the agency that VRS should contact for specific areas of responsibility. VRS mails or faxes important information to the primary contacts and may need to contact the person. Secondary contacts may contact VRS to obtain information about their employees relative to their particular contact type.</p> <p>You must assign only one primary to each contact type except Info Systems/Technology and the Optional Retirement Plan (ORP). Colleges and universities must assign an employee for ORP. You can designate more than one secondary person to each contact type. Once you have selected a contact for each area type, enter that individual’s name, title, telephone number, extension, fax number, agency address and e-mail address.</p> <p>Non-VRS (wage) contacts can only be added for up to 12 months.</p> <p>If all contacts are non-VRS (wage), each contact can only be designated for up to six months.</p> <p>If designated contact is reported by a different employer code, a relationship letter must be submitted by the designated administrative contact explaining the function of the employee to the agency.</p>

Note: Changes to an existing contact's address, phone number, e-mail and fax number can be made by calling the VRS Customer Contact Center or by email at: employer-info@varetire.org. All other changes must be submitted on a VRS-67. Changes to the agency's mailing and/or physical address must be submitted on the VRS-67A. The VRS-67A should be on file with VRS before submitting the VRS-67 to ensure the proper contacts are on file.

A sample of the form is shown on the following page.

AUTHORIZATION OF EMPLOYER CONTACTS



VIRGINIA RETIREMENT SYSTEM
 P.O. Box 2500 • Richmond, Virginia 23218-2500
 Toll Free 1-888-VARETIR (827-3847)
 www.varetre.org

1. Date
2. Employer Code
3. Employer Name

Complete this form to authorize the official contacts who require access to information about VRS members working in the employer code recorded in Box 2. (Complete a separate VRS-67 to authorize contacts for a different employer code.) VRS will not discuss member information with a person not listed as an approved contact.

Note: Submit only a signed, original form. Fax copies cannot be accepted.

PART A. ADMINISTRATIVE APPROVAL (Please print clearly.)

Name: _____
 Title: _____
 Mailing Address: _____
 City: _____ State: _____ Zip Code: _____
 Phone: _____
 E-Mail Address: _____

I certify the contacts designated on this form are authorized to obtain information from VRS about members employed by the employer code identified above. Additionally, I certify the contacts designated to use myVRS for Employers are authorized to access our employees' VRS records using the VRS on-line application.

I understand I am responsible for updating contact information in a timely manner. I also certify that I have the authority to designate each of the VRS contacts as indicated on the following pages.

Signature _____ Date _____

4. Total number of pages submitted in this request:

GENERAL INFORMATION

PART B. CONTACT DESIGNATION (Copy this page as needed to designate contacts.)

SSN: _____	Action: <input type="checkbox"/> Add <input type="checkbox"/> Update <input type="checkbox"/> Delete
Level of Access: <input type="checkbox"/> Primary <input type="checkbox"/> Secondary	Employment Status: <input type="checkbox"/> Full Time <input type="checkbox"/> Non-VRS
Contact Type: <input type="checkbox"/> Human Resources <input type="checkbox"/> Payroll <input type="checkbox"/> Publications <input type="checkbox"/> ORP <input type="checkbox"/> Accounting <input type="checkbox"/> Info Systems	
Name: _____	Title: _____
Mailing Address: _____	
City: _____	Zip Code: _____
Phone: _____	Fax: _____
E-Mail: _____	
Start Date: _____	End Date: _____
Gender if "Non-VRS": <input type="checkbox"/> M <input type="checkbox"/> F	
<i>For Human Resources or Payroll only:</i> Uses myVRS for Employers? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes and "Non-VRS" is checked, enter birth date: _____	

SSN: _____	Action: <input type="checkbox"/> Update <input type="checkbox"/> Delete
Level of Access: <input type="checkbox"/> Primary <input type="checkbox"/> Secondary	Employment Status: <input type="checkbox"/> Full Time <input type="checkbox"/> Non-VRS
Contact Type: <input type="checkbox"/> Human Resources <input type="checkbox"/> Payroll <input type="checkbox"/> Publications <input type="checkbox"/> ORP <input type="checkbox"/> Accounting <input type="checkbox"/> Info Systems	
Name: _____	Title: _____
Mailing Address: _____	
City: _____	Zip Code: _____
Phone: _____	Fax: _____
E-Mail: _____	
Start Date: _____	End Date: _____
Gender if "Non-VRS": <input type="checkbox"/> M <input type="checkbox"/> F	
<i>For Human Resources or Payroll only:</i> Uses myVRS for Employers? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes and "Non-VRS" is checked, enter birth date: _____	

SSN: _____	Action: <input type="checkbox"/> Add <input type="checkbox"/> Update <input type="checkbox"/> Delete
Level of Access: <input type="checkbox"/> Primary <input type="checkbox"/> Secondary	Employment Status: <input type="checkbox"/> Full Time <input type="checkbox"/> Non-VRS
Contact Type: <input type="checkbox"/> Human Resources <input type="checkbox"/> Payroll <input type="checkbox"/> Publications <input type="checkbox"/> ORP <input type="checkbox"/> Accounting <input type="checkbox"/> Info Systems	
Name: _____	Title: _____
Mailing Address: _____	
City: _____	Zip Code: _____
Phone: _____	Fax: _____
E-Mail: _____	
Start Date: _____	End Date: _____
Gender if "Non-VRS": <input type="checkbox"/> M <input type="checkbox"/> F	
<i>For Human Resources or Payroll only:</i> Uses myVRS for Employers? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes and "Non-VRS" checked, enter birth date: _____	

5. Employer Code: _____
Authority Initials: _____

VRS-67 (Rev. 07/11)

DATA REQUESTS

Participating employers often request specially created reports of VRS information regarding their employees and/or retirees. VRS has established guidelines to ensure that its release of such data is consistent, secure and not in violation of any restrictions on the disclosure of information.

Employers must follow these guidelines to obtain specially created data reports:

1. Submit the request in writing, on letterhead, and signed by the chief administrative officer, chief financial officer, chief human resource officer, or an individual identified to VRS on a VRS-67 as a primary contact authorized to obtain the information being requested (a signed request submitted by facsimile or electronic means is acceptable).
2. Address the request to the VRS Director, Deputy Director for Customer Relationships, Chief Customer Programs Officer, Chief Customer Support Officer, Product Administrator, Defined Contribution Plans Administrator, Director of Member Services, Director of Retiree Services, Employer Representative Program Manager or Chief Financial Officer or Controller.
3. Explain why the data is being requested.
4. Describe how and by whom the data will be used.
5. Specify the data requested (examples include Social Security numbers, names, birth dates, retirement dates, years of service, active member status and retirement option).
6. Specify file format requested (examples include flat file, paper file and Excel spreadsheet).
7. Specify how the data should be sorted if providing paper file.
8. Specify the file transmission format for data provided by electronic means (examples include encrypted FTP, compact disk and floppy disk).
9. Provide the approximate date the data is needed. If data is needed within two weeks, explain the urgency for the data.
10. Specify the name, title, telephone number and email address of the person designated to work with VRS for the data request. (Note: The data will not be released to this designee unless he or she is one of the persons identified in item 1, above.)

An internal auditor of any agency or political subdivision that is a participating employer with VRS or an external auditor hired by any agency or political subdivision that is a participating employer with VRS may also request data. However, VRS must verify the identity and authorization of the

auditor making the request. The chief administrative officer, chief financial officer, or chief human resource officer of the agency or political subdivision may provide verification by phone. The chief administrative officer, chief financial officer, or chief human resource officer may also provide verification by letter. The letter should identify the auditor and request the data be sent directly to the auditor.