

Disability Retirement Checklist FOR EMPLOYERS

✓ Considerations to Discuss With Member Before Applying for Disability Retirement	
	At the time of service retirement or upon receiving approval for disability retirement (whichever is earliest), the member must terminate all full-time and part-time positions that are covered by VRS in order to receive a monthly retirement benefit.
	The member must terminate work in any part-time positions not covered by VRS for the employer from which he/she is retiring.
	If the member returns to work in a full-time position with any employer participating in VRS, the monthly retirement benefit must cease and the member once again becomes an active VRS member.
	If the member plans to return to work in a part-time position with any employer participating in VRS: <ul style="list-style-type: none"> • The duties of the new position cannot be similar to the duties of the position from which the member retired. • The employer must comply with Internal Revenue Service (IRS) rules about “in-service” distributions. For the employer to be in compliance, the member must terminate all full-time and part-time employment with the current employer before receiving the benefit payment. In addition, the member must incur a break in service of at least one full calendar month before returning to part-time employment in a position not covered by VRS with the current employer. This break must occur during a normal work period.
	NOTE: State agencies are considered one employer. Retired state employees may return to work in part-time positions with other state agencies after a full calendar month break in service during a normal work period.
✓ Preparing the Application	
	When the member submits the Application for Disability Retirement (VRS-6) , the following documents must be included:
	A readable copy of the member’s birth certificate. If the birth certificate does not include the full given name and birth date, the member must provide other legal documentation. NOTE: <i>The application cannot be processed without this document.</i>
	A readable copy of the survivor’s birth certificate if the member chose a survivor option. If the survivor’s birth certificate does not include a full given name and birth date, the member must provide other legal documentation.
	You, as the employer, complete Part E of the application if the member is currently employed in a covered position or has been within the last 12 months.
	NOTE: Both types of disability retirements require a copy of the job description before the application can be sent to the medical board for review.
	The member completes and submits the Authorization for Direct Deposit of Monthly Benefit (VRS-57) and the Request for Income Tax Withholding (VRS-15) . NOTE: <i>Processing of the retirement application is delayed if VRS-57 is not completed and submitted with the application.</i>
	NOTE: It is important to provide all required documents at the time of application. <i>If all required documents are not received, VRS is unable to submit the member’s file to the Medical Board. This will delay a determination in the member’s disability case and may affect when the member’s first benefit payment is made.</i>
✓ Completing the Application	
	Items the Member Completes: Parts A-D of the Application for Disability Retirement (VRS-6)
	Items You, the Employer, Complete
	Part E of the Application for Disability Retirement (VRS-6)
	Employer Information for Disability Application (VRS-6D)
	Ensure that the following forms and documents are included:
	Explanation of Disability (VRS-6A)
	Physician’s Report (VRS-6B), if it has been completed previously; may be forwarded directly from the physician to VRS
	Request for Income Tax Withholding (VRS-15)
	Authorization for Direct Deposit of Monthly Benefit (VRS-57) and a voided check
	The employee’s job description, required for either type of disability retirement
	If the disability is work-related, copies of the accident report and the workers’ compensation award are required
	Review the birth certificate (and the survivor’s birth certificate if applicable) to ensure it is readable.
✓ Submitting the Application	
	Mail the original Application for Disability Retirement and all other required documents to VRS. A copy of the application cannot be processed. NOTE: <i>VRS recommends that the application be faxed to VRS in the case of life-threatening illness.</i>