



**North Carolina Retirement Systems**

**Retirement Monitor – Special Edition, January 12, 2010**

A monthly newsletter for public sector human resources and payroll specialists from the Retirement Systems Division of the North Carolina Department of State Treasurer.

**Be Sure To Use Only Newly Revised Disability Forms**

In order to provide the most up-to-date information and provide the best possible service to members applying for disability benefits, effective immediately, the Retirement System will only process current disability forms (revised on or after February 2009). The revised forms are available on both the “Employers” and “Active Members” sections of the Retirement Systems’ Web site at [www.myncretirement.com](http://www.myncretirement.com).

Disability forms revised prior to February 2009 will no longer be accepted for processing, although the receipt by the System of an old disability form will be used as a date marker for any new applications to determine eligibility. (See *Retirement Monitor* of March 20, 2009, for the communication on the new or revised disability forms).

Employers, please discard the old forms and retrieve current forms from the “Employers” section of the Retirement Systems’ Web site. A disability training module also is on the Web site to guide employers and members on disability form completion.

Using the new forms will ensure that members and employers are provided with up-to-date information and enhanced guides to explain the disability process. The new disability forms were designed to simplify and clarify the disability process for members and employers.

New and revised disability forms include:

*7 – Requesting Disability Benefits*

*7A – Medical Report for Disability Eligibility Review*

*700 – Requesting Employer Information Required for Member Disability Income Plan Benefits*

*701 – Requesting Short-Term Benefits Through the Disability Income Plan of North Carolina*

*703 – Reporting Earnings for Short-Term Disability Benefits and Medical Report for Eligibility Review*

*704 – Requesting Additional Benefits Through the Disability Income Plan of North Carolina*

*711 – Determining and Recording Short-Term Disability Benefits*

*714 – Requesting Reimbursement and Service Credit for the Short-Term Period (Employer Form)*

**Disability Form Submission Process**

Please note that an acceptable submission includes sending to the Retirement System a complete package of forms as specified below. The Retirement System will contact members and employers about incomplete packages.

Disability applications cannot be fully processed until all the correct forms and information are received. Retirement System staff will not be able to determine program eligibility or schedule a medical board review date until all the proper forms are received. If additional employer information is needed, employers will be contacted by Retirement System staff.

The disability process is summarized below:

- The employee or employer, as applicable, must complete all required disability forms in a correct, accurate and legible manner.
- The employee or employer should package all of the forms so they arrive at the Retirement System together as one single package. The employee may protect the Form 7A, medical report information, by placing it in a sealed envelope and including the sealed envelope with the other appropriate disability forms.

- Once all the properly completed disability forms are received, Retirement System personnel will accept the forms, send a letter of acknowledgement to both the employee and employer, determine applicant's eligibility and prepare the forms for review by the medical board.
- If any form required in the disability package is missing, Retirement System staff will send a letter to the employer and employee stating which forms are missing, and suspend processing of the incomplete package until all properly completed forms are received. Processing may also be suspended if essential information is incorrect or has been omitted from forms that were submitted.

### **Acceptable Disability Application Packages**

The lists below identify the forms that should be included in a complete disability packet.

#### **For a Teachers' and State Employees' Retirement System member vested on or before January 1, 1988, and who wishes to apply for State disability retirement:**

- Form 7 - *Requesting Disability Retirement Benefits*
- Form 7A - *Medical Report for Eligibility Review*
- Any accompanying medical notes, and summaries
- Job Description (Provided by employer)

#### **For a Teachers' and State Employees' Retirement System member vested at any time who elects to apply for Short-Term Disability, Extended Short-Term Disability, or Long-Term Disability under the Disability Income Plan of North Carolina (DIPNC):**

- Short-Term and/or Preliminary Long-Term DIPNC application includes:
  - Form 701 - *Requesting Short-Term Benefits Through the Disability Income Plan of North Carolina*
  - Form 700 - *Requesting Employer Information Required for Member Disability Income Plan Benefits*
  - Job Description (Provided by employer)
  - Form 703 - *Reporting Earnings for Short-Term Disability Benefits and Medical Report for Eligibility Review*
  - Form 7A - *Medical Report for Eligibility Review*
  - Any accompanying medical notes and summaries
- Extended Short-Term or Long-Term DIPNC application includes:
  - Form 704 - *Requesting Additional Benefits Through the Disability Income Plan of North Carolina*
  - Form 701 - *Requesting Short-term Benefits Through the Disability Income Plan of North Carolina*
  - Form 700 - *Requesting Employer Information Required for Member Disability Income Plan Benefits*
  - Job Description (Provided by employer)
  - Form 703 - *Reporting Earnings for Short-Term Disability Benefits and Medical Report for Eligibility Review*
  - Form 7A - *Medical Report for Eligibility Review*
  - Any accompanying medical notes and summaries

#### **For a Local Governmental Employees' Retirement System member:**

- Form 7 - *Requesting Disability Retirement Benefits*
- Form 7A - *Medical Report for Eligibility Review*
- Any accompanying medical notes and summaries
- Job Description (Provided by employer)

## After Medical Board Approval for a DIPNC Recipient

The following additional forms may be needed for calculation and processing of benefits for DIPNC Recipients after Medical Board approval:

- Form 711 - *Determining and Recording Short-Term Disability Benefits*
- Form 705 - *Agreeing to Accept Long-Term Benefits Through the Disability Income Plan of N.C.*  
(Provided by the Retirement System)
- Form 706 - *Confirming an Employee's Resignation for Disability (Long-Term Disability Recipient)*
- Form 715 - *Authorizing Social Security Information (if Award Notice not available)*

After Medical Board approval for a State or Local Disability recipient, the Retirement System will send additional information and forms to the member for completion.

We appreciate your time and your important role in the disability process.

**Remember:** Current disability forms are available on the "Employers" and "Active Member" sections of our Web site at [www.myncretirement.com](http://www.myncretirement.com) under "Disability Benefits Processing and Training" and "All Forms by Form Number." Please be sure all properly completed disability forms are sent together to the Retirement System. A disability package sent to the Retirement System with missing or outdated forms, or missing information will delay processing.

**Employers with questions about the disability process:**

Contact the Employer Education Services Unit at (toll-free) 1-877-807-3131 (outside the Raleigh area) or (919) 807-3131 (Raleigh area only).

**Members with questions about the disability process:**

Contact Member Services at (toll-free) 1-877-627-3287 or (919) 807-3050 (Raleigh area only).