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This chapter lists the forms used by the Division of Retirement. To obtain copies of most of the forms listed in this chapter, please contact the appropriate Bureau to request the form or forms you need. (Investment Plan forms listed exclusively on page 17-10 are **available online**.)

**Contact Us
for Forms**

Contact information for each Bureau is published below:

Bureau of Enrollment and Contributions: enrollment@frs.state.fl.us	(850) 488-8837 / SUNCOM 278-8837 FAX #: (850) 921-2925
Bureau of Retirement Calculations: calculations@frs.state.fl.us	(850) 488-6491 / SUNCOM 278-6491 FAX #: (850) 410-2195
Bureau of Benefit Payments: retired@frs.state.fl.us	(850) 488-4742 / SUNCOM 278-4742 FAX #: (850) 410-2193
Disability Determination Section: disability@frs.state.fl.us	(850) 488-2968 / SUNCOM 278-2968 FAX #: (850) 410-2198
DROP Termination Section: drop_term@frs.state.fl.us	(850) 487-4856 / SUNCOM 277-4856 FAX #: (850) 410-2199
Survivor Benefits Section: survivor@frs.state.fl.us	(850) 488-5207 / SUNCOM 278-5207 FAX #: (850) 410-2197

**Sample Forms
& Forms
Published
Online**

Samples of the most commonly used forms are shown throughout the chapters of this handbook¹. A number of the forms listed in this chapter are also available on the Division's Internet web site at www.myflorida.com/frs or from the joint website of the Division and the State Board of Administration at: www.myfrs.com (select the Resources Tab). Forms available on the Internet are indicated by the symbol .

NOTE: Completed forms may be mailed or faxed to the Division. If you fax us a signed and/or notarized form you **must** retain the original form. You do not need to mail the original to us, unless requested.













¹ Samples are not included in the handbook for forms marked with an asterisk (*).

I. ADMINISTRATIVE FORMS

Form Number	Title/Subject of Form	Page
SAPS	Florida Retirement System Statement Attesting to Payee Status	*
[none]	Publications Request Form 🔗	16-7











II. FORMS OF THE BUREAU OF ENROLLMENT AND CONTRIBUTIONS

Form Number	Title/Subject of Form	Page
BEN-001	FRS Pension Plan Beneficiary Designation Form (Active Members Only) [Note: Not for DROP participants] 🔗	1-66
BLE-1	FRS Pension Plan Ballot for Member of an Existing Retirement System	1-13
CERT	New Employee Certification Form 🔗	13-12
ELE-1-EZ	Florida Retirement System EZ Retirement Plan Enrollment Form for Regular, Special Risk and Special Risk Administrative Support Class Employees 🔗	*
ELE-2-EZ	Florida Retirement System 2nd Election EZ Retirement Plan Enrollment Form 🔗	*
ELE-1	Florida Retirement System GENERAL Retirement Plan Enrollment Form for Regular, Special Risk and Special Risk Administrative Support Class Employees 🔗	*
ELE-2	Florida Retirement System 2nd Election Retirement Plan Enrollment Form 🔗	*
EOC-1	Florida Retirement System Elected Officers' Class Employees Retirement Plan Enrollment Form 🔗	1-33
ERQ-1	FRS Pension Plan Employment Relationship Questionnaire	*
FRS-400	Application for Special Risk Membership 🔗 Law Enforcement/Correctional Officers	1-23
FRS-401	FRS Pension Plan Special Risk Credit for Past Service 🔗	*
FRS-402	FRS Pension Plan Application for Special Risk Equivalent Credit 🔗	*

FRS-404	Florida Retirement System Application for Special Risk Administrative Support Class 	1-27
FRS-405	Florida Retirement System Application for Special Risk Membership Firefighters/Paramedics/EMTs 	1-24
OCC-1	Florida Retirement System Ballot/Enrollment Form for Community Colleges Optional Retirement Program Employees 	1-57
OCC-2	Florida Retirement System Retirement Plan Conversion Form for Community College Optional Retirement Program (CCORP) Members 	1-58
[Online]	Florida Retirement System FRS Contributions Summary : (Retirement/HIS)  only	2-25
[Online]	Florida Retirement System Optional Annuity Program Contributions Summary  only	2-29
[Online]	Florida Retirement System Optional Retirement Program (ORP/IFAS) Contributions Summary  only	2-27
ORP-16	Florida Retirement System State University System Optional Retirement Program (SUSORP) FRS Ballot 	1-47
ORP-16A	Florida Retirement System State University System Optional Retirement Program (SUSORP) Change Form 	1-48
SMS-1	Florida Retirement System State Senior Management Service Employees Retirement Plan Enrollment Form 	1-39
SMS-3	Florida Retirement System Local Senior Management Service Employees Retirement Plan Enrollment Form 	1-40
SMSD-1	FRS Pension Plan Senior Management Service Class Designated Position Form 	1-42
SRC-001	Florida Retirement System Petition for Administrative Hearing before the State Retirement Commission	*

III. FORMS OF THE BUREAU OF RETIREMENT CALCULATIONS

Form Number	Title/ Subject of Form	Page
BVR-1	Florida Retirement System Request for Proof of Age (Birth Verification Form) 	*
DP-11	FRS Pension Plan Application for Service Retirement and the Deferred Retirement Option Program (DROP) 	9-45
DP-ELE	FRS Pension Plan Notice of Election to Participate in the Deferred Retirement Option Program (DROP) and Resignation of Employment 	9-44
DP-EXT	FRS Pension Plan Extension of Deferred Retirement Option Program (DROP) for Specified K-12 Instructional Personnel 	9-46
DPR-100	Florida Retirement System Certification of Salaries	*
DS-11	State and County Officers and Employees' Retirement System Application for Service Retirement and the Deferred Retirement Option Program (DROP) 	*
DT-11	Teachers' Retirement System Application for Service Retirement and the Deferred Retirement Option Program (DROP) 	*
ER-TERM	Florida Retirement System Agency Termination Verification for Service Retirements and Health Insurance Subsidy	*
FC-1	FRS Pension Plan Salary Certification 	9-19
FR-9	FRS Pension Plan Information Request 	7-6
FR-11	FRS Pension Plan Application for Service Retirement 	9-10
FR-23	FRS Pension Plan Notification of Reemployment for Suspension of Retirement Benefits (For Retired Members Only) 	13-5
FR-23a	FRS Pension Plan Application to Reactivate Retirement Benefits (For Retired Members Only) 	13-6
FR-28	Division of Retirement Pension Plan Application to Purchase Retirement Credit for a Pension Plan Leave of Absence 	7-21

FR-30	FRS Pension Plan Verification for In-State or Out-of-State Service Credit 	7-27 to 7-28
FR-30a	FRS Pension Plan Out-of-State Employer Request	*
FRS-11o	FRS Pension Plan Option Selection for FRS Members 	9-14
FST-11o	Florida Retirement System Option Selection for TRS and SCOERS Members 	*
FST-12	FRS Pension Plan Beneficiary Designation Form (Retired Members Only) 	9-17
HIS-IP	Florida Retirement System Application for Health Insurance Subsidy for Investment Plan Members 	*
HIS-IP-2	Florida Retirement System Health Insurance Subsidy Certification for Investment Plan Members 	*
IF-11	Institute of Food and Agricultural Sciences Application for IFAS Supplemental Retirement	*
MF-1	FRS Pension Plan Statement of Military Eligibility 	7-15
MF-2	FRS Pension Plan Statement of Military Eligibility to Purchase Military Service under the Out-of-State Provisions of Section 121.1115, F.S. 	7-29
OSE-1	FRS Pension Plan Eligibility for Out-of-State Credit	*
PRO-1	FRS Pension Plan (401(a) Plan) Pretax Direct Rollover/Transfer Form 	7-7
SA-1	Florida Retirement System Spousal Acknowledgment	*
SR-11	State and County Officers and Employees' Retirement System Application for Service Retirement	*
TR-11	Teachers' Retirement System Application for Service Retirement	*
TR-4	Florida Retirement System Verification of Out-of-State Teaching Service	*
WC-1	Florida Retirement System Certification of Workers' Compensation 	7-34



IV. FORMS OF THE BUREAU OF BENEFIT PAYMENTS




A. DISABILITY DETERMINATION

Form Number	Title/Subject of Form	Page
FC-1	FRS Pension Plan Salary Certification 🔗	9-19
FR-13	FRS Pension Plan Application for Disability Retirement 🔗	10-8 to 10-9
FR-13a	Florida Retirement System Statement of Disability by Employer 🔗	10-10 to 10-11
FR-13b	Florida Retirement System Physician's Report 🔗	10-12 to 10-13
FR-13e	Florida Retirement System Retiree's Report of Continuing Disability	*
FR-13f	Florida Retirement System Physician's Report of Reexamination	*
FRS-11o	FRS Pension Plan Option Selection for FRS Members 🔗	9-14
FST-12	FRS Pension Plan Beneficiary Designation Form (Retired Members Only) [Note: Includes DROP participants] 🔗	9-17
PR-11o	Florida Retirement System Investment Plan Option Selection for FRS Members	10-16
PR-13	Florida Retirement System Investment Plan Application for Disability Retirement	10-14 to 10-15
SB-13b	FRS Pension Plan Physician's Report (Disability Determination for Joint Annuitant)	*
SR-13	State and County Officers and Employees' Retirement System (SCOERS) Application for Disability Retirement	*
SR-13a	State and County Officers and Employees' Retirement System (SCOERS) Member's Statement of Disability by Employer	*
SR-13b	State and County Officers and Employees' Retirement System (SCOERS) Physician's Report	*
SR-13e	State and County Officers and Employees' Retirement System (SCOERS) Retiree's Report of Continuing Disability	*
SR-13f	State and County Officers and Employees' Retirement System (SCOERS) Physician's Report of Reexamination	*




SRA-1	FRS Pension Plan Service Retirement Agreement	*
SRC-001	Florida Retirement System Petition for Administrative Hearing before the State Retirement Commission	*
TR-13	Teachers' Retirement System Application for Disability Retirement	*
TR-13a	Teachers' Retirement System Statement of Disability by Employer	*
TR-13b	Teachers' Retirement System Physician's Report	*
TR-13e	Teachers' Retirement System Retiree's Report of Continuing Disability	*
TR-13f	Teachers' Retirement System Physician's Report of Reexamination	*

B. SURVIVOR BENEFITS

Form Number	Title/Subject of Form	Page
AAPS	FRS Pension Plan Affidavit Attesting to Payee Status	*
BVR-1	Florida Retirement System Request for Proof of Age (Birth Verification Form) 	*
DIS-1	FRS Pension Plan Disclaimer of Benefits (Surviving Beneficiary)	*
DIS-2	FRS Pension Plan Disclaimer of Benefits (Surviving Child)	*
DIS-3	FRS Pension Plan Disclaimer of Benefits (Surviving Beneficiary and Child)	*
DOCEV	FRS Pension Plan Explanation of Documentary Evidence	*
DP-12	FRS Pension Plan Beneficiary Designation Form for the Alternate Payee of a DROP Participant	*
DROLL	FRS Pension Plan Beneficiary Direct Rollover Election Form	*
FC-1	FRS Pension Plan Salary Certification 	9-19

FR-30b	FRS Pension Plan Verification for In-State or Out-of-State Service Credit	*
FRS-11o	FRS Pension Plan Option Selection for FRS Members 	9-14
FST-11b	FRS Pension Plan Application of Beneficiary for Monthly Retirement Benefits	11-17
FST-11g	FRS Pension Plan Application of Beneficiary for Benefit Payment	11-10
FST-11so2	Florida Retirement System Application for Survivor Benefits	*
FST-12	FRS Pension Plan Beneficiary Designation Form (Retired Members Only) [Note: Includes DROP participants] 	9-17
JA-1	FRS Pension Plan Change of Joint Annuitant Form (Retired members only)	11-5
JA-NUL	FRS Pension Plan Joint Annuitant Nullification Form	11-6
JAD-SB	FRS Pension Plan Joint Annuitant Information	*
MF-1	FRS Pension Plan Statement of Military Eligibility 	7-15
SB-13b	FRS Pension Plan Physician's Report (Disability Determination for Joint Annuitant)	*
SRF-2	FRS Pension Plan Student Report Form	*
SRF-3	FRS Pension Plan Authorization for Release of Information	*
SVF-1	FRS Pension Plan Student Verification of Enrollment by Institution	*
SVF-2	FRS Pension Plan Affidavit Attesting to Eligibility	*
TAXPREF	FRS Pension Plan Special Notice Regarding Plan Payments (<i>information on rollovers</i>)	*
TR-11c	Teachers' Retirement System Application for Survivor Benefits	*

C. RETIRED PAYROLL

Form Number	Title/Subject of Form	Page
1099-R	FRS Pension Plan Information for Reporting Taxes on Retirement Income [<i>Income Tax Reporting Form of the Internal Revenue Service</i>]	*
ADDCH-1	Florida Retirement System Mailing Address Change Request (Retirees Only) 	*
DFS-A1-26R	State of Florida Direct Deposit Authorization [<i>Form of the Department of Financial Services</i>] 	*
FRS-M81	Florida Retirement System Request for Refund	8-4
HIS-1	Florida Retirement System Health Insurance Subsidy Certification Form	12-7
HISBAL	Florida Retirement System Certification of Retirees 2003 Health Insurance Premium Payments	*
IDAF	Florida Retirement System Insurance Deduction Authorization Form	*
RAS	Florida Retirement System Retiree Annual Statement	*
Rollover	Florida Retirement System Direct Rollover Election Form	*
W-4P	Florida Retirement System Withholding Certificate for Pension Payments 	*

D. DROP TERMINATION UNIT

Form Number	Title/Subject of Form	Page
DP-JOINT	Florida Retirement System Deferred Retirement Option Program (DROP) Joint Annuitant Verification	*
DP-PAYT	Florida Retirement System Deferred Retirement Option Program (DROP) Selected Payout Method	9-48
DP-TEOC	Florida Retirement System Deferred Retirement Option Program (DROP) Elected Officers' Termination Notification	*
DP-TERM	Florida Retirement System Deferred Retirement Option Program (DROP) Termination Notification	9-47
DP-VOID	FRS Pension Plan Deferred Retirement Option Program (DROP) Void Form	*

V. FRS INVESTMENT PLAN FORMS²

Form Number	Title/Subject of Form	Page
CP-1	FRS Investment Plan How to File a Complaint under the Frs Investment Plan ↗	*
ETF-2	FRS Investment Plan Employment Termination Form ↗	*
HIS-IP	Florida Retirement System Application for Health Insurance Subsidy for Investment Plan Members ↗	12-8
HIS-IP-2	Florida Retirement System Health Insurance Subsidy Certification for Investment Plan Members ↗	12-9
IPBEN-1	FRS Investment Plan Beneficiary Designation Form ↗	*
IPBI	FRS Investment Plan Death Benefit Distribution Instructions and Options ↗	*
IPDB	FRS Investment Plan Death Benefit Distribution Claim ↗	*
IPDF	FRS Investment Plan Age 70½ Distribution Form ↗	*
IPRO-1	FRS Investment Plan Employee Rollover Deposit Form ↗	*
Notice	FRS Investment Plan Special Tax Notice Retirement Savings and Stock Ownership Plan Payments ↗	*

² Except for Forms HIS-IP and HIS-IP-2 (*see page 17-6*), investment plan forms listed on this page are forms of the Florida State Board of Administration and are available online only.