

## Senior Management Service Class Reassessment Window

Paragraph 121.055(2)(b), Florida Statutes, provides a six-month window every five years to allow local agencies to reassess and remove currently designated Senior Management Service Class (SMSC) positions from the class. The next window is July 1, 2025 through December 31, 2025. The Division of Retirement will be providing additional information and training in the near future. In the meantime, if you have any questions, please email the Enrollment Section at [enrollment@dms.fl.gov](mailto:enrollment@dms.fl.gov). To view your agency's SMSC Positions Report, log in to FRS Online at <https://frs.fl.gov/#/login>.

## Are You Using Outdated FRS Enrollment Forms?

FRS enrollment forms are routinely updated throughout the year. To use up-to-date forms and save paper, go to the [Forms section on MyFRS.com](#) to download and print the forms as you need them.

The following enrollment forms were recently updated as of January 2025:

- **Form ELE-1**
- **Form ELE-2**
- **Form EOC-1**
- **Form SMS-3**
- **Form OCC-1**
- **Form OCC-2**

**REMINDER:** If an employee provides you with a completed enrollment form, it will need to be forwarded to the Plan Choice Administrator to either the mailing address or the fax number listed on the form. Do not upload enrollment forms via FRS Online, as this will cause a delay in processing the forms by the Plan Choice Administrator. It is the responsibility of the employee to follow up with the Plan Choice Administrator to confirm that the enrollment form has been received and processed.

## Frequently Asked Questions

Has an employee ever asked you a question about the FRS, but you just didn't know where you might find a response? The [MyFRS.com](#) website is a great source of information and also has a section for [Frequently Asked Questions](#) based upon certain FRS subjects. At the bottom of the homepage is the link to the FAQs.

If you have any questions you'd like to see answered in upcoming newsletters, you can send them to [allison.olson@sbafla.com](mailto:allison.olson@sbafla.com).



## How to Keep Up with Florida Legislation

The Florida Legislative Session began on March 4, 2025 and will end on May 2, 2025. To keep up with proposed 2025 retirement bills, click "[Legislation](#)" in the "Alerts & Hot Topics" box on [MyFRS.com](#).



## Sign Up for an FRS Employer Training Workshop

FRS employer training workshops are an excellent opportunity for you and your staff to get an overview of the FRS plans and the various areas, functions, and processes that involve your agency and its employees. View the online [workshop calendar](#) for a list of in-person and Zoom workshops being offered.

### Upcoming Workshops

Pension Plan	Investment Plan
8:30 to 11:30 a.m. ET	1:00 to 4:00 p.m. ET
May 1, 2025	May 1, 2025
August 4, 2025	August 4, 2025
November 6, 2025	November 6, 2025



### To register:

#### By phone:

1-866-377-2121, Option 1

Be ready to provide your name, your contact information, the date and time of the workshop you want to attend, and the number of people from your agency who will be attending.

#### Online:

- Go to the [workshop calendar](#).
- Locate the employer workshop you want to attend (in-person or via Zoom), then register.
- You will receive a confirmation email after registering. Zoom registrants will receive a reminder email the day before the webinar.

You must register separately for each workshop you wish to attend.



## Free Financial Planning Workshops for Employees

The following 2025 live webinars are free and unlimited for FRS members. To schedule an in-person workshop or live webinar for your FRS employees, please reach out to Angela Ko by email at [Angela.Ko@ey.com](mailto:Angela.Ko@ey.com) or by telephone at 201-872-0176.

April 1	Using the FRS to Plan for Your Retirement	10:00 a.m. to Noon
April 1	Using the FRS to Plan for Your Retirement (SPANISH) <b>Zoom Only</b>	1:00 to 3:00 p.m.
April 2	New Employee Retirement Plan Choice	10:00 a.m. to Noon
April 2	New Employee Retirement Plan Choice (SPANISH) <b>Zoom Only</b>	1:00 to 3:00 p.m.
July 1	Taking Control of your Finances: 90 Minutes	10:00 a.m. to Noon
July 1	Protecting Yourself and Your Loved Ones	1:00 to 3:00 p.m.
July 2	Understanding the FRS Investment Plan	10:00 a.m. to Noon
July 2	Investment Planning	1:00 to 3:00 p.m.
October 1	Social Security and Your Retirement	10:00 a.m. to Noon
October 1	Understanding Your Benefits Under the FRS Pension Plan	1:00 to 3:00 p.m.
October 2	Nearing Retirement in the FRS	10:00 a.m. to Noon
October 2	Group Health Insurance (state employees & state college employees only)	1:00 to 3:00 p.m.

ALL TIMES ARE ET

### To register:

#### By phone:

1-866-446-9377, Option 2

#### Online (Zoom only):

- Go to the [workshop calendar](#).
- Locate the employee workshop you want to attend (in-person or via Zoom), then register.
- You will receive a confirmation email after registration. Zoom registrants will receive a reminder email the day before the webinar.

Employees must register separately for each workshop they wish to attend.



## Upcoming 1<sup>st</sup> Election Deadlines

Making an active retirement plan choice by the election deadline is the best way for members to ensure they participate in their preferred plan. Members should be encouraged to make an active election even if their preferred plan is the default. **If a member receives a new hire kit and/or election reminder information, such as a letter or email, this means the member is in their retirement plan choice period and must make an active election or they will be defaulted into the Investment Plan (or Pension Plan if they are in the Special Risk Class).** If you receive inquiries from employees regarding a reminder notice or how to make an election, please refer them to the MyFRS Financial Guidance Line at 1-866-446-9377, Option 2 (TRS 711).

Deadline dates and times apply to all members, no matter how they submit their retirement plan choice. To confirm a new hire's deadline, call the FRS Employer Assistance Line at 1-866-377-2121, Option 3, or refer to the member's benefit comparison statement.

### What Happens If a Member Misses the Deadline?

A member whose retirement plan choice is not received by their 1<sup>st</sup> Election deadline will be enrolled in the default plan based on their membership class, as shown at right. The default enrollment will count as the member's first election.

Continues on next page.



### Plan Defaults<sup>1</sup>

Membership Class	Plan Default
Special Risk Class	Pension Plan
All classes (except Special Risk Class)	Investment Plan

### 1<sup>st</sup> Election Deadlines

Month of Hire	Enrollment Deadline <sup>2</sup>
July 2024	March 31, 2025
August 2024	April 30, 2025
September 2024	May 30, 2025
October 2024	June 30, 2025
November 2024	July 31, 2025
December 2024	August 29, 2025
January 2025	September 30, 2025
February 2025	October 31, 2025
March 2025	November 26, 2025
April 2025	December 31, 2025
May 2025	January 30, 2026
June 2025	February 27, 2026

<sup>1</sup> Applies to members initially enrolled in the FRS on or after January 1, 2018.

<sup>2</sup> By 4:00 p.m. ET.



## Upcoming 1<sup>st</sup> Election Deadlines – continued

### What About Members with Prior Pension Plan Service?

The plan defaults shown on the previous page apply to any members who did not submit a retirement plan choice prior to January 1, 2018 or did not have a plan choice period – even if they were previously enrolled in the FRS. As a reminder, if a member receives a new hire kit and/or reminder information, they have not made a retirement plan choice in the FRS. If no election is received, they will default into the applicable plan based upon their membership class.













Here's an example of a member who may have previous Pension Plan service and never made a retirement plan choice in the FRS:

- **April 1, 1999** – The member initially enrolls in the FRS. (At that time, the Pension Plan was the only retirement program available, so no retirement plan choice was made.)
- **May 2001** – The member terminates employment.
- **July 1, 2024** – The member returns to work. (The member will be enrolled in the Pension Plan in accordance with Florida Statutes. The member must make an active election prior to the choice period deadline of January 31, 2025, by 4:00 p.m. ET to remain in the Pension Plan.)
- **March 31, 2025** – No election is received for this member.
- **April 1, 2025** – The member will be enrolled in the default plan based on their membership class. (If employed under the Special Risk Class, the default is the Pension Plan. For any other membership class, the default is the Investment Plan.) If enrolled in the Investment Plan, the member's prior Pension Plan service will be transferred to the Investment Plan as an opening account balance, which is subject to the Pension Plan's vesting provisions.



## New Hire Communication Road Map Highlights 1<sup>st</sup> Election Reminders

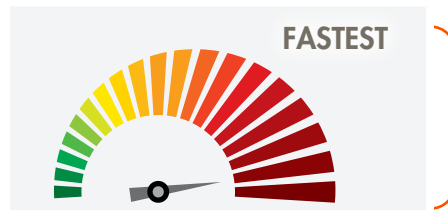
The **New Hire Communication Road Map**, available online and below, shows the materials your employees will receive during their 1<sup>st</sup> Election period. Employees will continue to receive reminder emails/letters until they make an active retirement plan election or until their election period ends. Explore the road map and click the links (yellow boxes) to access samples of each communication.

HIRED!	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	
Employee Orientation	Payroll Submitted	Welcome Brochure	1 <sup>st</sup> Reminder Email	2 <sup>nd</sup> Reminder Email	3 <sup>rd</sup> Reminder Mailing	4 <sup>th</sup> Reminder Email	5 <sup>th</sup> Reminder Email	6 <sup>th</sup> Reminder Mailing	Confirm Letter Welcome Letter	
New Hire Video			20 <sup>th</sup> day of the month	15 <sup>th</sup> day of the month	10 <sup>th</sup> day of the month	5 <sup>th</sup> day of the month	1 <sup>st</sup> day of the month	10 <sup>th</sup> day of the month	(Version depends on plan selected or default. Shown are the default to Investment Plan confirmation and welcome letters.)	
New Hire Flyer										
		Employee receives PIN and can access the 1 <sup>st</sup> Election Choice Service	Click on the yellow boxes to see sample communications.							
								7 <sup>th</sup> Reminder Email Day before choice deadline		
								Choice Deadline 4:00 p.m. on the last business day of month 8		

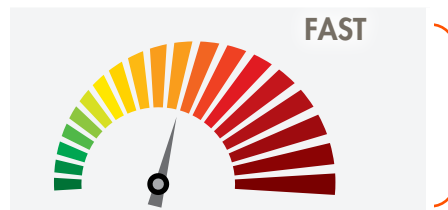


## ChooseMyFRSplan.com Is the Fastest Way to Submit a Retirement Plan Choice

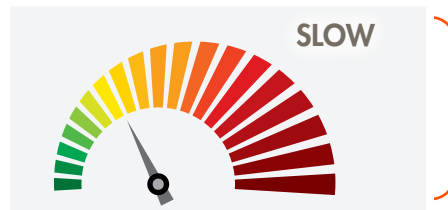
Here are some additional options from next fastest to slowest:



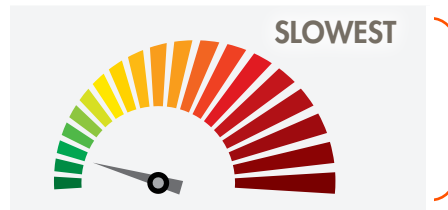
Call the MyFRS Financial Guidance Line at 1-866-446-9377, Option 4 (TRS 711). *This is a good option if the employee has questions.*



Submit the [online General Retirement Plan Enrollment Form](#).



Submit the hard copy form available on [MyFRS.com](#):  
By Fax: 1-888-310-5559



By Mail:  
Plan Choice Administrator  
P.O. Box 785027  
Orlando, FL 32878-5027

### Help Keep Your Co-Workers Informed

If you know a co-worker who should receive this employer newsletter, send an email to [allison.olson@sbafla.com](mailto:allison.olson@sbafla.com) with the co-worker's name, title, agency name, and email address.



## Help Keep Members' Names and Addresses Current

Encourage your active, inactive, and retired FRS members to keep their contact information current so they don't miss any important communications from you or the FRS.

### Investment Plan Members

#### Active Employees

Names and addresses are automatically updated on the FRS database when you submit your agency's monthly retirement report.

#### Inactive or Retired

See the online FAQ "[How can I change my name or mailing address if retired or terminated from the Investment Plan?](#)"

### Pension Plan Members

#### Active Employees

Names and addresses are automatically updated on the FRS database when you submit your agency's monthly retirement report.

#### Inactive (Not Currently Employed)

*Address Change* – Call the DMS, Division of Retirement.

#### Retired and Receiving a Benefit

*Address Change* – The retiree can log in to their FRS Online account at [frs.fl.gov](http://frs.fl.gov) to update their address. If you have questions, call the DMS, Division of Retirement.

*Name Change* – The member must **mail or fax** a signed letter to the DMS, Division of Retirement. The letter must be accompanied by a copy of the court order, marriage certificate, or valid driver's license reflecting the member's new name.

## How to Reach the DMS, Division of Retirement



Department of Management Services, Division of Retirement  
P.O. Box 9000  
Tallahassee, FL 32315-9000



850-410-2010 (fax)



1-844-377-1888 (toll-free)  
or 850-907-6500





## Resources

### FRS Employer Assistance Line

1-866-377-2121 (toll-free)

EY and Alight Solutions representatives are available from 8:00 a.m. to 6:00 p.m. ET, Monday through Friday, except holidays.

DMS, Division of Retirement staff are available from 8:00 a.m. to 5:00 p.m. ET, Monday through Friday, except holidays.

### MyFRS.com Resources

- [Recent News Articles](#) — Keep up with the latest legislation and more
- [Contribution Rates](#) — See “Retirement and Health Insurance Subsidy (HIS) Contribution Rates”
- [Employer Forms](#) and [General Forms](#) — Current forms available to print on demand
- [Employer Handbooks](#) — Technical guides for retirement coordinators, payroll staff, and others who have FRS responsibilities
- [FAQs](#) — Frequently asked questions and glossary
- [Helpful Links/Websites](#) — Links to agencies, departments, and other resources
- [Laws and Rules](#) — Florida Statutes and Administrative Code governing the FRS
- [Order Materials](#) — Online catalog of printed materials that you can order free of charge
- [Public Records](#) — State Board of Administration and DMS, Division of Retirement, Public Records Policy
- [Publications](#) — All available online publications
- [Request for Intervention/Final Orders](#) — Interventions may include unresolved customer service complaints and allegations of misconduct or misrepresentation
- [Videos](#) — New hire, educational, and training videos

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FRS forms are routinely updated throughout the year. To use up-to-date forms and save paper, go to the [Forms section on MyFRS.com](#) to download and print the forms as you need them.

