North Carolina
Total Retirement Plans

Form 704

Requesting Additional Benefits Through the Disability Income Plan of North Carolina

Department of State Treasurer
Retirement Systems Division
3200 Atlantic Avenue, Raleigh NC 27604
www.myNCRetirement.com • (919) 814-4590

Please print or type in black ink.

Section A. Tell us about yourself.

First Name	M.I.	Last Name		Suffix
Mailing Address				SSN (Last 4 Digits)
City	State	Zip Code	Telephone	Mobile Phone
Personal Email Address			Member ID	Date of Birth

Section B. Request additional benefits with your signature.

I have been receiving the short-term benefit under the Disability Income Plan of North Carolina, and I am now applying for the following subsequent benefit (choose only one):

☐ Extended short-term ☐ The remaining or a portion of the remaining balance of extended short-term ☐ Long-term

I certify that my illness did not result from active participation in a riot or committing or attempting to commit a terrorist act, felony, or intentional, self-inflicted injury.

I hereby authorize any physician, hospital, employer, agency, or other organization to disclose and release to my employer or the Retirement Systems Division any medical records or other information about my disability. I understand that a copy of this authorization will be as valid as the original. I further understand this information is to be furnished at no cost to my employer or to the Retirement Systems Division.

Further, I understand that I **cannot** withdraw my contributions from the Retirement System while receiving benefits under this Plan because withdrawing forfeits any rights to future benefits, including the benefits offered by this Plan.

Signature _____ Date _____

Section C. Complete the following information about your employer.

Current or last employer	Employer contact name

Section D. Submit this form to your employer.

This form is one part of an application for benefits from the Disability Income Plan of North Carolina.

You may submit this form independently of your employer, but doing so may cause a delay in the processing of your benefit and health insurance (if applicable), because your employer is required to provide information to the Retirement Systems Division for the Division to administer this benefit.

It is suggested that you do not apply for additional benefits more than 90 days prior to the end of your extended short-term benefit period.

NOTE: You must provide a copy of either your Social Security Awards Notice or Social Security Estimated Benefits Statement along with this form (Form 704) for the Retirement Systems Division to process your long-term disability application.

Please contact the Social Security Administration to obtain a copy of your Social Security Awards Notice (which shows actual benefits) or a Social Security Estimated Benefits Statement (which must show estimates of both Social Security disability and age 62 benefits). You may be able to obtain a copy of your Social Security Awards Notice or Estimated Benefits Statement by logging into your Social Security account at www.ssa.gov. The Retirement Systems Division will use the Social Security Estimated Benefits Statement (either the Social Security disability or age 62 estimate, whichever occurs first) in determining the amount of the future required offsets, if applicable, if an actual Social Security Awards Notice has not been received by the time of the required offsets.

Thank you.

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Form 704 Guides
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Guide A. Am I eligible for extended short-term (EST) benefits?

To be eligible for extended short-term benefits:

1) You must complete your 365-day short-term benefit period.
2) You may not apply for extended short-term benefits after 180 days from the end of your short-term, the end of any accumulated leave payments, or the conclusion of any Workers' Compensation payments.
3) Your illness should not be permanent and should be expected to improve within the next 365 days following your short-term benefit period.
4) Your illness must be continuous and directly impact the performance of your regular job duties.
5) A medical professional must complete a Form 7A, explaining how your illness impacts your job duties.

To apply for extended short-term benefits, you should work with your employer to submit the following forms to the Retirement Systems Division in one complete package:

- Form 704 (This form)
- Form 700 (Required Employer Information)
- Form 701 (Short-term Benefits Application) Only required if your employer made your short-term determination.
- Form 7A (Medical Report - Current, completed within the last 6 months)
- Form 703 (Doctor Certification)
- Job description (Provided by your employer)

NOTE: If the Retirement Systems Division does not receive all the above-mentioned forms in one package, the processing and/or approval of your disability benefit may be delayed until all forms have been properly completed and received.

Guide B. What is the length of the extended short-term (EST) benefit period?

Extended short-term benefits may last for a period of up to 365 days after the end of the short-term disability period.

You may use any remaining leave balance as a source of income instead of receiving a benefit during the extended short-term period. If you exhaust all leave during this period, the benefit will be available to you for the remainder of the 365 days, as long as you remain eligible for benefits.

Should you return to work during the extended short-term benefit period, contact the Retirement Systems Division regarding earnings limitations.

The extended short-term period will end in one of the following ways, whichever is first:

a) A medical professional does not continue to certify your disability.
b) You return to work in the same capacity. To avoid a possible overpayment, contact the Retirement Systems Division if you return to work.
c) Your extended short-term was not approved for the full 365 days, and you reached the end of the approved period. You may apply for the remaining balance or a portion of the remaining balance of extended short-term period, or you may apply for long-term benefits, if eligible.
d) The benefit reaches the maximum allowable 365 days. If you have reached the end of the 365 days, you may apply for long-term benefits, if eligible. It is suggested that you do not apply for long-term disability benefits more than 90 days prior to the end of your extended short-term period, provided you meet the additional requirements for long-term benefits.
e) You die.

Guide C. Am I eligible for long-term (LT) benefits?

To be eligible for long-term benefits:

1) You must complete the 365 day short-term benefit period.
2) You may not apply for long-term benefits after 180 days from the end of your short-term, the end of any accumulated leave payments, or the conclusion of any Workers' Compensation payments.
3) You must have earned at least 5 years of contributing membership credit in the Teachers' and State Employees' Retirement System within the past 96 calendar months prior to the conclusion of your short-term period, or as of the last day of continuous accumulated leave payments, whichever is later.
4) Your illness must be continuous and directly impact the performance of your regular job duties and must be permanent.
5) A medical professional must complete a Form 7A, explaining how your illness impacts your job duties.
6) You must be approved by the Retirement Systems Division's Medical Board for long-term benefits.
7) You must resign from your covered position before you can receive any long-term benefit payments.

NOTE: Approval for long-term benefits is necessary to receive retirement service credit, which will later affect your retirement date and the amount of your retirement benefit when you become eligible to convert from Disability Income Plan benefits to service retirement benefits.

Please continue to the next page.

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Guide D. What is the length of the long-term (LT) benefit period?

Long-term benefits will end in one of the following ways, whichever is first:

a) A medical professional does not continue to certify your disability when a re-examination is requested by the Medical Board.

b) You return to work as a contributing member of the Teachers' and State Employees' Retirement System. If you return to work in the above-mentioned capacity, contact the Retirement Systems Division to avoid a possible overpayment.

c) If you had less than five years of membership service as of July 31, 2007, and were denied or did not get approved for Social Security disability benefits after the first 36 months of the long-term disability period.

d) You become eligible for an unreduced service retirement benefit. You will be notified approximately 120 days before your date of eligibility for unreduced service retirement benefits, and will be given further instructions at that time.

e) You die.

Guide E. Will other benefits affect the amount of my long-term (LT) benefit?

If you receive benefits from certain agencies, your long-term benefit amount may be reduced on a dollar-for-dollar basis. If you are receiving benefits from **Workers' Compensation, Veterans Affairs, Social Security, and/or Railroad Retirement** while receiving long-term benefits, your long-term benefit will be offset for benefits that you receive from any of the agencies listed above.

A copy of all award notices must be submitted with this form.

You should file for any applicable Social Security benefits.

Long-term disability benefits are offset (reduced) by an amount equal to any Social Security benefits you are receiving (excluding widow's/widower's benefit) or which you are entitled to receive, including age 62 Social Security retirement benefits.

If you had five or more years of membership service as of July 31, 2007:

- After four years from the end of the waiting period (which is generally after the first 36 months of the long-term disability period), if you are not receiving Social Security benefits, your long- term benefit will be reduced by an amount equal to the estimated amount of a Social Security disability benefit to which you might be entitled had you been awarded Social Security disability benefits.

If you had less than five years of membership service as of July 31, 2007:

- After the first 36 months of the long-term disability period, your long-term benefits will end unless you are receiving Social Security disability benefits.

NOTE: You must provide a copy of either your Social Security Awards Notice or a Social Security Estimated Benefits Statement along with this form (Form 704) for the Retirement Systems Division to process your long-term disability application. Please contact the Social Security Administration to obtain your Social Security Awards Notice (which shows actual benefits) or a Social Security Estimated Benefits Statement (which must show estimates of both Social Security disability and age 62 benefits). You may be able to obtain a copy of your Social Security Awards Notice or Estimated Benefits Statement by logging into your Social Security account at www.ssa.gov. The Retirement Systems Division will use the Social Security Estimated Benefits Statement (either the Social Security disability or age 62 estimate, whichever occurs first) in determining the amount of the future required offsets, if applicable, if an actual Social Security Awards Notice has not been received by the time of the required offsets.

If you receive retroactive benefits from the Social Security Administration, you may be required to repay the Disability Income Plan for benefits you received during the long-term period. The amount you must repay to the Disability Income Plan for Social Security benefits you receive during the long-term period may be reduced by attorney fees paid directly by Social Security to your legal representative if you work with such a person in filing your Social Security claim.

Under the Disability Income Plan of North Carolina, a long-term disability benefit recipient may earn the difference between the monthly compensation on which the benefit is based and the net monthly amount of the long-term disability benefit after reduction for monthly Social Security benefits. If earned income exceeds this amount monthly, the monthly long-term disability benefits must be reduced on a dollar-for-dollar basis for the excess earnings.

Guide F. Will Trial Rehabilitation affect my benefits?

Trial Rehabilitation is a term used to reference the period during which a member returns to service while receiving benefits from the Disability Income Plan of North Carolina.

While receiving long-term disability benefits, you may return to service in the same capacity for a period of up to 36 continuous months without resuming regular system participation.

Trial rehabilitation does not extend the length of the extended short-term period.

During periods of trial rehabilitation, your benefits will be suspended, contributions to the Retirement System will not be withheld, and System credit is not earned.

Thank you.

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