A bill to be entitled
An act relating to the Florida Retireme

An act relating to the Florida Retirement System; amending s. 121.021, F.S.; redefining the term "termination"; providing a definition for the term "volunteer services"; amending s. 121.091; authorizing the Division of Retirement to adopt rules for the provision of volunteer services; authorizing employers to create volunteer programs; providing an effective date.

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Be It Enacted by the Legislature of the State of Florida:

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Section 1. Subsection (39) of section 121.021, Florida Statutes, is amended, and subsection (65) is added to that section, to read:

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121.021 Definitions.—The following words and phrases as used in this chapter have the respective meanings set forth unless a different meaning is plainly required by the context:

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(39) (a) "Termination" occurs, except as provided in paragraphs paragraph (b) and (c), when a member ceases all employment relationships with, and ceases providing services to, all participating employers, however:

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1. For retirements effective before July 1, 2010, if a member is employed by, or provides services to, any such employer within the next calendar month, termination shall be

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deemed not to have occurred. A leave of absence constitutes a continuation of the employment relationship, except that a leave of absence without pay due to disability may constitute termination if such member makes application for and is approved for disability retirement in accordance with s. 121.091(4). The department or state board may require other evidence of termination as it deems necessary.

- 2. For retirements effective on or after July 1, 2010, if a member is employed by, or provides services to, any such employer within the next 6 calendar months, termination shall be deemed not to have occurred. A leave of absence constitutes a continuation of the employment relationship, except that a leave of absence without pay due to disability may constitute termination if such member makes application for and is approved for disability retirement in accordance with s. 121.091(4). The department or state board may require other evidence of termination as it deems necessary.
- (b) "Termination" for a member <u>ending participation</u>

 electing to participate in the Deferred Retirement Option

 Program occurs when the program participant ceases all

 employment relationships with, and ceases providing services to,

 all participating employers in accordance with s. 121.091(13),

 however:
- 1. For termination dates occurring before July 1, 2010, if a the member is employed by or provides services to, any such

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employer within the next calendar month, termination <u>shall</u> will be deemed not to have occurred, except as provided in s.

121.091(13)(b)4.c. A leave of absence <u>constitutes</u> shall constitute a continuation of the employment relationship.

- 2. For termination dates occurring on or after July 1, 2010, if <u>a</u> the member becomes employed by, or provides services to, any such employer within the next 6 calendar months, termination shall will be deemed not to have occurred, except as provided in s. 121.091(13)(b)4.c. A leave of absence constitutes a continuation of the employment relationship.
- (c) Effective July 1, 2011, "termination" for a member receiving a refund of employee contributions occurs when a member ceases all employment relationships with, and ceases providing services to, all participating employers for 3 calendar months. A leave of absence constitutes a continuation of the employment relationship.

All terminations must be a termination of employment as defined in 26 C.F.R. s. 1.409A-1(h)(1)(ii). Volunteer services do not constitute employment by, or provision of services to, an employer. The department or state board may require any evidence of termination necessary to determine compliance with this chapter or the rules promulgated thereunder.

(65) "Volunteer services" means services provided in accordance with any rules promulgated under s. 121.091(15).

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Section 2. Paragraph (c) of subsection (4) of section 121.091, Florida Statutes, is amended, and subsection (15) is added to that section, to read:

121.091 Benefits payable under the system.—Benefits may not be paid under this section unless the member has terminated employment as provided in s. 121.021(39)(a) or begun participation in the Deferred Retirement Option Program as provided in subsection (13), and a proper application has been filed in the manner prescribed by the department. The department may cancel an application for retirement benefits when the member or beneficiary fails to timely provide the information and documents required by this chapter and the department's rules. The department shall adopt rules establishing procedures for application for retirement benefits and for the cancellation of such application when the required information or documents are not received.

- (4) DISABILITY RETIREMENT BENEFIT.-
- (c) Proof of disability.—The administrator, before approving payment of any disability retirement benefit, shall require proof that the member is totally and permanently disabled as provided herein:
- 1. Such proof shall include the certification of the member's total and permanent disability by two licensed physicians of the state and such other evidence of disability as the administrator may require, including reports from vocational

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rehabilitation, evaluation, or testing specialists who have evaluated the applicant for employment. A member whose position with an employer requires that the member work full time outside this state in the United States may include certification by two licensed physicians of the state where the member works. A member who is receiving care at a federal Veterans Health Administration facility may include certification by two licensed physicians working at the facility.

2. It must be documented that:

- a. The member's medical condition occurred or became symptomatic during the time the member was employed in an employee/employer relationship with his or her employer;
- b. The member was totally and permanently disabled at the time he or she terminated covered employment; and
- c. The member has not been employed with, or provided any services to, any other employer after such termination.
- 3. If the application is for in-line-of-duty disability, in addition to the requirements of subparagraph 2., it must be documented by competent medical evidence that the disability was caused by a job-related illness or accident which occurred while the member was in an employee/employer relationship with his or her employer.
- 4. The unavailability of an employment position that the member is physically and mentally capable of performing will not be considered as proof of total and permanent disability.

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(15) VOLUNTEER SERVICES.—The division may adopt rules
establishing criteria for volunteer services that retirees may
provide to an employer while still being deemed to have a
termination as defined in s. 121.021(39). Employers may
establish volunteer programs in accordance with these rules.
Section 3. This act shall take effect July 1, 2022.

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