



PERS, SERS and TRS Plans 2 and 3 Eligibility Worksheet

Employers retain this worksheet

DRS contact information:
www.drs.wa.gov • 800.547.6657
 360.664.7000 • TTY: 711

This form is used and retained by employers to help determine an employee's position eligibility for PERS, SERS and TRS Plans 2 and 3 membership.

Instructions

You must evaluate the **position** and the **person**:

- If the position is eligible for retirement as determined in Section 2, report the employee from the first day of eligibility
- If the employee is working in more than one position for you, determine if they are retirement-eligible in Section 3

Section 1: Employee Information

Name (Last, First, Middle)	Social Security Number	Date Eligibility Evaluated (mm/dd/yyyy)
Position Title and Number		Date Employee Entered Position (mm/dd/yyyy)
Is The Position New Or Existing? <input type="checkbox"/> New <input type="checkbox"/> Existing		If Existing, The Position Was Formerly Held By:

Section 2: Evaluate Position Eligibility

1. Does the position ever require at least 70 hours of compensated employment in a month? If you answered yes to question 1, go to question 2. If you answered no, STOP. The position is not eligible.	PERS/SERS <input type="checkbox"/> Yes <input type="checkbox"/> No	TRS <input type="checkbox"/> Yes <input type="checkbox"/> No
2. Does the position require at least 5 months of 70 or more hours of compensated employment per month during a 12-month period for PERS/SERS or during a school year for TRS? PERS/SERS: If you answered yes to question 2, go to Question 3. If you answered no, the position is not eligible. TRS: If you answered yes to question 2, the position is eligible; report to DRS. If you answered no, STOP. The position is not eligible.	PERS/SERS <input type="checkbox"/> Yes <input type="checkbox"/> No	TRS <input type="checkbox"/> Yes <input type="checkbox"/> No
3. PERS/SERS: Is it expected to require at least 5 months of at least 70 hours for two consecutive years? If you answered yes, the position is eligible; report to DRS. If you answered no, STOP. The position is not eligible.	PERS/SERS <input type="checkbox"/> Yes <input type="checkbox"/> No	Does not apply to TRS

A PERS/SERS eligible position is one that is expected to require at least five months of 70 hours or more for two consecutive years initially. Once a position is determined to be eligible, it will continue to be eligible if it requires at least five months of 70 or more hours of compensated service at least every other year.

- Do not include educational substitute on-call service in the initial eligibility determination of a position.
- If multiple people share the same eligible position, all are retirement-eligible.
- If a project position meets these requirements, the position may be eligible. Refer to Chapter 2 of the Employer Handbook.

Based on this evaluation, is the position eligible or ineligible? If the employee is working in only one position , you have completed the eligibility determination. Next, notify the employee in Section 4. If the employee is working in more than one position , they may still be retirement eligible. Continue to Section 3 on the back of this worksheet.	<input type="checkbox"/> Eligible	<input type="checkbox"/> Ineligible
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Section 3: A Person Working in More Than One Position

Complete this section only if the **PERSON** is working in more than one position for you.

- All the monthly work of an employee for one employer counts as one position
- However, do not include educational substitute on-call service in the initial eligibility determination
- If the employee is working in multiple systems (example: PERS and TRS) contact Employer Support Services for assistance

1. List the job titles and position numbers:

Job Title 1	Position Number
Job Title 2	Position Number

2. **Return to Section 2 to evaluate the eligibility of an employee working in one system by using the combined hours of service.** For example: when an employee has two PERS positions, combine the hours worked in both positions. When the employee's combined hours of employment meet the definition of an eligible position in Section 2, the employee is retirement-eligible.

Section 4: Eligibility Determination and Employee Notification

Employers: Check the appropriate box and have the employee sign the form to acknowledge the position eligibility determination. You retain this worksheet.

The position has been determined to be: Eligible for membership
 Ineligible for membership

Employee's Signature _____ Date (mm/dd/yyyy) _____

Employer Representative's Name and Title (Please Print)
 Cheri Jo Kramer, Benefits and Programs Coordinator

Employer Representative's Signature _____ Date (mm/dd/yyyy) _____

Section 5: Periodic Eligibility Review

Employers: You should review eligibility periodically. Fill out this section when eligibility has changed.

Date: Reviewer:	Has eligibility changed? <input type="checkbox"/> Yes <input type="checkbox"/> No	Comment:
Date: Reviewer:	Has eligibility changed? <input type="checkbox"/> Yes <input type="checkbox"/> No	Comment:
Date: Reviewer:	Has eligibility changed? <input type="checkbox"/> Yes <input type="checkbox"/> No	Comment:

Employers retain this worksheet to document eligibility decisions.