

**Member History Chart – Employee Hired Into An Eligible Position**  
 (This chart is *not* for retirees or substitutes)

<b>Member History</b>	Hiring into an eligible PERS position report as	Hiring into an eligible LEOFF position report as	Hiring into an eligible SERS position report as	Hiring into an eligible TRS position report as	Hiring into an eligible PSERS position report as
<b>No Previous Membership</b>					
No Membership History	New Member <sup>1</sup>	LEOFF 2	New Member <sup>1</sup>	New Member <sup>1</sup>	PSERS 2
<b>PERS Previous Membership</b>					
Plan 1 member	PERS 1	LEOFF 2	PERS 1	New Member <sup>1</sup>	PERS 1
Plan 2 member	PERS 2 January Transfer Option <sup>2</sup>	LEOFF 2	New Member	New Member <sup>1</sup>	PSERS 2
Plan 2 Chosen member	PERS 2 <sup>3</sup>	LEOFF 2	New Member	New Member <sup>1</sup>	PSERS 2
Plan 2 Converted to SERS member	New Member <sup>1</sup>	LEOFF 2	See SERS Previous Membership	New Member <sup>1</sup>	PSERS 2
Plan 3 member	PERS 3 <sup>4</sup>	LEOFF 2	New Member <sup>1</sup>	New Member <sup>1</sup>	PSERS 2
No Plan 2/3 choice made	New Member <sup>1</sup>	LEOFF 2	New Member	New Member <sup>1</sup>	PSERS 2
<b>PSERS Previous Membership</b>					
Plan 2 member	New Member <sup>1</sup>	LEOFF 2	New Member <sup>1</sup>	New Member <sup>1</sup>	PSERS 2
<b>LEOFF Previous Membership</b>					
Plan 1 member	New Member <sup>1</sup>	LEOFF 1	New Member <sup>1</sup>	New Member <sup>1</sup>	PSERS 2
Plan 2 member	New Member <sup>1</sup>	LEOFF 2	New Member <sup>1</sup>	New Member <sup>1</sup>	PSERS 2
<b>SERS Previous Membership</b>					
Plan 2 member	New Member <sup>1</sup>	LEOFF 2	See SERS Previous Membership	New Member <sup>1</sup>	PSERS 2
Plan 2 Chosen member	New Member <sup>1</sup>	LEOFF 2	SERS 2 <sup>3</sup>	New Member <sup>1</sup>	PSERS 2
Plan 3 member	New Member <sup>1</sup>	LEOFF 2	SERS 3 <sup>4</sup>	New Member <sup>1</sup>	PSERS 2
No Plan 2/3 Choice Made	New Member <sup>1</sup>	LEOFF 2	New Member <sup>1</sup>	New Member <sup>1</sup>	PSERS 2

## Member History Chart Continued

Member History	Hiring into an eligible PERS position report as	Hiring into an eligible LEOFF position report as	Hiring into an eligible SERS position report as	Hiring into an eligible TRS position report as	Hiring into an eligible PSERS position report as
<b>TRS Previous Membership</b>					
Plan 1 Former (withdrawn)	New Member <sup>1</sup>	LEOFF 2	New Member <sup>1</sup>	Contact DRS	PSERS 2
Plan 1 Member	Employer Type <sup>5</sup>	LEOFF 2	TRS 1	TRS 1	Employer Type <sup>6</sup>
Plan 2 member	New Member <sup>1</sup>	LEOFF 2	New Member <sup>1</sup>	TRS 2- January Transfer Option <sup>2</sup>	PSERS 2
Plan 2 Chosen member	New Member <sup>1</sup>	LEOFF 2	New Member <sup>1</sup>	TRS 2 <sup>3</sup>	PSERS 2
Plan 3 member	New Member <sup>1</sup>	LEOFF 2	New Member <sup>1</sup>	TRS 3 <sup>4</sup>	PSERS 2
No Plan 2/3 Choice Made	New Member <sup>1</sup>	LEOFF 2	New Member <sup>1</sup>	New Member <sup>1</sup>	PSERS 2

<sup>1</sup> **New Member** – has 90 calendar days to make an irrevocable Plan Choice. New employees have the option to become members of Plan 2 or Plan 3 if they established membership on or after:

- PERS (for state agency or higher education employers) - March 1, 2002,
- PERS (for local government employers) - September 1, 2002
- SERS (all members) on or after August 1, 2009.
- SERS (with no prior service in PERS Plan 2) between July 1, 2007 and July 31, 2009.
- TRS - July 1, 2007

The employee must be reported in Plan 2 until they choose their Plan or are defaulted by the employer into Plan 3, rate option A, investment program WSIB. If reporting for the first time, be sure to include the Begin Date, even if it's the same as the Plan Choice date.

<sup>2</sup> **January Transfer Option** – an individual has the option to transfer to Plan 3 in January of any year and must select their Contribution Rate Option and Investment Program at that time.

<sup>3</sup> **Plan 2 Chosen Member** – An individual who chose Plan 2 during their 90 calendar day period doesn't have the option to transfer in January.

<sup>4</sup> **Plan 3 Member** – has 90 calendar days from hire date to select a Contribution Rate Option and Investment Program.

<sup>5</sup> **Employer Type** – State agency or education employers must report member in TRS Plan 1 regardless of the type of position. Local government employers must treat person as a New Member.<sup>1</sup>

<sup>6</sup> **Employer Type** – State agencies must report member in TRS Plan 1 regardless of the type of position. All other PSERS employers must report member in PSERS Plan 2.