

Retirement Membership Options – Higher Education Faculty, HERP-Eligible Positions

Effective July 1, 2011

ESHB 1981, passed during the 2011 legislative session, changed the retirement eligibility rules for higher education employees hired into HERP-eligible positions. The following table is provided to assist higher education employers in making eligibility determinations for new employees. New employees are eligible for a one-time System Choice at each institution, once a choice has been made; it is irrevocable for that institution (Community and Technical Colleges are all considered one institution). Please contact DRS if you have additional questions regarding eligibility determinations.

HIGHER EDUCATION FACULTY POSITIONS	EMPLOYEE’S HISTORY	HERP OR DRS PLAN?
NEW TO HERP-ELIGIBLE EMPLOYMENT July 1, 2011 and after	No DRS plan history	<ul style="list-style-type: none"> 30-day choice between TRS Plan 3 or HERP Choice is permanent
	TRS Plan 1, active and not eligible to retire	<ul style="list-style-type: none"> HERP or TRS Plan 1¹
	TRS Plan 1 and eligible to retire	<ul style="list-style-type: none"> CANNOT participate in HERP; TRS Plan 1¹ ONLY
	TRS Plan 1, withdrawn	<ul style="list-style-type: none"> HERP or TRS Plan 1¹ UW & WSU exception: HERP ONLY
	TRS Plan 2 or 3, active and not eligible to retire	<ul style="list-style-type: none"> HERP or previous TRS Plan¹
	TRS Plan 2 or 3 and eligible to retire	<ul style="list-style-type: none"> CANNOT participate in HERP; Previous TRS Plan ONLY UW & WSU exception: Institution’s rule regarding TRS participation apply
	TRS Plan 2, withdrawn	<ul style="list-style-type: none"> HERP or TRS Plan 2¹ UW & WSU exception: HERP ONLY
	All other DRS plans, active or withdrawn and not eligible to retire	<ul style="list-style-type: none"> 30-day choice between TRS Plan 3 or HERP Choice is permanent
	All other DRS plans ² and eligible to retire (with less than 15 years of service)	<ul style="list-style-type: none"> CANNOT participate in HERP; TRS Plan 3 ONLY
	All other DRS plans ² and eligible to retire (with more than 15 years of service)	<ul style="list-style-type: none"> CANNOT participate in HERP; Estopped³ from TRS; Participate in previous plan if PERS¹
	DRS retiree	<ul style="list-style-type: none"> CANNOT participate in HERP; Hourly limits apply (see Chapter 5 - Reporting Retirees Who Return to Work)
MADE HERP/PLAN 3 CHOICE July 1, 2011 and after	Chose or defaulted to HERP	<ul style="list-style-type: none"> HERP ONLY, if the irrevocable choice was made at your institution. If a choice has not been made at your institution, 30-day choice between HERP and TRS Plan 3.
	Chose TRS Plan 3	<ul style="list-style-type: none"> TRS Plan 3 ONLY
	Chose PERS Plan 3	<ul style="list-style-type: none"> 30-day choice between TRS Plan 3 and HERP
HAD PREVIOUS HERP-ELIGIBLE EMPLOYMENT before July 1, 2011	HERP participant	<ul style="list-style-type: none"> HERP ONLY
	Did not participate in HERP (with DRS history)	<ul style="list-style-type: none"> Rules under “New to HERP-Eligible Employment” section apply (except employee CANNOT be given 30-day choice between Plan 3 or HERP)

¹ If institution allows, and DRS rules permit.

² LEOFF retirees and LEOFF members eligible to retire have additional options, please contact DRS.

³ Estoppel rules do not apply if membership was established prior to March 19, 1976.