

Retirement Membership Options – Higher Education Non-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 NON-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 PERS Plan 3 or HERP • Choice is permanent
	PERS Plan 1, 2 or 3 active or withdrawn and not eligible to retire	<ul style="list-style-type: none"> • HERP or previous PERS Plan¹
	PERS Plan 1, 2 or 3 and eligible to retire	<ul style="list-style-type: none"> • CANNOT participate in HERP; • Previous PERS Plan ONLY
	TRS Plan 1 active and not eligible to retire	<ul style="list-style-type: none"> • HERP or TRS Plan 1¹
	All other DRS plans, active or withdrawn and not eligible to retire	<ul style="list-style-type: none"> • 30-day choice between PERS 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; • PERS 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 PERS
	DRS retiree	<ul style="list-style-type: none"> • CANNOT participate in HERP; • Hourly limits apply (see Chapter 5 - Reporting Retirees Who Return to Work)
HIGHER EDUCATION NON-FACULTY POSITIONS	EMPLOYEE'S HISTORY	HERP OR DRS PLAN?
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 PERS Plan 3.
	Chose PERS Plan 3	<ul style="list-style-type: none"> • PERS Plan 3 ONLY
	Chose TRS Plan 3	<ul style="list-style-type: none"> • 30 day choice between PERS Plan 3 and HERP
HIGHER EDUCATION NON-FACULTY POSITIONS	EMPLOYEE'S HISTORY	HERP OR DRS PLAN?
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.