State of Washington
Department of Retirement Systems (DRS)

Position Eligibility Worksheet - PERS, SERS, TRS Plan 2 & Plan 3

Check only one: PERS ☐   SERS ☐   TRS Plan 2 & Plan 3 ☐

You must evaluate the POSITION and the PERSON.

- If the **position** is eligible 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 the **person** is retirement eligible in Section 3.

Section 1: Employee Data

Name		
Social Security Number	Date eligibility evaluated	Date employee entered position
Position Title		Position Number
Is this position new or existing? New Existing	If existing, position formerly held by:	

Section 2: Evaluating if the POSITION is retirement eligible

Place a check mark in the box to verify your determination.

1. Does this position ever require at least 70 hours of compensated employment in a month?		
PERS/SERS	No Yes	If no, not eligible If yes, go to next question
TRS	No Yes	If no, not eligible. If yes, go to next question
2. Does this 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 a school year for TRS?		
PERS/ SERS	No Yes	If no, not eligible If yes, and this is an existing position, the position is eligible; report to DRS. If this is a new position, go to question 3.
TRS	No Yes	If no, not eligible If yes, the position is eligible. Report to DRS.
3. If this is a new position, is the position expected to require at least 5 months of at least 70 hours for two consecutive years?		
PERS/ SERS	No Yes	If no, not eligible If yes, the position is eligible. Report to DRS.
TRS	Not applicable	

- A PERS/SERS eligible position requires 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, the position is:	**Eligible ☐**	**Ineligible ☐**
If the employee is working in only *one position*, you have completed the eligibility determination. Next, notify the employee in Section 4.	**Please continue on next page →**	
If the employee is working in *more than one position*, the employee may still be retirement eligible. Continue to Section 3.		

Section 3: 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 job 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 using the combined hours of service. For example, for two PERS positions combine the hours worked in both positions. If the employee's combined hours of employment meet the definition of an eligible position in Section 2, the employee is retirement eligible.

Section 4: Make your eligibility determination and notify the employee

The employer checks the appropriate box below; then has the employee sign the form to acknowledge the position eligibility determination. The employer retains the worksheet to document eligibility determinations.

The position has been determined to be: **Eligible** ☐   **Not Eligible** ☐   for membership.

_____
Employee's Signature and Date

_____
Employer Representative Name and Title (Please print)

_____
Employer Representative Signature

Section 5: Employers should review eligibility periodically

Eligibility Has Changed

Date: Reviewer:	Yes ☐ No ☐	Comment:
Date: Reviewer:	Yes ☐ No ☐	Comment:
Date: Reviewer:	Yes ☐ No ☐	Comment:
Date: Reviewer:	Yes ☐ No ☐	Comment:

Employer retains this worksheet to document eligibility decisions.

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