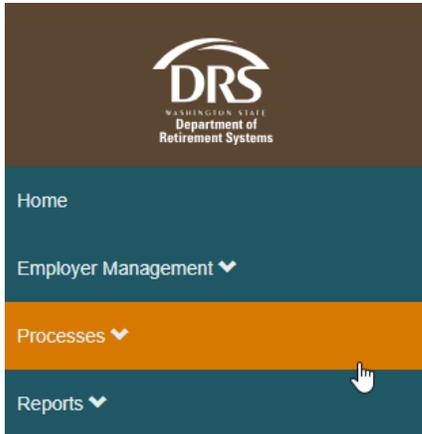




ERA: Verify 2008 ERF and Retirement Status

How to look up a member if they retired under the 2008 ERFs or applied for retirement

1. Open the Process menu and select “Member Management”



2. Select “Start”

Member Management Process

Select **Start** to begin a new Member Management Case.

The Member Management Process provides access to:

- Member Lookup – Verify an employee’s retirement membership and other earnings information.
- Determine Member Eligibility – Verify a position’s or an employee’s eligibility to participate in a DRS-covered retirement system and plan.
- Enroll Member – Enroll a member in a DRS-covered retirement system and plan.
- Update Member – Update information related to a member.

3. Enter the member’s Social Security number and select “Search”

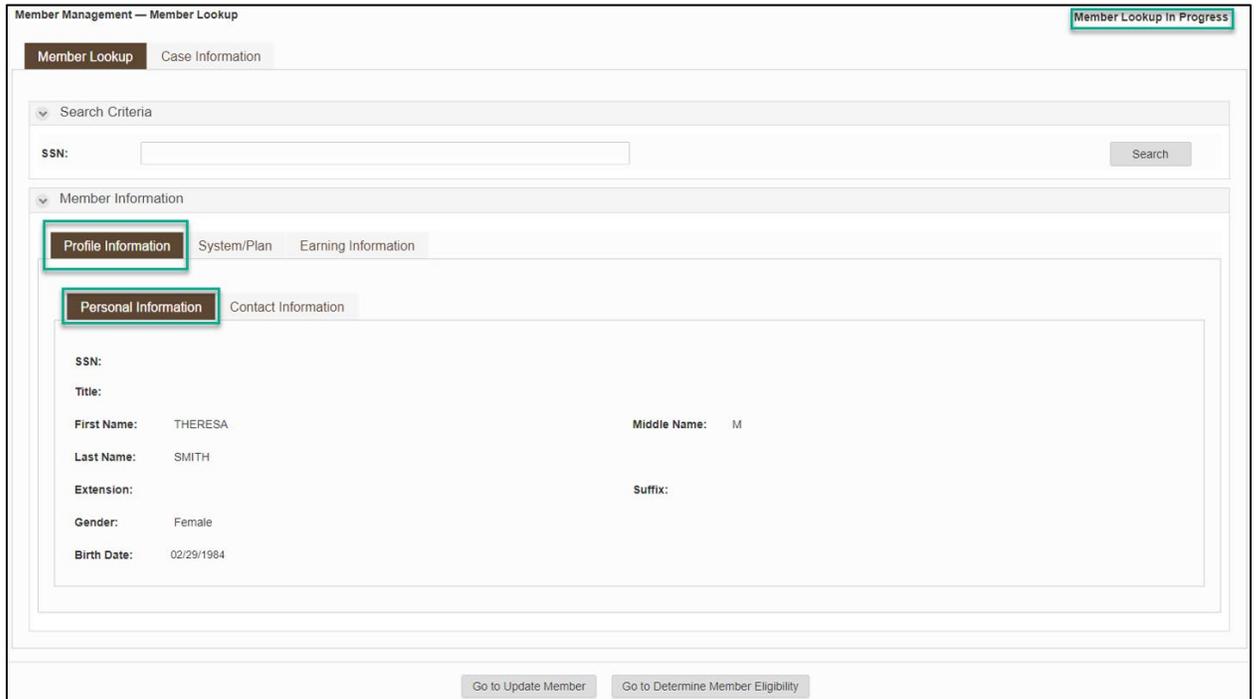
Member Management — Member Lookup Member Lookup In Progress

Member Lookup Case Information

Search Criteria

SSN:

The “Member Lookup In Progress” screen is displayed in the “Profile Information” tab. The “Personal Information” tab shows the member’s information.



Member Management — Member Lookup Member Lookup In Progress

Member Lookup Case Information

Search Criteria

SSN: Search

Member Information

Profile Information System/Plan Earning Information

Personal Information Contact Information

SSN:

Title:

First Name: THERESA Middle Name: M

Last Name: SMITH

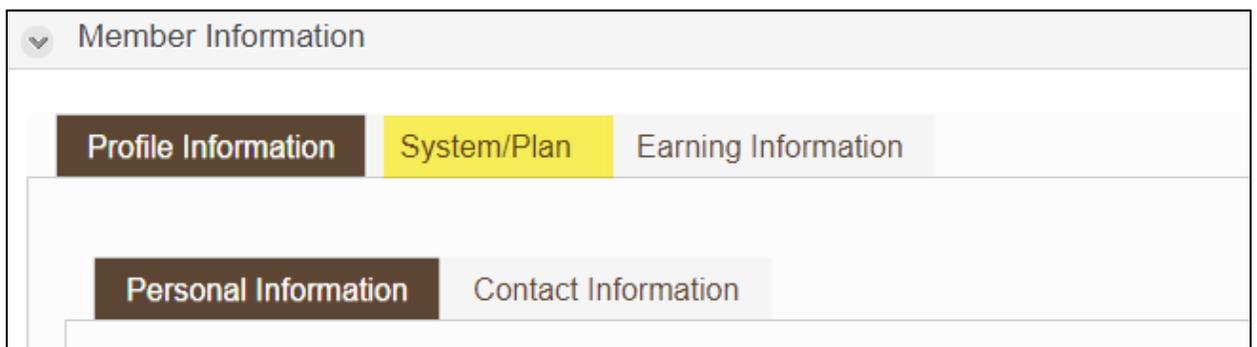
Extension: Suffix:

Gender: Female

Birth Date: 02/29/1984

Go to Update Member Go to Determine Member Eligibility

4. Select “System/Plan”



Member Information

Profile Information System/Plan Earning Information

Personal Information Contact Information

The System and Plans for the member are displayed with detailed information

5. Select the magnifying glass/paper icon next to appropriate retirement system

Member Information

Profile Information **System/Plan** Earning Information

System/Plan

System	Plan	Entry Date	Status	Plan Choice Date	Choice Status	Total Service Credit Months	Total Service Credit Years	
Deferred Compensation Program (DCP)	Plan 1	11/10/2010	Active		Enrolled into this plan	0.00	0.00	
Public Employees' Retirement System (PERS)	Plan 2	01/06/1992	Active		Has January transfer rights	334.00	27.83	

Go to Update Member Go to Determine Member Eligibility

The Employment Information tab is displayed with an Employment History and Retirement Data tab.

6. Select "Retirement Data"

Employment Information

Employment History **Retirement Data**

Employment History

Report Group	Begin Date	Separation Date	Job Type	Position Title	Position ID	Substitute	Employer
0180	01/06/1992					No	University Of Washington - Uw

Close

Examples:

A. The member is retired under the 2008 Early Retirement Factors (ERF)

Employment Information

Employment History **Retirement Data**

Benefit Reduction Type : 2008 Early Retirement Factor Retirement Date: 7/1/2013

Close

B. The member retired with a regular service retirement

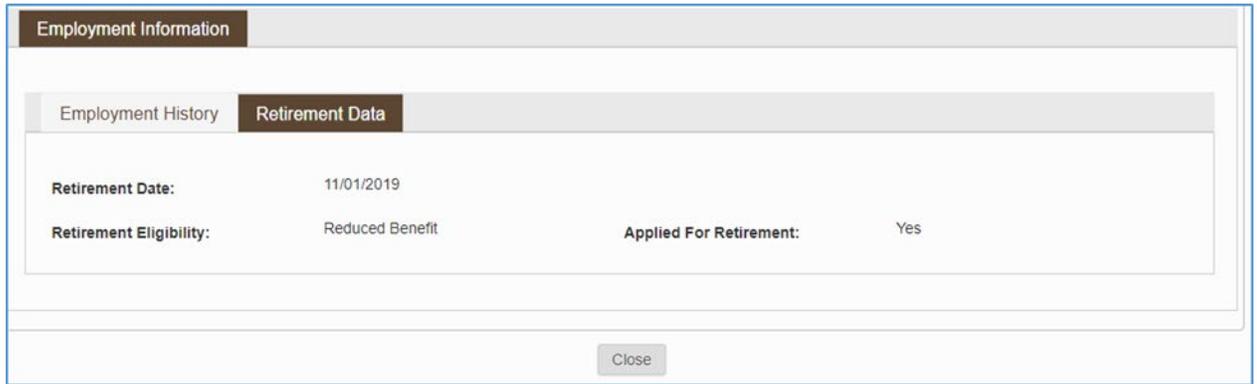
Employment Information	
Employment History	Retirement Data
Retirement Date:	07/01/2011
Close	

C. The member has applied for retirement:

Employment Information	
Employment History	Retirement Data
Retirement Date:	12/01/2019
Retirement Eligibility:	Unreduced Benefit
Retirement Status:	Logged
Applied For Retirement:	Yes
Close	

When you see **applied for retirement** with a date in the past that doesn't mean the member has retired yet. The application was logged but it has not yet been processed. Once it's gone through the final process it will look like example "A." Check Member Management again. In example D, the member applied for retirement with a date in the past. This member will actually be a 2008 ERF retiree upon completion of the process.

D. The member has applied for retirement with a retroactive date:



Employment Information

Employment History **Retirement Data**

Retirement Date: 11/01/2019

Retirement Eligibility: Reduced Benefit **Applied For Retirement:** Yes

Close

E. The member is eligible for retirement but hasn't submitted an application:



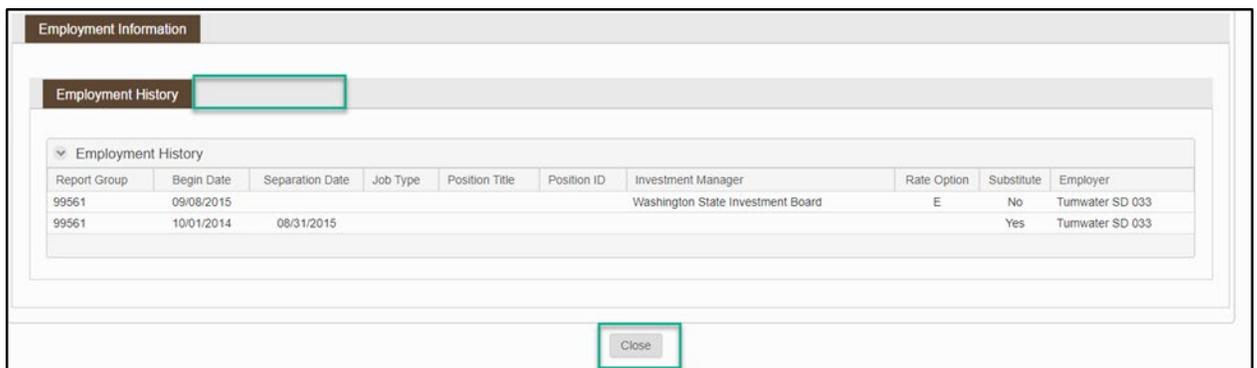
Employment Information

Employment History **Retirement Data**

Retirement Eligibility: Reduced Benefit

Close

F. If the member isn't eligible to retire there will be no "Retirement Data" tab:



Employment Information

Employment History

Employment History

Report Group	Begin Date	Separation Date	Job Type	Position Title	Position ID	Investment Manager	Rate Option	Substitute	Employer
99561	09/08/2015					Washington State Investment Board	E	No	Tumwater SD 033
99561	10/01/2014	08/31/2015						Yes	Tumwater SD 033

Close

7. Select “Close” at the bottom of the screen to close out of the Retirement Data or the Detail Form screen

If you have more members to look up, you can do so directly from the “Member Lookup In Progress” screen or you can start the process back at the beginning from the process menu.

Member Management — Member Lookup Member Lookup In Progress

Member Lookup Notifications Case Information

Search Criteria

SSN: Search

Member Information

Profile Information System/Plan Earning Information

System/Plan

System	Plan	Entry Date	Status	Plan Choice Date	Choice Status	Total Service Credit Months	Total Service Credit Years	
Public Employees' Retirement System (PERS)	Plan 2	10/16/1988	Active		Has January transfer rights	372.00	31.00	

Go to Update Member Go to Determine Member Eligibility