

Retirement Membership Options for Higher Education Non-Faculty, HERP-Eligible Positions



Washington State Department of Retirement Systems

Effective July 1, 2011, legislation changed the retirement eligibility rules for higher education employees hired into HERP-eligible positions. The following table is provided to help higher education employers make eligibility determinations for new employees. New employees are eligible for a one-time System Choice at each institution (all Community and Technical Colleges are considered one institution). Once a choice has been made, it is irrevocable for that institution. Please [contact DRS](#) if you have additional questions about 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	PERS Plan 1, 2 or 3 active or withdrawn and not eligible for a full retirement benefit	<ul style="list-style-type: none"> HERP or previous PERS Plan¹
	PERS Plan 1, 2 or 3 and eligible for a full retirement benefit	<ul style="list-style-type: none"> CANNOT participate in HERP Previous PERS Plan ONLY
	TRS Plan 1 active and not eligible for a full retirement benefit	<ul style="list-style-type: none"> HERP or TRS Plan 1¹
	All other DRS plans ² , active or withdrawn and not eligible for a full retirement benefit	<ul style="list-style-type: none"> 30-day choice between PERS Plan 3 or HERP Choice is permanent
	Other DRS plans ² and eligible for a full retirement benefit (with more than 15 years of service)	<ul style="list-style-type: none"> CANNOT participate in HERP Estopped³ from PERS 3
	All other DRS plans ² and eligible for a full retirement benefit (with less than 15 years of service)	<ul style="list-style-type: none"> CANNOT participate in HERP PERS Plan 3 ONLY
DRS retiree	<ul style="list-style-type: none"> CANNOT participate in HERP Hourly limits apply (see Chapter 5) 	
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 or 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 the "New to HERP-Eligible Employment" section apply (except employee CANNOT be given a 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.