

# Retirement Membership Options for Higher Education 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 Ed Faculty Positions	Employee's History	HERP or DRS Plan?
<b>New to HERP-Eligible Employment</b> July 1, 2011 and after	No DRS plan history	<ul style="list-style-type: none"> <li>30-day choice between TRS Plan 3 or HERP</li> <li>Choice is permanent</li> </ul>
	TRS Plan 1 active and <b>not eligible</b> for a full retirement benefit	<ul style="list-style-type: none"> <li>HERP or TRS Plan 1<sup>1</sup></li> </ul>
	TRS Plan 1 and <b>eligible</b> for a full retirement benefit	<ul style="list-style-type: none"> <li><b>CANNOT</b> participate in HERP</li> <li>TRS Plan 1<sup>1</sup> <b>ONLY</b></li> </ul>
	TRS Plan 1 withdrawn	<ul style="list-style-type: none"> <li>HERP or TRS Plan 1<sup>1</sup></li> <li>UW and WSU exception: <b>HERP ONLY</b></li> </ul>
	TRS Plans 2 and 3 active and <b>not eligible</b> for a full retirement benefit	<ul style="list-style-type: none"> <li>HERP or previous TRS Plan<sup>1</sup></li> </ul>
	TRS Plans 2 and 3 active and <b>eligible</b> for a full retirement benefit	<ul style="list-style-type: none"> <li><b>CANNOT</b> participate in HERP</li> <li>Previous TRS Plan<sup>1</sup> <b>ONLY</b></li> <li>UW and WSU exception: Institution's rule regarding TRS participation applies</li> </ul>
	TRS Plan 2 withdrawn	<ul style="list-style-type: none"> <li>HERP or TRS Plan 2<sup>1</sup></li> <li>UW and WSU exception: <b>HERP ONLY</b></li> </ul>
	All other DRS plans, active or withdrawn and <b>not eligible</b> for a full retirement benefit	<ul style="list-style-type: none"> <li>30-day choice between TRS Plan 3 or HERP</li> <li>Choice is permanent</li> </ul>
	All other DRS plans <sup>2</sup> and <b>eligible</b> for a full retirement benefit (with <b>less</b> than 15 years of service)	<ul style="list-style-type: none"> <li><b>CANNOT</b> participate in HERP</li> <li>TRS Plan 3 <b>ONLY</b></li> </ul>
	All other DRS plans <sup>2</sup> and <b>eligible</b> for a full retirement benefit (with <b>more</b> than 15 years of service)	<ul style="list-style-type: none"> <li><b>CANNOT</b> participate in HERP</li> <li>Estopped<sup>3</sup> from TRS</li> <li>Participate in previous plan if PERS<sup>4</sup></li> </ul>
DRS retiree	<ul style="list-style-type: none"> <li><b>CANNOT</b> participate in HERP</li> <li>Hourly limits apply (<a href="#">see Chapter 5</a>)</li> </ul>	
Higher Ed Faculty Positions	Employee's History	HERP or DRS Plan?
<b>Made HERP/Plan 3 Choice</b> July 1, 2011 and after	Chose or defaulted to HERP	<ul style="list-style-type: none"> <li><b>HERP ONLY</b>, if the irrevocable choice was made at your institution</li> <li>If a choice has not been made at your institution, 30-day choice between HERP and TRS Plan 3</li> </ul>
	Chose TRS Plan 3	<ul style="list-style-type: none"> <li>TRS Plan 3 <b>ONLY</b></li> </ul>
	Chose PERS Plan 3	<ul style="list-style-type: none"> <li>30-day choice between TRS Plan 3 or HERP</li> </ul>
Higher Ed Faculty Positions	Employee's History	HERP or DRS Plan?
<b>Had Previous HERP-Eligible Employment</b> Before July 1, 2011	HERP participant	<ul style="list-style-type: none"> <li><b>HERP ONLY</b></li> </ul>
	Did not participate in HERP (with DRS history)	<ul style="list-style-type: none"> <li>Rules under the "New to HERP-Eligible Employment" section apply (except employee <b>CANNOT</b> be given a 30-day choice between Plan 3 or HERP)</li> </ul>

<sup>1</sup> If institution allows, and DRS rules permit.

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

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