Member History Reporting Chart – Employee Hired Into An Eligible Position
(This chart is NOT for retirees or substitutes.)

Washington State Department of Retirement Systems

DRS
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Department of
Retirement Systems

Member history	Hiring into an eligible PERS position? report as …	Hiring into an eligible LEOFF position? report as …	Hiring into an eligible SERS position? report as …	Hiring into an eligible TRS position? report as …	Hiring into an eligible PSERS position? report as …
No previous membership					
No membership history	New member[1]	LEOFF 2	New member[1]	New member[1]	PSERS 2
PERS previous membership					
Plan 1 member	PERS 1	LEOFF 2	PERS 1	New member[1]	PERS 1
Plan 2 member	PERS 2 January Transfer Option[2]	LEOFF 2	New member[1]	New member[1]	PSERS 2
Plan 2 chosen member	PERS 2[3]	LEOFF 2	New member[1]	New member[1]	PSERS 2
Plan 2 converted to SERS member	New member[1]	LEOFF 2	See SERS previous membership	New member[1]	PSERS 2
Plan 3 member	PERS 3[4]	LEOFF 2	New member[1]	New member[1]	PSERS 2
No Plan 2/3 choice made	New member[1]	LEOFF 2	New member[1]	New member[1]	PSERS 2
PSERS previous membership					
Plan 2 member	New member[1]	LEOFF 2	New member[1]	New member[1]	PSERS 2
LEOFF previous membership					
Plan 1 member	New member[1]	LEOFF 1	New member[1]	New member[1]	PSERS 2
Plan 2 member	New member[1]	LEOFF 2	New member[1]	New member[1]	PSERS 2

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SERS previous membership					
Plan 2 member	New member[1]	LEOFF 2	See SERS previous membership	New member[1]	PSERS 2
Plan 2 chosen member	New member[1]	LEOFF 2	PERS 2[3]	New member[1]	PSERS 2
Plan 3 member	New member[1]	LEOFF 2	PERS 3[4]	New member[1]	PSERS 2
No Plan 2/3 choice made	New member[1]	LEOFF 2	New member[1]	New member[1]	PSERS 2
TRS previous membership					
Plan 1 former (withdrawn)	New member[1]	LEOFF 2	New member[1]	Contact DRS	PSERS 2
Plan 1 member	Employer Type[5]	LEOFF 2	TRS 1	TRS 1	Employer Type[6]
Plan 2 member	New member[1]	LEOFF 2	New member[1]	TRS 2 January Transfer Option[2]	PSERS 2
Plan 2 chosen member	New member[1]	LEOFF 2	New member[1]	TRS 2[3]	PSERS 2
Plan 3 member	New member[1]	LEOFF 2	New member[1]	TRS 3[4]	PSERS 2
No Plan 2/3 choice made	New member[1]	LEOFF 2	New member[1]	New member[1]	PSERS 2

[1] New Member – has 90 calendar days to make an irrevocable Plan Choice. New employees have the option to become members of Plan 2 or Plan 3 if they established membership on or after:
- PERS (for state agency or higher education employers) – March 1, 2002
- PERS (for local government employers) – Sept. 1, 2002
- SERS (all members) – on or after Aug. 1, 2009
- SERS (with no prior service in PERS Plan 2) – between July 1, 2007, and July 31, 2009
- TRS July 1, 2007

The employee must be reported in Plan 2 until they choose their Plan or are defaulted by DRS into Plan 2. If reporting for the first time, be sure to include the Begin Date, even if it's the same as the Plan Choice date.

[2] January Transfer Option – An individual has the option to transfer to Plan 3 in January of any year and must select their Contribution Rate Option and Investment Program at that time.

[3] Plan 2 Chosen Member – An individual who chose Plan 2 during their 90 calendar day period doesn't have the option to transfer in January.

[4] Plan 3 Member – Has 90 calendar days from their hire date to select a Contribution Rate Option and Investment Program.

[5] Employer Type – State agency or education employers must report the member in TRS Plan 1 regardless of the type of position. Local government employers must treat person as a New Member.[1]

[6] Employer Type – State agencies must report the member in TRS Plan 1 regardless of the type of position. All other PSERS employers must report the member in PSERS Plan 2.