



Substitute's Application for Service Credit

This form allows substitutes to request TRS or SERS service credit for time periods worked.

Send completed form to:
Department of Retirement Systems
PO Box 48380 • Olympia, WA 98504-8380

www.drs.wa.gov • 800.547.6657
360.664.7000 • TTY: 711

Important Information

Substitutes can request to purchase TRS or SERS retirement plan service credit for time periods worked. You can do this each year by completing this form, receiving a bill for your contributions and paying the bill. Once you select either Plan 2 or Plan 3, your selection is permanent. If you are a returning member, mark returning substitute in Section 2.

You can apply for multiple service credit years at the same time. However, you will owe less interest if you purchase each year's credit before February of the next year.

More about interest:

To avoid paying interest on the contributions, submit this application between September and January of the school year following the one in which you worked. For example, if you worked during the 9/1/22-8/31/23 school year, submit your application between September 2023 and January 2024. If your payment is received after the last day of February, you will be charged interest.

Section 1: Personal Information

Name (Last, First, Middle)		Social Security Number	
Mailing Address	City	State	ZIP
Email Address		Phone Number	
School Year(s) Applying For	Gender (optional) <input type="checkbox"/> M <input type="checkbox"/> F <input type="checkbox"/> X		

Section 2: Member Status and System

<p>Member Status: Select one</p> <p><input type="checkbox"/> New Member Choosing Plan 2: Complete sections 1 through 4 Choosing Plan 3: Complete sections 1 through 5</p> <p><input type="checkbox"/> Returning Plan 2 Substitute Complete sections 1, 2 and 4 only</p> <p><input type="checkbox"/> Returning Plan 3 Substitute Complete sections 1, 2, 4 and 5 only</p>	<p>System</p> <p><input type="checkbox"/> TRS Teachers' Retirement System</p> <p><input type="checkbox"/> SERS School Employees' Retirement System</p>
---	--

Section 3: Retirement Plan Selection (new members)

Choose your plan. **Your selection is permanent.**

☐ Plan 2 ☐ Plan 3



Choosing a plan? Visit **drs.wa.gov/choice** for info to help you decide.

Section 4: Signature Required (new and returning members)

The statements in this application and any accompanying documentation, including my full name and Social Security number, are correct. I understand that my employer(s) will be asked to verify the information I provide.

New member: I have chosen the retirement plan marked in Section 3. I understand my plan selection is permanent. **If I selected Plan 3, I have also completed Section 5.**

Returning Plan 3 member: I have completed Section 5 below. I understand that if I do not select a contribution rate, I will be billed at a rate of 5% and placed in the self-directed investment program.

Signature

Date (mm/dd/yyyy)

Section 5: Plan 3 Contribution Rate and Investment Selection

Plan 3 contribution rate: Substitutes in Plan 3 must select a contribution rate each year. If you do not select a contribution rate, you will be billed at a rate of 5%.

Option	Your Contribution Rate
<input type="checkbox"/> Option A	5.0%
<input type="checkbox"/> Option B (age based)	5.0% up to age 35, 6.0% ages 35 to 44, 7.5% age 45 and older
<input type="checkbox"/> Option C (age based)	6.0% up to age 35, 7.5% age 35 to 44, 8.5% age 45 and older
<input type="checkbox"/> Option D	7.0%
<input type="checkbox"/> Option E	10.0%
<input type="checkbox"/> Option F	15.0%

Plan 3 investment. Choose one.

☐ **Use the target date fund for my age (SELF Program)**

This option places you in the target date fund that assumes you'll begin withdrawing funds at age 65. No additional action is needed if you choose this option.

☐ **I will choose my own investments (SELF Program)**

If you choose this option, your Plan 3 account will need to be created before you can select investments. If you do not choose investments, your contributions will be invested in the target date fund that assumes you'll begin withdrawing funds at age 65.

☐ **Washington State Investment Board TAP (WSIB Program)**

This one-step fund is not adjusted based on your age, but is managed in the same way the state pension fund is invested. No additional action is needed if you choose this option.

You can change your investment selection at any time by logging into your investment account. For more information about Plan 3, including a complete list of available investments, visit drs.wa.gov/login or call 888-327-5596.

