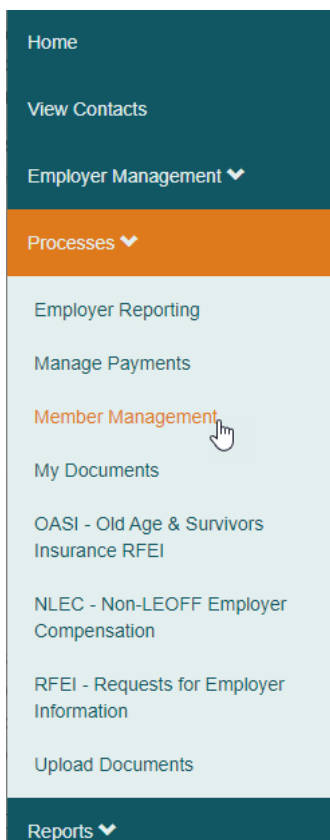
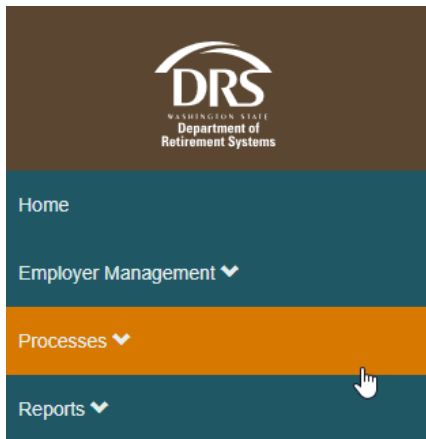




ERA: Verify Retirement Status

How do I look up if a member is retired or has 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.

Start

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: [*****] **Search**

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

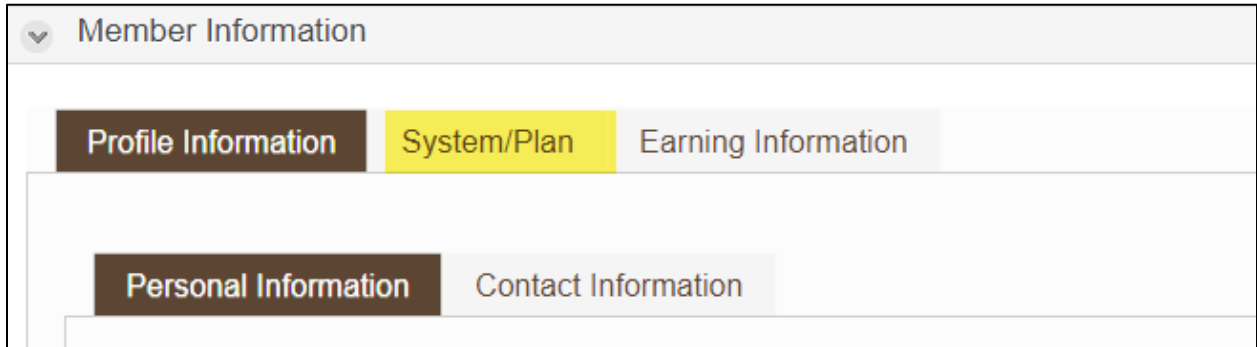
Personal Information Contact Information

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](#)

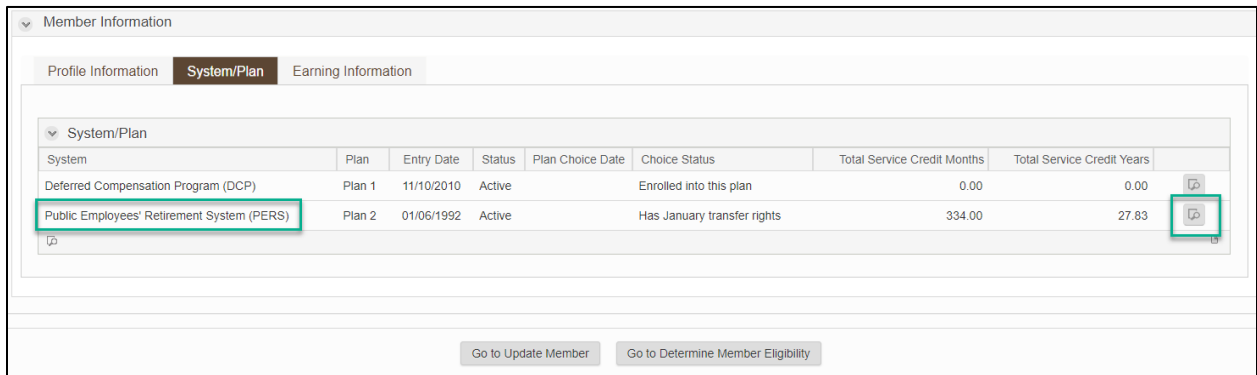


4. Select the “System/Plan” tab.



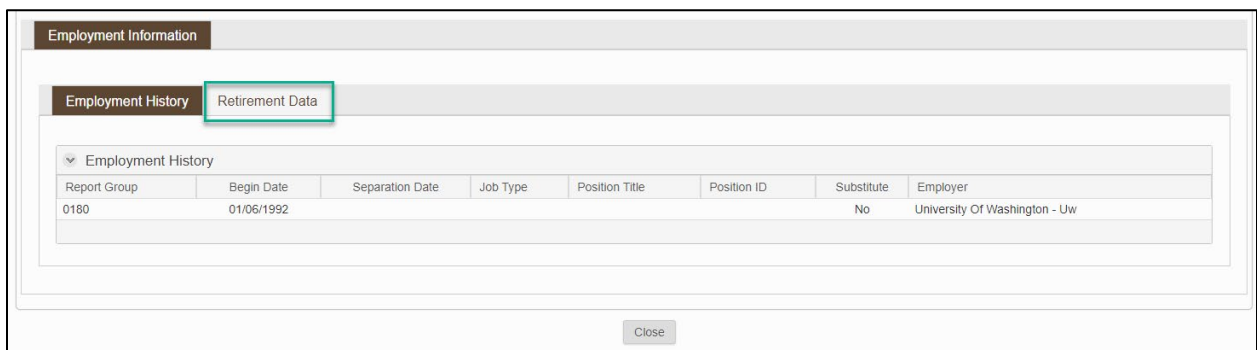
The System and Plans for the member are displayed with detailed information.

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



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

6. Select the “Retirement Data” tab.





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
<input type="button" value="Close"/>	

B. The member retired with a regular service retirement:

Employment Information	
Employment History	Retirement Data
Retirement Date:	07/01/2011
<input type="button" value="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
<input type="button" value="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 gone through the final process. Once it's gone through the final process it will look like example A. Please check Member Management again. In example D, the member applied for retirement with a date in the past. This member will be a 2008 ERF upon completion of the process.

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

The screenshot shows the 'Retirement Data' tab with the following information:

Retirement Date:	11/01/2019	Applied For Retirement:	Yes
Retirement Eligibility:	Reduced Benefit		

A 'Close' button is located at the bottom center of the window.

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

The screenshot shows the 'Retirement Data' tab with the following information:

Retirement Eligibility:	Reduced Benefit
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A 'Close' button is located at the bottom center of the window.

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

The screenshot shows the 'Employment History' tab with a table of employment records:

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

A 'Close' button is located at the bottom center of the window.



7. Select the “Close” button 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, select the “Member Lookup” tab and enter a new SSN.

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