



Employer Training



Revised 01/06/2026

Contact Information

Address

2101 S. Veterans Parkway
P. O. Box 19255
Springfield, IL 62794-9255

Phone

217-785-7444

Email

fieldservicesdivision@srs.illinois.gov

sers@srs.illinois.gov

Employer Services Login

employer.srs.illinois.gov





Employer Services Login





State Employees' Retirement System

Judges' Retirement System

General Assembly Retirement System



State Retirement Systems of I

Step 1: Visit <https://srs.illinois.gov/>. Click “State Employees’ Retirement System”.

ILLINOIS gov

AGENCIES SERVICES

English >

search

Home Contact Us About Us Disability Insurance Retirement Death Benefits Resources Publications

State Employees' Retirement System

Member Services Login Instructions

Workshops & Webinars

Paystubs & ePass

QILDRO Information

Calculators



Helpful Links



Retiree Corner



Employer Resources



Employer Services Login



Sign in using ILogin



Pension Estimate Calculator Instructional Video



Member Services Registration Instructional Video

Step 2: Click “Employer Services Login”.



Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

[Help](#) 

A collection of overlapping geometric shapes in teal, green, and yellow, arranged in a pattern that resembles a stylized 'V' or a series of overlapping triangles.

For agencies with email domains synced with Okta Workforce.

For the following email domains, see next slide.

- @ilga.gov
- @ilsos.gov
- @illinoistreasurer.gov
- @illinoiscourthistory.org
- @cmap.Illinois.gov

OKTA Workforce Notice

Agencies that have the following email domains do not have their email synced with Okta Workforce. In order to do so, these agencies will need to open a ServiceNow ticket with DOIT by calling 217-524-3648 before that agency can appoint a Security Administrator or assign any roles.

- @ilga.gov
- @ilsos.gov
- @illinoistreasurer.gov
- @illinoiscourthistory.org
- @cmap.Illinois.gov

ILLINOIS gov

AGENCIES SERVICES

English >

search

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Helpful Links



Retiree Corner



Employer Resources



Employer Services Login



Sign in using ILogin



Pension Estimate Calculator Instructional Video



Member Services Registration Instructional Video





Employer Resources

[Employer Services Login](#)[Security Administrator](#)[Retirement and Payroll Coordinators](#)[Tier Determination Requests](#)[Employer Workshop/Webinar](#)[Publications](#)[Email Contacts](#)[Forms](#)

Employer Resources

For Retirement Coordinators, Payroll Coordinators, Signature Designees, Security Administrators, and Tier Determination Users.

The State Retirement Systems (SRS) Employer Resources section of the SERS website is an online portal for Retirement Coordinators, Payroll Coordinators, Signature Designees, Security Administrators, and Tier Determination Users. The SRS Employer Services website provides functionality for registered employers to access their employee's membership information, request service purchase estimates, complete Tier Determinations, access publications related to registered Retirement Coordinators, Payroll Coordinators, and Security Administrators employer services job duties. SRS Employer Services registered employers can view electronic notifications regarding member's request for payroll deductions, track and enter agency's 75-day contract Returned to Work Retirees, along with Disability member's Return to Work.

[Employer Services Login](#)[Security Administrator](#)[Retirement and Payroll Coordinators](#)[Tier Determination Requests](#)[Employer Workshop/Webinar](#)[Publications](#)[Email Contacts](#)[Forms](#)

Security Administrator Appointment Request





Sign In

Username

Keep me signed in

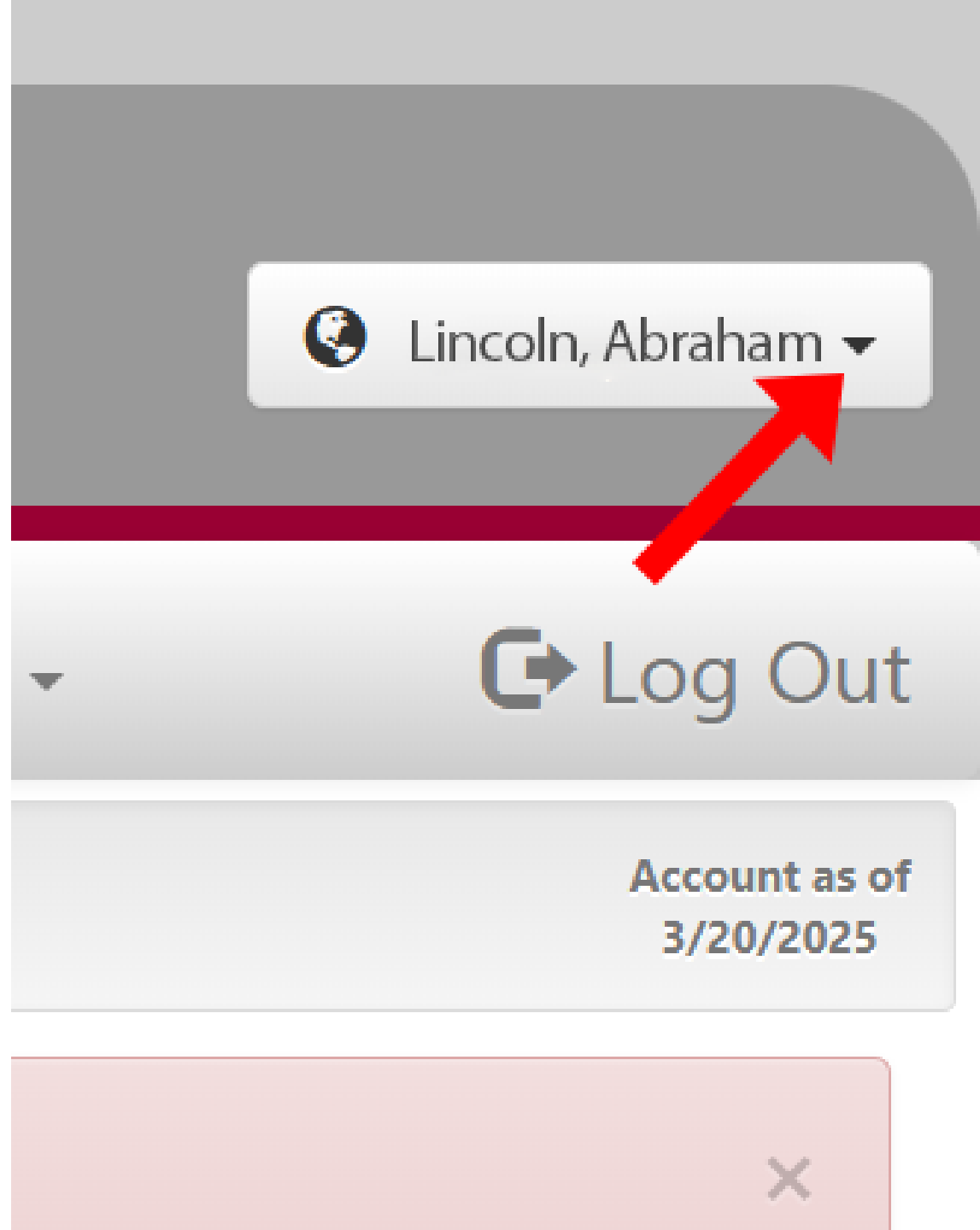
Next

[Unlock account?](#)

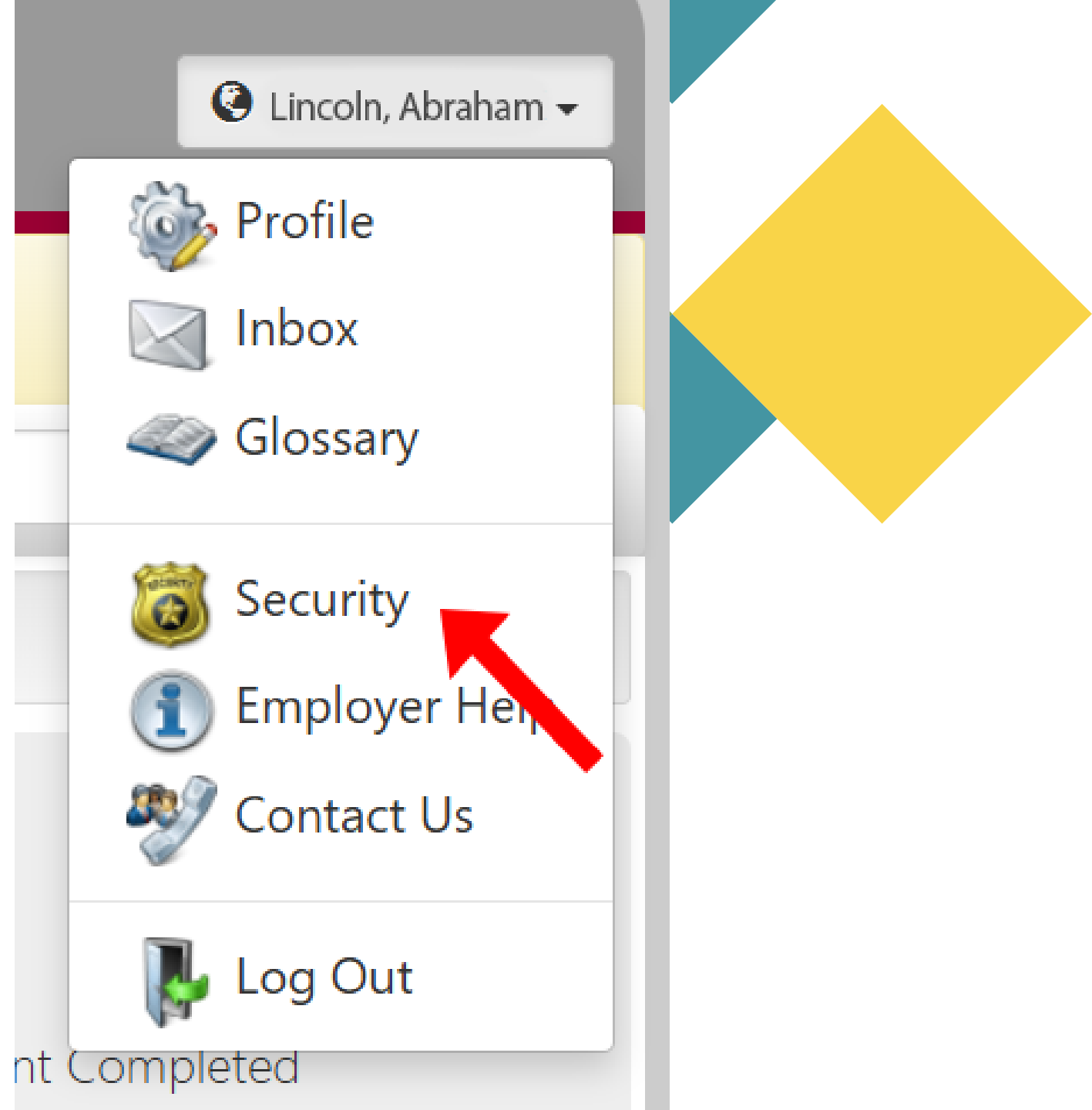
[Help](#) 

**Step 1: Login to
Employer Services**

Step 2: Click the arrow next to your name in the top right hand corner of the screen.



Step 3: Click "Security".



nt Completed

Security

SERS ONLINE SECURITY FORM

Each agency must have a completed SERS Online Security Form on file with the Field Services Division at SRS. The SERS Online Security Form will designate the Agency Head or Administrator that will be approving the appointment of the Retirement Coordinators.

[Click here to download and complete the SERS Online Security Form for your Agency](#) 

AGENCY SECURITY ADMINISTRATOR APPOINTMENT REQUEST

Security Administrators will be responsible for semi-annually reviewing the list of the employees of their agency who can access the SRS member services website on behalf of the agency and shall be responsible to remove such access for those individuals that are no longer employed by that agency.

[Click here to download and complete the Agency Security Administrator Appointment Request form for a new Security Administrator](#) 

© 2026 - State Retirement Systems

www.srs.illinois.gov

All aspects of the administration of the State Retirement Systems of Illinois (SRS), including but not limited to benefit calculation and payment, must comply with state and federal law (40 ILCS 5/2, 5/14, and 5/18). No employee of SRS has the authority to bind the System to take action contrary to the law, even in the event of a misstatement of law. Furthermore, while this statement describes SRS' current understanding of the law, this could change as a result of court opinions, statutory changes or other matters (e.g. Attorney General's opinions). Accordingly, SRS is required under law to correct any mistake in benefit amount, even after payments have begun. Use of any information from this website, form or any other document provided by SRS is for general information only.

Step 4: Click "Click here to download and complete the Agency Security Administrator Appointment Request form for a new Security Administrator".



2101 South Veterans Parkway
P.O. Box 19255
Springfield, IL 62794-9255

217-785-7444
Email: sers@srs.illinois.gov

Employer's request to appoint the Security Administrator for the SRS Employer Services website

Complete this form to appoint your Security Administrator for the SRS Employer Services Website who will have access to such website and shall be responsible to validate and apply changes to access rights for the employees designated to access such website on behalf of your agency.

All fields are required

Name:

Date of Birth:

mm/dd/yyyy

Last four of SSN:

Agency Name:

Work Address:

Work Phone:

(area code) xxx-xxxx ext.

Fax:

Work Email:

Is the SA also a Payroll Coordinator?

Check box if appointee is a new Security Administrator.

Reset Form

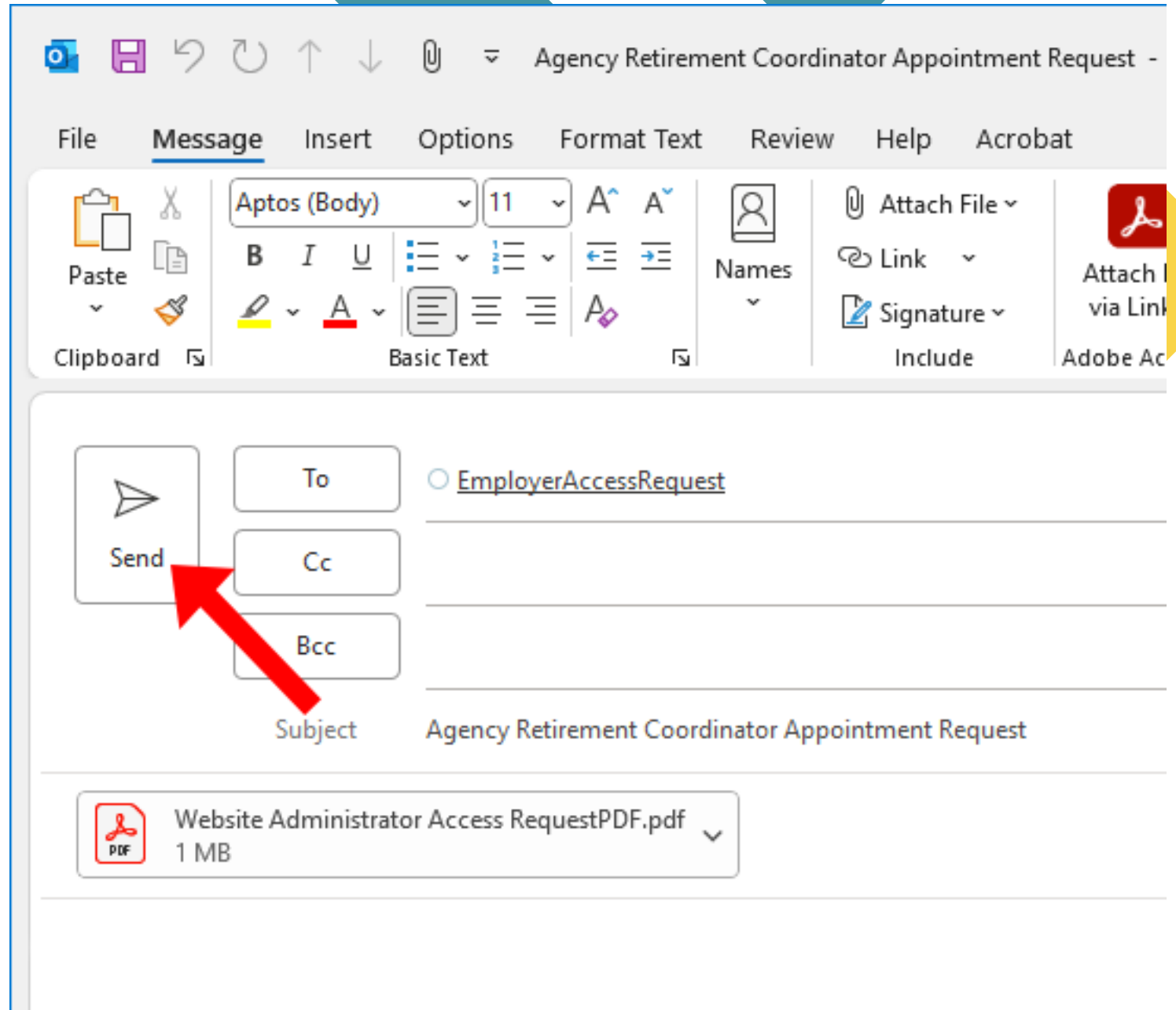
Email to SRS

Step 5: Fill out the form.



Step 6: Click the "Email to SRS" button located within the form.

Step 7: Send the email.



The screenshot displays the Microsoft Word ribbon interface for an email. The title bar reads "Agency Retirement Coordinator Appointment Request". The ribbon includes tabs for "File", "Message", "Insert", "Options", "Format Text", "Review", "Help", and "Acrobat". The "Message" tab is active, showing options for "Clipboard", "Basic Text", "Names", "Attach File", "Link", and "Signature".

The email composition area shows the following fields:

- To:** [EmployerAccessRequest](#)
- Cc:**
- Bcc:**
- Subject:** Agency Retirement Coordinator Appointment Request

A red arrow points to the "Send" button, which is located to the left of the recipient fields. Below the subject line, there is an attachment: "Website Administrator Access RequestPDF.pdf" (1 MB).



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P.O. Box 19255
Springfield, IL 62794-9255

217-785-7444
Email: sers@srs.illinois.gov

Employer's request to appoint the Security Administrator for the SRS Employer Services website

Complete this form to appoint your Security Administrator for the SRS Employer Services Website who will have access to such website and shall be responsible to validate and apply changes to access rights for the employees designated to access such website on behalf of your agency.

All fields are required

Name: _____

Date of Birth: _____ Last four of SSN: _____
mm/dd/yyyy

Agency Name: _____

Work Address: _____

Work Phone: _____ Fax: _____
(area code) xxx-xxxx ext.

Work Email: _____

Is the SA also a Payroll Coordinator?

Check box if appointee is a new Security Administrator.

Reset Form

Email to SRS

Legal Disclaimer:

_____, has been designated to perform Website Security Administrator functions related to the access rights for our employees who access the SRS Employer Services website on behalf of our agency .

Upon the submission of this form to SERS, the Security Administrator agrees that they will be given access to this Employer Services data site on an as needed basis to perform their Website Security Administrator duties. The Security Administrator agrees to limit the use of this Employer Services data site, data solely for legitimate SERS member-related business purposes. The Security Administrator's employing agency also agrees that the Security Administrator will not use or disclose SERS records or data for any purpose other than in connection with the specific member for whom the data is sought.

The employing agency and Security Administrator agree to take all reasonable and appropriate measures to protect the information accessed from the SRS Employer Services data site and to prevent unauthorized access to the site by unauthorized third parties. SERS is responsible only for its security issues and does not assume any responsibility for the security issues of the Security Administrator's employer or any consequences resulting from the Security Administrator's access to the Employer Services data site. The information displayed on the SRS Employer Services data site reflects the records of SERS. These records can change because of an audit or because of new data received from a member or an employer.

The Security Administrator acknowledges that the right to access the SRS Employer Services data site can be terminated with or without notice at any time by SERS.

Form to Appoint Security Administrator



Assigning Roles

Retirement Coordinators,
Payroll Coordinators,
Tier Determination Users



Sign In

Username

Keep me signed in


Next


[Unlock account?](#)

[Help](#) 


**Step 1: Login to
Employer Services.**

Employer Dashboard

 Employer Reports

 You have **0 Notifications** **0** Unread

 You have **18 Payroll Deductions** **10** Payroll Setup **0** Lump Sum Setup **8** Upcoming Payoff **0** Payment Completed

 You have **86 Employer Statements** **23** Pending **63** Completed

 You have **355 Service Purchase Estimate Requests** **275** New **8** Pending **72** Completed 

 You have **488 Tier Determination Requests** **8** Pending **480** Completed 

Step 2: Click "Security Admin".



User Management

Security Review



Employer Reports



You have **0** Notifications **0** Unread



You have **18** Payroll Deductions **10** Payroll Setup **0** Lump Sum Setup **8** Upcoming Payoff **0** Payment Completed



You have **86** Employer Statements **23** Pending **63** Completed



You have **355** Service Purchase Estimate Requests **275** New **8** Pending **72** Completed **i**



You have **488** Tier Determination Requests **8** Pending **480** Completed **i**



You have **84** 2025 Returned to Work Retirees **81** Current **3** Overdue

Step 3: Click "User Management".



Dashboard

Search

Tasks

Publications

Security Admin

Log Out

User Management

Add New User



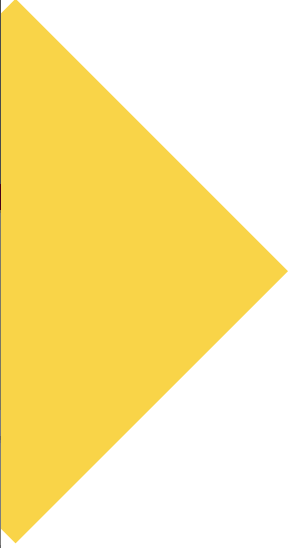
EMPLOYEE NAME	USER TYPE(S)	OKTA USER NAME	EDIT USER	DELETE USER
Human Services, Department of				
		@Illinois.gov	Edit User	Delete User
		@Illinois.gov	Edit User	Delete User
		@illinois.gov	Edit User	Delete User

Step 4: Click "Add New User".

Add New User ×

Employee Search

Search for an employee by first name, middle name, last name, SSN, last four digits of SSN, Member Id or a combination of any of the criteria.



Step 5: Search for the employee.

Add New User

Employee Search

Search for an employee by first name, middle name, last name, SSN, last four digits of SSN, Member Id or a combination of any of the criteria.

Total Records Found: 1

Step 1: Select Employee

First Name	Last Name	SSN	Birth Date	
				<input type="radio"/>

Step 2: Select User Type(s)

Retirement Coordinator	<input type="checkbox"/>
Payroll Coordinator	<input type="checkbox"/>
Signature Designee	<input type="checkbox"/>
Tier Determination User	<input type="checkbox"/>

Step 3: Select Agency

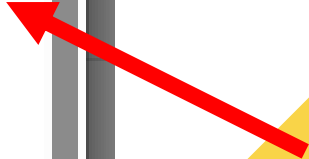
Step 6: Select the employee.

Step 2: Select User Type(s)

Retirement Coordinator	<input type="checkbox"/>
Payroll Coordinator	<input type="checkbox"/>
Signature Designee	<input type="checkbox"/>
Tier Determination User	<input type="checkbox"/>

Step 3: Select Agency

Close



Step 7: Select the role(s) the employee will handle.

Step 2: Select User Type(s)

Retirement Coordinator

Payroll Coordinator

Signature Designee

Tier Determination User

Step 3: Select Agency

Step 4: Enter Work Email

- To verify employee has a valid Okta Workforce account, please enter employee's work email address and click on "Verify Email".

Step 8: Select the Agency.

Step 4: Enter Work Email

- To verify employee has a valid Okta Workforce account, please enter employee's work email address and click on "Verify Email".

abraham.lincoln@illinois.gov



Verify Email

Manage Pay Codes

Save

Close

Step 9: Enter the employee's work email, click "Verify Email" and click "Save".

Step 4: Enter Work Email

- To verify employee has a valid Okta Workforce account, please enter employee's work email address and click on "Verify Email".

abraham.lincoln@illinois.gov



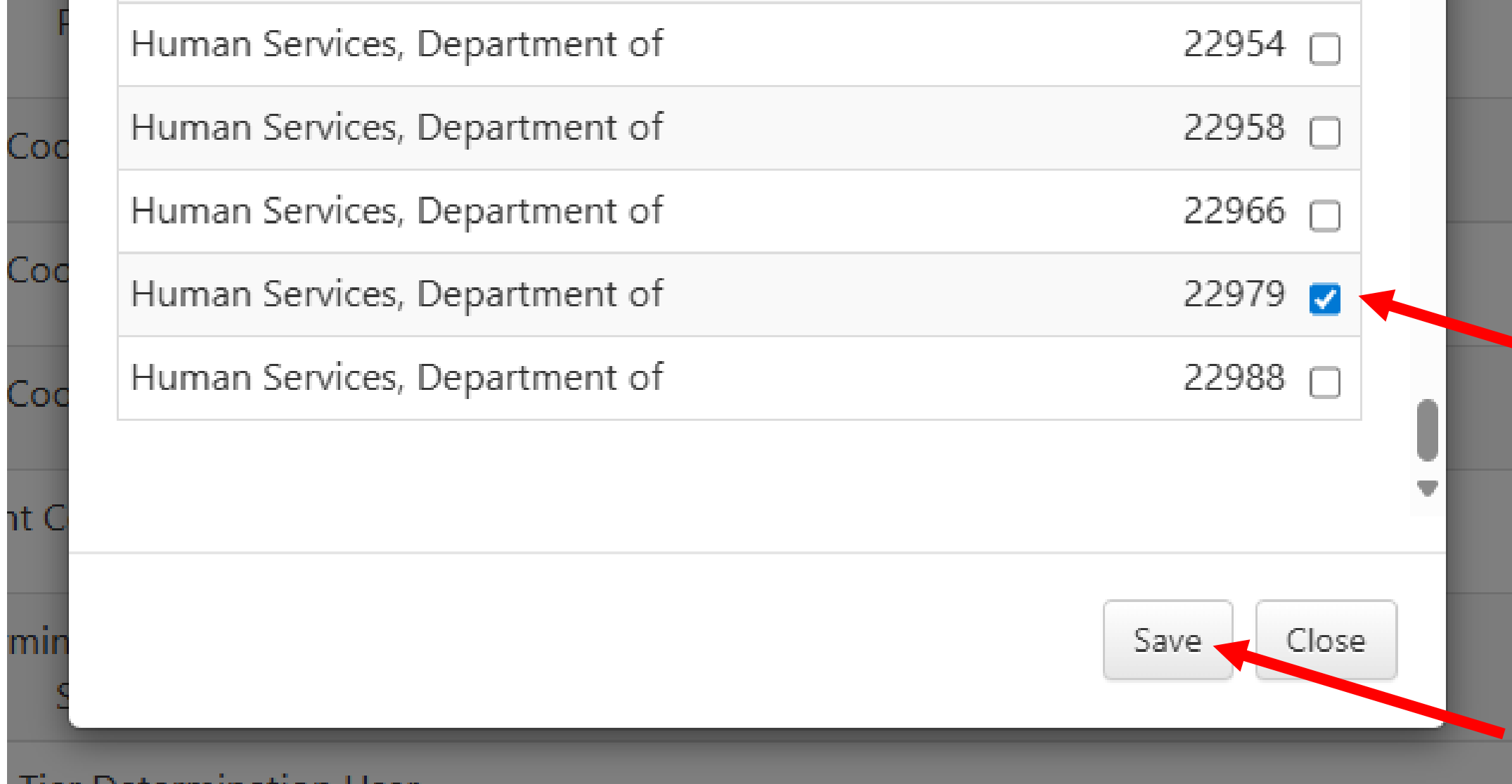
Verify Email

Manage Pay Codes

Save

Close

Step 10: click "Manage Pay Codes". If the user is a Tier Determination User, skip this step.



**Step 11: click the appropriate pay code(s) and click “Save”.
If the user is a Tier Determination User, skip this step.**

User Management

[Add New User](#)

EMPLOYEE NAME	USER TYPE(S)	OKTA USER NAME	EDIT USER	DELETE USER
Human Services, Department of				
[blurred]	[blurred]	[blurred]@Illinois.gov	Edit User	Delete User
[blurred]	[blurred]	[blurred]@Illinois.gov	Edit User	Delete User
[blurred]	[blurred]	[blurred]@illinois.gov	Edit User	Delete User



To update the Okta Email Address of a user, click the email address under the “OKTA USER NAME” heading.

Correction to Incorrectly Assigned Roles



Sign In

Username

Keep me signed in

Next 

[Unlock account?](#)

[Help](#) 

**Step 1: Login to
Employer Services.**

Correction to Incorrectly Assigned Roles

SRS STATE RETIREMENT SYSTEMS Employer Services

Dashboard Search Publications Security Admin Employee Search Log Out


User Management
Security Review


VERIFICATION BETWEEN 1/1/2025 AND 6/30/2025

Agency	Contact Name	Contact Type(s)	Keep	Remove	Last Verified
		Retirement Coordinator	<input checked="" type="radio"/>	<input type="radio"/>	02/04/2025
		Signature Designee	<input type="radio"/>	<input checked="" type="radio"/>	03/12/2025
		Retirement Coordinator, Signature Designee	<input type="radio"/>	<input checked="" type="radio"/>	02/06/2025
		Payroll Coordinator	<input checked="" type="radio"/>	<input type="radio"/>	02/04/2025
		Payroll Coordinator, Signature Designee	<input checked="" type="radio"/>	<input type="radio"/>	02/04/2025
		Payroll Coordinator, Signature Designee	<input checked="" type="radio"/>	<input type="radio"/>	
		Payroll Coordinator, Signature Designee	<input checked="" type="radio"/>	<input type="radio"/>	02/04/2025
		Retirement Coordinator, Payroll Coordinator	<input checked="" type="radio"/>	<input type="radio"/>	02/04/2025
		Tier Determination User, Payroll Coordinator, Signature Designee	<input checked="" type="radio"/>	<input type="radio"/>	02/04/2025
		Tier Determination User	<input checked="" type="radio"/>	<input type="radio"/>	
		Tier Determination User, Payroll Coordinator	<input checked="" type="radio"/>	<input type="radio"/>	02/04/2025
		Payroll Coordinator	<input checked="" type="radio"/>	<input type="radio"/>	02/04/2025


Step 1: The security admin should go to “Security Review” listing to “Remove” employees who have incorrect roles assigned.

Employer Dashboard

 Employer Reports

 You have **0 Notifications** **0** Unread

 You have **18 Payroll Deductions** **10** Payroll Setup **0** Lump Sum Setup **8** Upcoming Payoff **0** Payment Completed

 You have **86 Employer Statements** **23** Pending **63** Completed

 You have **355 Service Purchase Estimate Requests** **275** New **8** Pending **72** Completed 

 You have **488 Tier Determination Requests** **8** Pending **480** Completed 

Step 2: Click "Security Admin".



User Management

Security Review



Employer Reports



You have **0** Notifications **0** Unread



You have **18** Payroll Deductions **10** Payroll Setup **0** Lump Sum Setup **8** Upcoming Payoff **0** Payment Completed



You have **86** Employer Statements **23** Pending **63** Completed



You have **355** Service Purchase Estimate Requests **275** New **8** Pending **72** Completed **i**



You have **488** Tier Determination Requests **8** Pending **480** Completed **i**



You have **84** 2025 Returned to Work Retirees **81** Current **3** Overdue

Step 3: Click "User Management".



Dashboard

Search

Tasks

Publications

Security Admin

Employee Search



Log Out

User Management

Add New User

EMPLOYEE NAME	USER TYPE(S)	OKTA USER NAME	EDIT USER	DELETE USER
Human Services, Department of				
[blurred]	[blurred]	[blurred]@Illinois.gov	Edit User	Delete User
[blurred]	[blurred]	[blurred]@Illinois.gov	Edit User	Delete User
[blurred]	[blurred]	[blurred]@illinois.gov	Edit User	Delete User



Step 4: Click "Edit User".

Step 2: Select User Type(s)

Retirement Coordinator	<input type="checkbox"/>
Payroll Coordinator	<input type="checkbox"/>
Signature Designee	<input type="checkbox"/>
Tier Determination User	<input type="checkbox"/>

Step 3: Select Agency

[Dropdown Menu]

Manage Pay Codes Save Close

**Step 5: Select the role(s) the employee will handle.
Remember to deselect the incorrect role(s).**

Step 2: Select User Type(s)

Retirement Coordinator	<input type="checkbox"/>
Payroll Coordinator	<input type="checkbox"/>
Signature Designee	<input type="checkbox"/>
Tier Determination User	<input type="checkbox"/>

Step 3: Select Agency

[Dropdown Menu]

Manage Pay Codes Save Close

Step 6: Select “Save” for Tier Determination Users, Otherwise Continue to Step 7.

Step 4: Enter Work Email

- To verify employee has a valid Okta Workforce account, please enter employee's work email address and click on "Verify Email".

abraham.lincoln@illinois.gov



Verify Email

Manage Pay Codes

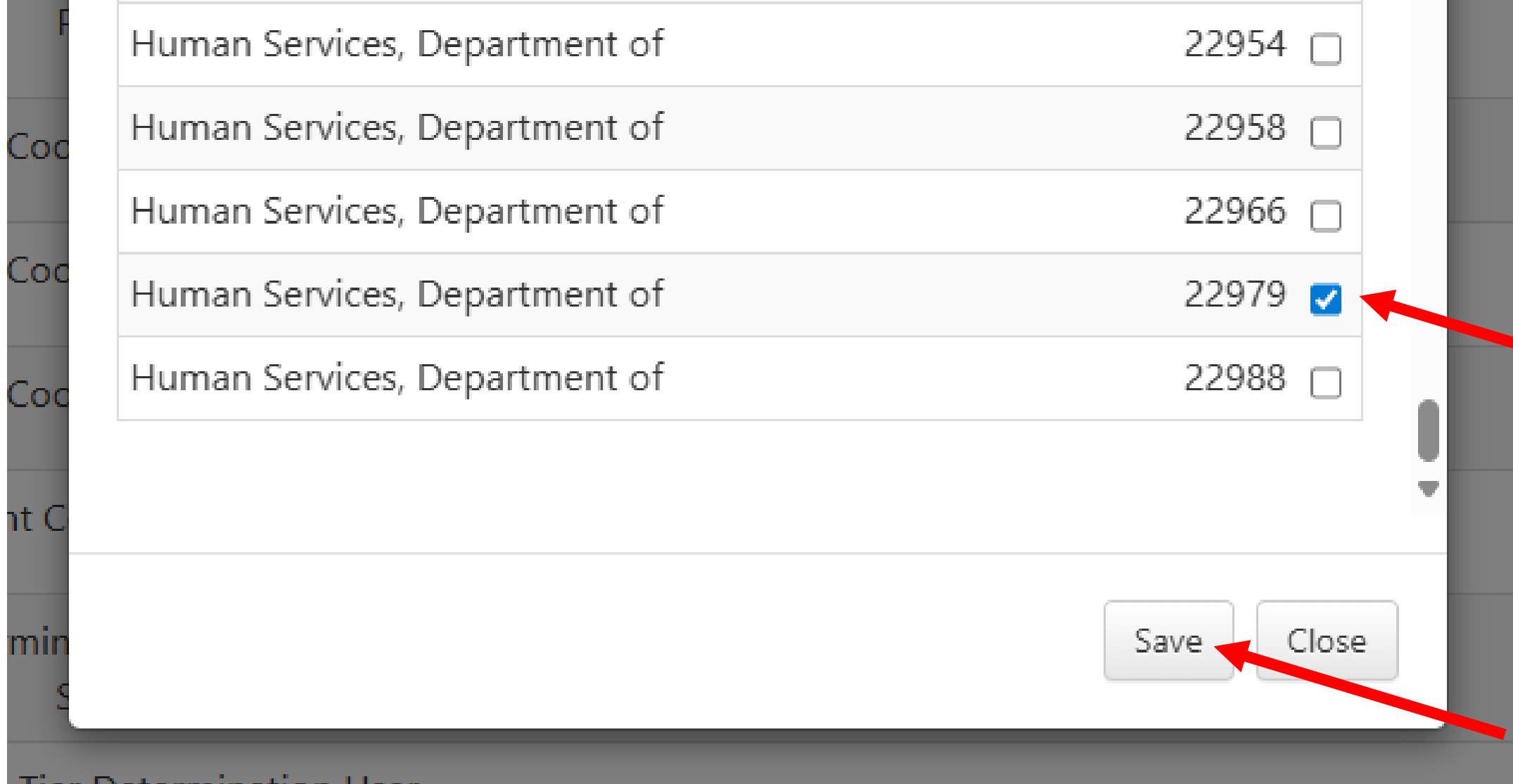
Save

Close

Step 7: click "Manage Pay Codes". If the user is a Tier Determination User, skip this step.

Human Services, Department of	22954	<input type="checkbox"/>
Human Services, Department of	22958	<input type="checkbox"/>
Human Services, Department of	22966	<input type="checkbox"/>
Human Services, Department of	22979	<input checked="" type="checkbox"/>
Human Services, Department of	22988	<input type="checkbox"/>

Save Close



Step 8: click the appropriate pay code(s) and click “Save”.

User Management

[Add New User](#)

EMPLOYEE NAME	USER TYPE(S)	OKTA USER NAME	EDIT USER	DELETE USER
Human Services, Department of				
[blurred]	[blurred]	[blurred]@Illinois.gov	Edit User	Delete User
[blurred]	[blurred]	[blurred]@Illinois.gov	Edit User	Delete User
[blurred]	[blurred]	[blurred]@illinois.gov	Edit User	Delete User

If you're having issues after these steps, click "Delete User" and then "Add New User" to add the User as New (See Assigning Roles for Assistance).

User Management

[Add New User](#)

EMPLOYEE NAME	USER TYPE(S)	OKTA USER NAME	EDIT USER	DELETE USER
Human Services, Department of				
[blurred]	[blurred]	[blurred]@Illinois.gov	Edit User	Delete User
[blurred]	[blurred]	[blurred]@Illinois.gov	Edit User	Delete User
[blurred]	[blurred]	[blurred]@illinois.gov	Edit User	Delete User



To update the Okta Email Address of a user, click the email address under the "OKTA USER NAME" heading.



Security Review



Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

[Help](#) 



**Step 1: Login to
Employer Services**



Employer Dashboard

Employer Reports

You have **0** **Notifications** **0** Unread

You have **18** **Payroll Deductions** **10** Payroll Setup **0** Lump Sum Setup **8** Upcoming Payoff **0** Payment Completed

You have **86** **Employer Statements** **23** Pending **63** Completed

You have **355** **Service Purchase Estimate Requests** **275** New **8** Pending **72** Completed **i**

You have **488** **Tier Determination Requests** **8** Pending **480** Completed **i**

You have **84** **2025 Returned to Work Retirees** **81** Current **3** Overdue

Step 2: Click “Security Admin”

- User Management
- Security Review

Employer Reports

You have 0 **Notifications** 0 Unread

You have 18 **Payroll Deductions** 10 Payroll Setup 0 Lump Sum Setup 8 Upcoming Payoff 0 Payment Completed

You have 86 **Employer Statements** 23 Pending 63 Completed

You have 355 **Service Purchase Estimate Requests** 275 New 8 Pending 72 Completed

You have 488 **Tier Determination Requests** 8 Pending 480 Completed

You have 84 **2025 Returned to Work Retirees** 81 Current 3 Overdue

You have 451 **Employees on Disability** 108 Reported back to work

Step 3: Click “Security Review”



Dashboard

Search

Tasks

Publications

Security Admin

Employee Search



Log Out

Security Administration

VERIFICATION BETWEEN 7/1/2024 AND 12/31/2024

Agency	Contact Name	Contact Type(s)	Keep	Remove	Last Verified
		Retirement Coordinator, Payroll Coordinator, Signature Designee	<input checked="" type="radio"/>	<input type="radio"/>	02/22/2024
		Signature Designee	<input checked="" type="radio"/>	<input type="radio"/>	02/22/2024
		Payroll Coordinator	<input checked="" type="radio"/>	<input type="radio"/>	02/22/2024

Step 4: Select the option to keep or remove employees from their already designated roles.



Employer Dashboard



Employer Dashboard

The Employer Dashboard is your homepage as an employer. The dashboard gives you a brief synopsis of what you have access to on the site.

You can access the Employer Dashboard by clicking on the Dashboard icon in the main menu bar.


Announcements will be displayed at the top of the dashboard, providing notifications of system-wide changes and events. An announcement can be dismissed by clicking the x in the upper right-hand corner of the announcement.


Notifications will provide the total count of messages in your inbox and specify any unread messages.

You will have access to various employer functionalities and the counts based on status. You have access to **Service Purchase Estimate Requests, Tier Determination Requests, Returned to Work Retirees and Employees on Disability.**


At the bottom, legal Terms & Conditions of the SRS Member Services website are available to review.

Employer Dashboard

 Employer Reports

 You have **0 Notifications** **0** Unread

 You have **18 Payroll Deductions** **10** Payroll Setup **0** Lump Sum Setup **8** Upcoming Payoff **0** Payment Completed

 You have **86 Employer Statements** **23** Pending **63** Completed

 You have **355 Service Purchase Estimate Requests** **275** New **8** Pending **72** Completed 

 You have **488 Tier Determination Requests** **8** Pending **480** Completed 

 You have **84 2025 Returned to Work Retirees** **81** Current **3** Overdue

 You have **451 Employees on Disability** **108** Reported back to work

Employer Dashboard

- Click on bolded text to reach the desired category

The screenshot shows the 'Employer Dashboard' interface. At the top, there is a header 'Employer Dashboard'. Below it, there are several categories with icons and counts:

- Employer Reports**: You have 0 **Notifications** 0 Unread
- You have 18 **Payroll Deductions** 10 Payroll Setup 0 Lump Sum Setup 8 Upcoming Payoff 0 Payment Completed
- You have 86 **Employer Statements** 23 Pending 63 Completed
- You have 355 **Service Purchase Estimate Requests** 275 New 8 Pending 72 Completed ⓘ
- You have 488 **Tier Determination Requests** 8 Pending 480 Completed ⓘ
- You have 84 **2025 Returned to Work Retirees** 81 Current 3 Overdue
- You have 451 **Employees on Disability** 108 Reported back to work

At the bottom right of the dashboard area, there is a button labeled 'Dashboard' with a home icon. A red arrow points to this button.

- When done working on the category, click “Dashboard” to return to the dashboard

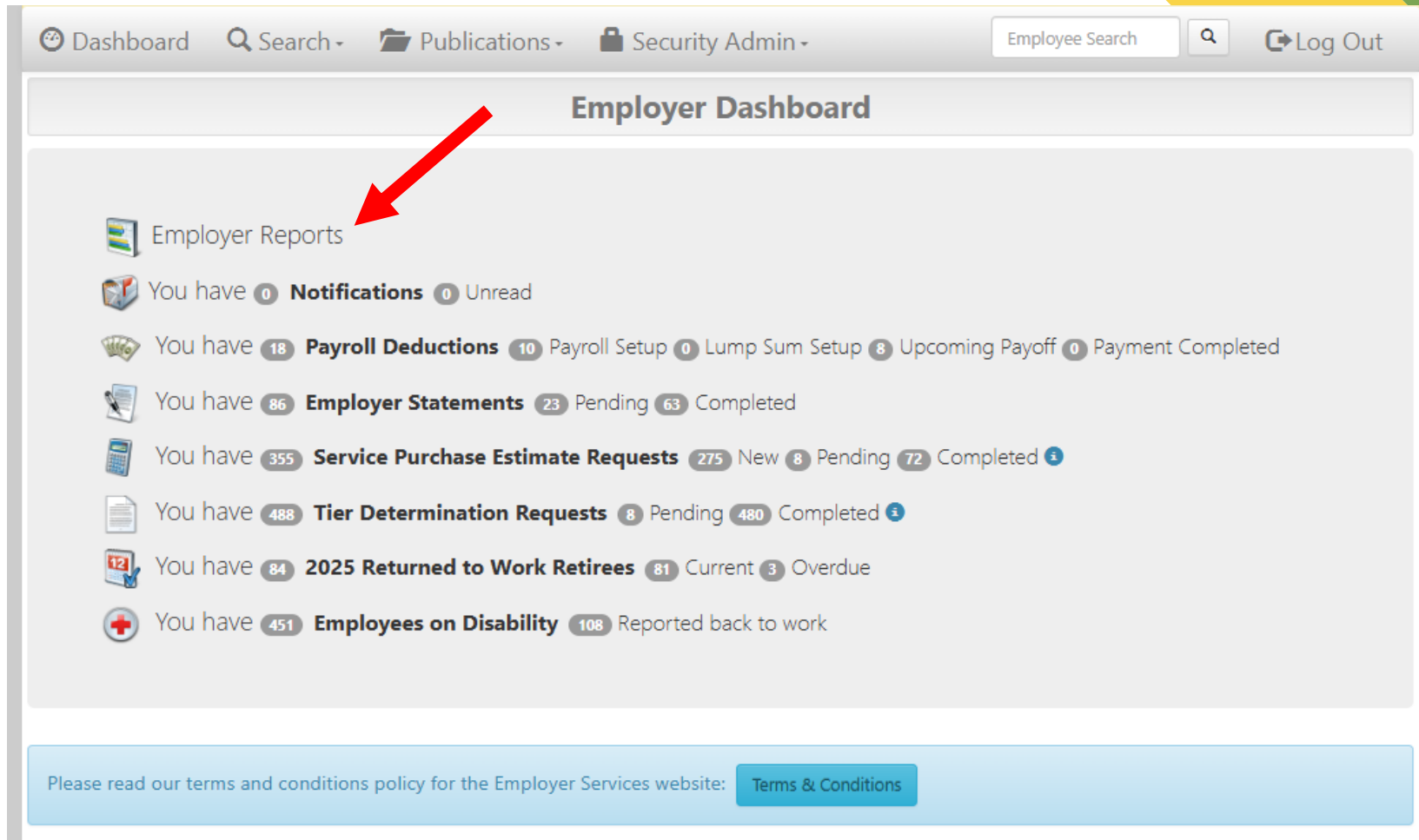


Employer Reports



Employer Reports

Step 1: Click “Employer Reports”



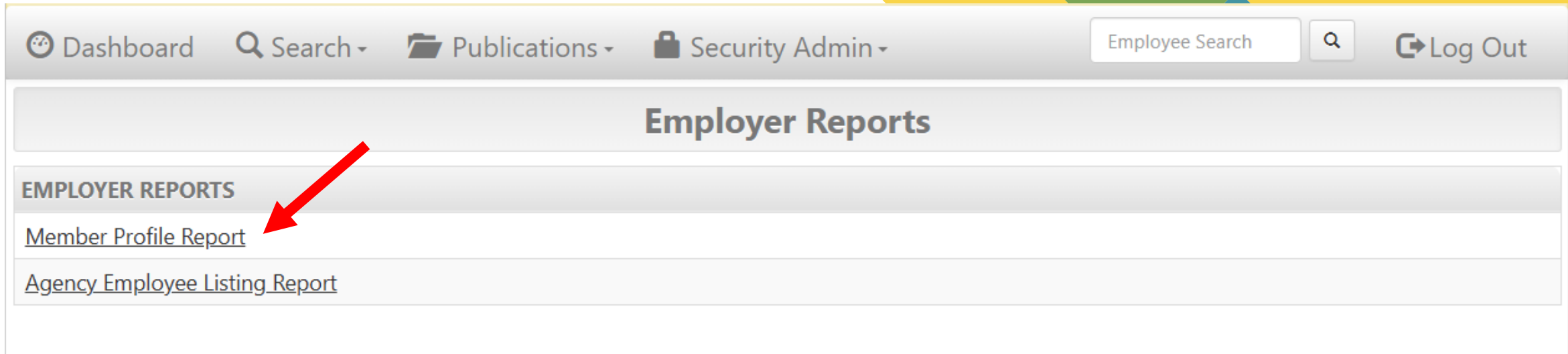
The screenshot displays the Employer Dashboard interface. At the top, there is a navigation bar with links for Dashboard, Search, Publications, Security Admin, Employee Search, and Log Out. The main content area is titled "Employer Dashboard" and contains several status indicators:

- Employer Reports**: A red arrow points to this link.
- Notifications**: 0 Unread
- Payroll Deductions**: 18 Payroll Setup 0 Lump Sum Setup 8 Upcoming Payoff 0 Payment Completed
- Employer Statements**: 86 Pending 23 Completed 63
- Service Purchase Estimate Requests**: 355 New 8 Pending 72 Completed
- Tier Determination Requests**: 488 Pending 8 Completed 480
- 2025 Returned to Work Retirees**: 84 Current 3 Overdue 81
- Employees on Disability**: 451 Reported back to work 108

At the bottom of the dashboard, there is a footer with the text "Please read our terms and conditions policy for the Employer Services website:" and a button labeled "Terms & Conditions".

Member Profile Report

Step 2: Click “Member Profile Report” to view and print a summary of a member’s account.



The screenshot displays a web application interface. At the top, there is a navigation bar with the following elements: a home icon and the text 'Dashboard', a magnifying glass icon and the text 'Search', a folder icon and the text 'Publications', a padlock icon and the text 'Security Admin', a search box containing the text 'Employee Search' and a magnifying glass icon, and a 'Log Out' button with an arrow icon. Below the navigation bar is a section titled 'Employer Reports'. Under this title, there is a sub-section 'EMPLOYER REPORTS' which contains two links: 'Member Profile Report' and 'Agency Employee Listing Report'. A red arrow points to the 'Member Profile Report' link.

Member Profile Report

Step 3: Search for the employee

Member Profile Report ×

Employee Search

Search for an employee by first name, middle name, last name, SSN, last four digits of SSN, Member Id or a combination of any of the criteria.



Member Profile Report

Step 4: Select the employee and click “Generate Report”

Member Profile Report

Employee Search

Search for an employee by first name, middle name, last name, SSN, last four digits of SSN, Member Id or a combination of any of the criteria.

Total Records Found: 1

Step 1: Select Employee

First Name	Last Name	SSN	Birth Date	
				<input type="radio"/>

Step 2: Select Format

PDF Excel

Member Profile Report

Step 5: View or print the report as a PDF.

The report will be generated and downloaded from the web browser.



SERS Member Profile Report

As Of Date: 1/6/2026

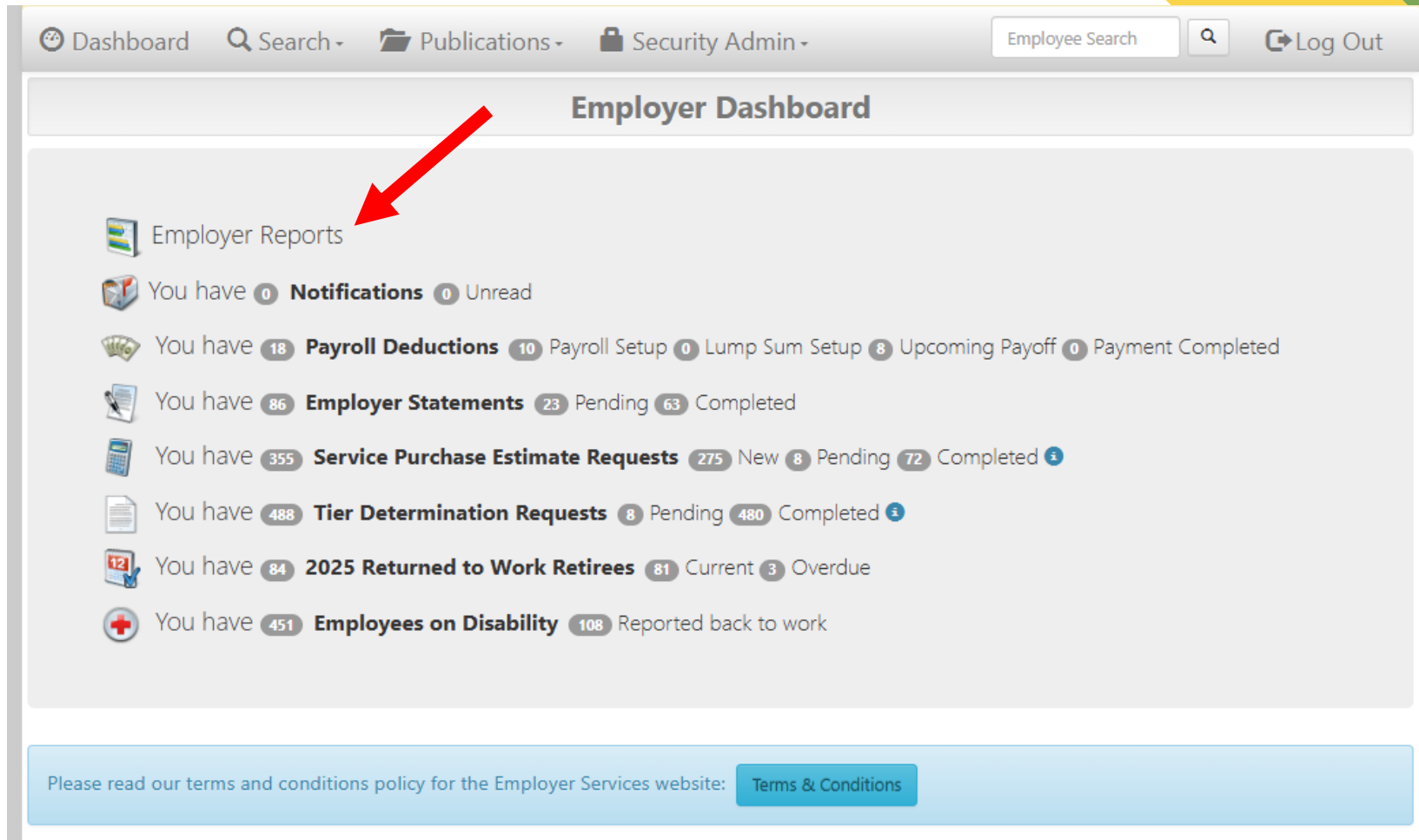
Demographics				Final Average Compensation (FAC)	
Plan:	SERS	Membership Date:	Gender:	Tier 1	Calculated FAC:
		Birth Date:		Age:	Earnings for FAC:
				Total Service:	Months:
					Used Start Date:
					Used End Date:
Last Payroll				Interest	
Plan:				Interest:	
Agency:				Arrearages	
				Balance Due	
				Arrearages:	

Contributions				
Type	Pre-Tax	Post-Tax	Pickup	Total
Retirement				
Widow & Survivor				

Service Claimed in All Systems				
System	From	To	Months of Service	Years of Service
State Employees' Retirement System				

Employer Reports

Step 1: Click “Employer Reports”



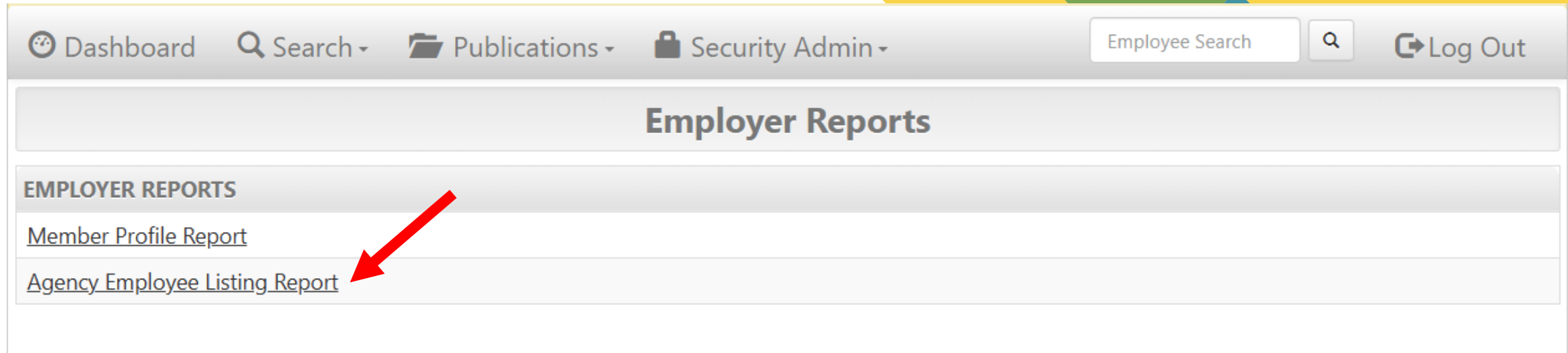
The screenshot displays the Employer Dashboard interface. At the top, there is a navigation bar with links for Dashboard, Search, Publications, Security Admin, Employee Search, and Log Out. The main content area is titled "Employer Dashboard" and contains several sections:

- Employer Reports**: A link with a document icon, highlighted by a red arrow.
- Notifications**: You have 0 Notifications, 0 Unread.
- Payroll Deductions**: You have 18 Payroll Deductions, 10 Payroll Setup, 0 Lump Sum Setup, 8 Upcoming Payoff, 0 Payment Completed.
- Employer Statements**: You have 86 Employer Statements, 23 Pending, 63 Completed.
- Service Purchase Estimate Requests**: You have 355 Service Purchase Estimate Requests, 275 New, 8 Pending, 72 Completed.
- Tier Determination Requests**: You have 488 Tier Determination Requests, 8 Pending, 480 Completed.
- 2025 Returned to Work Retirees**: You have 84 2025 Returned to Work Retirees, 81 Current, 3 Overdue.
- Employees on Disability**: You have 451 Employees on Disability, 108 Reported back to work.

At the bottom of the dashboard, there is a footer with the text "Please read our terms and conditions policy for the Employer Services website:" and a button labeled "Terms & Conditions".

Agency Employee Listing Report

Step 2: Click “Agency Employee Listing Report”



The screenshot displays a web application interface. At the top, there is a navigation bar with the following elements: a home icon and 'Dashboard', a search icon and 'Search', a folder icon and 'Publications', a lock icon and 'Security Admin', an 'Employee Search' input field with a search icon, and a 'Log Out' button with an exit icon. Below the navigation bar is a section titled 'Employer Reports'. Underneath this title, there is a sub-section labeled 'EMPLOYER REPORTS'. This section contains two links: 'Member Profile Report' and 'Agency Employee Listing Report'. A red arrow points to the 'Agency Employee Listing Report' link.

Dashboard Search Publications Security Admin Employee Search Log Out

Employer Reports

EMPLOYER REPORTS

- [Member Profile Report](#)
- [Agency Employee Listing Report](#)

Agency Employee Listing Report

Step 3: Select the Agency and click “Generate Report”

Agency Employee Listing Report

Step 1: Select Agency

Step 2: Select Format

PDF Excel

Generate Report Close

Agency Employee Listing Report

Step 4: The report will be generated and downloaded from the web browser.

The Agency Employee Listing Report allows you to see if a member has an ILogin account or if they have beneficiaries on file and for how long.



Agency Employee Listing Report

Agency:
Employee Count:

Human Services, Department of
15534

Name	Date of Birth	Age	Member ID	SSN	Service Credit (Months)	Last Paycode	First Normal Retirement Date	Member Services Registered	Beneficiary On File?
								No	Yes
								Yes	Yes
								No	No
								No	No
								Yes	Yes
								No	No
								Yes	Yes
								No	Longer than 10 Years
								No	No
								No	No



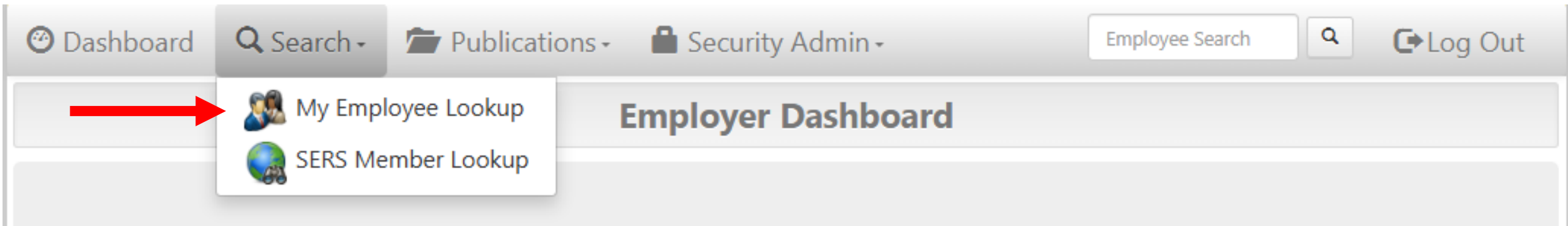


Employee Lookup Member Services



My Employee Lookup

You can access the My Employee Lookup screen by selecting the Search item in the main menu bar and then selecting the My Employee Lookup menu item in the drop down:



My Employee Lookup

You can search for your employee by first name, middle name, last name, SSN, last four digits of SSN, birth date, phone number or any combination. Below are some sample search criteria. Example: John L. Smith, SSN: 123-45-6789, DOB: 2/10/1962

Smith 123-45-6789

Smith 6789

John L Smith

6789 2/10/1962



My Employee Lookup

Employee Search

Search for your Active and Inactive employees by first name, middle name, last name, SSN, last four digits of SSN, Member Id, birth date, phone number or a combination of any of the criteria. View the [Help](#) page for information about which types of employees you can view.

My Employee Lookup

After you enter in your Search Criteria for your employees, click on the Search button to view the search results. A grid listing employees that matched the search criteria will display with their redacted SSN, Last Name, First Name, Middle Name, Birth Date, Pay Code, and Member Id. Use the grid column headers to sort on columns and the drop-down arrows to apply filters to the search results. Click on a row in the grid to view the employee's membership record.

My Employee Lookup

Employee Search

Search for your employees by first name, middle name, last name, SSN, last four SSN, birth date, phone number or a combination of any of the criteria.

Total Records Found: 6

SSN	Last Name	First Name	Middle Name	Birth Date	Pay Code	Member Id
XXX-XX-6789	Smith	Alice	M	10/5/1968	50032	11-1111111
XXX-XX-7891	Smith	Joan	L	7/12/1965	50032	22-2222222
XXX-XX-1234	Smith	John	L	2/10/1962	50131	44-4444444
XXX-XX-9876	Smith	John	S	11/19/1975	50030	66-6666666
XXX-XX-9999	Smith	Karen	A	8/17/1965	50030	55-5555555
XXX-XX-9123	Smith	Nancy	A	6/20/1951	50030	33-3333333

1

Please select an employee by clicking on a row. Use column headers to sort members and the text boxes with drop down arrows to apply filters to the list.

- SERS MEMBERSHIP RECORD**
- DEMOGRAPHICS
- FORMS & APPLICATIONS
- NOMINATED BENEFICIARIES

View Employee Membership Record

After you have selected an employee from the My Employee Lookup search results or from the Global Employee search results, you will be directed to the employee’s Membership Record.

Membership Record

The employee’s membership record will display information grouped into three tabs. The “Basic” tab will display a member’s basic information and last payroll or disability posting information.

BASIC	ACCOUNT	BENEFIT	COLA BUYOUT	TOTAL BUYOUT
Retirement System	State Employees' Retirement System			
Status	Active			
Birth Date	1/26/1959			
Age	66 years 2 months			
Membership Date	07/01/2007			
Tier	Tier 1			
LAST PAYROLL OR DISABILITY POSTING				
Type	Salary			
Current Plan	[1] SERS Regular - Coordinated, Tier 1, 4%			
Pay Code	10-110			
Agency	Human Services, Department of			
Position Code	19785			
Timeworked Basis	Monthly			
Pickup Code	00 (None)			
Last Salary Date	03/15/2025			
Current Rate	\$7,838.00			

For Tier 1 SERS Members, the Tier Summary will display the type of account transaction used for the Tier 1 coding (either Salary or Retroactive pay), the date of the account transaction, and the calculation note with the Tier 1 reasoning. The Tier Summary data is to be printed and used by agencies to code payroll and within personnel packets and files.

If the member is considered Tier 1 due to reciprocal service, the Tier Summary will display which reciprocal system the member has service with and their associated membership date with that reciprocal system. The Tier Summary data is to be printed and used by agencies to code payroll and within personnel packets and files.

SERS TIER SUMMARY	
Calculated Tier	Tier 1
Used Account Transaction Earning Type	Salary
Used Account Transaction From Date	07/01/2007
Used Reciprocal Service	
Used Reciprocal Membership Date	
Calculation Note	Salary or Retroactive Earned prior to 1/1/2011

For Tier 2 SERS Members, an additional warning message will display stating that the member is currently coded as Tier 2, but could qualify to be changed to Tier 1 based on service with a reciprocal retirement system. By clicking the Submit button, a Tier Determination Request will be submitted to the SRS Accounting Division for review. The agency will receive a notification once the Tier Determination case has been completed. The results will be accessible and be able to be used to document the tier.

If the system cannot determine if the member is Tier 1 or Tier 2, the tier will display as Unknown. For all members with an Unknown Tier, a Tier Determination Request must be submitted, via clicking the Submit button, to the SRS Accounting Division to determine the member's correct tier.

SERS TIER SUMMARY	
Calculated Tier	Tier 2 *
Used Account Transaction Earning Type	Salary
Used Account Transaction From Date	02/16/2016
Used Reciprocal Service	
Used Reciprocal Membership Date	
Calculation Note	Salary or Retroactive Earned on or after 1/1/2011

- SERS MEMBERSHIP RECORD
- DEMOGRAPHICS
- FORMS & APPLICATIONS
- NOMINATED BENEFICIARIES

BASIC	ACCOUNT	BENEFIT	COLA BUYOUT	TOTAL BUYOUT
Total Service Credit ⓘ				17 years 8 months
Total Contributions				<u>\$51,161.37</u>
Final Average Compensation (FAC) ⓘ				<u>\$9,024.55</u>
EARNINGS AND SERVICE CREDIT				
Earnings and Service Credit			Earnings and Service Credit by Calendar Year	

The “Account” tab will display account information, such as the member’s total service credit, total contributions, final average compensation (FAC), and Earnings and Service Credit information.

- SERS MEMBERSHIP RECORD
- DEMOGRAPHICS
- FORMS & APPLICATIONS
- NOMINATED BENEFICIARIES

- BASIC
- ACCOUNT
- BENEFIT**
- COLA BUYOUT
- TOTAL BUYOUT

[Print Statement On-Demand](#)

*Your estimated benefits have been calculated as of **3/27/2025**. The estimate is based on the most recent payroll data that we have received and posted to your account (**3/15/2025**). As additional payrolls are received and posted to your account, the benefit calculations will be updated accordingly.*

The “Benefit” tab will display benefit estimate information, including estimates of the member’s retirement, disability, and death/survivor benefits. If the member has reciprocal service with another agency, the record will also be displayed in this tab.

ESTIMATED RETIREMENT BENEFITS

These benefits assume continuous service at current rate of pay through benefit effective date.

Regular Retirement - Monthly Benefit	4/1/2025	<u>\$2,665.68</u>
Age 60 with 8 Years of Service: You must be at least age 60 with 8 years of service		

Earned Retirement - Monthly Benefit	4/1/2025	<u>\$2,665.68</u>
You have currently earned a benefit of \$2,665.68 that is payable on 04/01/2025. This amount is based on what you have earned in retirement benefits up to the present date. If you left state employment on 03/27/2025, this is the amount you can receive in retirement benefits on 04/01/2025.		

For each month (21 days) of unpaid sick days and/or paid sick and vacation days, your projected monthly gross is anticipated to increase by \$12.56.

SERS MEMBERSHIP RECORD

DEMOGRAPHICS

FORMS & APPLICATIONS

NOMINATED BENEFICIARIES

The employee's demographic record will display the member's profile information, current addresses, current phone numbers, and current email addresses.

PROFILE

Full Name

SSN

Gender

Birth Date

ADDRESSES

Mailing Address

Home

PHONE NUMBERS

Cell ★

EMAIL ADDRESSES

Home ★

SERS MEMBERSHIP RECORD

DEMOGRAPHICS

FORMS & APPLICATIONS

NOMINATED BENEFICIARIES


Under Forms & Applications, a selected group of pre-populated PDF forms are available for you to fill out, print, or email to the employee. These forms are specific to the selected member and contain specific member information. If you are printing or emailing these forms for an employee, please make sure you have the correct employee selected before providing the employee the form. Using Adobe Reader, you can open the form, complete the form electronically, and save the changes to the form so you can submit it to SRS.

Click on the form name (ex: Beneficiary Nomination) to either open or download the pre-populated PDF form.

Disability, Pension, and Termination Refund Packets are also available on this tab.

SERS MEMBER FORMS

APPLICATION FOR NON OCC DISABILITY ⬇	Form 3924_Non
APPLICATION FOR OCC DISABILITY ⬇	Form 3924_occ
APPLICATION FOR TEMPORARY DISABILITY ⬇	Form 3924_T
AUTHORIZATION TO RELEASE ⬇	Form 3934
BENEFICIARY NOMINATION ⬇	Form 101
CLAIM NOTIFICATION ⬇	Form 3901
CLAIM NOTIFICATION DISABILITY ⬇	Form 3901_D
JOB DUTY STATEMENT ⬇	Form 3935
MEMBER DEMOGRAPHIC CONFIRMATION ⬇	Form 1006
NON OCC DISABILITY MEDICAL REPORT ⬇	Form 3114
OCC DISABILITY MEDICAL REPORT ⬇	Form 3213
STATEMENT OF EMPLOYER DEATH ⬇	Form 3900
STATEMENT OF EMPLOYER NON OCC DISABILITY ⬇	Form 3900_D
STATEMENT OF EMPLOYER OCC DISABILITY ⬇	Form 3900_D
STATEMENT OF EMPLOYER TEMP DISABILITY ⬇	Form 3900_D
STATEMENT OF EMPLOYER TOTAL BUYOUT ⬇	Form 3900
TEMPORARY DISABILITY MEDICAL REPORT ⬇	Form 3135



SERS MEMBERSHIP RECORD

DEMOGRAPHICS

FORMS & APPLICATIONS

NOMINATED BENEFICIARIES

SERS NOMINATED BENEFICIARIES

Member has beneficiaries on file that were last updated 12/14/2016.

Under Nominated Beneficiaries, the date in which the employee last updated their beneficiaries with SERS is available for review. To update beneficiaries, the form 101 is available under Forms & Applications.

Global Employee Search

Alternatively, you can use the global employee search to quickly search for an employee to view their membership record. The global employee search uses the same search criteria as the Employee Search on the My Employee Lookup page.

The screenshot displays a web application interface. At the top right, there is a user profile dropdown menu showing a globe icon and the text "Taker, Screenshot L". Below this is a search bar containing the text "Smith". To the right of the search bar is a search button with a magnifying glass icon, which is highlighted with a red dashed box and a red arrow pointing left. Further right is a "Log Out" button with a circular arrow icon, also with a red arrow pointing left. Below the search bar, a dropdown menu is open, showing a search result for "Test M Case". The result includes a profile picture of a woman, the name "Test M Case", and two lines of text: "SSN: XXX-XX-4444" and "ID: 22-7777777". A red arrow points to the right side of the dropdown menu.



Pension/Death Benefit Information



Tier 1 How Soon? Regular Formula

- Age 60 with 8 Years Service Credit
- Rule of 85 (Age + Service = 85)
- Any age with 35 Years of Service

Tier 1 Member: Individuals who became a member of SERS or a reciprocal system before January 1, 2011. (needs 8 years service credit to be vested)

FAC: Final Average Compensation.

Coordinated Employee: Employee who pays into Social Security.

Non-Coordinated Employee: Employee who does not pay into Social Security.



Tier 1 How Soon?

Alternative Formula

- Age 50-54 with 25 years of service credit.
- Age 55-59 with 20 years of service credit.

No Rule of 75



Tier 2 How Soon? Regular Formula

Age 67 with 10 Years Service Credit

Tier 2 Member: Individuals who became a member of SERS or a reciprocal system after January 1, 2011. (needs 10 years service credit to be vested)

FAC: Final Average Compensation.

Coordinated Employee: Employee who pays into Social Security.

Non-Coordinated Employee: Employee who does not pay into Social Security.



Tier 2 How Soon?

Alternative Formula

- Age 60 with 20 years of alternative service credit.
- Age 55 with 20 years of alternative service credit (certain non-coordinated job positions only).

Tier 2 Alternative Formula Employees Non-Coordinated

- State Police*
- Conservation Police Officers*
- Secretary of State Investigators*
- Attorney General Investigators*
- Commerce Commission Police Officers*
- Gaming Board Investigators*
- Department of Revenue Investigators*
- Arson Investigators*
- Firefighters

*These positions are eligible to retire at Age 55 with 20 years of alternative service credit.

Service

Monthly Employees	Hourly Employees	Daily Employees	Monthly Credit
15 or more days	75 or more hours	10 or more workdays	1
8 – 14 days	38 – 74 hours	5 – 9 workdays	½
Less than 8 days	Less than 38 hours	Less than 5 workdays	¼

Sick & Vacation Days can help with:

- Meet eligibility date to retire
- Increase pension once eligibility date has been reached
- Counts towards getting free insurance premium



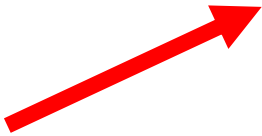
Calculators

[Social Security Benefit Estimate Calculator](#)

[Service Credit Calculator](#)

[Sick Leave and Vacation Chart](#)

[Pension Estimate Calculator Training Video](#)



[Back to top ^](#)

SERS CONTACT INFORMATION

2101 S. Veterans Parkway
Springfield, IL 62704
Phone: 217-785-7444
Fax: 217-785-7019
[Email SERS](#)

HELPFUL LINKS

Illinois State Board of Investments
[Report SERS Fraud](#)
[Report JRS Fraud](#)
[Report GARS Fraud](#)

JRS/GARS CONTACT INFO

2101 S. Veterans Parkway
Springfield, IL 62704
Phone: 217-782-8500
Fax: 217-524-9039
[Email JRS](#)
[Email GARS](#)

FOR JRS/GARS MEMBERS ONLY
JRS/GARS representatives do not have the ability or authorization to access SERS member data, or to assist SERS members.

Sick Leave & Vacation Service Credit Conversion Chart

Days	=	Months	Days	=	Months
1-5	=	0.25	131-135	=	6.25
6-10	=	0.50	136-140	=	6.50
11-21	=	1.00	141-151	=	7.00
22-26	=	1.25	152-156	=	7.25
27-32	=	1.50	157-161	=	7.50
33-43	=	2.00	162-173	=	8.00
44-48	=	2.25	174-178	=	8.25
49-53	=	2.50	179-183	=	8.50
54-65	=	3.00	184-195	=	9.00
66-70	=	3.25	196-200	=	9.25
71-75	=	3.50	201-205	=	9.50
76-86	=	4.00	206-216	=	10.00
87-91	=	4.25	217-221	=	10.25
92-96	=	4.50	222-226	=	10.50
97-108	=	5.00	227-238	=	11.00
109-113	=	5.25	239-243	=	11.25
114-118	=	5.50	244-248	=	11.50
119-130	=	6.00	249-260	=	12.00

Sick Time

Tier 1 Before 1984	Tier 1 1984 – 1997 (168 max)	Tier 1 After 1997	Tier 2 After 1997
# of unused sick days = FREE service credit	½ sick days – paid days plus service credit ½ sick days – FREE service credit	# of unused sick days = FREE service credit	# of unused sick days = FREE service credit

Sick & Vacation Time

Vacation days = 67

Sick days (unpaid) = 130

Paid	Unpaid
V = 67	S = 130
3.25 Months	6 Months

Pay contributions for paid time to receive 3.25 months of credit

Unpaid time for 6 months is Free

TOTAL SERVICE CREDIT = 9.25 Months (within 90 days of retiring)





Calculators

[Social Security Benefit Estimate Calculator](#)

[Service Credit Calculator](#)

[Sick Leave and Vacation Chart](#)

[Pension Estimate Calculator Training Video](#)



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[Back to top ^](#)



Service Credit Calculator

Service Credit Calculator

Remember: this is a projection based on information you provide.

This calculator is a tool to estimate how many months of service you have for your unused sick, vacation, and personal days.

Unused Sick Days earned before 1-1-1984

Unused Sick Days earned after 12-31-1997

Unused Sick Days earned between 12-31-1983 and 1-1-1998

Unused Vacation Days

1/2 Unused Personal Days (input half your unused days)

Calculate

Total Number of Months



Reciprocal Systems*


- Chicago Teachers' Pension Fund
- County Employees' Annuity & Benefit Fund of Cook County
- Forest Preserve District Employees' Annuity & Benefit Fund of Cook County
- General Assembly Retirement System
- Illinois Municipal Retirement Fund
- Judges' Retirement System
- Laborers' Annuity & Benefit Fund of Chicago
- Metropolitan Water Reclamation District Retirement Fund
- Municipal Employees' Annuity & Benefit Fund of Chicago
- Park Employees' Annuity & Benefit Fund of Chicago
- State Employees' Retirement System of Illinois
- Teachers' Retirement System
- State Universities Retirement System

*Members with questions regarding Reciprocal Time should contact SERS.



Employer Statement Instructions (3900/1404)



Connecting to 

Sign in with your account to access SRS Employer Website



Sign In

Username

 This field cannot be left blank

Keep me signed in

Next

[Unlock account?](#)


[Help](#)




Login to Employer Services.

Employer Dashboard

 Employer Reports

 You have **0 Notifications** **0** Unread

 You have **18 Payroll Deductions** **10** Payroll Setup **0** Lump Sum Setup **8** Upcoming Payoff **0** Payment Completed

 You have **86 Employer Statements** **23** Pending **63** Completed 

 You have **355 Service Purchase Estimate Requests** **275** New **8** Pending **72** Completed 

 You have **492 Tier Determination Requests** **7** Pending **485** Completed 

 You have **84 2025 Returned to Work Retirees** **83** Current **1** Overdue

 You have **451 Employees on Disability** **108** Reported back to work

Click “Employer Statements”

Employer Statements

PENDING COMPLETED



Payable Benefit Time Calculator

Show 10 entries

Search:

MEMBER NAME	EIN	CLAIM TYPE	RETIREMENT DATE	PAY CODE	1404 STATUS	LAST UPDATED BY	LAST UPDATED DATE
		Pension	4/1/2025	10-158	Pending	Marilyn Kennedy	3/3/2025
		Pension	4/1/2025	10-158	Pending	Marilyn Kennedy	2/5/2025
		Pension	4/1/2025	10-158	Pending	Marilyn Kennedy	3/3/2025
		Pension	5/1/2025	10-179	Pre-Tax	Marilyn Kennedy	3/19/2025
		Pension	5/1/2025	10-139	Pending	Marilyn Kennedy	2/13/2025
		Pension	5/1/2025	10-110			
		Pension	5/1/2025	10-174			
		Pension	5/1/2025	10-215			
		Pension	5/1/2025	10-195			
		Pension	5/1/2025	10-154			

Select "Payable Benefit Time Calculator" to create an unofficial estimate for the employee.

Payable Benefit Time Calculator

SERS PAYABLE BENEFIT TIME CALCULATOR

Plan Tier: [1] SERS Regular - Coordinated, Tier 1, 4%

Retirement Date: 02/01/2026

Employee total monthly rate of pay: 10,000.00

Total unused sick days earned prior to January 1, 1984: 0.00

Total unused sick days earned after December 31, 1997: 0.00

Total unused sick days earned after December 31, 1983 and before January 1, 1998: 0.00

Vacation Days: 20.00

Total Unused Personal Days: 0.00

Calculate Cancel

Select a Plan Tier, Retirement Date, input Total monthly rate of pay and Sick/Vacation Days, then click "Calculate"



SERS PAYABLE BENEFIT TIME ESTIMATE

Retirement Date	2/1/2026
Daily Rate of Pay	\$459.77
Deduction Rate	4.0000 %
Lump Sum Payment for Paid Sick, Vacation and Personal Days	\$9,195.40
Months of Service Credit Established for Paid Time	1.00
Contributions Due	$(\$5,057.47 * 4.0000 \%)$ \$202.30

LUMP SUM PAYMENT IS BEING MADE FOR:

Paid Sick Days	0.00	\$0.00
Vacation Days	20.00	\$9,195.40
Personal Days	0.00	\$0.00
Total Days	20.00	\$9,195.40

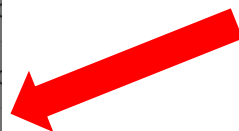
SERVICE IS BEING ESTABLISHED FOR:

Paid Sick Days	0.00	\$0.00
Vacation Days	11.00	\$5,057.47



Print

Close



Scroll down to see the rest of the estimate or click "Print" to print a copy.

Sample Estimate



SERS Payable Benefit Time Estimate

Retirement Date	2/1/2026
Daily Rate of Pay	\$459.77
Deduction Rate	4.0000 %
Lump Sum Payment for Paid Sick, Vacation and Personal Days	\$9,195.40
Months of Service Credit Established for Paid Time	1.00
Contributions Due	$(\$5,057.47 * 4.0000 \%)$ \$202.30

Employer Dashboard

- Employer Reports
- You have 0 **Notifications** 0 Unread
- You have 18 **Payroll Deductions** 10 Payroll Setup 0 Lump Sum Setup 8 Upcoming Payoff 0 Payment Completed
- You have 86 **Employer Statements** 23 Pending 63 Completed ←
- You have 355 **Service Purchase Estimate Requests** 275 New 8 Pending 72 Completed ⓘ
- You have 492 **Tier Determination Requests** 7 Pending 485 Completed ⓘ
- You have 84 **2025 Returned to Work Retirees** 83 Current 1 Overdue
- You have 451 **Employees on Disability** 108 Reported back to work

Click "Employer Statements"

Employer Statements

PENDING COMPLETED

Payable Benefit Time Calculator

Show 10 entries

Search:

MEMBER NAME	EIN	CLAIM TYPE	RETIREMENT DATE	PAY CODE	1404 STATUS	LAST UPDATED BY	LAST UPDATED DATE
		Pension	4/1/2025	10-158	Pending	Marilyn Kennedy	3/3/2025
		Pension	4/1/2025	10-158	Pending	Marilyn Kennedy	2/5/2025
		Pension	4/1/2025	10-158	Pending	Marilyn Kennedy	3/3/2025
		Pension	5/1/2025	10-179	Pre-Tax	Marilyn Kennedy	3/19/2025
		Pension	5/1/2025	10-139	Pending	Marilyn Kennedy	2/13/2025
		Pension	5/1/2025	10-110			
		Pension	5/1/2025	10-174			
		Pension	5/1/2025	10-215			
		Pension	5/1/2025	10-195			
		Pension	5/1/2025	10-154			

Select the appropriate employee. You can sort by the items on the headings or use the search bar to find them.

Last day employee physically worked:

MM/DD/YYYY

« October 2023 »

Su	Mo	Tu	We	Th	Fr	Sa
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

10/31/2023



Last day employee physically worked: Input the last date the employee was present and worked.



Last pay period employee due wages, either the 15th or the end of month:

MM/DD/YYYY

Last pay period employee due wages, either the 15th or the end of the month:
Indicate the last day of the pay period employee was paid



Date employee removed from payroll:

MM/DD/YYYY

Date employee removed from payroll: Indicate the pay period ending date of when employee was removed from payroll.



Has employee returned to work?

Yes No

Has employee returned to work? If employee is returning as a 75 day employee or on a contract, the answer is “no”.

If employee is returning as a state employee, select “yes” and enter the date the employee returned to work.



Date returned to work:

MM/DD/YYYY

Date returned to work: Date employee physically returned to work.

Reason for removal:	Resignation
Total unused sick days earned prior to January 1, 1	-Select One-
Total unused sick days earned after December 31,	Discharge/Dismissal
Total unused sick days earned after December 31,	Layoff
Total unused sick days earned after December 31,	Medical Leave of Absence
Total unused sick days earned after December 31,	No Leave Granted
Total unused sick days earned after December 31,	Resignation
Total unused sick days earned after December 31,	Service Connected Leave

Reason for removal: Use the drop down menu to select the reason for the member's removal from employment.



Effective date of Action:

MM/DD/YYYY

Effective date of Action: Self-explanatory.



Total unused sick days earned prior to January 1, 1984:

0.00

Total unused sick days earned prior to January 1, 1984: Self-explanatory.



Total unused sick days earned after December 31, 1997:

0.00

Total unused sick days earned after December 31, 1997: Self-explanatory.



Total unused sick days earned after December 31, 1983 and before January 1, 1998:

0.00

Total unused sick days earned after December 31, 1983 and before January 1, 1998: Self-explanatory.



Number of unused sick days remaining for pension calculation:

$$0 + 0 + 0/2 = 0.00$$

(rounded to 0)

Number of unused sick days remaining for pension calculation: This is automatically calculated by the system.



Employee base rate of pay:

0.00

Employee base rate of pay: Rate of pay at the time of separation of employment.

Employee Work Status:

Frequency of pay:

-Select One-



-Select One-

Full Time

Part Time

YES

NO

Employee Work Status: Select Full time or Part time from the drop down menu.



Employee total rate of pay:

0.00

Employee total rate of pay: Include base rate of pay plus longevity, bilingual, and permanent differential.

Frequency of pay:

-Select One-



-Select One-

Bi-Weekly

Daily

Hourly

Monthly

Semi-Monthly

ist the member, arising from or in

Frequency of pay: Select bi-weekly, daily, hourly, monthly, or semi-monthly from the drop down menu.

Will a 1404 be processed?

Yes No

Will a 1404 be processed? | [View 1404](#)

Yes No

Vacation Days:

0.00

Total Unused Personal Days:

0.00

Is estimated 1404 ready for Member Election? 

Yes No

Will a 1404 be processed? Select Yes or No from the button menu. Selecting “Yes” will make the applicable questions appear. Selecting “No” will keep them hidden.

If you selected “Yes”, enter the amount of vacation days, total unused personal days, and is the estimate ready for Member Election? When you select yes to the estimate, the member will be able to make an election on their Member Services account.

Select Payment Method

Your employer has indicated that you would like to establish extra months of service using your lump sum payment for Paid Sick, Vacation and Personal Days. If this is correct, please select either the Pre-Tax or Post-Tax option, the contributions will be withheld from your lump sum payment. If this is incorrect, please select No, I did not want to establish extra months of service.

Pre-Tax (Contributions are not taxed until after employee retires.)
I elect and authorize the deduction of employee retirement contributions for my lump sum pay for sick days, vacation and or personal days on a pre-tax (i.e. tax deferred) basis.

IRREVOCABLE PAYROLL AUTHORIZATION

I hereby authorize and understand that this authorization is binding and irrevocable.

- A deduction is to be made from my lump sum sick and vacation payment in the amount of **\$1,540.54** .
- For the effective period of this agreement, payments are to be made by my employer. While this agreement is in effect, I understand that SERS will only accept payment from my employer and not directly from me.
- My employer is obligated to make payment pursuant to this agreement only if there are sufficient funds from my earnings to do so after any other mandatory deductions.

Post-Tax (Uncommon) (Contributions are taxed at the time of Lump Sum payment.)
I elect and authorize the deduction of employee retirement contributions on my lump sum pay for sick days, vacation and/or personal days on a post-tax (i.e. NOT tax deferred) basis.

No, I DID NOT want to establish extra months of service.

Review and Confirm Sick and Vacation Election

Member Election

SICK AND VACATION MEMBER ELECTION

Lump Sum Payment from Paid Sick, Vacation and Personal Days \$6,052.47

Paid Months of Service Established 1.50

Contributions Due \$514.46

Tax Option Pre-Tax

I understand that by checking this box I elect and authorize the deduction of employee retirement contributions for my lump sum pay for sick days, vacation and or personal days on a pre-tax (i.e. tax deferred) basis.

I understand that checking this box constitutes a legal signature under Illinois Law that confirms I acknowledge and warrant the truthfulness of the information provided in this official record of the retirement system. I understand that pursuant to State law, any person who knowingly makes a false statement or falsifies a record in an attempt to defraud the retirement system is guilty of a Class 3 felony.

Please send me an e-mail receipt of this election confirmation. Your notification e-mail address is: d-witt1969@hotmail.com. Click [Profile](#) to update your e-mail address.

Submit

Close



Member Election

Will a 1404 be processed?

Yes No

Member Election Status: **i** Member has not made an online election. Please contact the member at therailsplitter@gmail.com .

Vacation Days:

22.00

Total Unused Personal Days:

4.00

Is estimated 1404 ready for Member Election?

Yes No

Member Election Status: **i** Member has elected Pre-Tax (BSLS) contributions to be withheld from lump sum payment. [Reset Member Election](#)

Vacation Days:

22.00

Total Unused Personal Days:

4.00

Is estimated 1404 ready for Member Election?

Yes No

You will need to enter an estimated number of days as the member will make the election while they are still working. When the agency submits the form, the number of days must be the final numbers. You can also reset the member's election if a mistake is made or if a decision is reversed.

SRS Member Services - Sick And Vacation Contribution Election Received



SRSITTestEmail
To: SRSITTestEmail

Reply Reply All Forward

Tue 11/28/2023 8:45 AM

We have received your election on Sick and Vacation Contributions. Please forward this email to your retirement coordinator/payroll coordinator.

Below are lump sum payment, months of service, and contributions due estimates. Final numbers may change upon the last date of employment.

Employee Name:
Member ID:
Paid Months of Service Established: 1.00
Contributions Due: \$113.33
Tax Option: Pre-Tax

Thank you,
State Retirement Systems of Illinois



This e-mail was sent to test3900@gmail.com from a notification-only address that cannot accept incoming email. Please do not reply to this message. Contact (217) 785-7444 if you have any questions regarding this message.

This is an example email that a member will receive when they make an election. As a retirement coordinator or payroll coordinator, you will need to communicate to your employees that they need to forward this email to you.

Lump Sum Payment for Sick, Vacation and Personal Days

LINCOLN, ABRAHAM - XXX-XX-1234 - [MEMBER ID: 12-3456789]

Daily Rate of Pay	\$286.02
Pay Code	27-101
Deduction Rate (Code: 1)	4.0000 %
Lump Sum Payment for Paid Sick, Vacation and Personal Days	\$15,067.53
Months of Service Credit Established for Paid Time	2.50
Contributions Due	(\$14,014.98 * 4.00 %) \$560.60
Member Election	Pre-Tax (BSLS)

LUMP SUM PAYMENT IS BEING MADE FOR:

Paid Sick Days	0.00	\$0.00
Vacation Days	51.68	\$14,781.51
Personal Days	1.00	\$286.02
Total Days	52.68	\$15,067.53

SERVICE IS BEING ESTABLISHED FOR:

Paid Sick Days	0.00	\$0.00
----------------	------	--------

Close

Lump Sum Payment for Sick, Vacation and Personal Days

Personal Days	1.00	\$286.02
Total Days	52.68	\$15,067.53

SERVICE IS BEING ESTABLISHED FOR:

Paid Sick Days	0.00	\$0.00
Vacation Days	48.00	\$13,728.96
Personal Days	1.00	\$286.02
Total Days	49.00	\$14,014.98

Best Calculation Method: i

✓ Separate calculation of unpaid and paid days:
4.50 (93.70 unpaid days) + 2.50 (52.68 paid days) = 7.00 months of service credit.

Combined calculation of unpaid and paid days:
(93.70 unpaid days + 52.68 paid days = 146.38 days) = 7.00 months of service credit.

	Unpaid Time	Paid Time	Total
Months of Service Credit Established	4.50	2.50	7.00

Calculation Note:

Minimum Days Apply: Employee's paid days has been automatically adjusted to 49.00 days to establish 2.50 months of paid service credit.

Close

Are you aware of any official misconduct charges (pending, dismissed, or finalized) against the member, arising from or in connection with their employment with the state of Illinois?

Yes No

Are you aware of any official misconduct charges (pending, dismissed, or finalized) against the member, arising from or in connection with their employment with the state of Illinois?

Yes No

Please provide brief explanation of the official misconduct charges (pending, dismissed, or finalized) against the member.

Are you aware of any official misconduct charges (pending, dismissed, or finalized) against the member, arising from or in connection with their employment with the state of Illinois? This question is asking for felonies at the job against the State of Illinois.



Please use this space to document any additional information that you feel we need to know.

Enter any additional information you feel would be helpful to SERS in processing this Employer Statement.

REVIEW AND SUBMIT 


By submitting this form electronically, I certify this information is correct and that I am aware that knowingly making a false statement or falsifying a record in an attempt to defraud SERS is a class 3 felony. I understand that if the SERS Board of Trustees has a reasonable suspicion that an attempt has been made to defraud SERS, it is required to report the matter to the appropriate State's Attorney for investigation.

Save

Submit to SRS

Employer Statement has been saved!

Select “Save” at the bottom of the page. If there are errors in the form, an explanation will be given at the top of the page for you to address.

- 
- Last day salary or wages due employee is a required field to save.
 - Date employee removed from payroll is a required field to save.
 - Effective Date of Action is a required field to save.
 - Last day employee physically worked is a required field to save.
 - Employer Work Status is a required field to save.
 - Frequency of Pay is a required field to save.
 - Unused sick days earned after 12/31/1983 and before 1/1/1998 cannot exceed 168.
 - Total Rate of Pay (\$56,465.00) must equal Current Rate of Pay (\$6,820.00). Please fix the rate or provide a reason for the discrepancy.
 - Total Unused Sick Days (852446635.00) cannot be greater than Total Months of Service (257.75). Please fix the number of days or provide a reason for the discrepancy.
 - Member has Unused Sick Days Earned Prior to January 1, 1984, but has the membership date of 1/1/1999. Please fix the number of days or provide a reason for the discrepancy.
 - Please provide brief explanation of the official misconduct charges (pending, dismissed, or finalized) against the member.
 - Will a 1404 be processed? is a required field to save.
-
- Last day salary or wages due employee must be 15th or last day of the month.

All possible errors are listed above for your reference.

REVIEW AND SUBMIT

By submitting this form electronically, I certify this information is correct and that I am aware that knowingly making a false statement or falsifying a record in an attempt to defraud SERS is a class 3 felony. I understand that if the SERS Board of Trustees has a reasonable suspicion that an attempt has been made to defraud SERS, it is required to report the matter to the appropriate State's Attorney for investigation.

Save

Submit to SRS

Employer Statement has been submitted!

[View Printable Employer Statement](#)



Submit to SRS. All errors must be resolved before submitting to SRS. The employee must be off payroll. The number of sick/vacation/personal days must be finalized. If the lump sum sick and vacation time is being purchased, the employee must make the election in Member Services before “Submit to SRS” is available.

If you find that changes need to be made after the forms have been submitted to SERS, please contact our office at SERS@SRS.illinois.gov

Print Employer Statement

Dashboard Search Tasks Publications Employee Search Log Out

Employer Statements

PENDING COMPLETED

Show 10 entries Search:

MEMBER NAME	EIN	CLAIM TYPE	RETIREMENT DATE	PAY CODE	1404 STATUS	LAST UPDATED BY	LAST UPDATED DATE
[REDACTED]	[REDACTED]	Pension	11/1/2023	29-183	Pre-Tax	Yock Tan	11/28/2023
[REDACTED]	[REDACTED]	Pension	11/1/2023	29-180	Pre-Tax	Nancy George	11/28/2023
[REDACTED]	[REDACTED]	Pension	12/1/2023	29-169	Pre-Tax	Jawni Watters	11/22/2023
[REDACTED]	[REDACTED]	Pension	12/1/2023	29-175	Pre-Tax	Amelia West	11/22/2023
[REDACTED]	[REDACTED]	Pension	12/1/2023	29-104	Pre-Tax	Austin Schmitz	11/27/2023
[REDACTED]	[REDACTED]	Pension	1/1/2024	29-301	Pre-Tax	Emily Zumwalt	11/21/2023
[REDACTED]	[REDACTED]	Pension	1/1/2024	29-188	Pre-Tax	Austin Schmitz	11/28/2023
[REDACTED]	[REDACTED]	Pension	12/1/2023	29-167	Pending	Silvestre Diaz	11/20/2023
[REDACTED]	[REDACTED]	Pension	1/1/2024	29-105	Pending	Emily Zumwalt	11/22/2023
[REDACTED]	[REDACTED]	Pension	12/1/2023	29-163			

Showing 1 to 10 of 67 entries Previous 1 2 3 4 5 6 7 Next

Employer Statement for Pension

[View Printable Payable Benefit Time](#)

[View Printable Employer Statement](#)

[RETURN TO EMPLOYER STATEMENT LISTING](#)

Retirement Date:	1/1/2024	Type of Claim:	Pension
Date Received:	1/11/2024	Submitted:	1/11/2024 By Stuart L Bogan

EMPLOYER STATEMENT

Please enter and complete the requested information below.

Last day employee physically worked:

Last pay period employee due wages, either the 15th or the end of month:

Date employee removed from payroll:

Has employee returned to work? Yes No **Date returned to work:**

Reason for removal: **Effective date of Action:**

Total unused sick days earned prior to January 1, 1984:

Total unused sick days earned after December 31, 1997:

Total unused sick days earned after December 31, 1983 and before January 1, 1998:



Employer Statement 3900 Form for Death Benefit/Total Buyout





2101 South Veterans Parkway
P.O. Box 19255
Springfield, IL 62794-9255

217-785-7444
Email: sers@srs.illinois.gov

Employer Statement

1. Type of claim

- Death
- Total Buyout

Member information

Name (Last, first, middle) _____

SSN (last 4) or Member ID _____

Address (Street, City, State, Zip) _____

Phone number _____

2. Last day employee physically worked (MM/DD/YYYY) _____

3(a). Last day of salary or wages due employee: (MM/DD/YYYY) _____

(b). Date employee removed from payroll, biweekly or either the 15th or the end of month: _____

(c). Has employee returned to work? Yes No Date returned to work: _____

4(a). Reason for removal:

- Resignation
- Medical Leave of Absence
- Discharge/Dismissal
- Service Connected Leave
- Layoff
- Death (Was member on an approved medical leave of absence at death? Yes No)

(b). Effective date of removal action (MM/DD/YYYY) _____

5. Total unused sick days earned prior to Jan. 1, 1984 (A)

Total unused sick days earned after Dec. 31, 1997 (B)

Total unused sick days earned after Dec. 31, 1983 and before Jan. 1, 1998

Subtract one-half of unused sick days earned after Dec. 31, 1983 and before Jan. 1, 1998 (C)

Number of unused sick days remaining for pension calculation (A)+(B)+(C)=

6(a). Employee base rate of pay: \$ _____; (b). Employee work status: Full time Part time

(c). Employee total rate of pay: \$ _____; (d). Pay frequency: monthly semi-monthly biweekly hourly

7. Will a Form 1404 (Retirement Contributions on Lump-Sum Pay for Sick Leave, Vacation and/or Personal Days) be processed?


- Yes No

8. Are you aware of any official misconduct charges (pending, dismissed, or finalized) against the member, relating to, or arising out of, or in connection with their employment with the state of Illinois? Yes No

Retirement Coordinator signature _____ Date _____

Phone number _____



- 
1. Type of claim
 - Death
 - Total Buyout

2. Last day employee physically worked (MM/DD/YYYY) _____

3(a). Last day of salary or wages due employee: (MM/DD/YYYY) _____

(b). Date employee removed from payroll, biweekly or either the 15th or the end of month: _____

(c). Has employee returned to work? Yes No Date returned to work: _____

Please Note

1. Select the type of claim
2. Input the date for this specific separation of employment
- 3 (a). When the agency last paid the member
- 3 (b). 15th, 30th, or 31st
- 3 (c). Has the employee physically returned to work from the specific leave the member is submitting a claim for?



4(a). Reason for removal:

Resignation

Medical Leave of Absence

Discharge/Dismissal

Service Connected Leave

Layoff

Death (Was member on an approved medical leave of absence at death? Yes No)

(b). Effective date of removal action (MM/DD/YYYY)

Please Note

4 (a). Select the reason for the member's removal from employment

4 (a). If death was selected, was the member on an approved medical leave of absence at the time of death?

4 (b). Input the effective date of the removal from employment

5.	Total unused sick days earned prior to Jan. 1, 1984	_____	(A)
	Total unused sick days earned after Dec. 31, 1997	_____	(B)
	Total unused sick days earned after Dec. 31, 1983 and before Jan. 1, 1998	_____	
	Subtract one-half of unused sick days earned after Dec. 31, 1983 and before Jan. 1, 1998	(_____)	(C)
	Number of unused sick days remaining for pension calculation	(A)+(B)+(C)= _____	

Please Note

- 5 (A). Input the total amount of unused sick days earned prior to January 1, 1984
- 5 (B). Input the total amount of unused sick days earned after December 31, 1997
- 5 (B). Input the total amount of unused sick days earned after December 31, 1983 but before January 1, 1998
- 5 (C). Input half of the amount of the number of unused sick days earned after December 31, 1983 but before January 1, 1998. Both lines should match.
- 5 (C). Add the numbers together from 5 (A), 5 (B), and 5 (C)

- 6(a). Employee base rate of pay: \$ _____; (b). Employee work status: Full time Part time
- (c). Employee total rate of pay: \$ _____; (d). Pay frequency: monthly semi-monthly biweekly hourly
7. Will a Form 1404 (Retirement Contributions on Lump-Sum Pay for Sick Leave, Vacation and/or Personal Days) be processed?
 Yes No
8. Are you aware of any official misconduct charges (pending, dismissed, or finalized) against the member, relating to, or arising out of, or in connection with their employment with the state of Illinois? Yes No

Please Note

- 6 (A). Rate of pay at the time of separation of employment, not current rate of pay
- 6 (B). Select Full time or Part time
- 6 (C). Including longevity pay or this will cause a discrepancy
- 6 (D). Monthly, semi-monthly, biweekly, or hourly
7. Yes or No
8. This question is asking for felonies at your job against the State of Illinois



Disability Benefit Information



Disability

SERS offers three types of disability benefits:

- Nonoccupational
- Occupational
- Temporary



Nonoccupational Disability (Non-Work Related Injury/Illness)

Requirements for Nonoccupational Disability Benefits

- Must be granted a medical leave of absence by agency
- Disability must continue beyond 30 days after stopping work
- 18 months of credited service with SERS (reciprocal service with TRS or SURS can apply)
- Must use all accumulated sick leave
- Submit Nonoccupational Disability Application and all required documents to SERS
- SERS determines member is disabled

Nonoccupational Disability

When payments begin & end

Benefits begin:

- The 31st day of absence from work because of disability (Sick time is included in the 30-day waiting period)
- The 31st day after the medical onset of disability
- The last day wages were received (including periods when sick pay was received)

Benefits end:

- When disability ends
- When member returns to work for the State or becomes gainfully employed
- When ½ of service credit is exhausted
- When member reaches age 65
- If disability began after age 60, benefits are payable for a maximum of 5 years as long as the member has at least 10 years of credited service



Nonoccupational Disability Half Time Ceasing

If a member's Nonoccupational benefit is terminated because of the ½ time limit and the member is still disabled, they are eligible for an unreduced retirement annuity if:

Tier 1

- Member is age 60 with at least 8 years of service credit
- Member is age 55 with at least 15 years of service credit
- Member is age 50 with at least 20 years of service credit

Tier 2

- Member is age 67 with at least 10 years of service credit

Tier 2 (reduced option)

- Member is 62 with at least 10 years of service credit

Nonoccupational Disability



Benefit Amounts

Tier 1 Members

- 50% of the member's monthly rate of pay or Final Average Compensation as of the date removed from payroll, whichever is the higher of the two.

Tier 2 Members

- 50% of the member's Final Average Compensation as of the date removed from payroll.

The benefit amount is reduced by Social Security Disability benefits, or Social Security Retirement benefits if the member is at **full** retirement age regardless if the member is receiving Social Security or not.

Final Average Compensation (FAC)

- FAC for Tier 1 members is the average of the 48 highest consecutive months of service within the last 10 years
- FAC for Tier 2 members is the average of the 96 highest consecutive months of service within the last 10 years
- FAC is the same as AFC

Occupational Disability (Work-Related Injury/Illness)



Requirements for Occupational Disability Benefits

- File a claim with the Illinois Workers' Compensation Commission to determine if your disability is work-related
- Must be paid TTD benefits from IL Workers' Compensation or receive a Workers' Compensation Settlement
- Submit an occupational disability application and all required documents to SERS
- SERS determines you are disabled

Occupational Disability

When payments begin & end

Benefits begin:

- SERS determines member is disabled
- Receive benefits under the Workers' Compensation or Occupational Diseases Act
- Member is removed from agency payroll
- SERS can pay the same days as Workers' Compensation pays

Benefits end:

- When disability ends
- When member returns to work for the state
- Workers' Compensation stops paying benefits
- When member reaches age 65
- If disability begins after age 60, benefits can be paid for a maximum of five years.



Occupational Disability Benefit Amounts

Benefit Amounts

Tier 1 Members

75% of member's Final Average Compensation or monthly rate of pay on the date removed from payroll, whichever is greater

Tier 2 Members

75% of Final Average Compensation on the date removed from payroll

The benefit amount is reduced by any payments made under the Workers' Compensation Act or the Workers' Occupational Diseases Act



Temporary Disability Benefits

- This benefit is only available when there is a disputed Workers' Compensation claim and member is filing an appeal with Workers' Compensation
- Members **are not eligible** for a Non-Occupational disability benefit if they are appealing a Workers' Compensation denial or suspension of TTD benefits
- Members are not required to exhaust their sick time for a Temporary benefit



Temporary Disability Eligibility

Requirements for Temporary Disability Benefits

If the claim for TTD is denied:

- Filed an appeal with the Illinois Workers' Compensation Commission (19b)
- Have at least 18 months of credited service with SERS (includes TRS and SURS reciprocal service)
- Submit the Temporary Disability application and all required documents to SERS
- SERS determines if member is disabled
- Can begin receiving payments on the 31st day from the day last paid by the agency.

An approved medical leave of absence is NOT required

Members do not have to exhaust their sick time

Temporary Disability Eligibility

If TTD is terminated:

- Have filed an appeal with the Illinois WCC (19b)
- Must have at least 18 months of credited service with SERS (includes TRS or SURS reciprocal service)
- Submit the Temporary Disability application and all required documents to SERS
- SERS determines you are disabled

An approved medical leave of absence is NOT required
Members do not have to exhaust their sick time

Temporary Disability Offset

Temporary benefits will be offset by any Social Security Disability payments received, or retirement benefits eligible to receive once the member has reached their full retirement age.

Temporary Disability

When payments begin & end

Benefits begin:

- On the 31st day from the date member received any compensation, if the claim was denied by the Workers' Compensation Act

OR

- Benefits are payable the next day after cessation of TTD

Benefits end:

- When the disability ends
- When the member returns to a State job or resumes gainful employment
- When $\frac{1}{2}$ of credited service has been exhausted
- When member reaches age 65
- If disability began after age 60, a member can receive benefits for up to 5 years maximum as long as the member has at least 10 years of credited service.

Temporary Disability

Benefit Amounts

Tier 1 Members

- 50% of member's monthly rate of pay or Final Average Compensation as of the date removed from payroll, whichever is the higher of the two.

Tier 2 Members

- 50% of the member's Final Average Compensation as of the date removed from payroll.

The benefit amount is reduced by Social Security Disability benefits, or Social Security Retirement benefits if the member is at **full** retirement age, regardless if the member is receiving Social Security or not.



Disability - Reporting Employees Returned to Work



Disability

Returning to Work

- It is both the member and the agency's responsibility to notify SERS when the member returns to work
- If a member was on a Nonoccupational benefit, returns to work, and they become disabled from the SAME injury/illness within 60 days, the 30-day waiting period is waived and the benefit can begin the day after they were last paid by the agency
- If a member is off work on a non-occupational disability and they suffer another injury or illness, their disability can be extended after medical has been supplied and approved by SERS. There would not be another 30-day waiting period as long as they never physically return to work

Employees on Disability Report Employee Returning to Work

The screenshot shows the Employer Dashboard interface. At the top, there is a navigation bar with links for Dashboard, Search, Publications, Security Admin, Employee Search, and Log Out. The main content area is titled "Employer Dashboard" and lists several key metrics:

- Employer Reports
- You have 0 Notifications 0 Unread
- You have 18 Payroll Deductions 10 Payroll Setup 0 Lump Sum Setup 8 Upcoming Payoff 0 Payment Completed
- You have 86 Employer Statements 23 Pending 63 Completed
- You have 355 Service Purchase Estimate Requests 275 New 8 Pending 72 Completed
- You have 492 Tier Determination Requests 7 Pending 485 Completed
- You have 84 2025 Returned to Work Retirees 83 Current 1 Overdue
- You have 451 Employees on Disability 108 Reported back to work

A red arrow points to the "Employees on Disability" section. At the bottom, there is a footer with the text "Please read our terms and conditions policy for the Employer Services website:" and a "Terms & Conditions" button.

Select "Employees on Disability" from the Employer Dashboard

Disability Report Employee Returning to Work

Employees on Disability				
Show 10 entries	Search: <input type="text"/>			
NAME	BIRTH DATE	SSN	MEMBER ID	MANAGE EMPLOYEE ON DISABILITY
Corrections, Department of				
				Manage Employee on Disability
				Manage Employee on Disability
				Manage Employee on Disability
				Manage Employee on Disability ⓘ
				Manage Employee on Disability ⓘ
				Manage Employee on Disability ⓘ
				Manage Employee on Disability ⓘ
				Manage Employee on Disability
				Manage Employee on Disability

Showing 1 to 10 of 356 entries

Previous 1 2 3 4 5 ... 36 Next



Select "Manage Employee on Disability" from the menu

Disability Report Employee Returning to Work

Report Employee on Disability Back to Work

- Returned To Work
- Returned to Payroll
- Resigned From Agency

Enter Date Employee Physically Returned Back To Work











4/16/2024

Save

Close

Select one of the three options and then enter that specific date. Click "Submit" (Future dates not allowed)

Disability Report Employee Returning to Work

Employees on Disability				
Show 10 entries	Search: <input type="text"/>			
NAME	BIRTH DATE	SSN	MEMBER ID	MANAGE EMPLOYEE ON DISABILITY
Corrections, Department of				
				Manage Employee on Disability 
				Manage Employee on 
				Manage Employee on 
				Manage Employee on Disability 
				Manage Employee on Disability 
				Manage Employee on Disability 
				Manage Employee on Disability 
				Manage Employee on Disability 
				Manage Employee on Disability 
				Manage Employee on Disability 

Showing 1 to 10 of 356 entries

Previous 1 2 3 4 5 ... 36 Next

Employee has been reported back to work on 6/16/2022.

The icon will show indicating the member has been reported back to work.

Hovering your mouse over it will display a tooltip to confirm.



Employer Statement for Disability Forms





2101 South Veterans Parkway
P.O. Box 19255
Springfield, IL 62794-9255

217-785-7444
Email: sers@srs.illinois.gov

Employer Statement for Disability

1. Type of claim

- Occupational disability
- Nonoccupational disability
- Temporary disability

Member information

Name (Last, first, middle) _____

SSN (last 4) or Member ID _____

Address (Street, City, State, Zip) _____

Phone number _____

2. Last day employee physically worked: (MM/DD/YYYY) _____

3 (a). Last day of salary or wages due employee: (MM/DD/YYYY) _____

(b). Date employee removed from payroll, biweekly or either the 15th or the end of month: _____

(c). Has employee returned to work? Yes No Date returned to work: _____

4 (a). Reason for removal:

- Medical Leave of Absence
- Service Connected Leave

(b). Effective date of removal action: (MM/DD/YYYY) _____

5. Number of unused sick days remaining: _____

6 (a). Employee base rate of pay: \$ _____

(b). Employee work status: Full time Part time

(c). Employee total rate of pay: \$ _____

(d). Pay frequency: monthly semi-monthly biweekly hourly

7 (a). Has the employee filed a claim for Worker's Compensation benefits? Yes No

(b). Was Worker's Compensation claim denied? Yes No

8 (a). Is there any indication this is a work-related disability? Yes No

(b). If yes, was there a 3rd party involved? Yes No

9. Are you aware of any official misconduct charges (pending, dismissed, or finalized) against the member, relating to, arising out of, or in connection with their employment with the state of Illinois? Yes No

Retirement Coordinator signature _____ Date _____

Phone number _____



1. Type of claim

- Occupational disability
- Nonoccupational disability
- Temporary disability

2. Last day employee physically worked: (MM/DD/YYYY) _____

3 (a). Last day of salary or wages due employee: (MM/DD/YYYY) _____

(b). Date employee removed from payroll, biweekly or either the 15th or the end of month: _____

(c). Has employee returned to work? Yes No Date returned to work: _____

Please Note

1. Select the type of claim being applied for

2. Input the date when the member was last physically at work

3 (a). When the agency last paid the member

3 (b). 15th, 30th, or 31st

3 (c). Has the employee physically returned to work from the specific injury the member is submitting a claim for?



4 (a). Reason for removal:
Medical Leave of Absence
Service Connected Leave


(b). Effective date of removal action: (MM/DD/YYYY) _____

Please Note

4 (a). Medical Leave of Absence: Nonoccupational Disability Claim

4 (a). Service Connected Leave: Occupational Disability Claim


4 (b). This date is the date the agency takes the action to remove the member from payroll. (If the member is going on an occupational benefit and the agency pays them 5 service connected days then it would be 5 days from the last day worked. Nonoccupational and Temporary claims would not be 5 days from when the member last physically worked.)



5. Number of unused sick days remaining: _____
- 6 (a). Employee base rate of pay: \$_____
- (b). Employee work status: Full time Part time
- (c). Employee total rate of pay: \$_____
- (d). Pay frequency: monthly semi-monthly biweekly hourly
- 7 (a). Has the employee filed a claim for Worker's Compensation benefits? Yes No
- (b). Was Worker's Compensation claim denied? Yes No

Please Note

5. For Nonoccupational claims this number needs to be 0
- 6 (a). Rate of pay at the time of leave for this specific leave, not current rate of pay
- 6 (b). Full time or Part time
- 6 (c). Including longevity pay or this will cause a discrepancy
- 6 (d). Monthly, semi-monthly, biweekly, or hourly
- 7 (a). Yes or No
- 7 (b). If the answer if yes, then the member should be applying for Temporary Disability



8 (a). Is there any indication this is a work-related disability? | Yes | No

(b). If yes, was there a 3rd party involved? | Yes | No

9. Are you aware of any official misconduct charges (pending, dismissed, or finalized) against the member, relating to, arising out of, or in connection with their employment with the state of Illinois? | Yes | No

Please Note

8 (a). Yes or No

8 (b). Yes or No

9. This question is asking for felonies at your job against the State of Illinois

Job Duty Statement



2101 South Veterans Parkway
P.O. Box 19255
Springfield, IL 62794-9255

217-785-7444
Email: sers@srs.illinois.gov

Job Duty Statement

Member information

Name (Last, first, middle) _____

SSN (last 4) or Member ID _____

Address (Street, City, State, Zip) _____

Job title (no temporary titles) _____

To be completed by the member's supervisor.

Please indicate, by using the numbers 0-3 in the grading system below, the average daily job demand of the above named member. If lifting is involved, please indicate if the employee must also carry the object. Also, indicate if the employee would have intermittent rest while performing the demand.

Grading system

0 - Never 1 - Monthly 2 - Weekly 3 - Daily

Please complete section below based on actual job duties employee is required to perform.

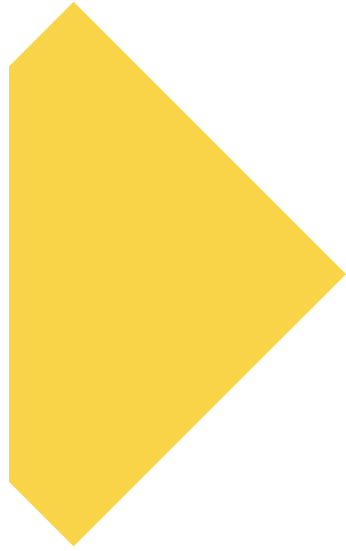
1. _____ Working on or with moving machinery (with without intermittent rest)
2. _____ Working on or with moving machinery using foot controls (with without intermittent rest)
3. _____ Driving automotive equipment, including loading & unloading (with without intermittent rest)
4. _____ Driving automotive equipment (with without intermittent rest)
5. _____ Lifting 1-10 lbs (with without carrying) (with without intermittent rest) (with without help available)
6. _____ Lifting 11-25 lbs (with without carrying) (with without intermittent rest) (with without help available)
7. _____ Lifting 26-50 lbs (with without carrying) (with without intermittent rest) (with without help available)
8. _____ Lifting 51-100 lbs (with without carrying) (with without intermittent rest) (with without help available)
9. _____ Pushing and hand trucking (weight _____) (number of times per day _____) (with without intermittent rest)
10. _____ Climbing stairs (with without intermittent rest)
11. _____ Climbing ladders (with without intermittent rest)
12. _____ Walking (with without intermittent rest)
13. _____ Standing (with without intermittent rest)
14. _____ Sitting
15. _____ Running
16. _____ Bending or stooping (with without intermittent rest)
17. _____ Reaching above shoulder level (with without intermittent rest)
18. _____ Use of hands for gross manipulation (grasping, twisting, handling)
19. _____ Use of hands for fine manipulation (typing, good finger dexterity)
20. _____ Wet work- (hands feet)
21. _____ Dust, fumes, gases - (respiratory irritants skin irritants allergic irritants)
22. _____ Use of a weapon
23. _____ Dealing with combative individuals
24. _____ Maintain an appropriate work pace
25. _____ Perform complex or varied tasks
26. _____ Relate to others (co-workers and /or public)
27. _____ Make critical decisions
28. _____ Manage or supervise projects or staff
29. _____ Interact with public or co-workers in written form
30. _____ Other/comments (use back of form if necessary to describe any job demands unique to this employee's duties)

Supervisor signature _____ Date _____

Agency name/address _____ Phone _____

Please complete section below based on actual job duties employee is required to perform.

1. _____ Working on or with moving machinery (with without intermittent rest)
2. _____ Working on or with moving machinery using foot controls (with without intermittent rest)
3. _____ Driving automotive equipment, including loading & unloading (with without intermittent rest)
4. _____ Driving automotive equipment (with without intermittent rest)
5. _____ Lifting 1-10 lbs (with without carrying) (with without intermittent rest) (with without help available)
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13. _____ Standing (with without intermittent rest)
14. _____ Sitting
15. _____ Running
16. _____ Bending or stooping (with without intermittent rest)
17. _____ Reaching above shoulder level (with without intermittent rest)
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19. _____ Use of hands for fine manipulation (typing, good finger dexterity)
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26. _____ Relate to others (co-workers and /or public)
27. _____ Make critical decisions
28. _____ Manage or supervise projects or staff
29. _____ Interact with public or co-workers in written form
30. _____ Other/comments (use back of form if necessary to describe any job demands unique to this employee's duties)





2101 South Veterans Parkway
P.O. Box 19255
Springfield, IL 62704-9255

217-785-7444
Email: sers@srs.illinois.gov

Claim Notification (Disability)

Member information

Name *(Last, first, middle)*

Address *(Street, City, State, Zip)*

Email address

Agency information

Agency name

Retirement Coordinator (RC) signature

Date

SSN *(last 4)* or Member ID

Phone number

(H)

(W)

(C)

RC phone number

Member Tier

Tier 1 Tier 2

Claim information

If employee had WC claim denied OR if TTD benefits stopped. Complete section below for temporary disability only.

Nonoccupational disability

Date last worked _____

Date leave of absence begins _____

Maternity? Yes No

Occupational disability

Date of accident _____

Date removed from payroll _____

Temporary disability *(if WC claim denied or TTD ended)*

Date last worked _____

Date last paid _____

Did employee have WC claim denied? Yes No

Did TTD payments stop? Yes No

Comments:





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P.O. Box 19255
Springfield, IL 62794-9255

217-785-7444
Email: sers@srs.illinois.gov

Claim Notification (Disability)

Member information

Name *(Last, first, middle)*

Address *(Street, City, State, Zip)*

Email address

Agency information

Agency name

Retirement Coordinator (RC) signature

Date

SSN *(last 4)* or Member ID

Phone number

(H)

(W)

(C)

RC phone number

Member Tier

Tier 1 Tier 2





Claim information

If employee had WC claim denied OR if TTD benefits stopped. Complete section below for temporary disability only.

Nonoccupational disability

Date last worked _____

Maternity? Yes No

Date leave of absence begins _____

Occupational disability

Date of accident _____

Date removed from payroll _____

Temporary disability *(if WC claim denied or TTD ended)*

Date last worked _____

Date last paid _____

Did employee have WC claim denied? Yes No

Did TTD payments stop? Yes No

Comments:



Please Note

In Regards to Disability Claims

- Agencies should never put a member back on payroll when they are on a disability benefit
- Returning to payroll is not the same as physically returning to work.

Leaving SERS/ Termination Refund



Leaving SERS/Termination Refund

When a member resigns, is discharged, dismissed, or laid-off from state employment, they may choose to withdraw their contributions or leave them in SERS. The member must be off the payroll for 14 days to be eligible for a refund of their contributions.

If the member leaves their contributions in SERS

- A member with at least eight years of service credit will qualify for a monthly benefit upon reaching retirement age.
- A member with at least one year of service credit but less than eight years of SERS service credit may be eligible for a SERS monthly benefit upon reaching retirement age if they have service credit in another reciprocal system; but the combined service credit under the reciprocal systems must meet each system's minimum service credit and age requirements.

Leaving SERS/Termination Refund



If the member has their contributions refunded

- The member will receive no interest on their contributions.
- They will forfeit all rights to future benefits.



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TERMINATION REFUND AGENCY CERTIFICATION

TO BE COMPLETED ONCE ALL FINAL AGENCY PAYROLL TRANSACTIONS ARE POSTED

Member information

Name (Last, first, middle) _____

Member ID _____

Payroll Code _____

The above member applied for a refund of all contributions made to their retirement account. Please complete and return this form once all payroll transactions are finalized with your agency.

1. Reason for Separation from service (check one only). Resignation Discharge Dismissal Layoff

2. Date of Separation _____

3. Payroll period **FINAL** SERS contributions or employer pickup of employee retirement contributions were paid.

From _____ Through _____

4. If dates in No. 2 and No. 3 do not match, explain: _____

5. Do any member contributions remain outstanding to your agency as of the separation date? Yes No

If yes, how will your agency collect the funds:

Payroll Reversal. Complete Form 1210 and provide details of when reversal will be completed:

Payroll period: _____ Reversal Amount: _____

Payroll period: _____ Reversal Amount: _____

Involuntary Withholding. Must be filed with IOC in IDROP.

Order Number: _____ Date Filed: _____ Gross Amount: _____

Coordinator/Authorized Designee Signature: _____

Telephone Number: _____ Signature Date: _____



1. Reason for Separation from service (check one only). Resignation Discharge Dismissal Layoff

2. Date of Separation _____.

3. Payroll period **FINAL** SERS contributions or employer pickup of employee retirement contributions were paid.

From _____ Through _____

4. If dates in No. 2 and No. 3 do not match, explain: _____

5. Do any **member contributions** remain outstanding to your agency as of the separation date? Yes No

If yes, how will your agency collect the funds:

Payroll Reversal. Complete **Form 1210** and provide details of when reversal will be completed:

Payroll period: _____ Reversal Amount: _____

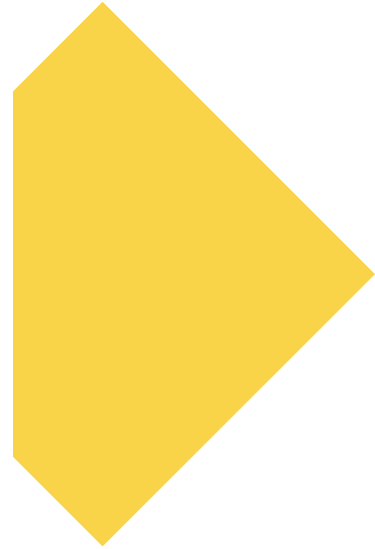
Payroll period: _____ Reversal Amount: _____

Involuntary Withholding. Must be filed with IOC in IDROP.

Order Number: _____ Date Filed: _____ Gross Amount: _____

Coordinator/Authorized Designee Signature: _____

Telephone Number: _____ Signature Date: _____





Returning to State Employment



Returning to SERS

Returning to Work After Retiring

- If member returns to state employment on a permanent basis after retirement, they should notify SERS immediately.
- There are two methods of returning to state employment that may not affect the continuation of a SERS pension: contractual (Tier 1 only) and non-permanent (Both Tiers).

Returning to SERS

Reciprocity

- If a member receives a pension from more than one Illinois public retirement system which participates in the Retirement Systems' Reciprocal Act, they must notify each retirement system.
- Each reciprocal retirement system has specific rules to determine if retirees are eligible to receive pension benefits during reemployment.

Returning to SERS



Reciprocity

- Tier 1 retirees receiving a proportional annuity from another reciprocal retirement system that return to service under that system will have the proportional annuities payable from that System and SERS suspended for the duration of that service.
- Tier 2 retirees who return to work with a system that participates in the Retirement Systems' Reciprocal Act will have their pension suspended even if the retiree did not retire reciprocally.

Returning to SERS

Contractual Employment

Tier 1

If a member returns to State employment on a contractual basis after retiring and were not a participant in the 2002-2003 Early Retirement Incentive (ERI) program or if the member returns to employment in the private sector, their SERS benefit will not be affected. Early Retirement Incentive participants from 2002-03 are not allowed to return to work on a contractual basis.

Tier 2

If a member returns to State employment as a contractor with the employer from which they retired, their benefit shall be suspended.

Returning to SERS

Non-Permanent Reemployment

- If a retiree's employment with the state will last for 75 or less working days per calendar year (any part of a day is counted as a full day), they will continue to receive their pension payment.
- During employment, they make no contributions to SERS, but they must contribute to Social Security.
- If a member works more than 75 working days, their pension benefit will end on the 76th day and they will resume contributing to SERS.
- 75-day employment requires certification to be submitted to SERS by their agency.

Returning to SERS

Permanent Reemployment

- If a member is reemployed by the state on a permanent basis, they won't be eligible for pension benefits while working. They will make contributions to both SERS and Social Security during the employment and earn additional service credit.
- After the member again retires from state employment, they must reapply for a pension. The new pension amount will be the benefit earned before reemployment, plus the pension amount earned during reemployment.
- If the member re-enters state service within three years after retiring, they may qualify to have the new retirement benefit computed as though they never retired. To qualify, they must repay all of the pension benefits they received, plus interest.
- The repayment may be made in a lump sum, by installments paid within five years after the reemployment, or before the next retirement date, whichever is first.

Returning to SERS



Returning to Work After Receiving a Refund

If a member returns to state employment after receiving a refund, they may repay their refunded contributions with interest and have their previous service credit restored after they complete at least 24 months of credited service subsequent to the date of the refund.

Credited service from other public retirement systems under the Reciprocal Act can also be used to meet the two year requirement.



Returned to Work Retirees

Do I need to continue submitting Form #3904 - Report of Retiree Non-Permanent Employment?

No, all Retirees employed in a nonpermanent position need to be reported under the Returned to Work Retirees Task. At the end of each payroll period, the dates the Retiree worked should be entered and certified. Each payroll period needs to be certified. You can certify all remaining payroll periods as final once the Retiree has completed their contract with the Agency. All Retirees, Reported Days Worked, and Certifications need to be submitted by February 15 of the following year.



Returned to Work Retirees

Do I need to continue submitting Form #3905 - Certification of Retiree Return to State Employment?

No, Form #3905 – Certification of Retiree Return to State Employment is no longer required.



Returned to Work Retirees

What days should be reported?

Any fraction of a day worked is considered a full work-day. If the Retiree is paid for a holiday, sick day, personal day, etc., it is the same as if the day was worked and must be reported.



Returned to Work Retirees

Can I make a correction to the Reported Days Worked for a payroll period after the certification has been submitted?

Yes, you are allowed to add an adjustment to the Reported Days Worked and recertify until February 15th of the following year. After February 15th, you will not be able to modify any of the data entered for the previous calendar year.



Returned to Work Retirees

What happens if a Retiree exceeds the 75-day limit?

When a retired nonpermanent employee exceeds 75 working days during a calendar year the SERS pension is suspended, and their employment status must be changed to permanent. Reciprocal system pensions are also suspended.

The permanent status is effective the first pay period following the date the employee completed 75 working days in a calendar year and SERS retirement contributions must be deducted from salary.

Returned to Work Retirees

What happens if a Retiree exceeds the 75 day limit?

If the nonpermanent employee participated in any Alternative Retirement Cancellation Payment (ARCP) buyout and exceeds the 75-day limit, or returns to full time employment, the employee is required to repay to SERS the ARCP portion of their buyout within 60 days of the return-to-work date. Reciprocal system pensions are also terminated. Retirement deductions must be made from their salary for SERS effective the first pay period following the date they complete 75 working days.



Returned to Work Retirees

What happens if a Retiree exceeds the 75-day limit?

If the nonpermanent employee participated in the Contingent Lump Sum Incentive Program (CLSIP) and exceeds the 75-day limit, or returns to full time employment, the employee is required to repay to Central Management Services the full amount of the incentive, including any amounts withheld for taxes, etc. The employing agency should contact Central Management Services' Personnel for clarification of employment restrictions.



Reporting Returned to Work Retirees



Reporting Returned to Work Retirees

Select the “Returned to Work Retirees” category

The screenshot shows an 'Employer Dashboard' with several categories and their counts:

- Employer Reports
- You have 0 Notifications 0 Unread
- You have 18 Payroll Deductions 10 Payroll Setup 0 Lump Sum Setup 8 Upcoming Payoff 0 Payment Completed
- You have 86 Employer Statements 23 Pending 63 Completed
- You have 355 Service Purchase Estimate Requests 275 New 8 Pending 72 Completed ⓘ
- You have 492 Tier Determination Requests 7 Pending 485 Completed ⓘ
- You have 84 2025 Returned to Work Retirees 83 Current 1 Overdue
- You have 454 Employees on Disability 108 Reported back to work

A red arrow points to the '2025 Returned to Work Retirees' category.

Returned to Work Retirees							
Calendar Year:		2025					Add New Retiree
Show	10	entries	Search:				<input type="text"/>
TOTAL REPORTED DAYS							
RETIREE NAME	SYSTEM	LAST 4 SSN	AGENCY	TOTAL	CERTIFICATION STATUS	MANAGE RETIREE	
Human Services, Department of							
[REDACTED]	SERS	[REDACTED]	10	10	Current	Manage Retiree	
[REDACTED]	SERS	[REDACTED]	36	36	Current	Manage Retiree	
[REDACTED]	SERS	[REDACTED]	11	11	Current	Manage Retiree	
[REDACTED]	SERS	[REDACTED]	49	49	Current	Manage Retiree	
[REDACTED]	SERS	[REDACTED]	7	7	Current	Manage Retiree	

The Returned to Work Retirees List displays the returned to work retirees for your agencies. You can change the calendar year by choosing from the dropdown menu in the left-hand corner. You can add new retirees by clicking the blue button in the upper right-hand corner labelled “Add New Retiree.” Retirees are listed by Retiree Name, SSN, Agency Reported Days Worked, Total Reported Work Days, and Certification Status.

Returned to Work Retirees

Calendar Year:

2025

Add New Retiree

Show 10 entries

Search:

TOTAL REPORTED DAYS						
RETIREE NAME	SYSTEM	LAST 4 SSN	AGENCY	TOTAL	CERTIFICATION STATUS	MANAGE RETIREE
Human Services, Department of						
[REDACTED]	SERS	[REDACTED]	10	10	Current	Manage Retiree
[REDACTED]	SERS	[REDACTED]	36	36	Current	Manage Retiree
[REDACTED]	SERS	[REDACTED]	11	11	Current	Manage Retiree
[REDACTED]	SERS	[REDACTED]	49	49	Current	Manage Retiree
[REDACTED]	SERS	[REDACTED]	7	7	Current	Manage Retiree

Warning icons will appear next to retirees' reported days worked to alert you as they approach the maximum 75 days per calendar year. A yellow icon will appear when the member's total worked days have reached or exceeded 60 days, and a red icon will appear when the member's total worked days exceeds 70 days. "All Retirees (currently Retired or ERI Buy & Quit Participant), Alternative Retirement Cancellation Payment Participants (ARCP), or Contingent Lump Sum Incentive Payment Participants (CLSIP) that have returned to nonpermanent employment on a 75-Day contract need to be reported under the Returned to Work Retirees Task for each calendar year (January 1st through December 31).

Add New Retiree ×

Retiree Search

Search for a retiree by first name, middle name, last name, SSN, last four digits of SSN, Member Id or a combination of any of the criteria.

Check this box if you want search for a recent retiree. ⓘ

You can also search for recent retirees, members who have retired within the last 6-8 weeks, but only using their full 9-digit SSN or Member ID.

Returned to Work Retirees

[RETURN TO RETIREE LISTING](#)

Pay Period	Days Worked	Certified By	Certification Date	Status	Report Dates	Certification
1/1/2025 - 1/15/2025	6			<u>Certified</u>		Add Adjustment
1/16/2025 - 1/31/2025	8		2/4/2025	<u>Certified</u>		Add Adjustment
2/1/2025 - 2/15/2025	6		2/19/2025	<u>Certified</u>		Add Adjustment
2/16/2025 - 2/28/2025	8		3/4/2025	<u>Certified</u>		Add Adjustment
3/1/2025 - 3/15/2025	8		3/18/2025	<u>Certified</u>		Add Adjustment

You can access the specific details of your Returned to Work retirees' records by clicking on their name in the Returned to Work Retiree listing. These details are listed by pay period; each pay period includes the reported days worked and certification information. You can report dates, certify pay periods, and add adjustments to certified pay periods.

Note that the **Add Adjustment** and **Certify Pay Period** commands will be disabled if it is currently past the record's cutoff date, February 15th of the year following this record's calendar year.



Total Agency Reported Days Worked:	13 ←	
Total Reported Days Worked:	13 ←	RETURN TO RETIREE LISTING

[RETURN TO RETIREE LISTING](#)

Additionally, the total days worked reported in this agency and the retiree's total reported days worked will be displayed at the end of the listing.

Each pay period for the retiree should be certified once the reported days worked for that pay period have been entered. The Certified Pay Period View will display the read-only version of the reported work days.

The deadline for certifying pay periods is up to February 15th of the next calendar year. Please review work days entered, and certify the pay period.

You can view the details of a certified pay period at any time from the pay period listing by clicking the “Certified” status for the pay period.

Certification for Pay Period 11/16/2025 - 11/30/2025 ✕


Sunday, November 16, 2025	<input type="checkbox"/>
Monday, November 17, 2025	<input type="checkbox"/>
Tuesday, November 18, 2025	<input type="checkbox"/>
Wednesday, November 19, 2025	<input type="checkbox"/>
Thursday, November 20, 2025	<input type="checkbox"/>
Friday, November 21, 2025	<input type="checkbox"/>
Saturday, November 22, 2025	<input type="checkbox"/>
Sunday, November 23, 2025	<input type="checkbox"/>
Monday, November 24, 2025	<input type="checkbox"/>
Tuesday, November 25, 2025	<input type="checkbox"/>
Wednesday, November 26, 2025	<input type="checkbox"/>
Thursday, November 27, 2025 i	<input type="checkbox"/>
Friday, November 28, 2025 i	<input type="checkbox"/>
Saturday, November 29, 2025	<input type="checkbox"/>
Sunday, November 30, 2025	<input type="checkbox"/>
Total Selected for Pay Period:	0
Total Agency Reported Days Worked:	13
Total Reported Days Worked:	13

Close

Returning to the Retirees List, selecting the **Manage Retiree** option next to each retiree record will open a pop-up providing more details on the retiree and further actions to take.

If the retiree is finished working for the calendar year, the **Certify All Pay Periods** command will allow you to certify all the retirees' pay periods, with days entered, for the calendar year.

The screenshot shows a pop-up window titled "Manage Returned to Work Retiree" with a close button (X) in the top right corner. The window contains a form with the following fields and actions:

Calendar Year	2025
Employer	Human Services, Department of
Birth Date	[Redacted]
Member Status	Retired
Employment Start Date	1/31/2025
Certify All Pay Periods	Certify All Pay Periods
Delete Retiree	 Delete Retiree

At the bottom right of the window is a "Close" button. The background of the application shows a table with columns for years: 1899, 24, 24, and Current.



Service Purchases



Optional Service Purchases



Qualifying Periods, Tier 1 only

- 0 months: 1-1-72 to 12-31-83
- 6 months: 1-1-84 to 11-30-10
- 0 months: after 1-1-11 (Tier 2 began)

Short Periods – no temporary or contractual time allowed.

Previously Refunded Service – AFTER 24 months of subsequent state service.

Optional Service Purchases

- Previously Refunded Service
- Military Time
 - Maximum of 48 months of active duty
(can be purchased in one-month increments)
- Service for Leaves of Absence
 - Must be after 1982 and less than one year
- Sick & vacation days (at retirement only)



Service Purchases

The Service Purchase Estimate Request module allows you to submit Service Purchase requests on your employees' behalf. This module can be accessed through the Employer Dashboard.

The screenshot displays a dashboard with the following items:

- Employer Reports
- You have 0 **Notifications** 0 Unread
- You have 18 **Payroll Deductions** 10 Payroll Setup 0 Lump Sum Setup 8 Upcoming Payoff 0 Payment Completed
- You have 86 **Employer Statements** 23 Pending 63 Completed
- You have 355 **Service Purchase Estimate Requests** 275 New 8 Pending 72 Completed ⓘ
- You have 492 **Tier Determination Requests** 7 Pending 485 Completed ⓘ
- You have 84 **2025 Returned to Work Retirees** 83 Current 1 Overdue
- You have 451 **Employees on Disability** 108 Reported back to work

A red arrow points to the 'Service Purchase Estimate Requests' entry.

Service Purchases Estimate Request List

As an employer, you will be able to see the Service Purchase Estimate Requests made by your employees. The Service Purchase Estimate Request List is separated by three tabs: New, Pending and Completed.

The screenshot shows a web interface for managing Service Purchase Estimate Requests. At the top, there is a header "Service Purchase Estimate Requests". Below the header are three tabs: "NEW", "PENDING", and "COMPLETED". A red arrow points to the "NEW" tab. To the right of the tabs is a blue button labeled "Add New Estimate Request", with another red arrow pointing to it. Below the tabs, there is a "Show 10 entries" dropdown menu and a "Search:" input field. The main content area is a table with the following columns: "EMPLOYEE NAME", "PLANNED RETIREMENT DATE", "SUBMITTED BY", "SUBMITTED DATE", and "STATUS". The table contains three rows of data, all with a status of "New Request". At the bottom left, it says "Showing 1 to 3 of 3 entries". At the bottom right, there are "Previous", "1", and "Next" navigation buttons.

EMPLOYEE NAME	PLANNED RETIREMENT DATE	SUBMITTED BY	SUBMITTED DATE	STATUS
[REDACTED]	1/1/2025			New Request
[REDACTED]	2/1/2060			New Request
[REDACTED]	7/1/2037			New Request

Service Purchases New Estimate Request

You can search for employees by entering the first name, middle name, last name, SSN, last four digits of SSN, Member ID, or a combination of any of the criteria and clicking on the Search button.

The Employee Search will return the number of total records found and a list of employees that meet the search criteria.

Request to Establish Optional Service Credits

Employee Search

Search for an employee by first name, middle name, last name, SSN, last four digits of SSN, Member Id or a combination of any of the criteria.

Total Records Found: 2

Select Employee

First Name	Last Name	SSN	Birth Date
Lorie	TestName	XXX-XX-	1/1/1979 <input checked="" type="radio"/>
Lori	TestName2	XXX-XX-	12/31/1980 <input type="radio"/>

Enter Planned Retirement Date

The Planned Retirement Date defaults to the earliest calculated date that you would be eligible for a pension benefit. A date is required in this field, but it does not commit you to that retirement date in any way. The date is necessary to help us organize our workflow. You can override it if the Planned Retirement Date is different.

Service Purchases

New Estimate Request

Once a new request is created, you or the employee cannot create another estimate request until the review has been completed by SERS staff. If you are trying to add a request when an employee already has an active request, you will get the error “Member already has an active Service Purchase Estimate Request.”

Request to Establish Optional Service Credits

Employee Search

Search for an employee by first name, middle name, last name, SSN, last four digits of SSN, Member Id or a combination of any of the criteria.

- 
- Member already has an active Service Purchase Estimate Request.

Service Purchases Estimate Request Detail

Click on “Add Optional Service” button to continue the request. You can update the Planned Retirement Date or add the optional additional comments if you would like.

You can click on the Add Optional Service button to the add optional services you would like to estimate for your employee.

The Save button will allow you to save the request without submitting it. The Submit Request button will be enabled when at least one Optional Service request has been added. Both you and your employee can access, edit, submit, and revise the request.

The screenshot shows a web form titled "Service Purchase Estimate Requests". At the top, a green message box states: "Request has been created! Click on 'Add Optional Service' to continue the request." Below this, the form header includes "Test, Subject - XXX-XX 1234 - [MEMBER ID: 12-34567 |" and a "RETURN TO ESTIMATE REQUEST LISTING" link. The "Planned Retirement Date:" is set to "1/1/2040" and the "Request Status:" is "New Request". A section titled "REQUEST TO ESTABLISH OPTIONAL SERVICE CREDITS" contains instructions: "Please enter and complete the requested information based on the type of service credit for which you may be interested in purchasing." It features a table with columns "Service Purchase Type", "Start Date", "End Date", and "Agency", and an "Add Optional Service" button. A message below the table says "No records found. Please click on Add Optional Service to start." There is a text area for "Please use this space to document any additional information about your service purchase request that you feel we need to know." The "REVIEW AND SUBMIT" section contains a disclaimer: "By submitting this form electronically, I certify this information is correct and that I am aware that knowingly making a false statement or falsifying a record in an attempt to defraud SERS is a class 3 felony. I understand that if the SERS Board of Trustees has a reasonable suspicion that an attempt has been made to defraud SERS, it is required to report the matter to the appropriate State's Attorney for investigation." At the bottom right, there are "Save" and "Submit Request" buttons.

Service Purchase Type	Start Date	End Date	Agency
No records found. Please click on Add Optional Service to start.			

Service Purchases

Add Optional Service

- **Start Date:** The Start Date is required and must be a date in the past.
- **End Date:** The End Date is required, must be past date and greater than Start Date.
- Click on **Add Government Public Service Internship Program** button to add GPSI to the request.

No duplicate GPSI service with the same start and end dates can be added.

The screenshot shows a modal window titled "Add Optional Service" with a close button (X) in the top right corner. The form contains the following fields:

- Service Purchase Type:** A dropdown menu with "Government Public Service Internship Program" selected.
- Start Date:** An empty text input field.
- End Date:** An empty text input field.

At the bottom of the form, there are two buttons: "Add Government Public Service Internship Program" and "Close".

Red arrows point from the text on the left to the dropdown menu, the Start Date field, the End Date field, and the "Add Government Public Service Internship Program" button.

Service Purchases

Add Optional Service

- **Start Date:** The Start Date is required and must be past date.
- **End Date:** The End Date is required, must be past date and greater than Start Date.
- Click on Add Legislative Staff Internship Program button to add to the request. No duplicate

ILSIP with the same Start Date and End Date can be added.

The screenshot shows a modal window titled "Add Optional Service" with a close button (X) in the top right corner. The form contains the following fields and buttons:

- Service Purchase Type:** A dropdown menu with "Legislative Staff Internship Program" selected.
- Start Date:** An empty text input field with a red arrow pointing to it from the left.
- End Date:** An empty text input field with a red arrow pointing to it from the left.
- Buttons:** At the bottom, there are two buttons: "Add Legislative Staff Internship Program" and "Close". A red arrow points to the "Add Legislative Staff Internship Program" button from the left.

Service Purchases

Add Optional Service

- You will be instructed on how to submit the **DD-214** supportive document to SERS.
- **Start Date:** The Start Date is required and must be past date.
- **End Date:** The End Date is required, must be past date and greater than Start Date.
- Click on **Add Military Service** button to add to the request. No duplicate Military Service with the same Start Date and End Date can be added.

Add Optional Service ✕

Service Purchase Type:

Military Service ▾

SERS members are eligible to purchase optional service credit for their active military service. Members may establish up to 48 months of active duty military service with supporting documentation.

To verify active duty military service, please mail a copy of your DD-214 to:

State Employees' Retirement System
Attn: Accounting Division/Service Purchase
PO Box 19255
Springfield, IL 62794-9255.

The estimate cannot be completed until the DD-214 has been received and verified.

Start Date: ⓘ

End Date:

Service Purchases

Add Optional Service

- No data entry is required for Qualifying Period. The SRS staff will be able to find all the Qualifying Period the employee is eligible for, if any.
- Click on Add Qualifying Period button to add to the request. Only one Qualifying period can be added for each request.

Add Optional Service

Service Purchase Type:

Qualifying Period

A qualifying period is the period of employment that preceded your date of membership in the retirement system (i.e., your first six months of service in state government)

- For those that entered state service prior to 01/01/1972, there was a twelve(12) month qualifying period
- For those that entered state service between 01/01/1972 and 12/31/1983, there was no qualifying period
- For those that entered state service between 01/01/1984 and 11/30/2010, there was a six(6) month qualifying period
- The qualifying period was eliminated for all who entered state service on or after 12/01/2010
- Tier 2 members do not have a qualifying period to purchase
- If you have ever taken a termination refund of your SERS membership, you will have to pay back your entire refund prior to purchasing the related qualifying period.

Please click the Add Qualifying Period button below to request Qualifying Period which you may be eligible to purchase.



Add Qualifying Period

Close

Service Purchases

Add Optional Service

- No data entry is required for Short Period. The SERS staff will be able to find all Short Periods the employee is eligible to purchase, if any.
- Click on the Add Short Period button to the request. Only one Short Period can be added for each request.

Add Optional Service ×

Service Purchase Type:

Short Period ▾

A short period is a qualifying period that never finished.

You would not have been contributing to the retirement system nor earning service credit if you worked for a short period. Examples of short periods include summer workers at the state fair or seasonal workers at IDOT.

Please click the Add Short Period button below to request Short Period which you may be eligible to purchase.



Add Short Period

Close

Service Purchases

Repayment of Refund

- **Start Date:** The Start Date is required and must be past date.
- **End Date:** The End Date is required, must be past date and greater than Start Date.
- **Agency:** The Agency will be populated with employee's current and previous place of employment and is required.
- Click on **Add Repayment of Refund** button to add to the request. No duplicate Repayment of Refund with the same Start Date, End Date and Agency can be added.

Add Optional Service ×

Service Purchase Type:

Repayment of Refund ▼

If you previously took a refund of your prior State of Illinois service, you may elect to reestablish the service credit by repaying that refund with interest.

To be eligible to repay a refund, you must have established at least 2 years of service credit with SERS or a reciprocal system (i.e., IMRF) since taking your prior SERS refund.

Start Date: ⓘ

End Date:

Agency: ⓘ

Service Purchases Edit and Delete

You can update the Optional Service by clicking on the Edit button, or you can delete from the request by clicking on the Delete button. The Edit button will not be available for Qualifying and Short Periods since there are nothing to edit for either type.

REQUEST TO ESTABLISH OPTIONAL SERVICE CREDITS

Please enter and complete the requested information based on the type of service credit for which you may be interested in purchasing.

Service Purchase Type	Start Date	End Date	Agency	
Leave of Absence	9/1/1980	4/13/1982	Natural Resources, Department of	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Qualifying Period	N/A	N/A	N/A	<input type="button" value="Delete"/>
Government Public Service Internship Program	4/1/1999	4/13/2000	N/A	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Please use this space to document any additional information about your service purchase request that you feel we need to know.

REVIEW AND SUBMIT

By submitting this form electronically, I certify this information is correct and that I am aware that knowingly making a false statement or falsifying a record in an attempt to defraud SERS is a class 3 felony. I understand that if the SERS Board of Trustees has a reasonable suspicion that an attempt has been made to defraud SERS, it is required to report the matter to the appropriate State's Attorney for investigation.

Service Purchases Submit and Revise

Once you click on the Submit Request button, you will see an information message indicating “Request has been submitted! This request can still be revised until it’s under review process”. You or your employee can still edit the request up until SERS staff has accepted and begun the review process.

The screenshot shows the 'Service Purchase Estimate Requests' form. At the top, a green message box states: 'Request has been submitted! This request can still be revised until it is under review process.' A red arrow points to this message. Below the message is a 'RETURN TO ESTIMATE REQUEST LISTING' link. The 'Planned Retirement Date' is set to '1/1/2040'. A red arrow points to a black tooltip that says 'This request can still be revised until it is under review process.' To the right of the tooltip, the 'Request Status' is 'Submitted For Review'. The main section is titled 'REQUEST TO ESTABLISH OPTIONAL SERVICE CREDITS' and includes a table with columns for 'Service Purchase Type', 'Start Date', 'End Date', and 'Agency'. The table contains three rows: 'Leave of Absence' (9/1/1980 to 4/13/1982), 'Qualifying Period' (N/A), and 'Government Public Service Internship Program' (4/1/1999 to 4/13/2000). Each row has 'Edit' and 'Delete' buttons. A red arrow points to the 'Submit Revised Request' button at the bottom right of the form.

Service Purchase Type	Start Date	End Date	Agency	
Leave of Absence	9/1/1980	4/13/1982	Natural Resources, Department of	Edit Delete
Qualifying Period	N/A	N/A	N/A	Delete
Government Public Service Internship Program	4/1/1999	4/13/2000	N/A	Edit Delete

Service Purchases Request Review In-Process

Once SERS has begun the review process, the status will be updated to “Review In-Process”. The request at this time will be locked and no more changes will be accepted.

Service Purchase Estimate Requests

[RETURN TO ESTIMATE REQUEST LISTING](#)

Planned Retirement Date: 1/1/204C

→ This request is locked and can no longer be editable. →

Request Status: Review In-Process

Service Purchases Request Completed

When the request has been fully reviewed by the SRS staff, you will see the status updated to “Completed”. If the employee has eligible service to buy, they will receive an offer letter. If the employee has no eligible service to buy, they will receive a denial letter. Once the request has been completed, you or your employee can submit new estimate requests.

Service Purchase Estimate Requests

[RETURN TO ESTIMATE REQUEST LISTING](#)

Planned Retirement
Date:

1/1/2040



Request Status: Completed




Payroll Deductions



Payroll Deductions

The Payroll Deductions module provides you the ability to view and track payroll deductions for your employees. It can be accessed through the Employer Dashboard.



The screenshot displays the Employer Dashboard with the following modules and counts:


- Employer Reports
- You have **0 Notifications** **0** Unread
- You have **18 Payroll Deductions** **10** Payroll Setup **0** Lump Sum Setup **8** Upcoming Payoff **0** Payment Completed
- You have **86 Employer Statements** **23** Pending **63** Completed
- You have **355 Service Purchase Estimate Requests** **275** New **8** Pending **72** Completed **i**
- You have **492 Tier Determination Requests** **7** Pending **485** Completed **i**
- You have **84 2025 Returned to Work Retirees** **83** Current **1** Overdue
- You have **451 Employees on Disability** **108** Reported back to work

A red arrow points to the **Payroll Deductions** module.

Payroll Deduction List

As an employer, you will be notified by email if your employee requires payroll deductions. You can access the payroll deduction listing and track payroll deduction progress on Member Services website.

The Payroll Deduction List is separated by four tabs: Installment Setup, Lump Sum Setup, Upcoming Payoff and Payment Completed.



The screenshot displays the 'Payroll Deductions' interface. At the top, there are four tabs: 'INSTALLMENT SETUP', 'LUMP SUM SETUP', 'UPCOMING PAYOFF', and 'PAYMENT COMPLETED'. A red arrow points to the 'INSTALLMENT SETUP' tab, which is currently selected. Below the tabs, there is a 'Show 10 entries' dropdown and a 'Search:' input field. The main content area is a table with the following columns: MEMBER NAME, SSN, EIN, PAYMENT TYPE, START DATE, PAYMENT AMOUNT, and PAYMENT SETUP COMPLETED. The first row of data shows 'State Police, Illinois' as the member name, 'XXX-XX-1234' as the SSN, 'Pre-Tax' as the payment type, and '12/1/2021' as the start date. The payment amount is '\$1,162.31' and the 'PAYMENT SETUP COMPLETED' checkbox is unchecked.

MEMBER NAME	SSN	EIN	PAYMENT TYPE	START DATE	PAYMENT AMOUNT	PAYMENT SETUP COMPLETED
State Police, Illinois	XXX-XX-1234		Pre-Tax	12/1/2021	\$1,162.31	<input type="checkbox"/>

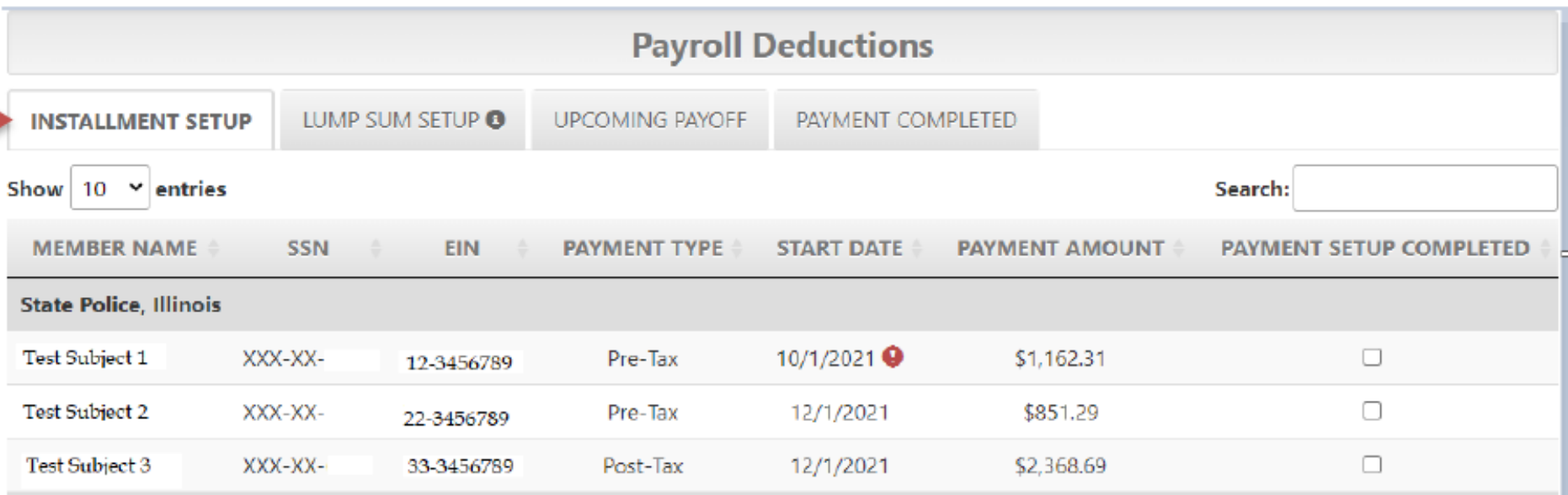
Payroll Deduction List

- **Installment Setup** tab displays receivables that need payroll deduction setup.
- **Lump Sum Setup** tab displays receivables that need lump sum sick and vacation payout deduction setup.
- **Upcoming Payoff** tab displays receivables that are going to pay off in 60 days.
- **Payment Completed** tab displays receivables that have been paid off and require payroll deduction stop.

Payroll Deductions						
INSTALLMENT SETUP	LUMP SUM SETUP ⓘ	UPCOMING PAYOFF	PAYMENT COMPLETED			
MEMBER NAME	SSN	EIN	PAYMENT TYPE	START DATE	PAYMENT AMOUNT	PAYMENT SETUP COMPLETED
State Police, Illinois	XXX-XX-1234		Pre-Tax	12/1/2021	\$1,162.31	<input type="checkbox"/>

Installment Setup

You can access the Installment Setup List by selecting Installment Setup tab. The Installment Setup List displays a list of employees whose receivables require payroll deduction setup. The list will display the member's name, redacted SSN, EIN, Payment Type (Post-Tax or Pre-Tax), Start Date and Payment Amount that you have to setup for your employees.



The screenshot shows the 'Payroll Deductions' interface. A red arrow points to the 'INSTALLMENT SETUP' tab, which is highlighted. Other tabs include 'LUMP SUM SETUP', 'UPCOMING PAYOFF', and 'PAYMENT COMPLETED'. Below the tabs, there is a 'Show 10 entries' dropdown and a search box. The main table lists three test subjects with their respective SSN, EIN, Payment Type, Start Date, Payment Amount, and a checkbox for 'PAYMENT SETUP COMPLETED'.

MEMBER NAME	SSN	EIN	PAYMENT TYPE	START DATE	PAYMENT AMOUNT	PAYMENT SETUP COMPLETED
State Police, Illinois						
Test Subject 1	XXX-XX-	12-3456789	Pre-Tax	10/1/2021	\$1,162.31	<input type="checkbox"/>
Test Subject 2	XXX-XX-	22-3456789	Pre-Tax	12/1/2021	\$851.29	<input type="checkbox"/>
Test Subject 3	XXX-XX-	33-3456789	Post-Tax	12/1/2021	\$2,368.69	<input type="checkbox"/>

Installment Setup Warning




The Installment Setup List will display a red warning icon next to the Start Date if the Installment Setup is past due for the employee. Don't be alarmed if you have already setup the payroll deductions but see the red warning icon. It may take Accounting up to two weeks to post the payments. The employee should drop off from the list the next pay period. However, if you haven't setup the payroll deductions, the employee will remain on the list until the first payment is received and posted by SRS.

PAYMENT TYPE	START DATE	PAYMENT AMOUNT	PAYM
Post-Tax →	10/1/2021 !		
Pre-Tax	12/1/2021	\$657.97	

Payroll deduction setup is overdue. Please setup this member's payroll deduction.

Installment Setup Tracking

The Installment Setup List provides a way for you to keep track of Installment Setup progress for your employees. You can indicate that you have completed the setup by checking the box under Payment Setup Completed column. Once you do that, a tooltip will show you when the setup is completed and who completed the setup. This is especially useful for larger agencies that have multiple payroll coordinators managing the Installment Setup List.

START DATE	PAYMENT AMOUNT	PAYMENT SETUP COMPLETED
10/1/2021 	\$544.97	 <input checked="" type="checkbox"/> 
12/1/2021	\$657.97	<input type="checkbox"/>

Payment Setup Completed by
[redacted]
on 10/6/2021.

Lump Sum Setup List


You can access the Lump Sum Setup List by selecting Lump Sum Setup tab. The Lump Sum Setup List displays a list of employees whose receivables require lump sum sick and vacation payout deduction setup. The list will display the member's name, redacted SSN, EIN, Payment Type (Post-Tax or Pre-Tax), Start Date and Payment Amount that you have to setup for your employees.



Payroll Deductions						
LUMP SUM SETUP						
MEMBER NAME						
SSN						
EIN						
PAYMENT TYPE						
START DATE						
PAYMENT AMOUNT						
PAYMENT SETUP COMPLETED						
State Police, Illinois						
Test Subject 1	XXX-XX-	12-3456789	Pre-Tax	9/30/2021	\$15,190.17	<input type="checkbox"/>
Test Subject 2	XXX-XX-	22-3456789	Pre-Tax	3/31/2022	\$5,205.78	<input type="checkbox"/>

Lump Sum Setup Warning




The Lump Sum Setup List will display a red warning icon next to the Start Date if the Lump Sum Setup is past due for the employee. Don't be alarmed if you have already setup the deduction but see the red warning icon. It may take Accounting up to two weeks to post the payments. The employee should drop off from the list the next pay period. However, if you haven't setup the deduction, the employee will remain on the list until the payment is received and posted by SRS.

PAYMENT TYPE	START DATE	PAYMENT AMOUNT	PAY
Pre-Tax	9/30/2021 		
Pre-Tax	3/31/2022	\$5,205.78	

Lump Sum Sick and Vacation setup is overdue. Please setup this member's deduction.

Lump Sum Setup Tracking

The Lump Sum Setup List provides a way for you to keep track of Lump Sum Setup progress for your employees. You can indicate that you have completed the setup by checking the box under Payment Setup Completed column. Once you do that, a tooltip will show you when the setup is completed and who completed the setup. This is especially useful for larger agencies that have multiple payroll coordinators managing the Lump Sum Setup List.

START DATE	PAYMENT AMOUNT	PAYMENT SETUP COMPLETED
9/30/2021 	\$15,190.17	 <input checked="" type="checkbox"/> 
3/31/2022	\$5,205.78	<input type="checkbox"/>

Lump Sum Sick and Vacation Setup Completed by
Completed by
on 11/1/2021.

Upcoming Payoff List

You can access the Upcoming Payoff List by selecting Upcoming Payoff tab. The Upcoming Payoff List displays a list of employees whose receivables are going to pay off within 60 days. The list will display member's name, redacted SSN, EIN, Payment Type (Post-Tax or Pre-Tax), Payoff Date and Final Payment Amount. You may need to make a payroll deduction adjustment on your employees' final payment.

Payroll Deductions

PAYMENT GROUP | **UPCOMING PAYOFF** | PAYMENT COMPLETED


Show entries Search:

MEMBER NAME	SSN	EIN	PAYMENT TYPE	PAYOFF DATE	FINAL PAYMENT	ADJUSTMENT COMPLETED
State Police, Illinois						
Test Subject	XXX-XX-1234	12-3456789	Post-Tax	11/30/2021	\$219.56	<input type="checkbox"/>

Showing 1 to 1 of 1 entries Previous Next

Upcoming Payoff Warning

The Upcoming Payoff List will display a yellow warning icon next to the Final Payment if the employee is missing more than two payments.




PAYMENT TYPE	PAYOFF DATE	FINAL PAYMENT	ADJUSTMENT COM
Post-Tax	11/30/2021	\$219.56 	

Final payment does not pay amount due in full, Please review member's payroll deduction total.

Previous 1

Upcoming Payoff Tracking

The Upcoming Payoff List provides a way for you to keep track of payment adjustment progress for your employees. You can indicate that you have completed final payment adjustment by checking the box under Adjustment Completed column. Once you do that, a tooltip will show you when the adjustment is completed and who completed the adjustment. This is especially useful for larger agencies that have multiple payroll coordinators managing the Upcoming Payoff List.

FINAL PAYMENT	ADJUSTMENT COMPLETED
\$219.56 	 <input checked="" type="checkbox"/> 
	Previous

Final Payment Adjustment Completed by
[redacted]
on 10/6/2021.

Payment Completed List

The Payment Completed List displays a list of employees whose receivables have been paid off and the payroll deduction will need to stop. The list will display the member's name, redacted SSN, EIN, Payment Type (Post-Tax or Pre-Tax), and Payoff Date.

Payroll Deductions

PAYMENT SET UP **UPCOMING PAY OFF** PAYMENT COMPLETED


Show entries Search:

MEMBER NAME	SSN	EIN	PAYMENT TYPE	PAYOFF DATE	STOP PAYMENT COMPLETED
State Police, Illinois					
Test Subject	XXX-XX-1234	12-3456789	Post-Tax	11/30/2021	<input type="checkbox"/>

Showing 1 to 1 of 1 entries Previous **1** Next

Payment Completed Warning

The Payment Completed List will display a red warning icon next to the Payoff Date if the employee has paid in full and has past the payoff date. Don't be alarmed if you have already stopped the payroll deduction for the employee but see the red warning icon. It may take Accounting up to two weeks to post the payments. The employee should drop off from the list the next pay period. However, if you haven't stopped the payroll deductions, please ensure you do that as soon as possible to avoid over payment.

PAYMENT TYPE	PAYOFF DATE	STOP PAYMENT COMPLETED
Post-Tax	9/30/2021 	<input type="checkbox"/>

Member's amount due is paid in full. Please stop payroll deductions for this member.




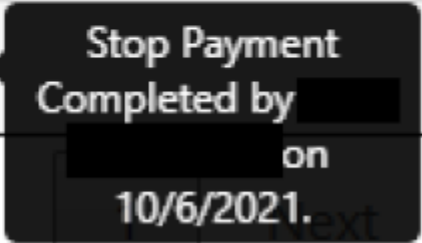
Previous

1

Next

Payment Completed Tracking

The Payment Completed List provides a way for you to keep track of stop payment progress for your employees. You can indicate that you have completed stop payment by checking the box under Stop Payment Completed column. Once you do that, a tooltip will show you when the stop payment is completed and who completed the stop payment. This is especially useful for larger agencies that have multiple payroll coordinators managing the Payment Completed List.

PAYOFF DATE	STOP PAYMENT COMPLETED
9/30/2021 	 <input checked="" type="checkbox"/> 
	<p>Previous  Next</p>



Tier Determination Requests



Tier Determination Requests

The screenshot shows the 'Employer Dashboard' with a navigation bar at the top containing 'Dashboard', 'Search', 'Publications', 'Security Admin', 'Employee Search', and 'Log Out'. The main content area lists several categories with counts:

- Employer Reports
- You have 0 Notifications 0 Unread
- You have 18 Payroll Deductions 10 Payroll Setup 0 Lump Sum Setup 8 Upcoming Payoff 0 Payment Completed
- You have 86 Employer Statements 23 Pending 63 Completed
- You have 355 Service Purchase Estimate Requests 275 New 8 Pending 72 Completed
- You have 488 Tier Determination Requests Pending 480 Completed
- You have 84 2025 Returned to Work Retirees 81 Current Overdue
- You have 451 Employees on Disability 108 Reported back to work

A red arrow points to the 'Tier Determination Requests' entry.

The Tier Determination Request Task module provides you the ability to track and view processed Tier Determination Requests and can be accessed from the Employer Dashboard.

Tier Determination Requests

Tier Determination Requests

PENDING COMPLETED ⓘ Request Tier Determination

Show 10 entries Search:

MEMBER NAME	SSN	EIN	STATUS DATE	STATUS	SUBMITTED BY
Human Services, Department of					

Showing 1 to 4 of 4 entries Previous 1 Next

The Tier Determination Request List displays the Pending and Completed Tier Determination Requests that have been submitted to the SRS Accounting Division for review. The list of Pending requests will be any request submitted that has yet to be completed. The list of Completed requests, however, will only show all completed ones that have been completed within the last 90 days. You can change whether you are looking at the Pending or the Completed list by choosing from the dropdown menu on the top left side.

Tier Determination Requests

SERS Member Lookup

SERS Member Search

Search for any SERS Member by first name, middle name, last name, SSN, last four digits of SSN, Member Id, birth date, phone number or a combination of any of the criteria. If you are having problems finding a member, try searching using the full SSN.

- The search criteria entered did not match any of our member records.
- This employee will need to complete a [New Hire Tier Determination Request](#). This request must be submitted by the agency to the Accounting Division at SERS.

When doing a SERS Member Lookup and your results yields no matches, you can start a New Hire Tier Determination Request. Clicking the [New Hire Tier Determination Request](#) link will open a new view to input the data for the new member.

Tier Determination Requests

The new view will allow you to select the Agency the new hire is for, input the new hire's first name, last name, gender, birth date, Social Security number, and any reciprocal systems the new hire states they have been with previously. For Social Security number, we do require inputting the number twice to help reduce accidents. For the reciprocal systems, check the box next to the applicable system(s). If they do not have any reciprocity claim, then do not select any reciprocal systems. Once completed, click the Submit button to send the request to the SRS Accounting Division for review. There is no need to submit the paper Tier Determination Form.

New Hire Tier Determination Request

SELECT AGENCY:

State Employees' Retirement System

NEW EMPLOYEE INFORMATION:

First Name:

Last Name:

Gender:

Birthdate:

7/29/2020

SSN:

Confirmation SSN:

SELECT RECIPROCAL SYSTEMS THAT HAVE BEEN EMPLOYED IN THE PAST:

County Employee's and Officer's Annuity Benefit Fund

Chicago Teachers' Pension Fund

Forest Preserve Employees' Annuity and Benefit Fund

Submit

Close

Tier Determination Requests

If you click the submit button early before the required fields are filled out, you will receive an error message stating which fields are required or if any data is invalid.

New Hire Tier Determination Request

- The value '09/26/20200' is not valid for BirthDate.
- First Name is required.
- Last Name is required.
- Birthdate is not valid.
- Gender is required.
- SSN is required.
- Confirmation SSN is required.

SELECT AGENCY:

State Employees' Retirement System

NEW EMPLOYEE INFORMATION:

First Name:

Last Name:

Gender:

Birthdate:

09/26/20200

SSN:

Confirmation SSN:

Tier Determination Requests

If you enter and confirm an SSN that is already in our system, you will be notified to try searching again for the member specifically using their SSN.

Tier Determination Request Sent ×

The following error has occurred:
A member matching this SSN already exists. Please search using the full SSN to display the tier summary page for this member.

Close

Tier Determination Requests

After clicking the submit button, and no errors have occurred, there will be a screen showing that the request has been submitted. If any errors, apart from the ones already mentioned above, did occur, a message box will be displayed stating what the error is.

Tier Determination Request Sent ×

You have successfully submitted a Tier Determination Request for review. You can view the pending Tier Determination Requests on the Employer Dashboard – Tier Determination Requests.

Close

Tier Determination



When your agency has employees who need their Tier determined, Security Admins can request SERS to perform a Tier Determination. This process is being implemented to correct roles that have been incorrectly assigned. Those who have been assigned as a Payroll Coordinator or Signature Designee to perform Tier Determination requests can now be removed by following step 1 and reassigned to Tier Determination User by following step 2. For new Tier Determination Users, you can proceed to step 2.



Workshops and Webinars



Retirement Counseling

SERS offers phone and in-person retirement counseling appointments for members at the Chicago and Springfield offices.

Appointments Offered		
In-Person Appointments	Wednesday – Friday	9am – 4:15pm
Phone Appointments	Monday – Friday	9am – 4:15pm

Appointments are limited to a maximum of 3 per calendar year.

To book an appointment, call SERS at 217-785-7444 or email sers@srs.illinois.gov.



Pre-Retirement Workshops

SERS provides workshops and webinars that are available to members. Given the nature of these workshops, the limitations of conducting such workshops, and the significant demand from the membership to attend such workshops, SERS has implemented a policy that a member may not attend multiple workshops within a 12-month period. This policy enables the System to offer this valuable service to the membership in an equitable manner. A reservation made in violation of this policy will be cancelled.

Pre-Retirement Workshops



Investing in Your Future (IYF)

For employees who are more than 15 years from retirement

Countdown to Retirement (CDR)

For members within 3 years of retirement.

Sworn Officers (SWORN)

For Sworn Officers within 3 years of retirement.

Pension Application

For members within 6 months of retirement.

Disability Webinar



SERS is pleased to announce a webinar dedicated exclusively to SERS Disability Benefits.

This Disability Webinar helps understand the disability benefits that SERS offers to its members. This workshop will help members understand the eligibility requirements for each type of SERS disability benefit.

Members can view the SERS Disability Webinar on our website at <https://ilsrs.illinois.gov/>.



Any Questions?