

Employer Training



Employer Training



Contact Information

Address

2101 S. Veterans Parkway

P. O. Box 19255

Springfield, IL 62794-9255

Email

<u>fieldservicesdivision@srs.illinois.gov</u> <u>sers@srs.lllinois.gov</u>

Employer Services Login

employer.srs.illinois.gov

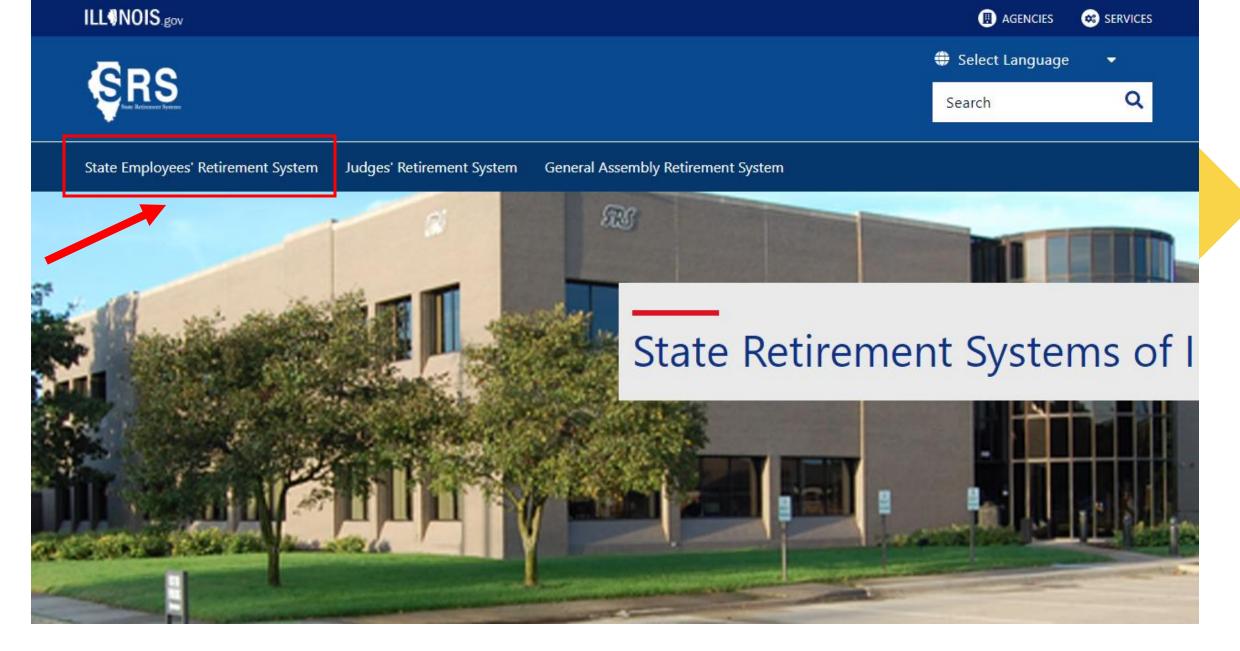
Phone

217-785-7444

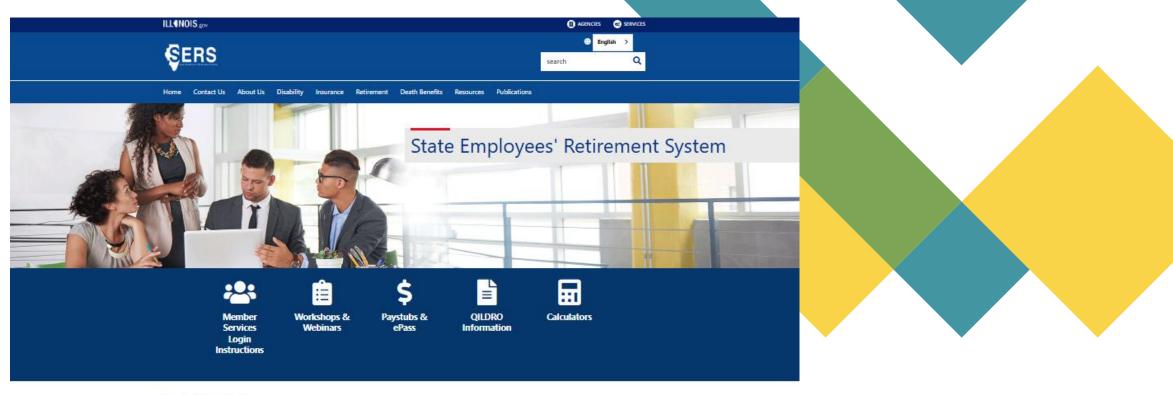


Employer Services Login





Step 1: Visit https://srs.lllinois.gov/. Click "State Employees' Retirement System".



Helpful Links



Step 2: Click "Employer Services Login".



Sign In

Username

Keep me signed in

Next

Unlock account?

Help ₫

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.lllinois.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



Helpful Links





State Employees Retire...

Employer Resources

Contact Us

About Us

Disability

Insurance

Employer Services Login

Security Administrator

Retirement and Payroll Coordinators

Tier Determination Requests

Employer Workshop/Webinar

Publications

Email Contacts

Forms

Employer Resources

Retirement

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

Death Benefits Resources

Publications

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

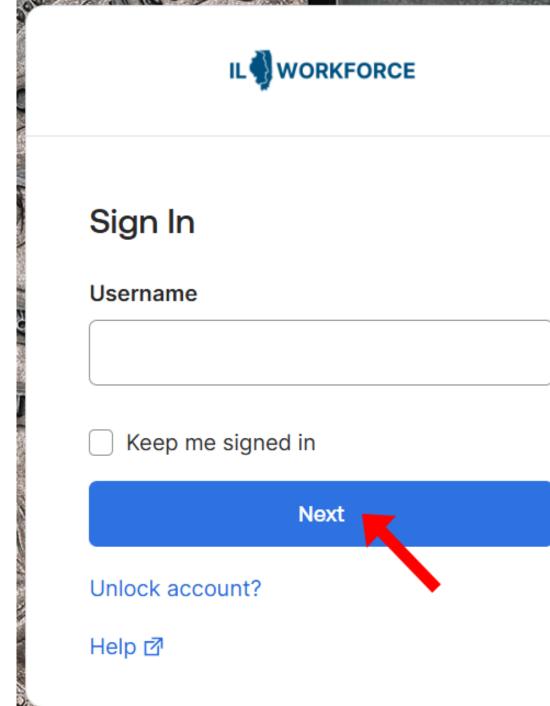
Email Contacts

Forms



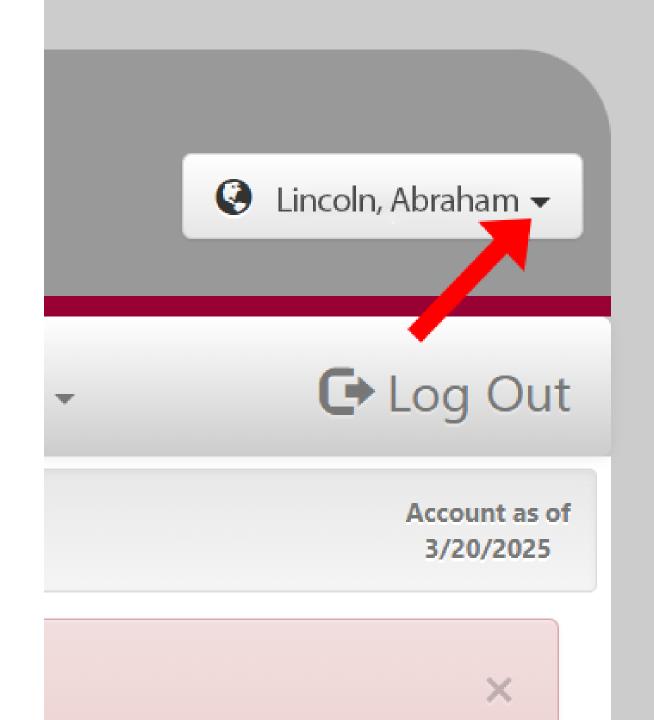
Security Administrator Appointment Request

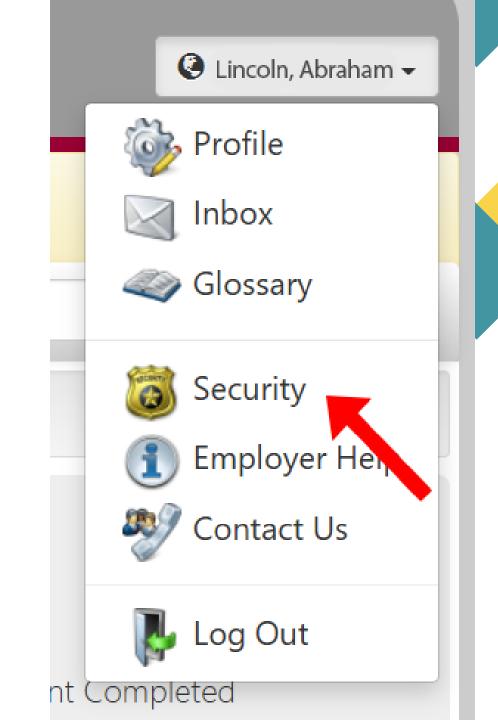




Step 1: Login to Employer Services

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





Step 3: Click "Security".

AGENCY RETIREMENT COORDINATOR APPOINTMENT REQUEST

All Retirement Coordinators will need to complete the Agency Retirement Coordinator Appointment Request form and have their agency's designated Agency Head or Administrator submit the form on their behalf to gain access to the website.

Click here to download and complete the Agency Retirement Coordinator Appointment Request form for a new Retirement Coordinators 🕹

AGENCY PAYROLL COORDINATOR & SIGNATURE DESIGNEE APPOINTMENT REQUEST

Retirement Coordinators will be responsible for signing up and approving their agency's Payroll Coordinators and Signature Designees. All Payroll Coordinators and Signature Designees will need to complete the Agency Payroll Coordinator & Signature Designee Appointment Request form and have the Retirement Coordinator submit the form on their behalf to gain access to the website.

Click here to download and complete the Agency Payroll Coordinator & Signature Designee Appointment Request form for a new Payroll Coordinator or Signature Designee &

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 🚣

© 2025 - 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".

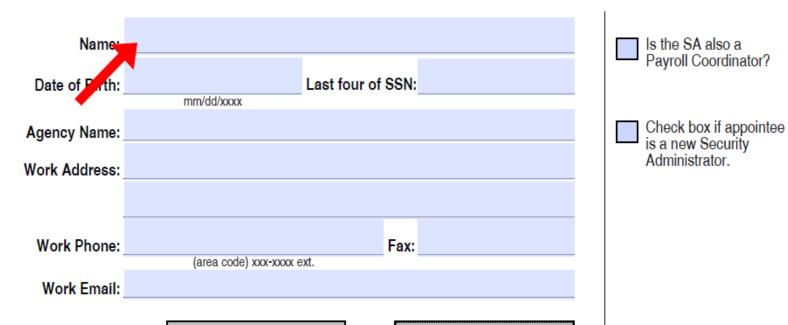


217-785-7444 Email: sers@srs.illinois.gov

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



Step 5: Fill out the form.

Reset Form

Email to SRS



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



Agency Retirement Coordinator Appointment Request -File Options Format Text Review Help Acrobat Message Insert Aptos (Body) Attach File > ுLink ∨ Names Paste Attach via Link 🕍 Signature 🗸 Clipboard 5 Basic Text $\overline{}$ Include Adobe Ac To EmployerAccessRequest \triangleright Send Cc Bcc Subject Agency Retirement Coordinator Appointment Request Website Administrator Access RequestPDF.pdf PDF 1 MB

Step 7: Send the email.

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:		Is the SA also a Payroll Coordinator?
Date of Birth:	Last four of SSN:	
Agency Name:		Check box if appointed is a new Security
Work Address:		Administrator.
Work Phone:	[area code) xxx-xxxx ext.	
Work Email:		
	Reset Form Email to SRS	
Legal Disclaimer:		
functions related to the access	, has been designated to perform Webs	•

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.

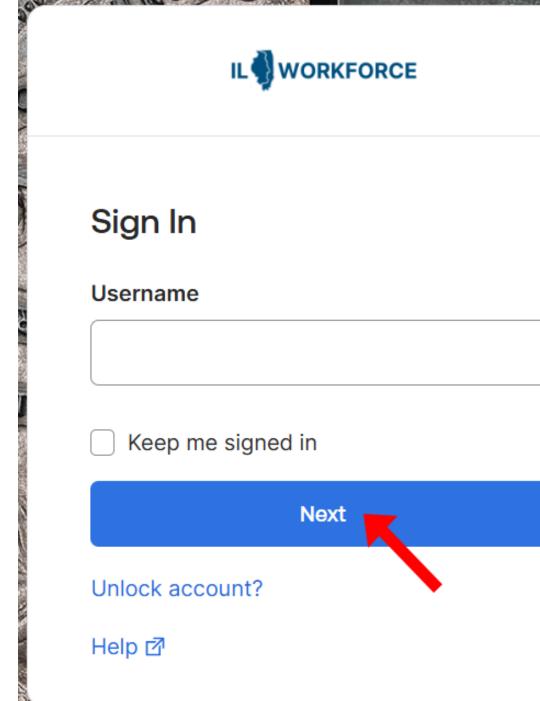
The Security Administrator acknowledges that the right to access the SRS Employer Services data site can be terminated with or without notice at any time by SERS.



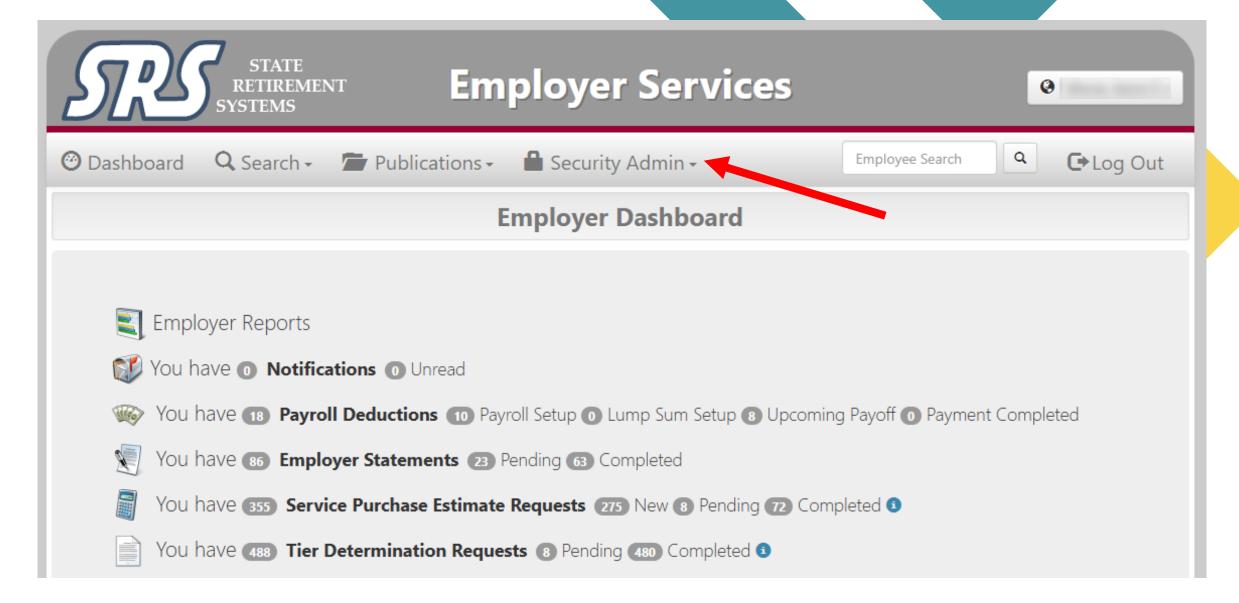


Assigning Retirement/ Payroll Coordinators

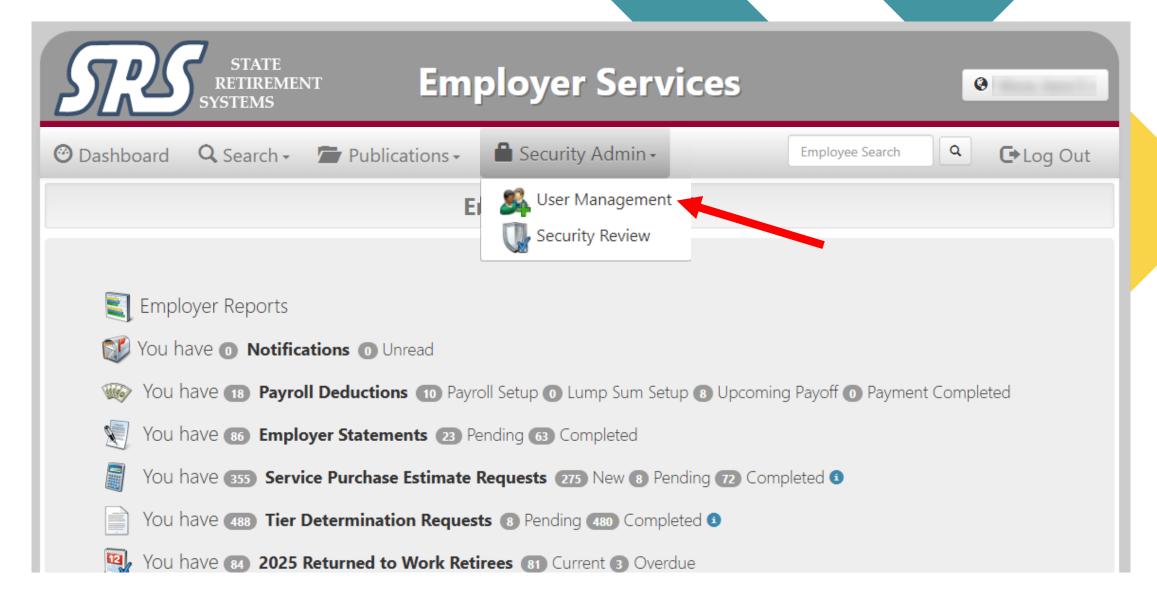




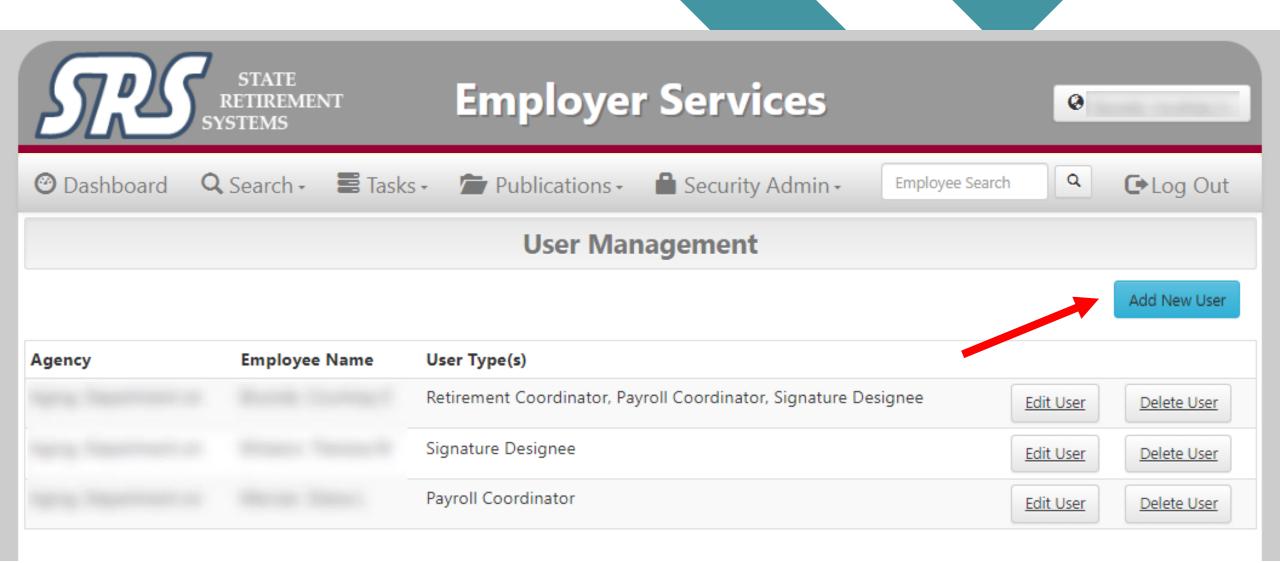
Step 1: Login to Employer Services.



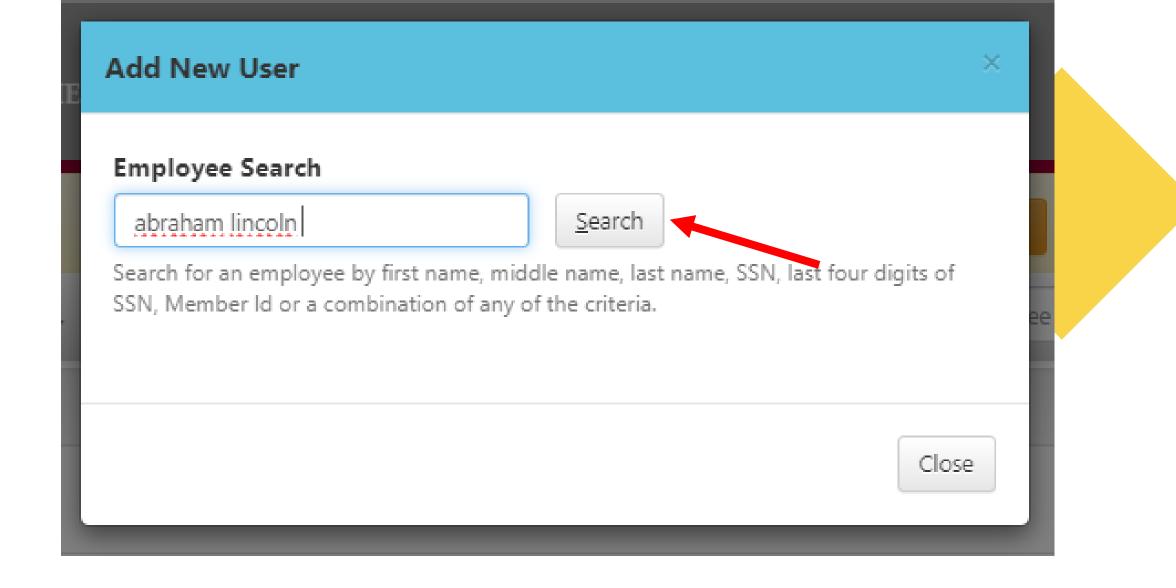
Step 2: Click "Security Admin".



Step 3: Click "User Management".



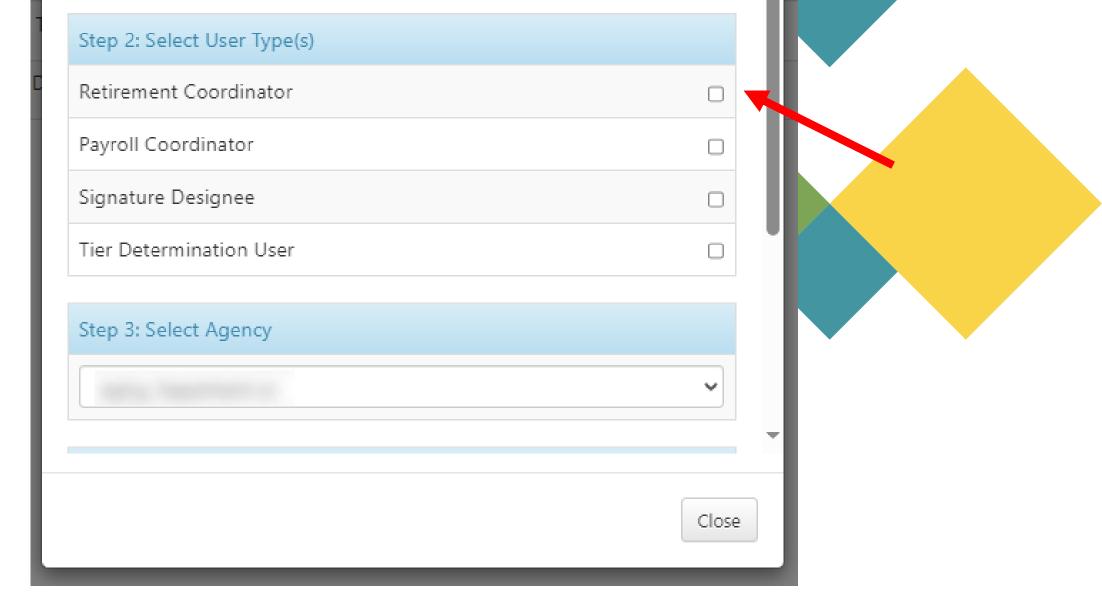
Step 4: Click "Add New User".



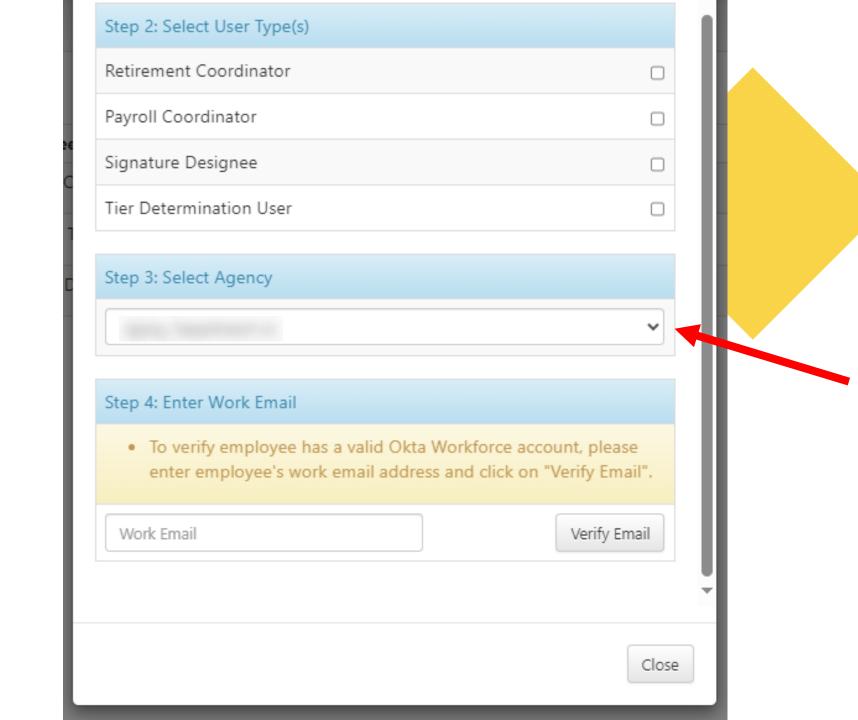
Step 5: Search for the employee.

Add New User **Employee Search** bounds c 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 SSN Birth Date Last Name Step 2: Select User Type(s) Retirement Coordinator Payroll Coordinator Signature Designee Tier Determination User Step 3: Select Agency

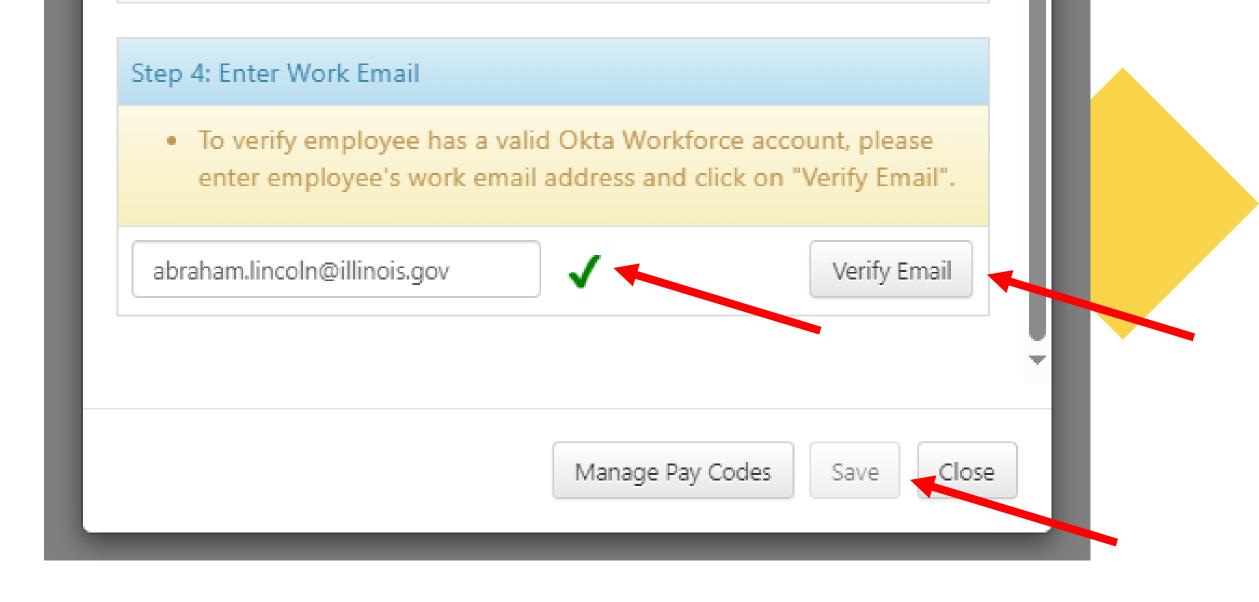
Step 6: Select the employee.



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



Step 8: Select the Agency.

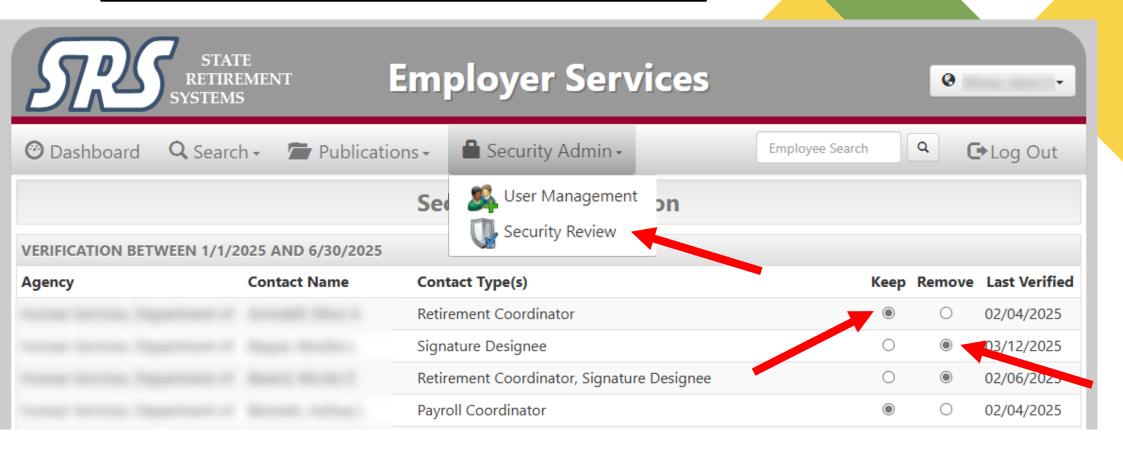


Step 9: Enter the employee's work email, click "Verify Email" and click "Save".

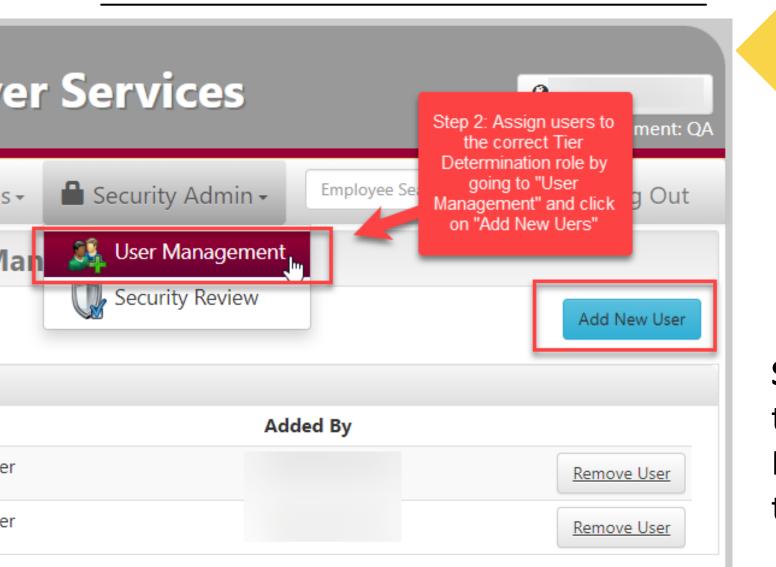
Assigning Tier Determination Users

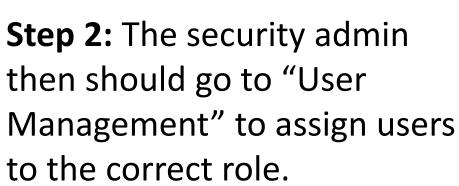


When your agency has employees who need their Tier determined, Security Admins can request SERS to perform a Tier Determination. This process is being implemented to correct roles that have been incorrectly assigned. Those who have been assigned as a Payroll Coordinator or Signature Designee to perform 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.

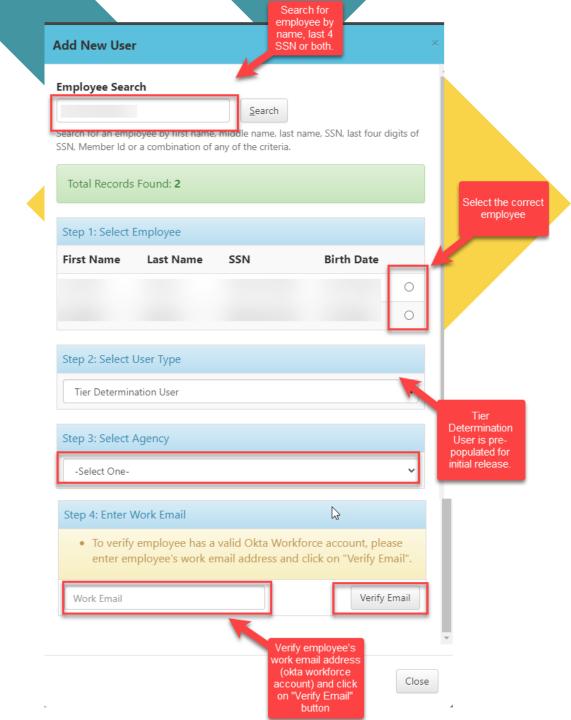


Step 1: The security admin should go to "Security Review" listing to "Remove" employees who have incorrect roles assigned.





This is the menu to add a new user.



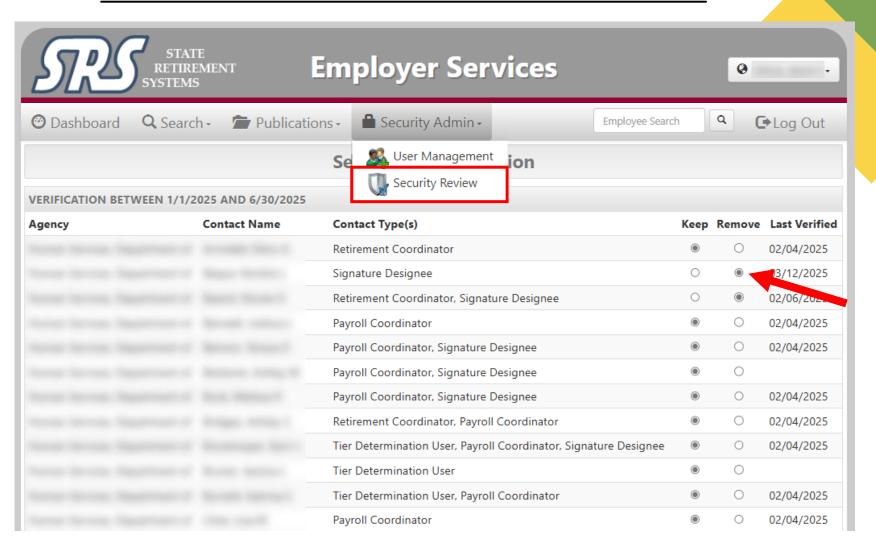
Correction to Incorrectly Assigned Roles



Correction to Incorrectly Assigned Roles

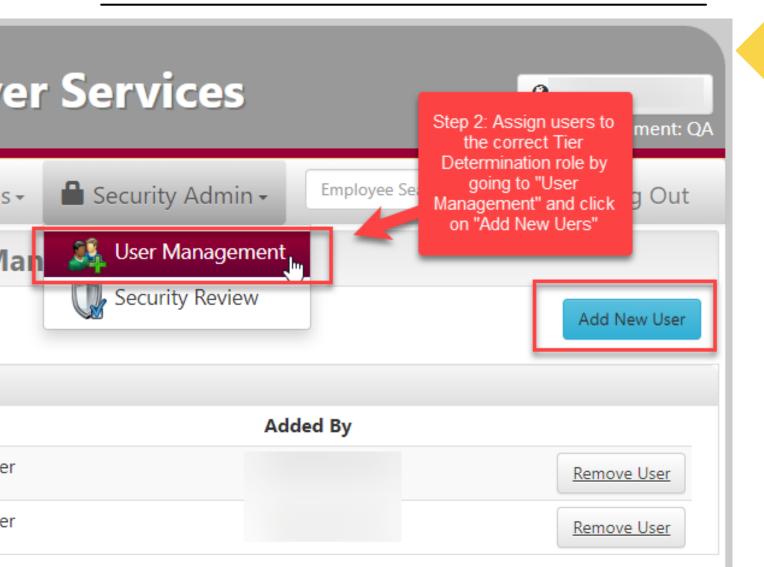
When your agency has employees who need their Tier determined, Security Admins can request SERS to perform a Tier Determination. This process is being implemented to correct roles that have been incorrectly assigned. Those who have been assigned as a Payroll Coordinator or Signature Designee to perform 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.

Correction to Incorrectly Assigned Roles



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

Correction to Incorrectly Assigned Roles



Step 2: The security admin then should go to "User Management" to assign users to the correct role.

Security Review

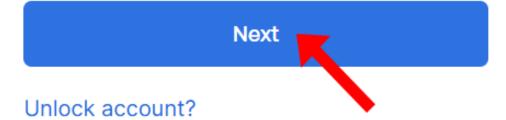




Sign In

Username

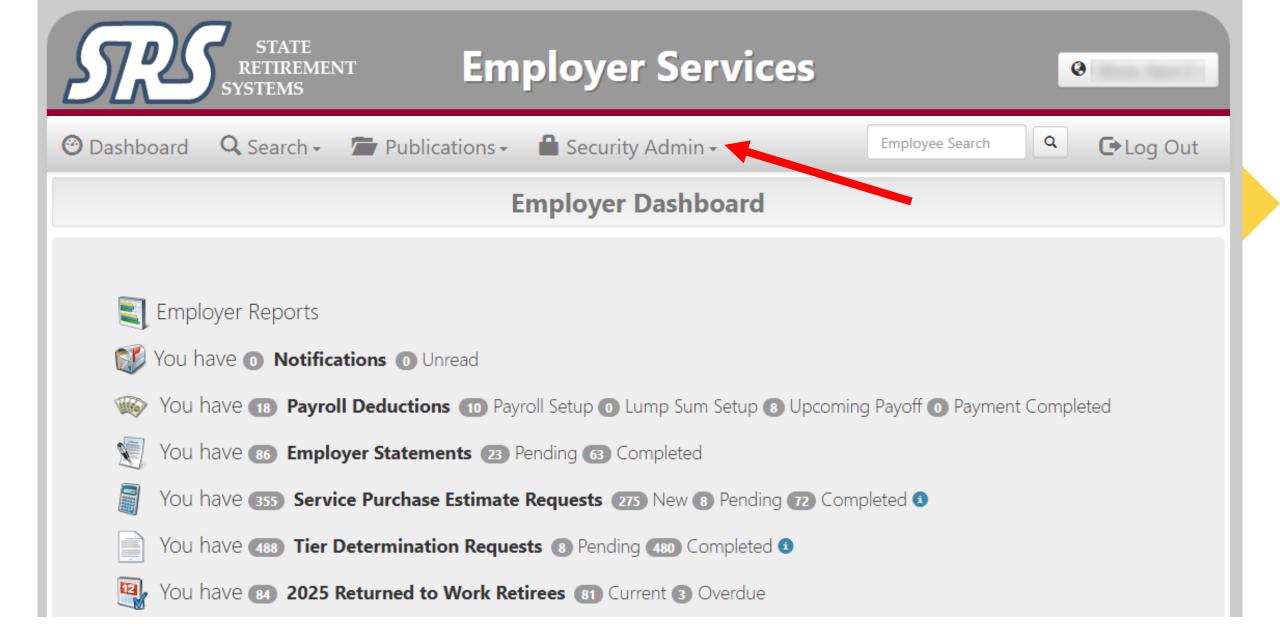
Keep me signed in



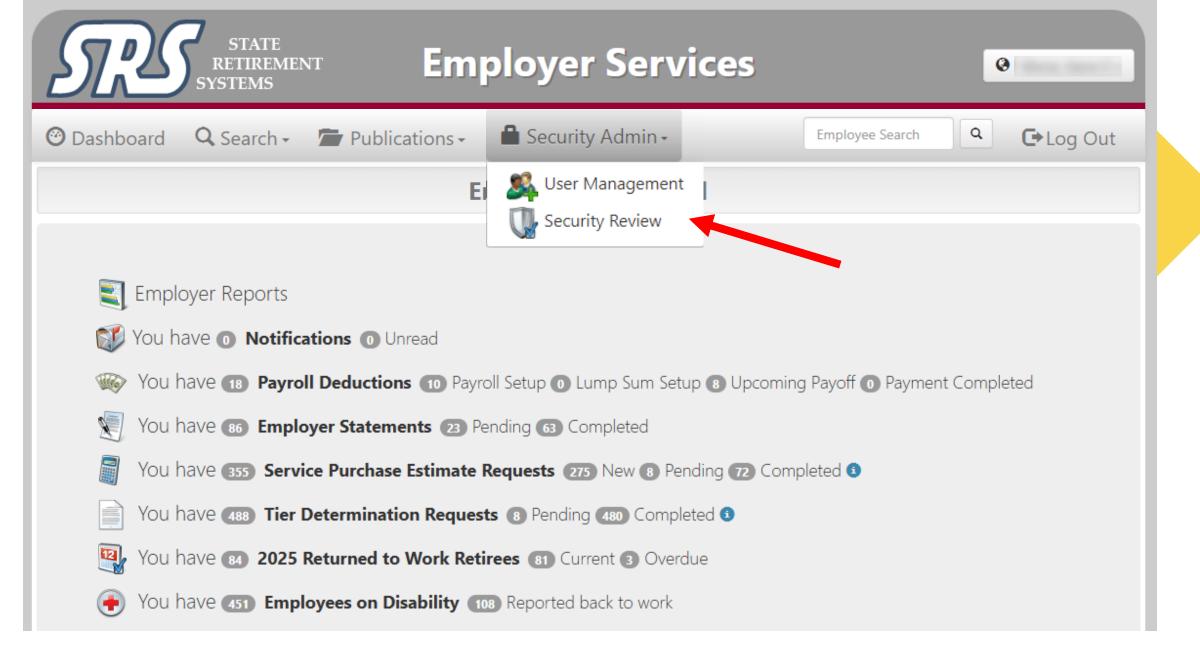
Help ₫



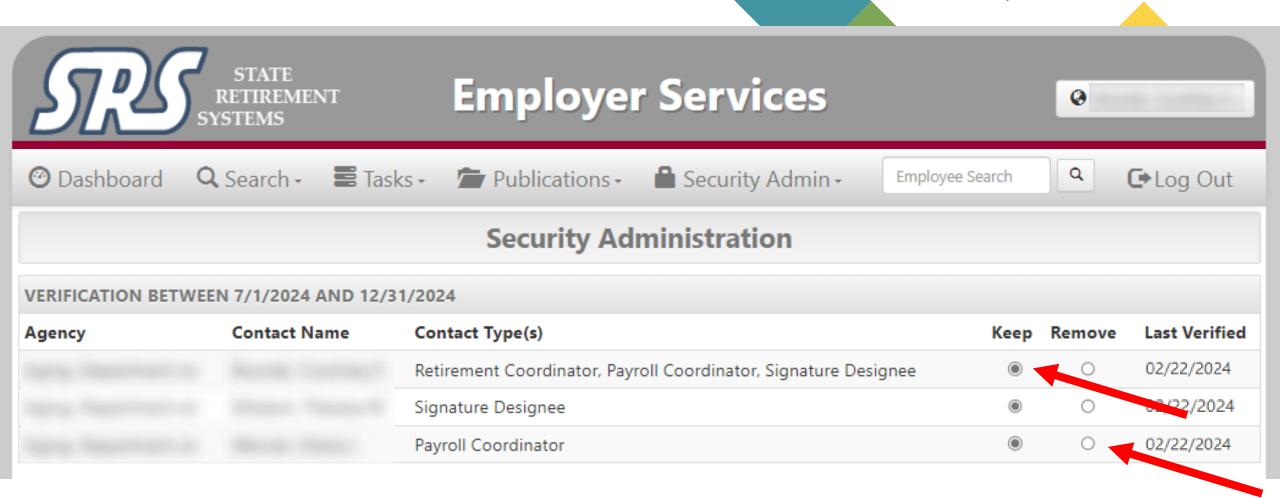
Step 1: Login to Employer Services



Step 2: Click "Security Admin"



Step 3: Click "Security Review"



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.

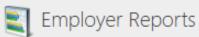
Notifications will provide the total count of messages in your inbox and specify any unread messages.

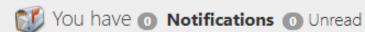
You will have access to various employer functionalities and the counts based on status. You have access to Service Purchase Estimate Requests, Tier Determination Requests, Returned to Work Retirees and Employees on Disability.

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

Q

Employer Dashboard











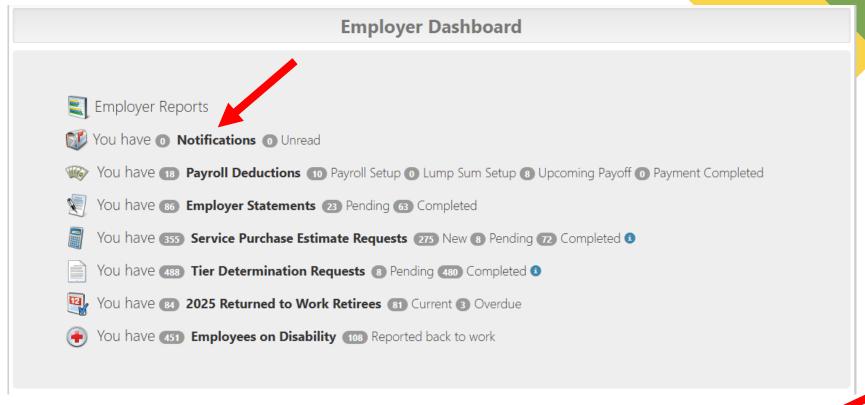
- YOU have 488 Tier Determination Requests (8) Pending 480 Completed (5)
- You have 2025 Returned to Work Retirees 81 Current 3 Overdue
- You have 451 Employees on Disability 108 Reported back to work

Please read our terms and conditions policy for the Employer Services website:

Terms & Conditions

Employer Dashboard

Click on bolded text to reach the desired category



Dashboard

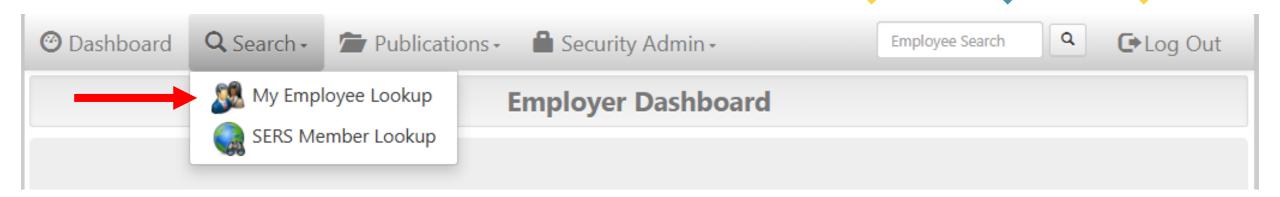
 When done working on the category, click "Dashboard" to return to the dashboard

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

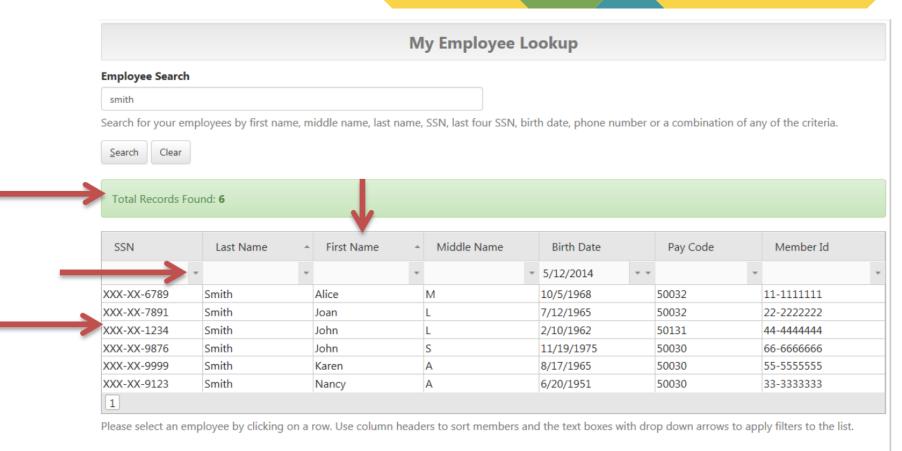
John L Smith
6789 2/10/1962

Employee Search

Enter Search Criteria
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.





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					<u>Tier 1</u>

LAST PAYROLL OR DISABILITY POSTING	
Туре	Salary
Current Plan	[1] SERS Regular - Coordinated, Tier 1, 4%
Pay Code	<u>10-110</u>
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.

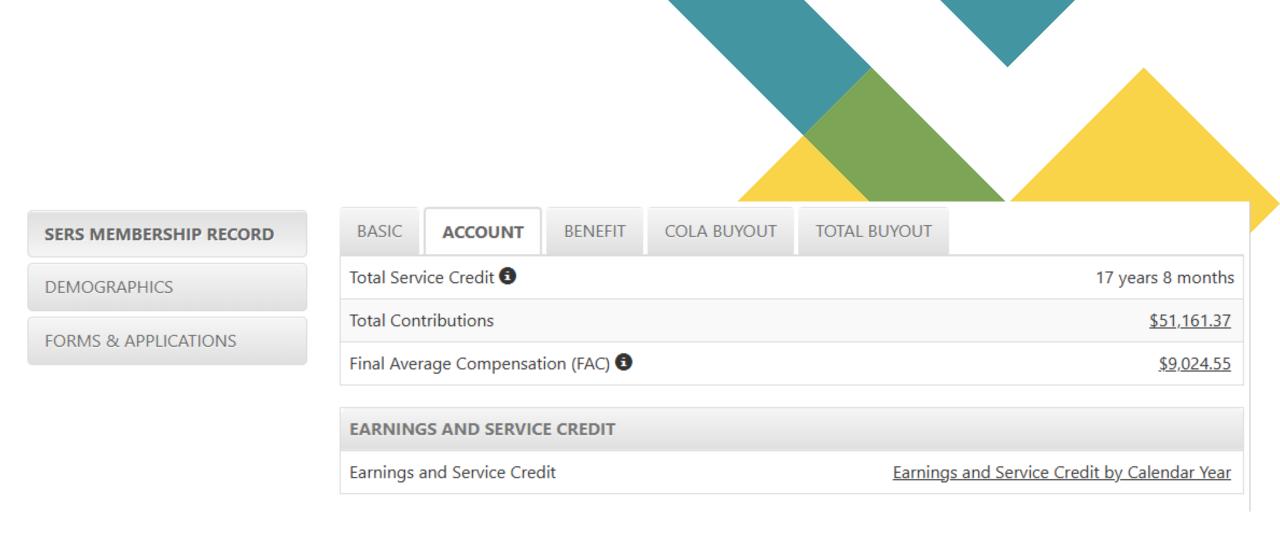
If the member is considered Tier 1 due to reciprocal service, the Tier Summary will display which reciprocal system the member has service with and their associated membership date with that reciprocal system. The Tier Summary data is to be printed and used by agencies to code payroll and within personnel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



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

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.

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.

ESTIMATED RETIREMENT BENEFITS

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

Regular Retirement - Monthly Benefit

4/1/2025

\$2,665.68

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.

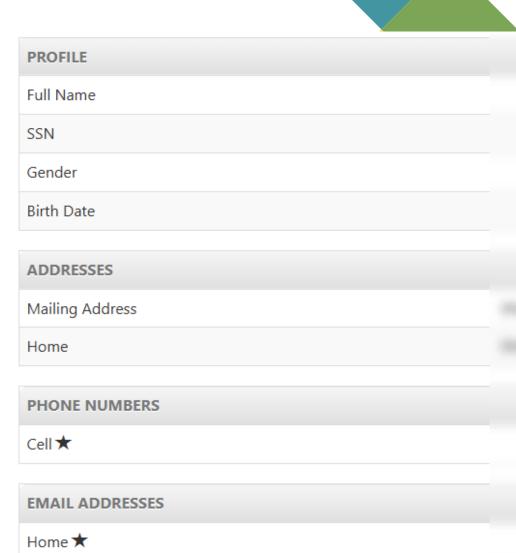
For each month (21 days) of unpaid sick days and/or paid sick and vacation days, your projected monthly gross is anticipated to increase by \$12.56.

SERS MEMBERSHIP RECORD

DEMOGRAPHICS

FORMS & APPLICATIONS

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



SERS MEMBERSHIP RECORD

DEMOGRAPHICS

FORMS & APPLICATIONS

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.

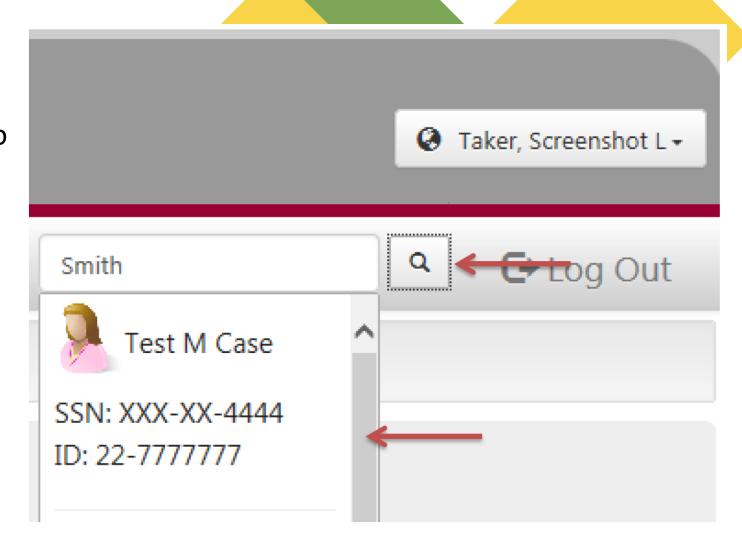
Click on the form name (ex: Beneficiary Nomination) to either open or download the pre-populated PDF form.

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 L	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

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.

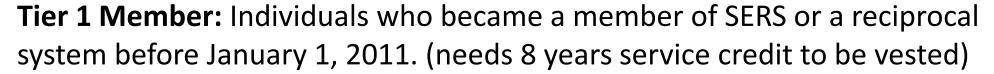


Pension/Death Benefit Information



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



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*
 Department of Revenue
- 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	Hourly	Daily	Monthly
Employees	Employees	Employees	Credit
15 or more days	75 or more hours	10 or more workdays	1
8 – 14 days	38 – 74 hours	5 – 9 workdays	1/2
Less than	Less than	Less than 5	1/4
8 days	38 hours	workdays	

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



State Retirement Systems > State Employees Retire...

Calculators

Social Security Benefit Estimate Calculator

Service Credit Calculator

Sick Leave and Vacation Chart

Pension Estimate Calculator Training Video



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.

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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)



State Retirement Systems > State Employees Retire...

Calculators

Social Security Benefit Estimate Calculator



Service Credit Calculator

Sick Leave and Vacation Chart

Pension Estimate Calculator Training Video

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

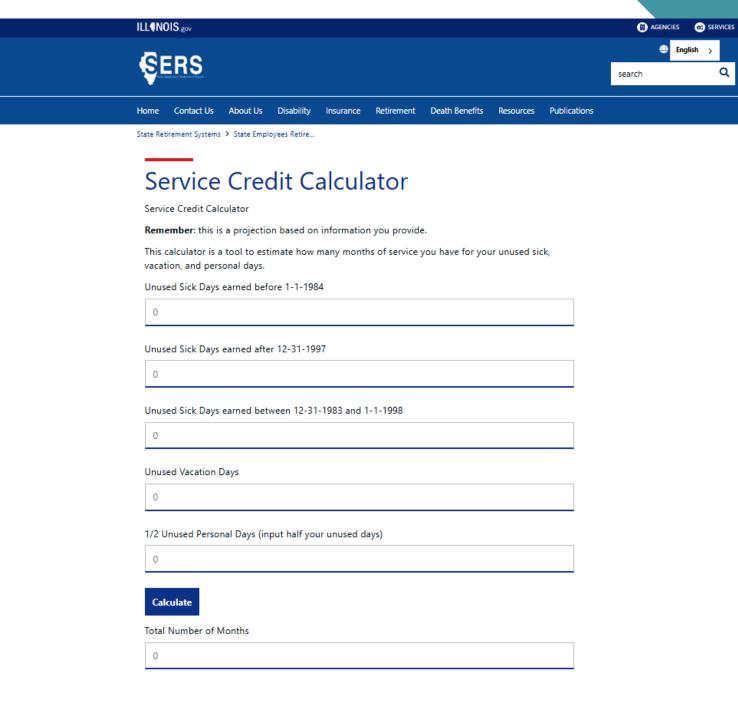
FOR JRS/GARS MEMBERS ONLY

JRS/GARS representatives do not have the ability or authorization to access SERS member data, or

to assist SERS members.

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English >

Reciprocal Systems*

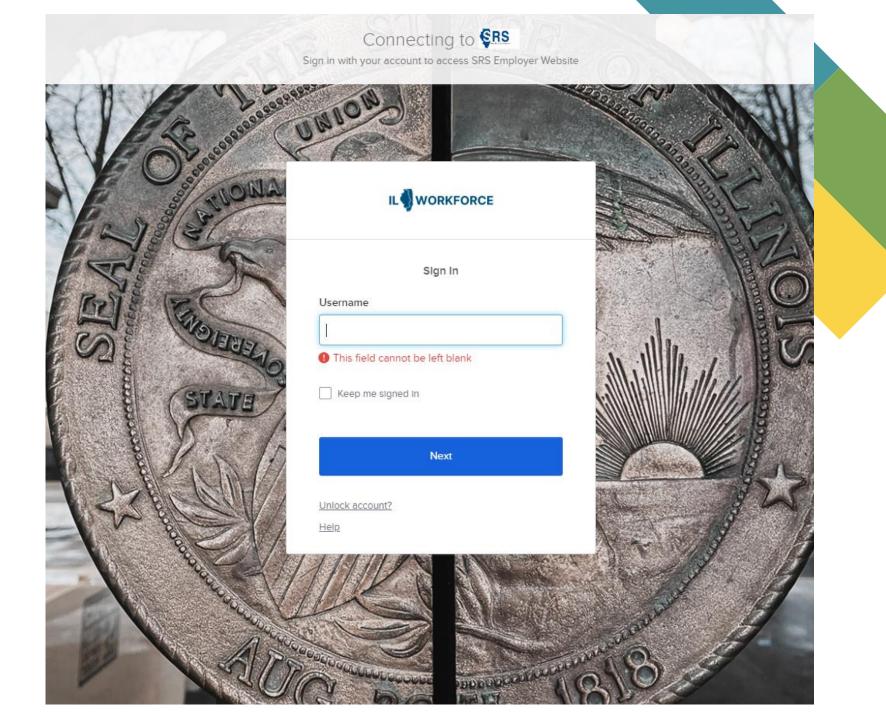
- Chicago Teachers' Pension Fund
- County Employees' Annuity
 & Benefit Fund of Cook County
- Forest Preserve District
 Employees' Annuity & Benefit
 Fund of Cook County
- General Assembly Retirement System
- Illinois Municipal Retirement Fund
- Judges' Retirement System
- Laborers' Annuity & Benefit 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)





Login to Employer Services.

Employer Dashboard



Employer Reports



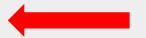
You have **O** Notifications **O** Unread



YOU have 18 Payroll Deductions 10 Payroll Setup 10 Lump Sum Setup 13 Upcoming Payoff 10 Payment Completed



You have 86 Employer Statements 23 Pending 63 Completed





You have 355 Service Purchase Estimate Requests 275 New 8 Pending 72 Completed 6



You have 492 Tier Determination Requests 7 Pending 485 Completed 5

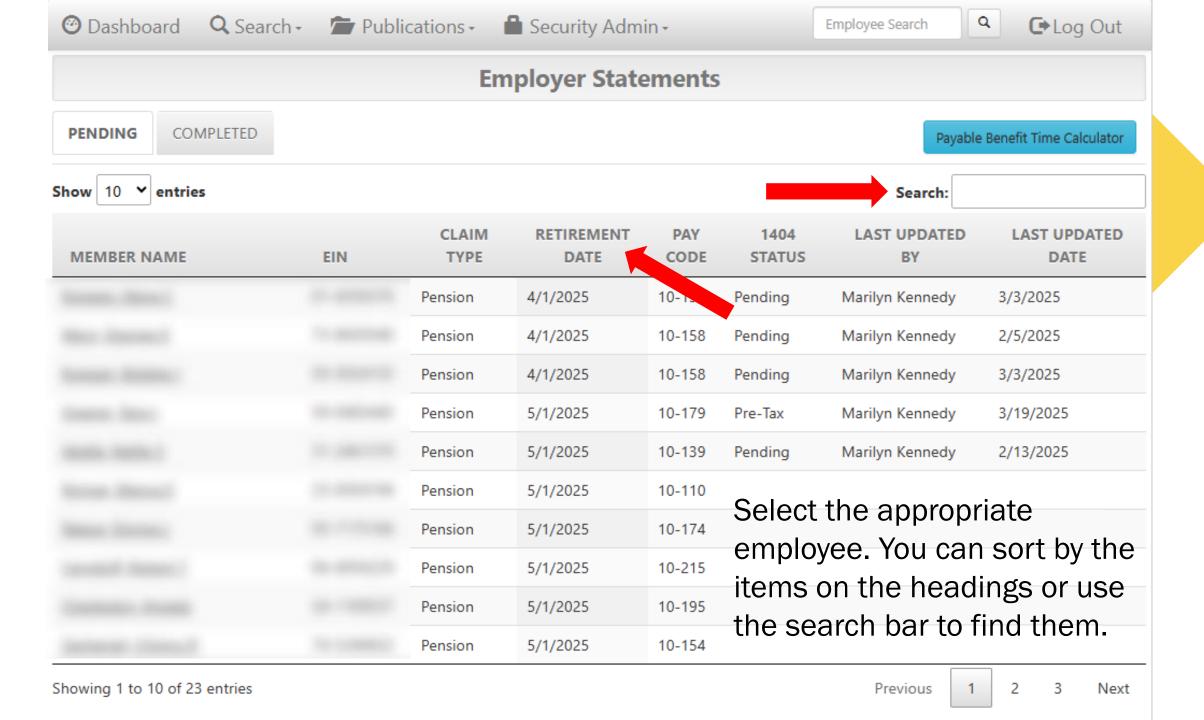


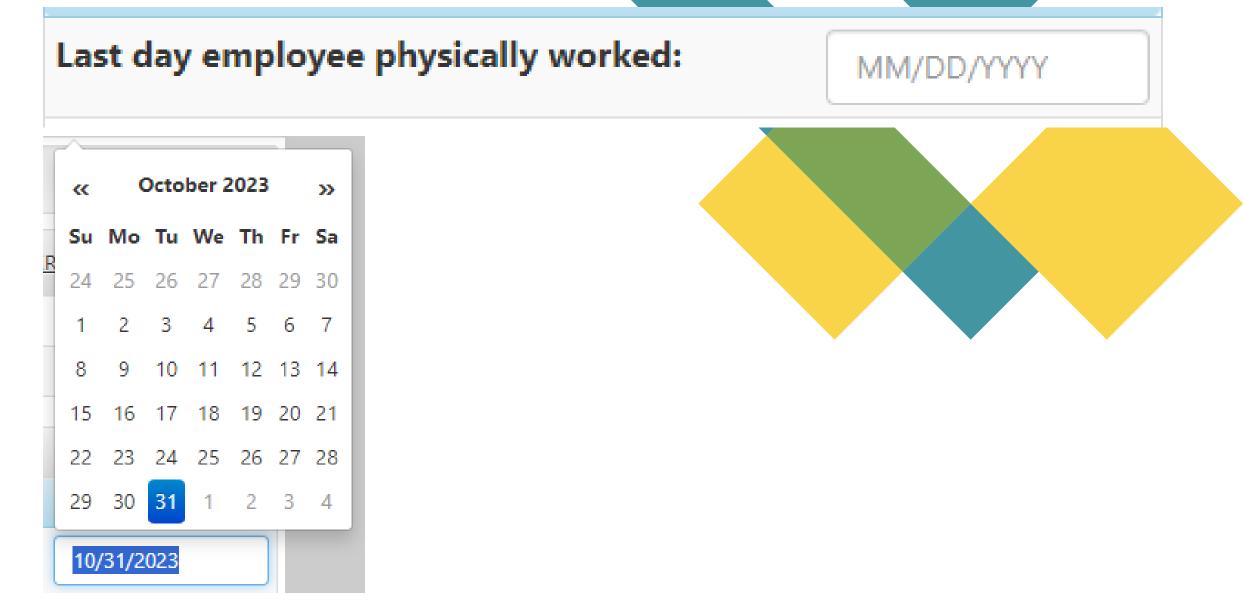
You have 84 2025 Returned to Work Retirees 83 Current 1 Overdue



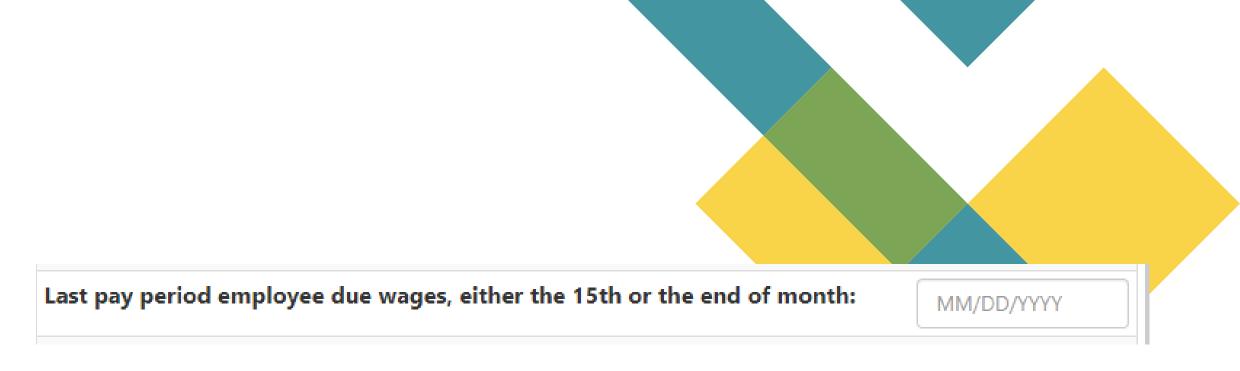
You have 451 Employees on Disability 108 Reported back to work

Click "Employer Statements"

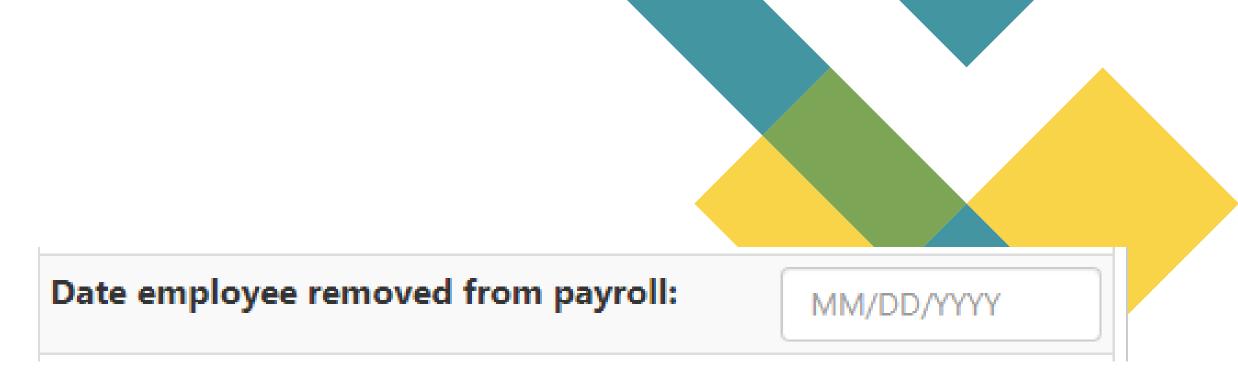




Last day employee physically worked: Input the last date the employee was present and worked.



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

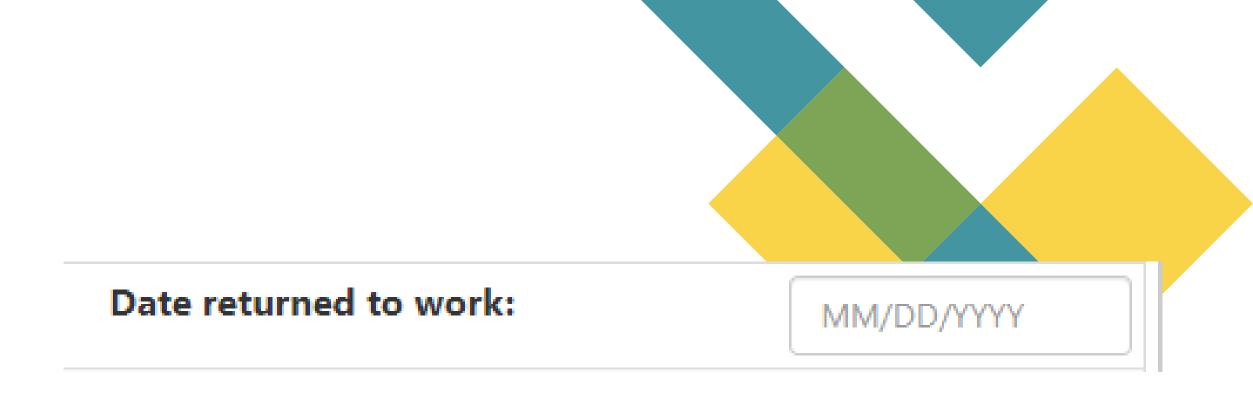


Date employee removed from payroll: Indicate the pay period ending date of when employee was removed from payroll.

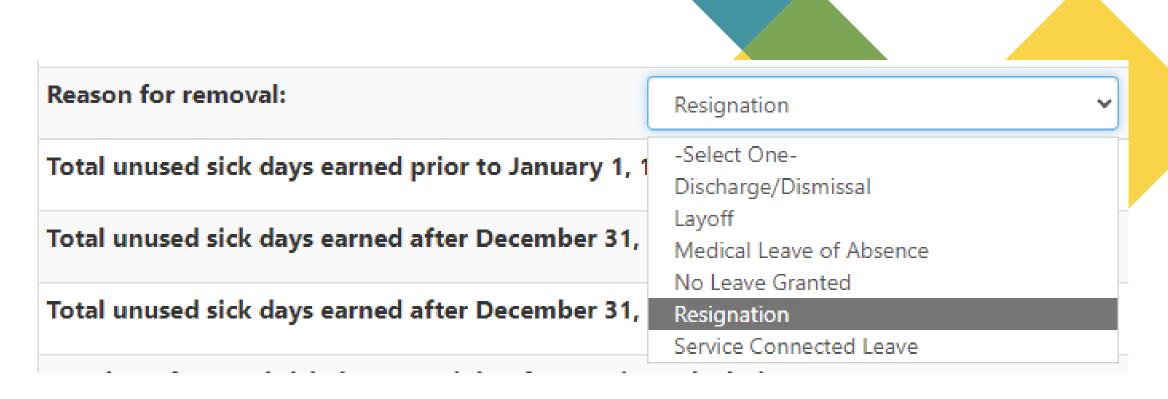


Has employee returned to work? If employee is returning as a 75 day employee or on a contract, the answer is "no".

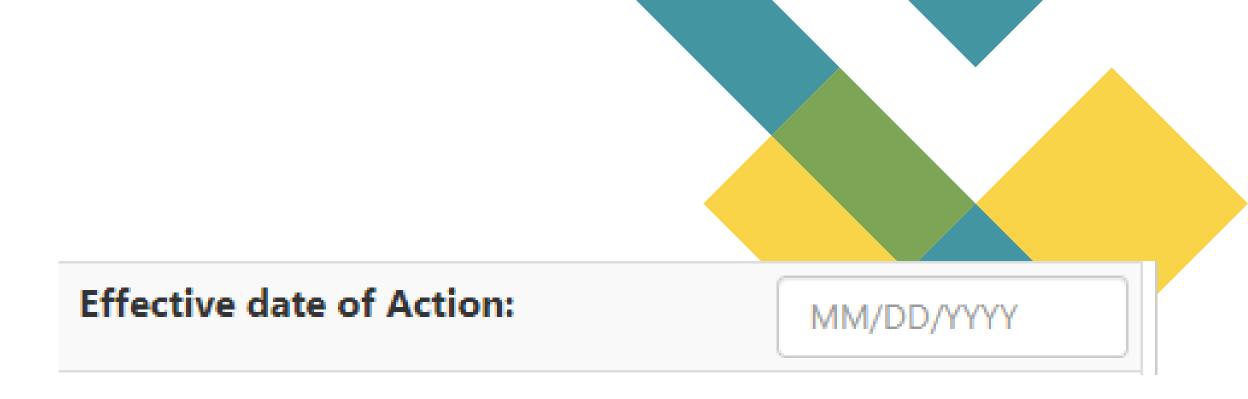
If employee is returning as a state employee, select "yes" and enter the date the employee returned to work.



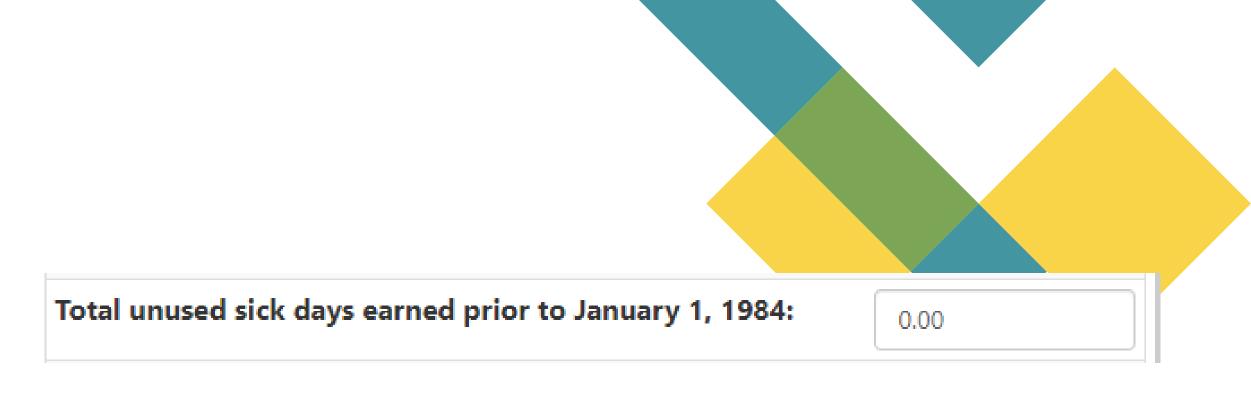
Date returned to work: Date employee physically returned to work.



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



Effective date of Action: Self-explanatory.



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



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: Self-explanatory.

Number of unused sick days remaining for pension calculation:

0 + 0 + 0/2 = 0.00

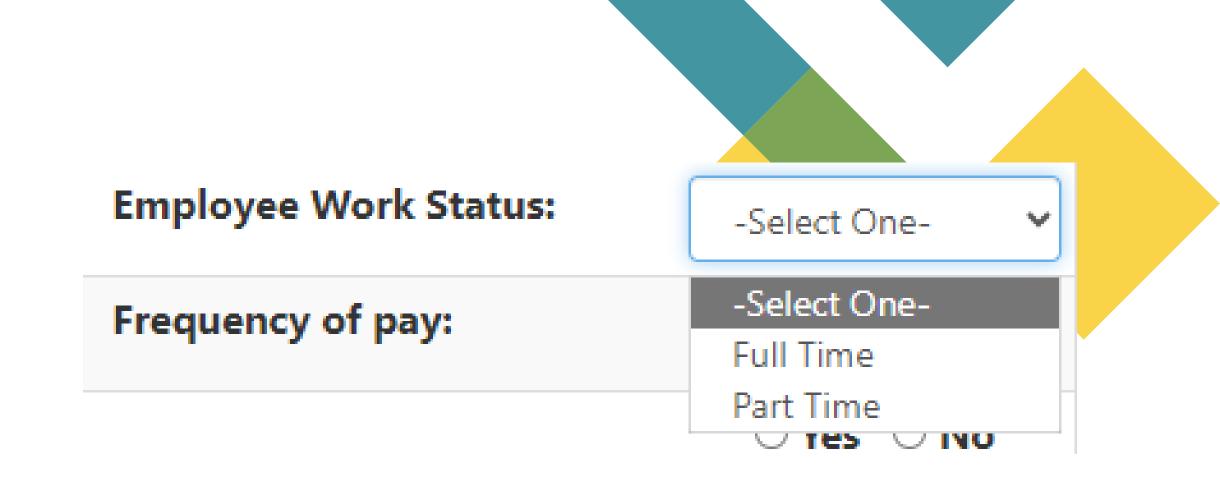
(rounded to 0)

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

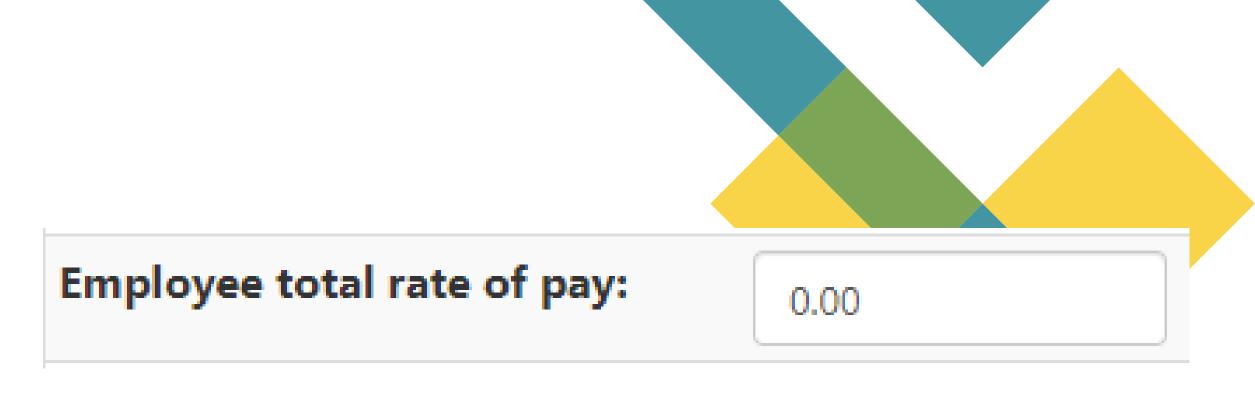


0.00

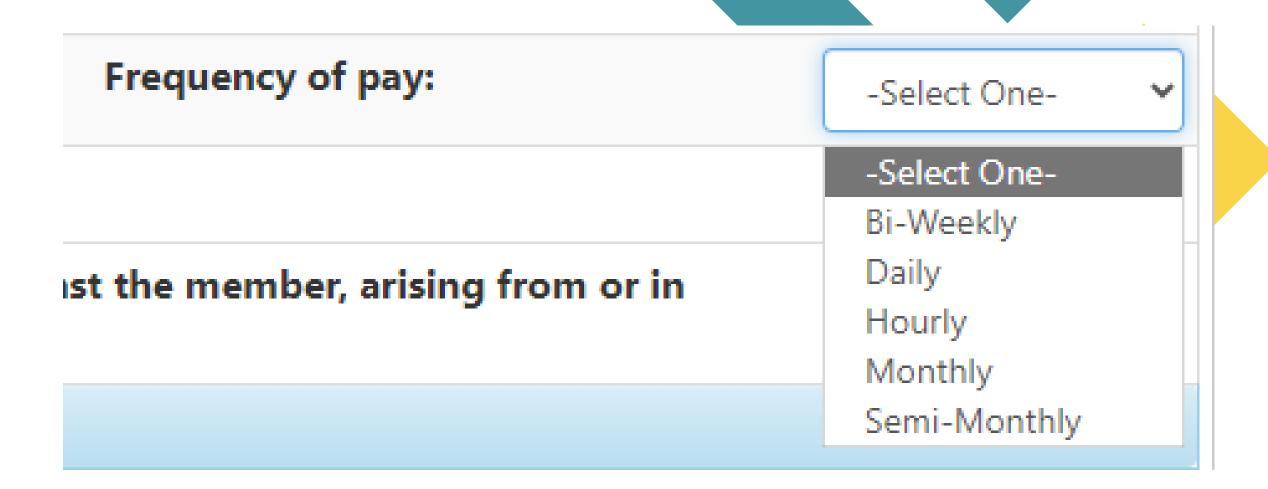
Employee base rate of pay: Rate of pay at the time of separation of employment.



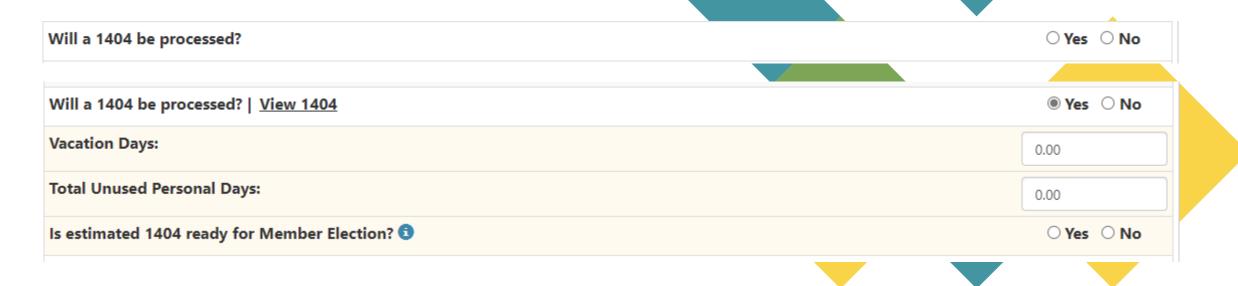
Employee Work Status: Select Full time or Part time from the drop down menu.



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



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



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.
- O **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 <u>Profile</u> to update your e-mail address.



Close



Member Election

Will a 1404 be processed?	○ Yes ○ No
Member Election Status: 1 Member has not made an online election. Please contact the member at therailsplit	tter@gmail.com .
Vacation Days:	22.00
Total Unused Personal Days:	4.00
Is estimated 1404 ready for Member Election?	
Member Election Status: 📵 Member has elected Pre-Tax (BSLS) contributions to be withheld from lump sum pa	ayment. 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





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: 12-34	56789]
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

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: 1

✓ 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.

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

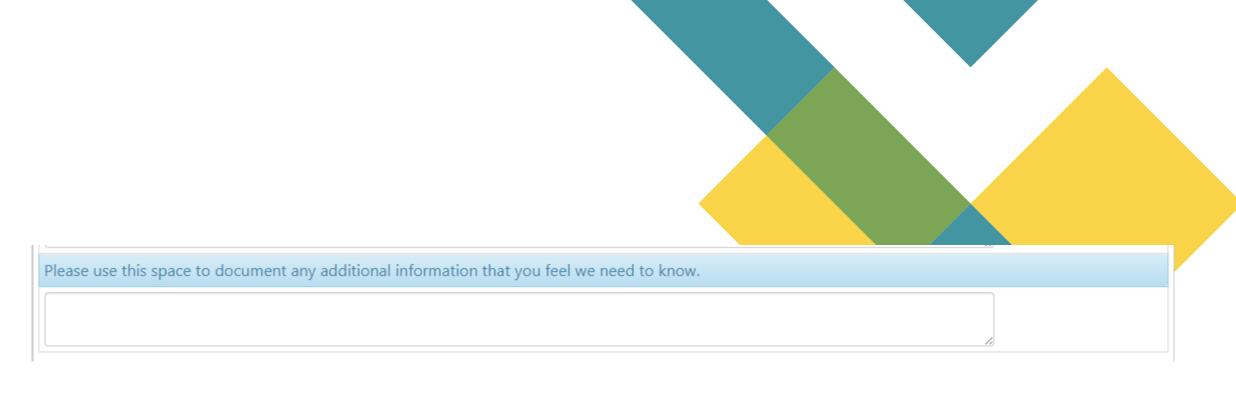
Calculation Note:

Close

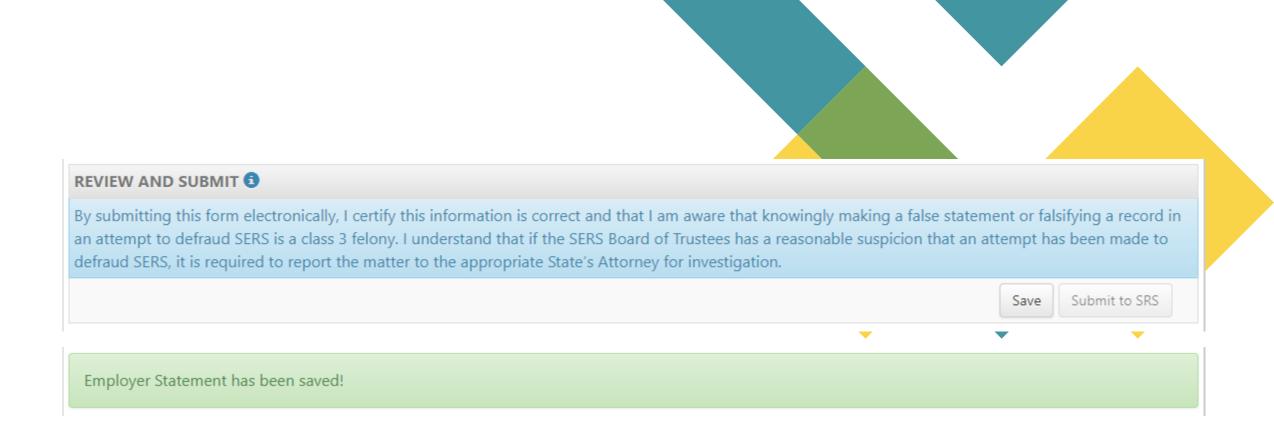
Minimum Days Apply: Employee's paid days has been automatically adjusted to 49.00 days to establish 2.50 months of paid service credit.

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?	
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.



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



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.

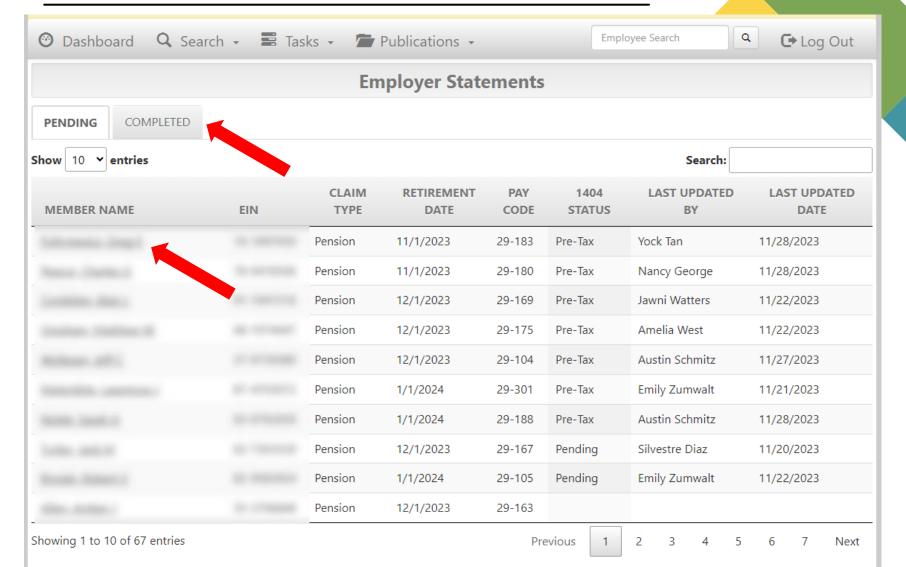
All possible errors are listed above for your reference.



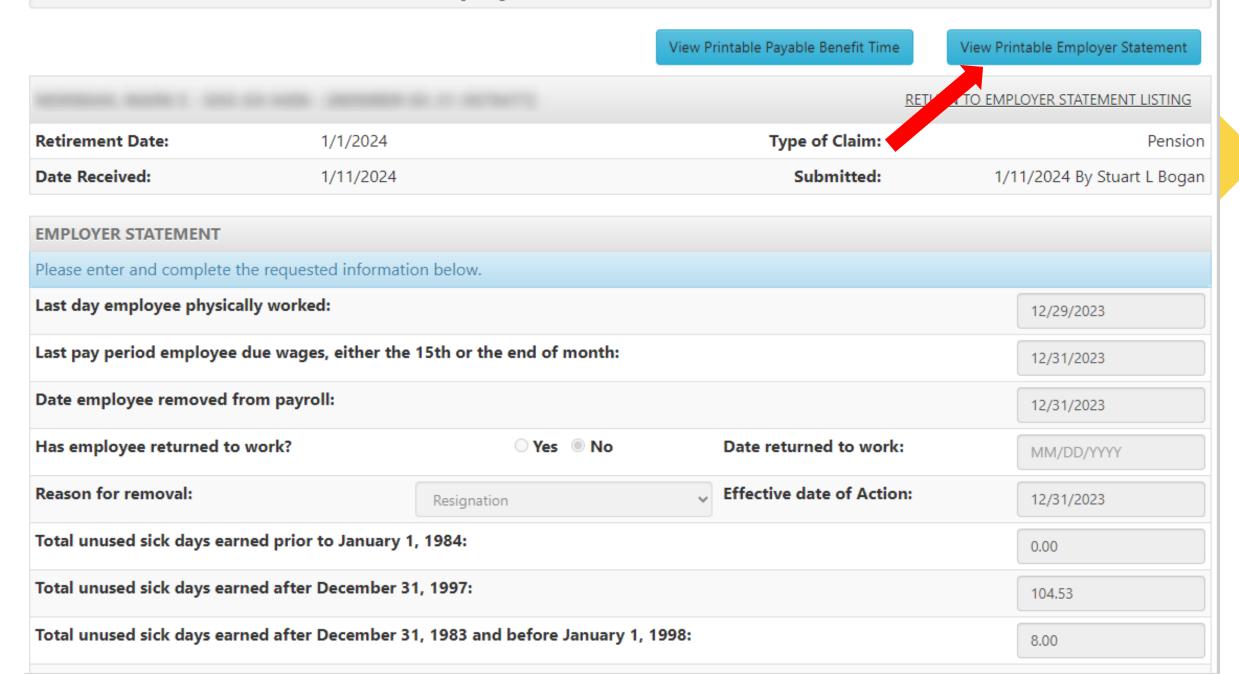
Submit to SRS. All errors must be resolved before submitting to SRS. The employee must be off payroll. The number of sick/vacation/personal days must be finalized. If the lump sum sick and vacation time is being purchased, the employee must make the election in Member Services before "Submit to SRS"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

Print Employer Statement



Employer Statement for Pension



Employer Statement 3900 Form for Death Benefit/Total Buyout





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

Employer Statement

1. Type of claim Death Death Total Buyout	
Member information Name (Last, first, middle) 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? No Date returned to work: 4(a). Reason for removal: Resignation Medical Leave of Absence Discharge/Dismissal	
Member information Name (Last, first, middle) 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? No Date returned to work: 4(a). Reason for removal: Resignation Medical Leave of Absence Discharge/Dismissal	
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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?	
(b). Date employee removed from payroll, biweekly or either the 15th or the end of month: (c). Has employee returned to work? No Date returned to work: 4(a). Reason for removal: Resignation Medical Leave of Absence Discharge/Dismissal	
(c). Has employee returned to work?	
4(a). Reason for removal: Resignation Medical Leave of Absence Discharge/Dismissal (b). Effective date of removal action (MM/DD/YYYY)	
☐ Resignation ☐ Medical Leave of Absence (b). Effective date of removal action (MM/DD/YYYY) ☐ Discharge/Dismissal	
 □ Layoff □ Death (Was member on an approved medical leave of absence at death? □ Yes □ No) 	
5. Total unused sick days earned prior to Jan. 1, 1984)
Total unused sick days earned after Dec. 31, 1997)
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)
Number of unused sick days remaining for pension calculation	
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 □ hou	ly
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 ou in connection with their employment with the state of Illinois? Yes No	of, or
Retirement Coordinator signature Date	
Phone number	



2.	Last day employee physically worker	ed (MM/DE) /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:

- 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?

1. Type of claim

☐ Death

☐ Total Buyout

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

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

No)

- 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 (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 st	tatus: 🔲 F	ull time 🛚 Part ti	me	
(c).	Employee total rate of pay: \$;	(d).Pay frequency:	□ monthly	☐ semi-monthly	□ biweekly	□ hourly
7.	Will a Form 1404 (Retirement Contributions on Lum ☐ Yes ☐ No	np-Sum Pay for Sick L	eave, Vacatio	on and/or Personal	Days) be proce	ssed?
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					

- 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
- 3. 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 benefit amounts offset

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 of if the member is receiving Social Security or not.

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
- You are removed from your agency payroll
- SERS can pay the same days as Workers' Compensation pays

Benefits end:

- Your disability ends
- You resume employment
- Workers' Compensation stops paying benefits
- You reach age 65
- If disability begins after age 60, benefits can be paid for a maximum of five years.

Occupational Disability 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:

- You filed an appeal with the Illinois Workers' Compensation Commission
- Have at least 18 months of credited service with SERS (includes reciprocal service)
- You submit the Temporary Disability application and all required documents to SERS
- SERS determines 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:

- You have filed an appeal with the Illinois WCC (19b)
- You must have at least 18 months of credited service with SERS (includes TRS or SURS reciprocal service)
- You 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 ½ of credited service has been exhausted
- When member reaches age 65
- If disability began after age 60, they can receive benefits for up to 5 years 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 of if the member is receiving Social Security or not.

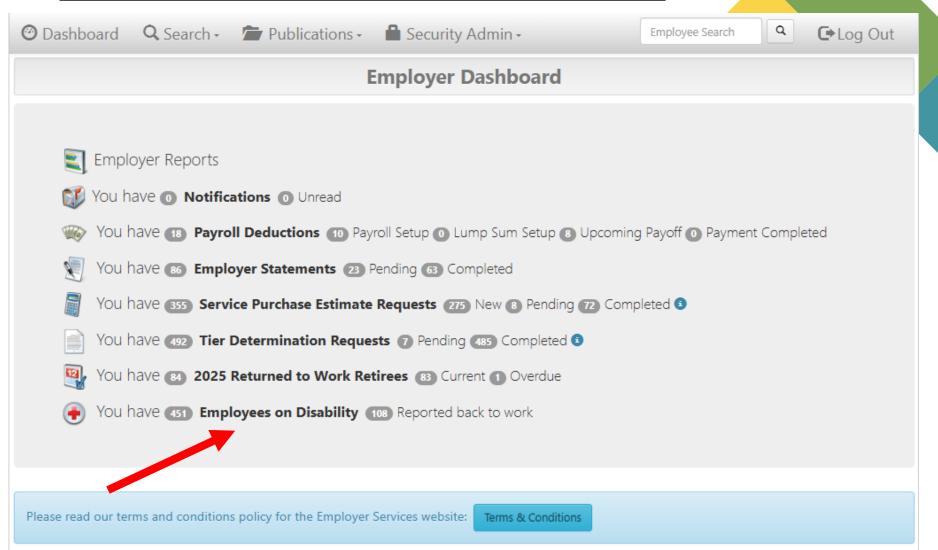
Disability - Reporting Employees Returned to Work



Disability Returning to Work

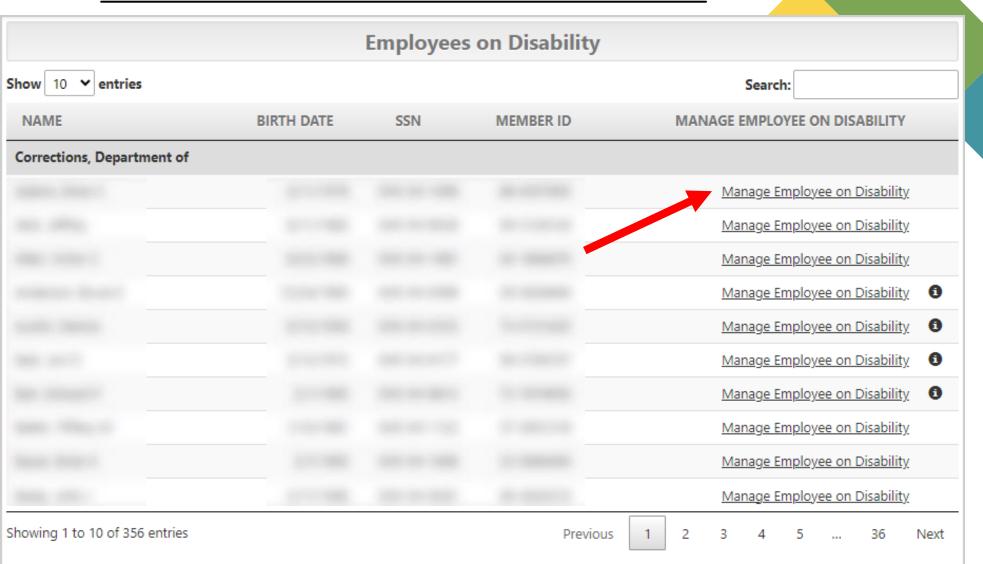
- It is both the member and the agency's responsibility to notify SERS when the member returns to work
- If a member was on a Nonoccupational benefit, returns to work, and they become disabled from the SAME injury/illness within 60 days, the 30-day waiting period is waived and the benefit can begin the 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



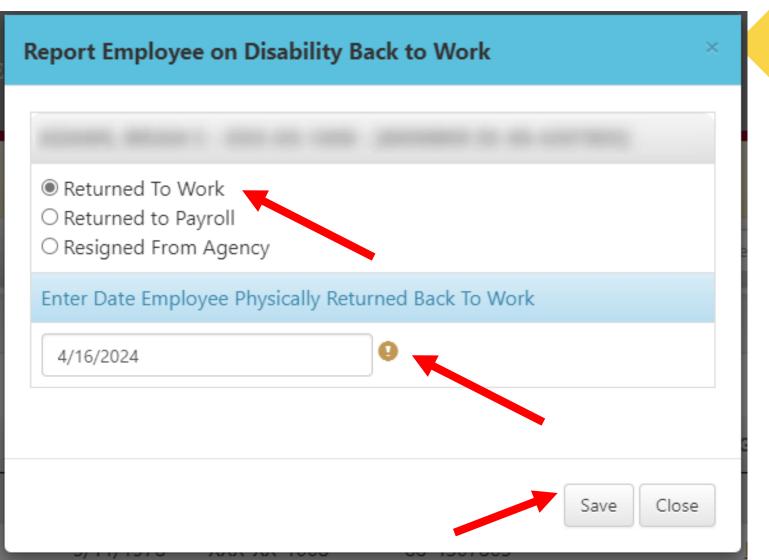
Select "Employees on Disability" from the Employer Dashboard

Disability Report Employee Returning to Work



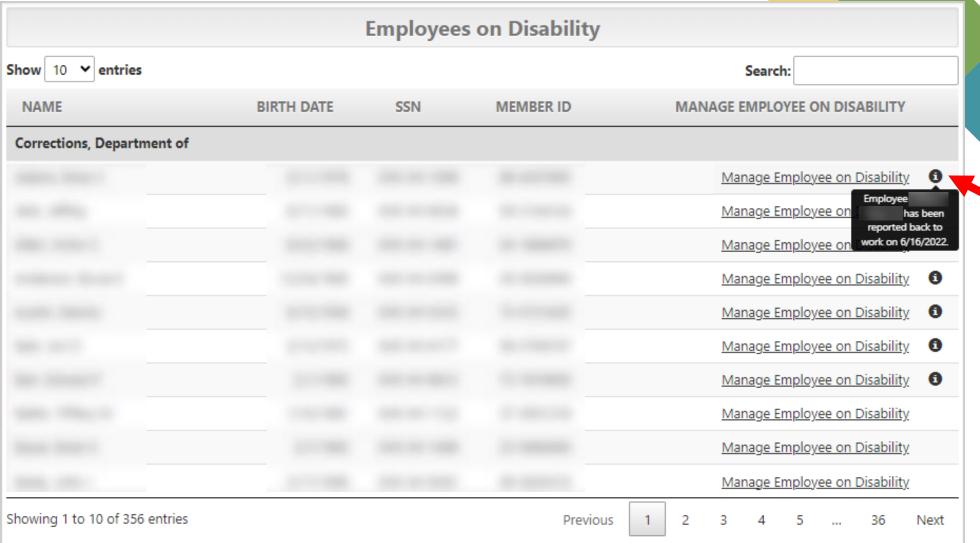
Select "Manage Employee on Disability" from the menu

Disability Report Employee Returning to Work



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

Disability Report Employee Returning to Work



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



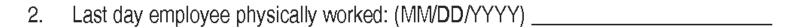


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Employer Statement for Disabili	ty
	Type of claim Occupational disability Nonoccupational disability Temporary disability
Member information Name (Last, first, middle)	SSN (last 4) or Member ID
Address (Street, City, State, Zip)	Phone number
Last day employee physically worked: (MM/DD/YYYY) (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:	
4 (a). Reason for removal: Medical Leave of Absence Service Connected Leave (b). Effective date of removal action: (MM/DD/YYYY)	
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 connection with their employment with the state of Illinois?	the member, relating to, arising out of, or in
Retirement Coordinator signature	Date
Phone number	



- 1. Type of claim
 - ☐ Occupational disability
 - Nonoccupational disability
 - ☐ Temporary disability



- 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: _____

- 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)

- 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.)

- 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

- 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

- 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

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	srs.illinois.gov					
		Job Duty 9	Statement			
Mem	ber information	•				
Name	e (Last, first, middle)	SSN (last 4) or Member ID				
Addr	ress (Street, City, State, Zip)	Job title (no temporary titles)	_			
To be	completed by the member's supervise	or.			_	
involve				b demand of the above named member. If lifting ployee would have intermittent rest while perform		
		Grading	system			
	0 - Never	1 - Monthly	•	3 - Daily		
Please	e complete section below based on actu	al job duties employee is	s required to perfor	m.		
1.	Working on or with moving machiner	Working on or with moving machinery (□ with □ without intermittent rest)				
		Working on or with moving machinery using foot controls (□ with □ without intermittent rest)				
3	Driving automotive equipment, including loading & unloading (□ with □ without intermittent rest)					
	Driving automotive equipment (□ with □ without intermittent rest)					
5	Lifting 1-10 lbs (□ with □ without carrying) (□ with □ without intermittent rest) (□ with □ without help available)					
	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 withou	ut intermittent rest)				
	Walking (□ with □ without intermi					
13	Standing (with without interm	ittent rest)				
14	Sitting					
15	Rupping					

Bending or stooping (□ with □ without intermittent rest) Reaching above shoulder level (with without intermittent rest) Use of hands for gross manipulation (grasping, twisting, handling) Use of hands for fine manipulation (typing, good finger dexterity)

Dust, fumes, gases - (☐ respiratory irritants ☐ skin irritants ☐ allergic irritants)

Other/comments (use back of form if necessary to describe any job demands unique to this employee's duties)

Phone

Wet work- (□ hands □ feet)

Dealing with combative individuals Maintain an appropriate work pace Perform complex or varied tasks Relate to others (co-workers and /or public)

Use of a weapon

Make critical decisions Manage or supervise projects or staff Interact with public or co-workers in written form



Supervisor signature Agency name/address

14.

Please complete section below based on actual job duties employee is required to perform. Working on or with moving machinery (□ with □ without intermittent rest) Working on or with moving machinery using foot controls (□ with □ without intermittent rest) Driving automotive equipment, including loading & unloading (with without intermittent rest) Driving automotive equipment (with without intermittent rest) Lifting 1-10 lbs (☐ with ☐ without carrying) (☐ with ☐ without intermittent rest) (☐ with ☐ without help available) Lifting 11-25 lbs (□ with □ without carrying) (□ with □ without intermittent rest) (□ with □ without help available) Lifting 26-50 lbs (□ with □ without carrying) (□ with □ without intermittent rest) (□ with □ without help available) Lifting 51-100 lbs (□ with □ without carrying) (□ with □ without intermittent rest) (□ with □ without help available) Pushing and hand trucking (weight) (number of times per day) (□ with □ without intermittent rest) Climbing stairs (with without intermittent rest) Climbing ladders (with without intermittent rest) Walking (□ with □ without intermittent rest) 13. ____ Standing (with without intermittent rest) Sitting 15. Running Bending or stooping (with without intermittent rest) 16. 17. ____ Reaching above shoulder level (with without intermittent rest) Use of hands for gross manipulation (grasping, twisting, handling) Use of hands for fine manipulation (typing, good finger dexterity) Wet work- (☐ hands ☐ feet) Dust, fumes, gases - (☐ respiratory irritants ☐ skin irritants ☐ allergic irritants) Use of a weapon Dealing with combative individuals 23. Maintain an appropriate work pace Perform complex or varied tasks Relate to others (co-workers and /or public) Make critical decisions Manage or supervise projects or staff 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)



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Claim Notification (Disability)

Member information	
Name (Last, first, middle)	SSN (last 4) or Member ID
Address (Street, City, State, Zip)	Phone number
	(H)
Email address	(W)
	(C)
Agency information	
Agency name	RC phone number
Retirement Coordinator (RC) signature	Date Member Tier
	☐ Tier 1 ☐ Tier 2
Nonoccupational disability Date last worked Maternity?	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? $\ \square$ Yes $\ \square$ No	Did TTD payments stop? ☐ Yes ☐ No
Comments:	





2101 South Veterans Parkway 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)	SSN (last 4) or Member ID	
Address (Street, City, State, Zip)	Phone number	
		(H)
Email address	(W)	
		(C)
Agency information		
Agency name		RC phone number
Retirement Coordinator (RC) signature	Date	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:	

Please Note

In Regards to Disability Claims

- Your agency 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 co eturn this form once all payroll transactions a		to their retirement account. Please complete and your agency.	
Reason for Separation from service (check of	one only). 🔲 Re	Resignation Discharge Dismissal Dayo	ff
Date of Separation		<u> -</u>	
Payroll period <u>FINAL</u> SERS contributions or one of the series of t	employer pickup o	of employee retirement contributions were paid.	
FromThrou	gh		
I. If dates in No. 2 and No. 3 do not match, exp	lain:		_
Do any member contributions remain outst If yes, how will your agency collect the funds:		gency as of the separation date? Yes No)
Payroll Reversal. Complete Form	1210 and provide	e details of when reversal will be completed:	
Payroll period:	Reversal Ar	mount	
Payroll period:	Reversal Ar	Amount	
☐ Involuntary Withholding. Must be	filed with IOC in II	IDROP.	
Order Number:	_ Date Filed:	Gross Amount:	_
Coordinator/Authorized Designee Signature:			_
Telephone Number:	Siç	ignature Date:	



1.	1. Reason for Separation from service (check one only). () Resignation () Discharge () Dismissal () Layo							
2.	2. Date of Separation							
3.	Payroll period <u>FINAL</u> SERS contributions or employer pickup of employee retirement contributions were paid.							
	From	Through						
4.								
5.	5. Do any member contributions remain outstanding to your agency as of the separation date? () Yes 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:	oll Reversal. Complete Form 1210 and provide details of when reversal will be completed: period: Reversal Amount:						
Payroll period: Reversal Amount:								
	() Involuntary Withholding. Must be filed with IOC in IDROP.							
	Order Number:	Date Filed:	Gross Amount:					
Co	pordinator/Authorized Designee Signatu	re:						
Te	elephone Number:	Signatu	re Date:					



Returning to State Employment



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).

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.

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.

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.

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.

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 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.

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.

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.

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.

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.

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.

What happens if a Retiree exceeds the 75 day limit?

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.

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

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.

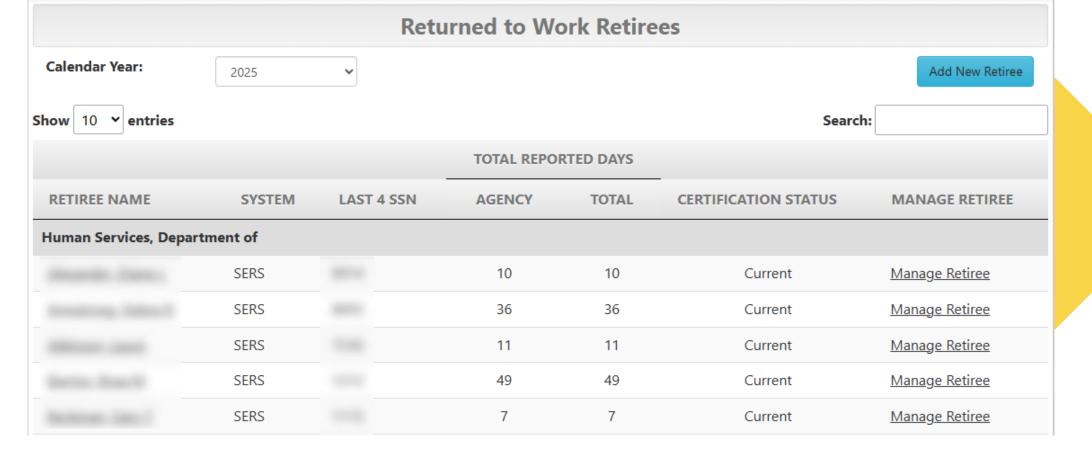
Reporting Returned to Work Retirees



Reporting Returned to Work Retirees

Select the "Returned to Work Retirees" category

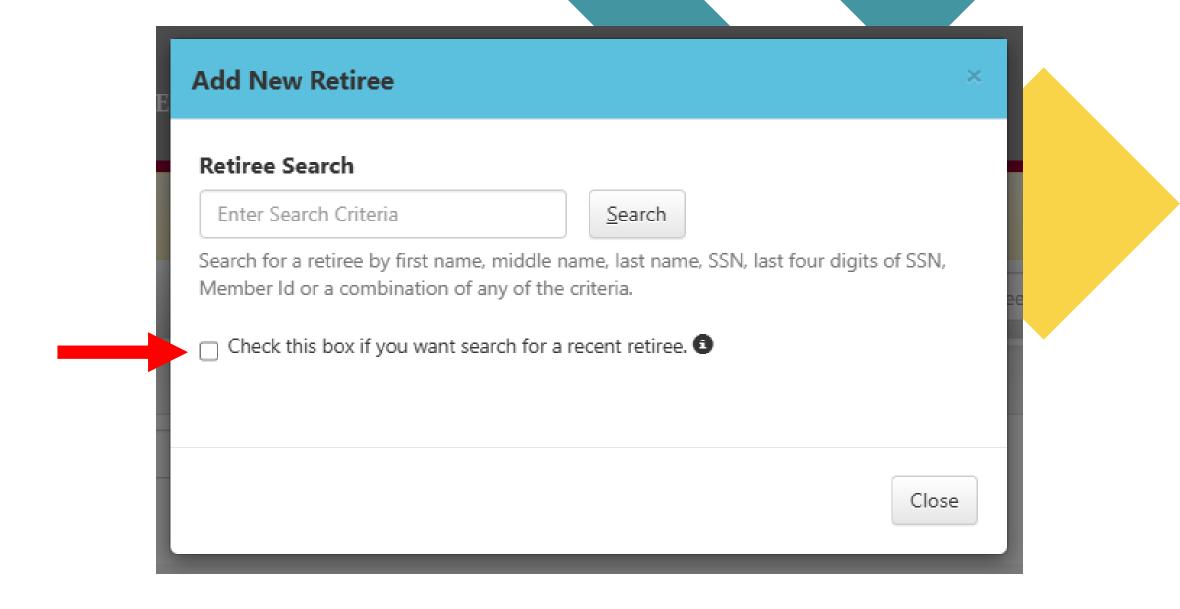
Employer Dashboard Employer Reports You have **O** Notifications **O** Unread YOU have 18 Payroll Deductions 10 Payroll Setup 10 Lump Sum Setup 13 Upcoming Payoff 10 Payment Completed You have 86 Employer Statements 23 Pending 63 Completed You have 355 Service Purchase Estimate Requests 275 New 8 Pending 72 Completed 6 You have 492 Tier Determination Requests 7 Pending 485 Completed 3 You have 84 2025 Returned to Work Retirees 83 Current 1 Overdue You have 450 cmployees on Disability 108 Reported back to work



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 v entries									
TOTAL REPORTED DAYS									
RETIREE NAME	SYSTEM	LAST 4 SSN	AGENCY	TOTAL	CERTIFICATION STATUS	MANAGE RETIREE			
Human Services, Department of									
	SERS		10	10	Current	Manage Retiree			
	SERS		36	36	Current	Manage Retiree			
	SERS		11	11	Current	Manage Retiree			
	SERS		49	49	Current	Manage Retiree			
	SERS		7	7	Current	<u>Manage Retiree</u>			

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).



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.



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.

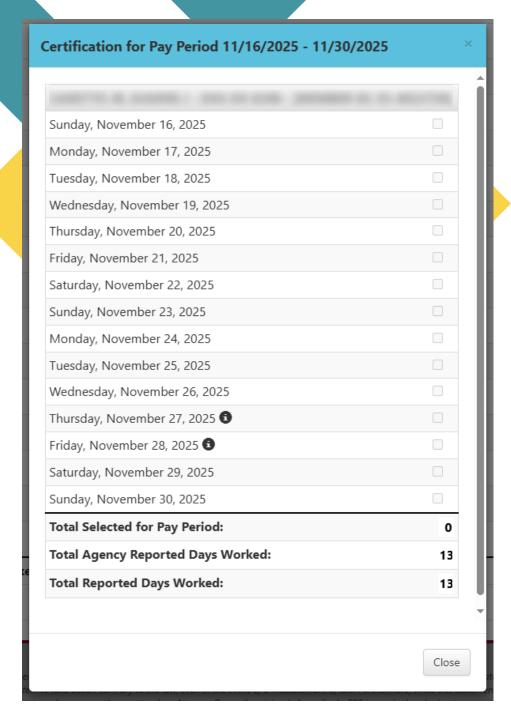


Additionally, the total days worked reported in this agency and the retiree's total reported days worked will be displayed at the end of the listing.

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.

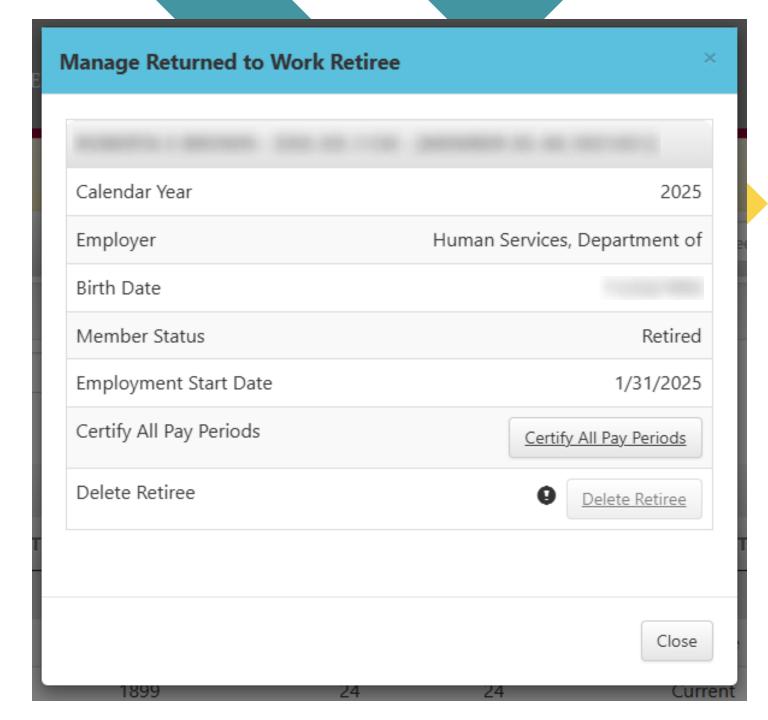
The deadline for certifying pay periods is up to February 15th of the next calendar year. Please review work days entered, and certify the pay period.

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.



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.



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.

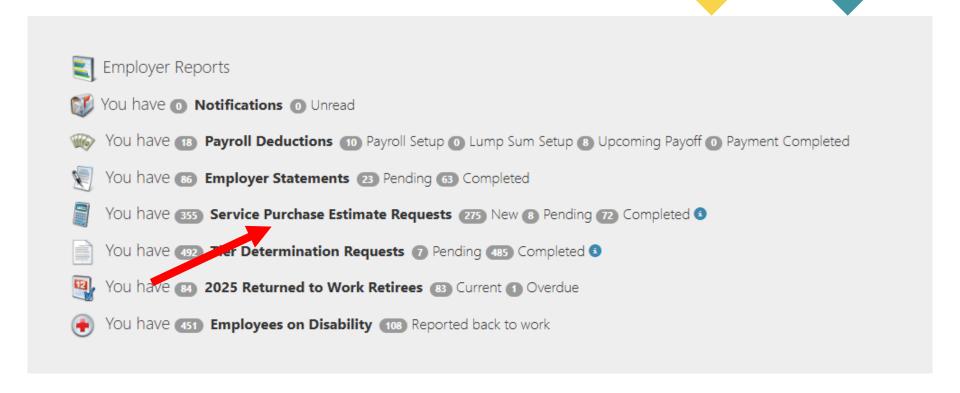


Optional Service Purchases

- 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)

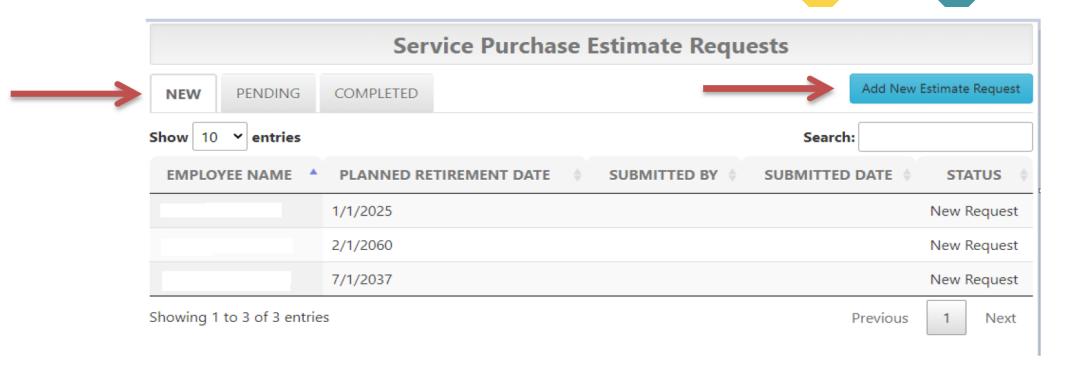
Service Purchases

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.



Service Purchases Estimate Request List

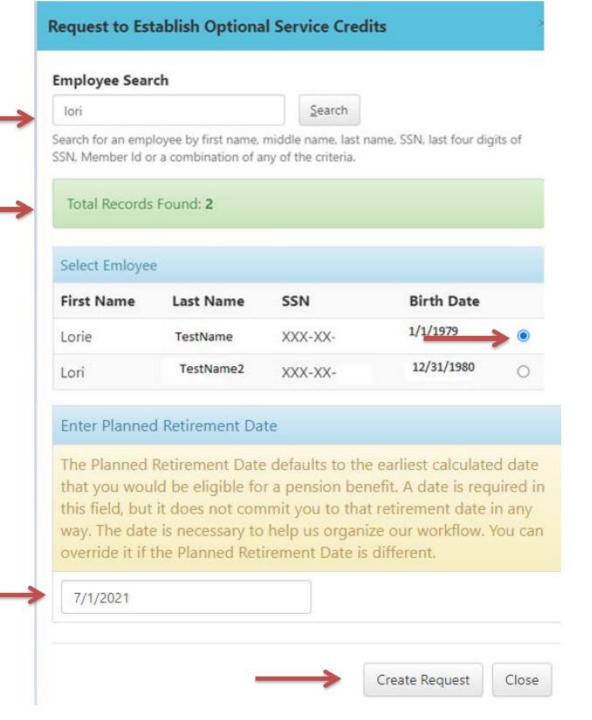
As an employer, you will be able to see the Service Purchase Estimate Requests made by your employees. The Service Purchase Estimate Request List is separated by three tabs: New, Pending and Completed.



Service Purchases New Estimate Request

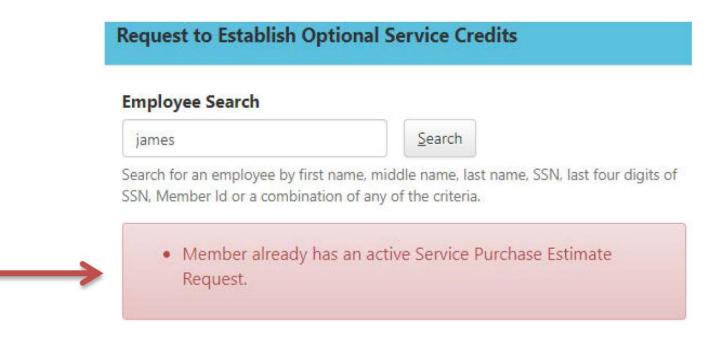
You can search for employees by entering the first name, middle name, last name, SSN, last four digits of SSN, Member ID, or a combination of any of the criteria and clicking on the Search button.

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



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."

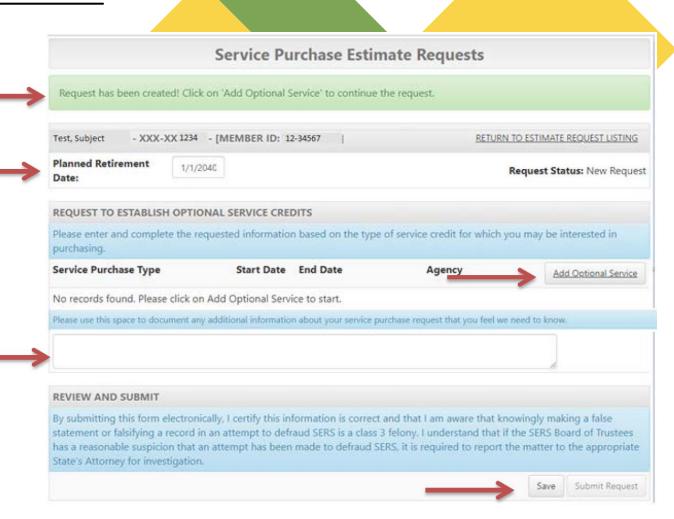


Service Purchases Estimate Request Detail

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.

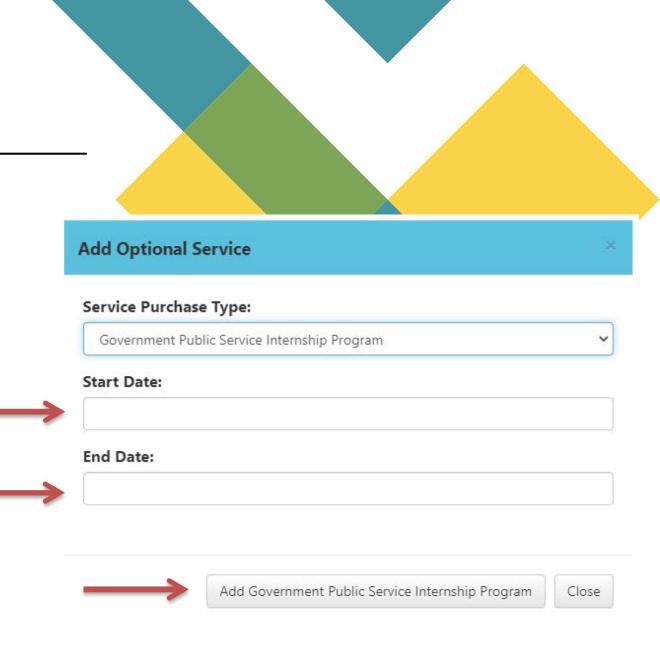
You can click on the Add Optional Service button to the add optional services you would like to estimate for your employee.

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.



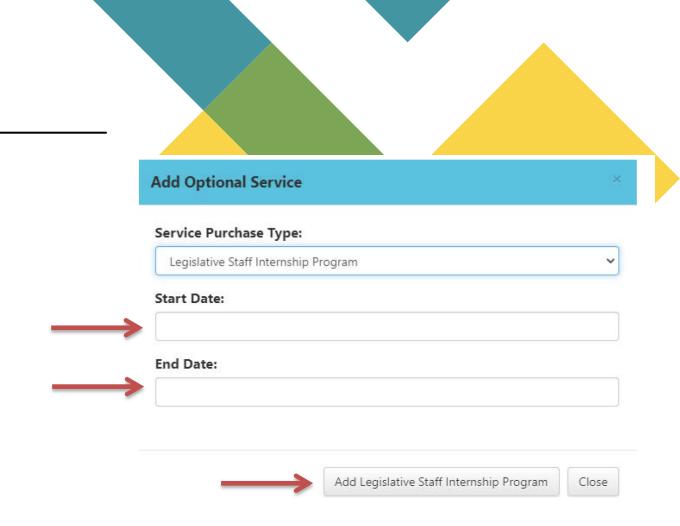
- Start Date: The Start Date is required and must be a date in the past.
- End Date: The End Date is required, must be past date and greater than Start Date.
- Click on Add Government Public
 Service Internship Program button
 to add GPSI to the request.

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

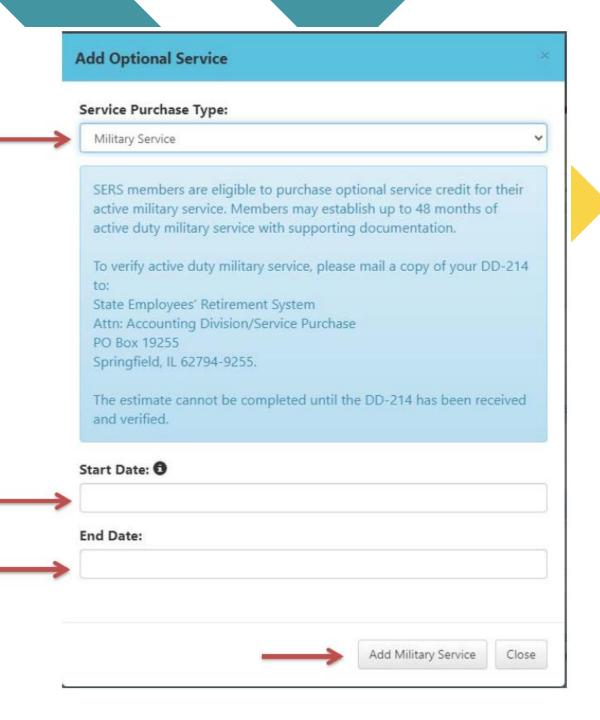


- Start Date: The Start Date is required and must be past date.
- End Date: The End Date is required, must be past date and greater than Start Date.
- Click on Add Legislative Staff
 Internship Program button to add to the request. No duplicate

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



- 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.



- 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

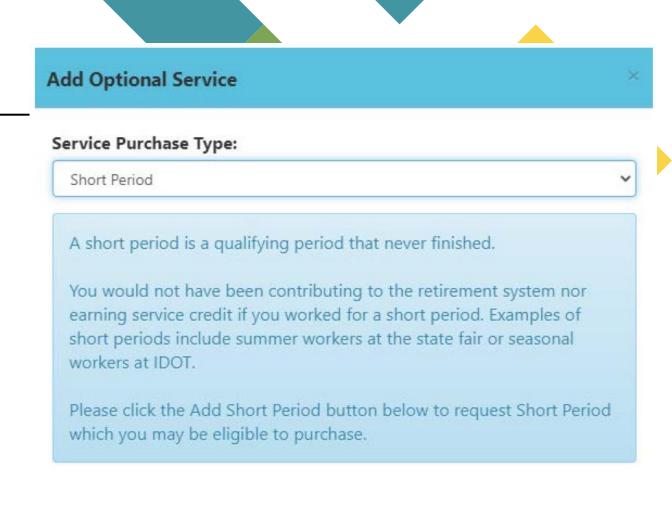
A qualifying period is the period of employment that preceded your date of membership in the retirement system (i.e., your first six months of service in state government)

- 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.



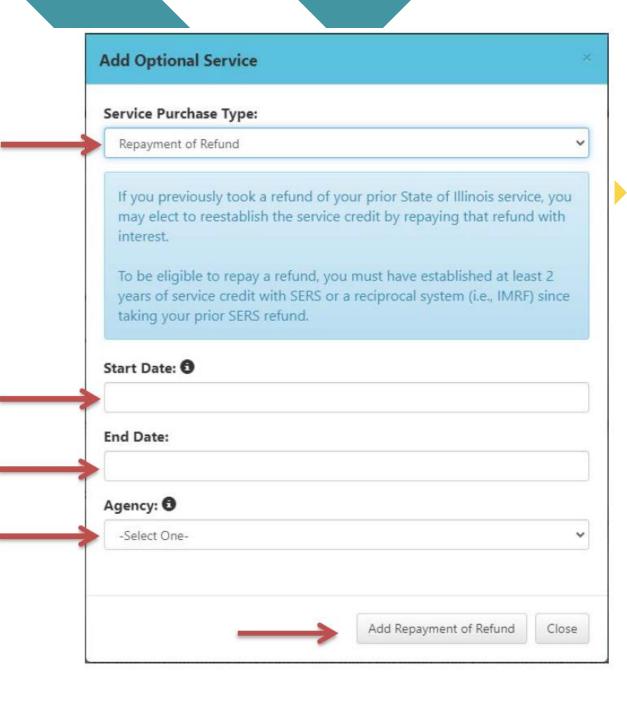
- No data entry is required for Short Period. The SERS staff will be able to find all Short Periods the employee is eligible to purchase, if any.
- Click on the Add Short Period button to the request. Only one Short Period can be added for each request.





Service Purchases Repayment of Refund

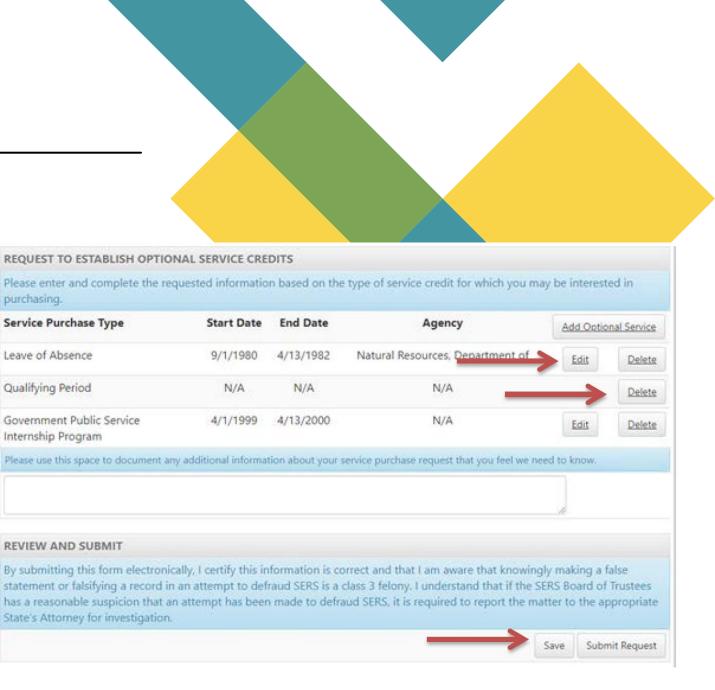
- **Start Date:** The Start Date is required and must be past date.
- **End Date:** The End Date is required, must be past date and greater than Start Date.
- Agency: The Agency will be populated with employee's current and previous place of employment and is required.
- Click on Add Repayment of Refund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



Service Purchases Edit and Delete

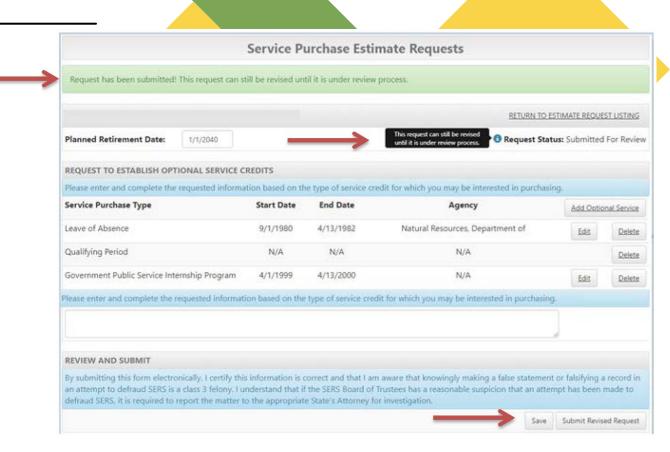
You can update the Optional Service by clicking on the Edit button, or you can delete from the request by clicking on the Delete button. The Edit button will not be available for Qualifying and Short Periods since there are nothing to edit for either type.

purchasing.



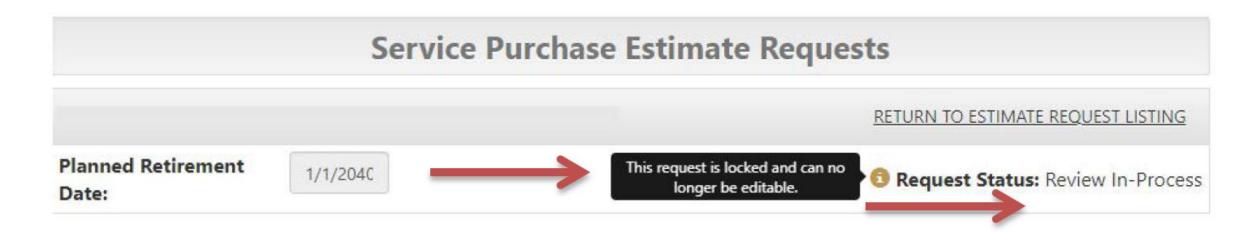
Service Purchases Submit and Revise

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.



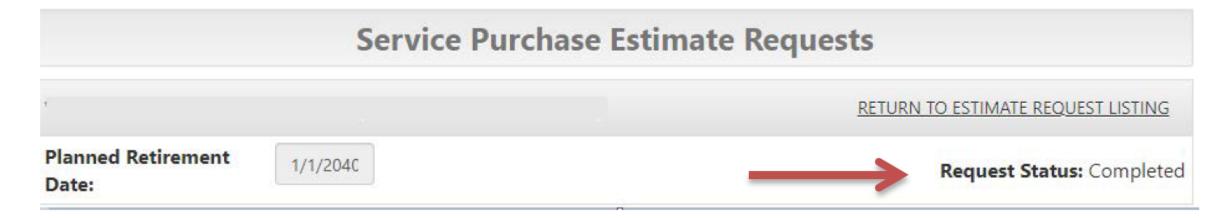
Service Purchases Request Review In-Process

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 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.

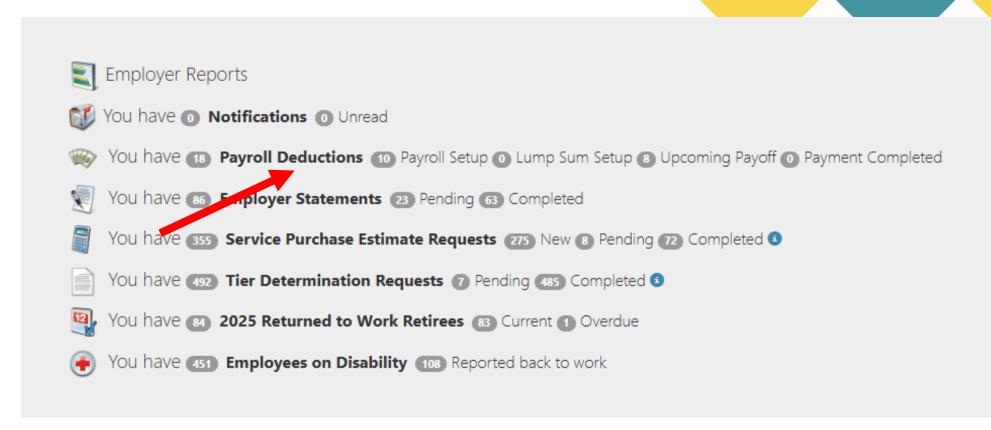


Payroll Deductions



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.



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.



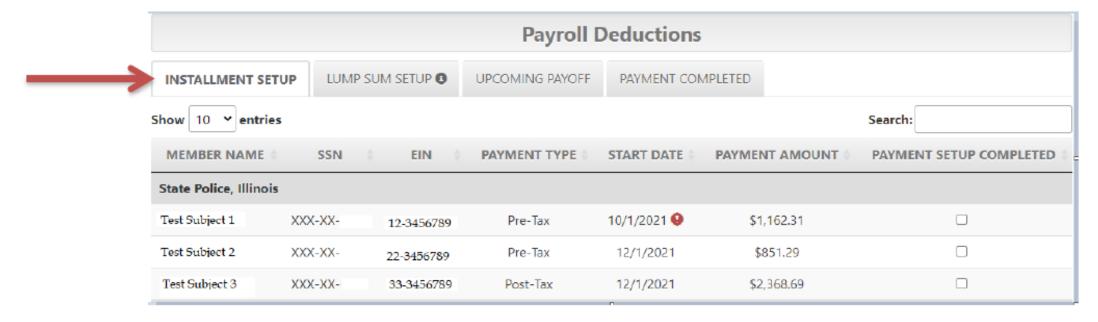
Payroll Deduction List

- 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.



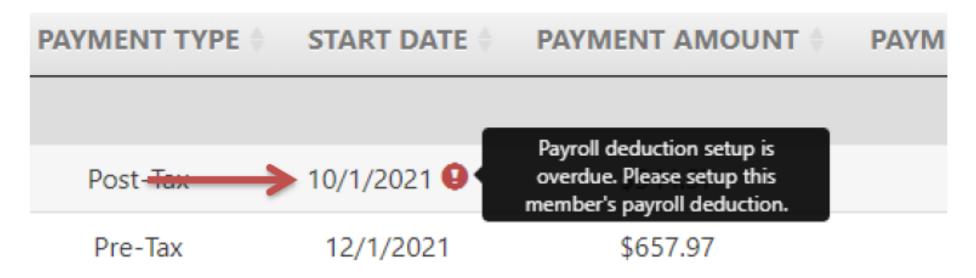
Installment Setup

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.



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.



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	Payment Setup Completed by
12/1/2021	\$657.97	on 10/6/2021.

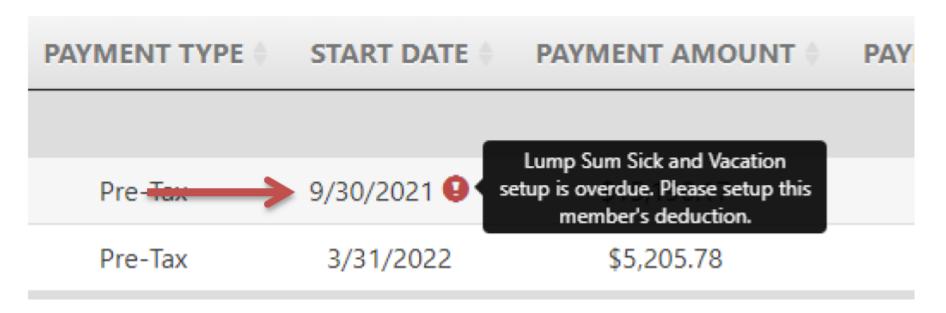
Lump Sum Setup List

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.



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.



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	Lump Sum Sick and Vacation
3/31/2022	\$5,205.78	Setup Completed by
		on 11/1/2021.

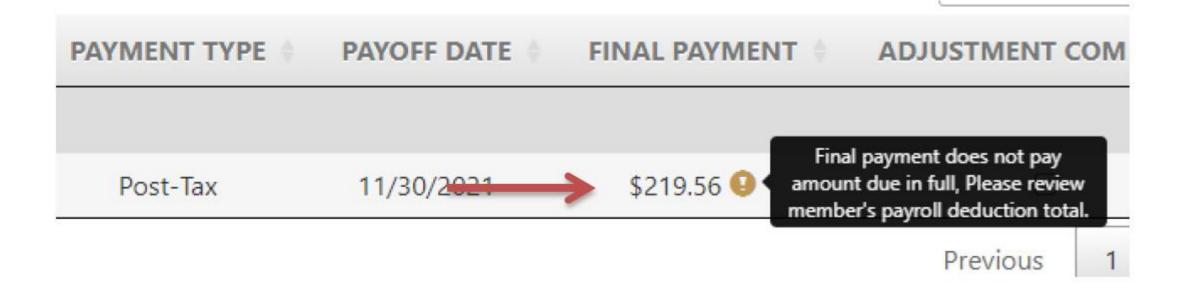
Upcoming Payoff List

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.



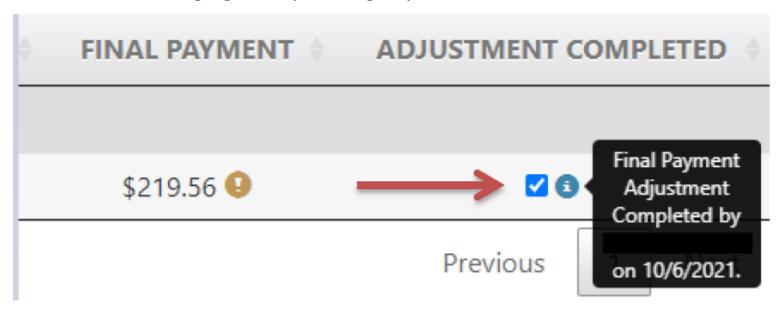
Upcoming Payoff Warning

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



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.



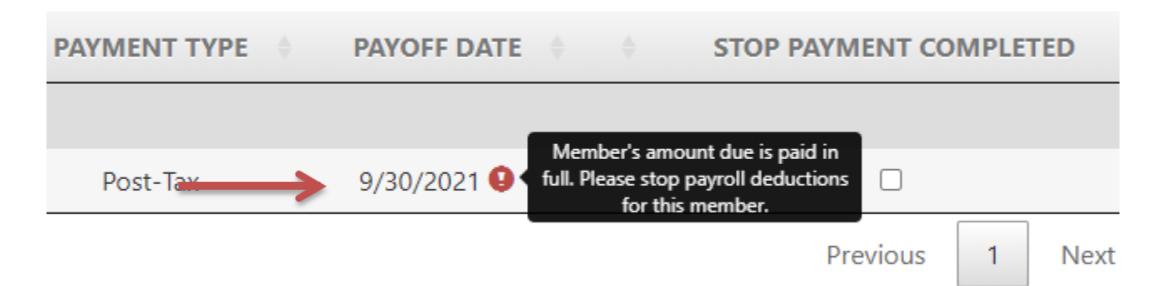
Payment Completed List

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.



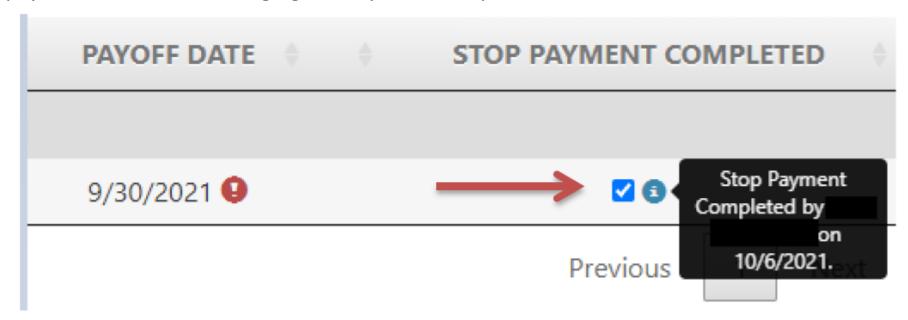
Payment Completed Warning

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.

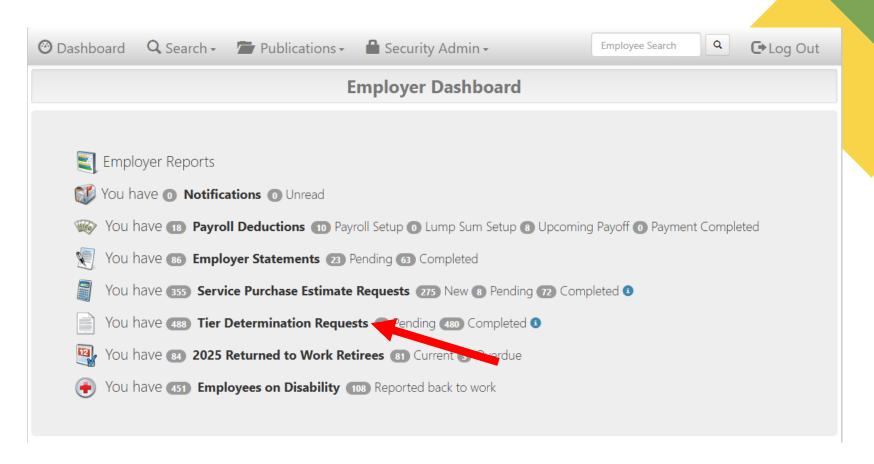


Payment Completed Tracking

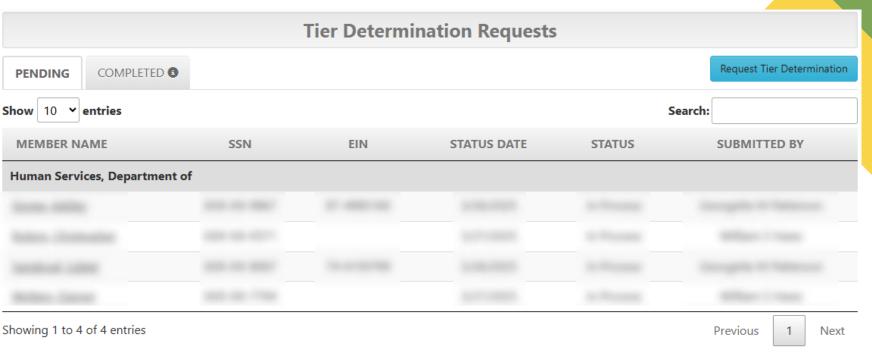
The Payment Completed List provides a way for you to keep track of stop payment progress for your employees. You can indicate that you have completed stop payment by checking the box under Stop Payment Completed column. Once you do that, a tooltip will show you when the stop payment is completed and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







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.



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.

SERS Member Lookup

SERS Member Search

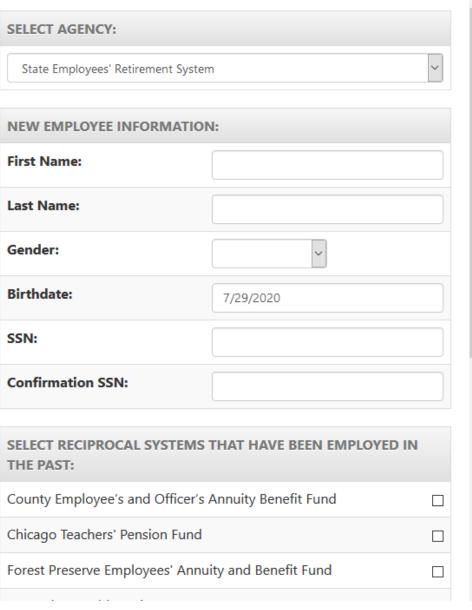
Search for any SERS Member by first name, middle name, last name, SSN, last four digits of SSN, Member Id, birth date, phone number or a combination of any of the criteria. If you are having problems finding a member, try searching using the full SSN.

- 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.

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



Submit Close

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:		

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 occured:

A member matching this SSN already exists. Please search using the full SSN to display the tier summary page for this member.

Close

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.

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.



Any Questions?