

- ✓ Check DRS website for employee status, **If the EE is a rehire and there is NO end date at DRS Contact HQ Payroll with EE data BEFORE anything is entered in HRMS.**
- ✓ **Receive in (date stamp) MIF, verify that MIF is complete, that signature dates are valid, and that beneficiary form is witnessed.**
- ✓ **Make sure the form is not dated prior to employment.**
  - Ø **IF** the MIF is received by Agency more than 7 days after it is dated, it should be returned to the EE and a new form will be required.
  - Ø Note DRS MIF: “Please sign and date this form on the day that you **submit it to your employer.** Note: You will be assigned to Plan 3 if your employer has not received your plan selection within the 90 calendar days from your date of hire.”
- ✓ The date the MIF is signed is the legal binding “**Choice Date**” which will be the start date.
- ✓ Make sure the “start date” for the initial HRMS entries is the same as the hire/rehire/appointment change date.
- ✓ **Post the PERS member into HRMS, send the Original DRS MIF to HQ. We will forward it to DRS after verification of data entry and what was transmitted.**

### 1) Retirement Effective Dating

- A. **New PERS member** – (no prior service) after completing the new PERS member in the HRMS system by using PA40.
  - i. Go to the PA30, Benefits tab, and use the ‘Pencil’ (or change feature) in PA30 to enter 2N on Infotype 0169.
  - ii. This will send the information over to DRS. (without the 2N, the information must be manually entered for DRS)
- B. **PERS 2 Choice – 2C** The example is as follows: The EE is hired on 6/1 and 2N was entered using 6/1. Then the MIF is received and the EE has made the PERS 2 choice on 6/3
  - i. **IF we are still processing 6/1-15 pay period,**
    - 1. Please **HOLD** the data entry until the 6/1-15 pay period is done processing after Day 4 (lock out day.)
    - 2. On Day 5 use the “copy” feature and enter 2C and the choice date.
  - ii. **If the MIF is received after 6/1-15 is done processing**
    - 1. Nothing out of the ordinary needs to be done.
    - 2. Use the “copy” feature and enter 2C and the choice date.

**The date the form is signed is the legal binding “Choice Date.”**

**THERE CAN NOT BE TWO ENTRIES IN THE SAME PROCESSING PERIOD**
- C. **PERS 3 Choice – 3C** The example is as follows: The EE is hired on 6/1 and 2N was entered using 6/1. Then the MIF is received and the EE has made the PERS 2 choice on 6/3
  - i. **IF we are still processing 6/1-15 pay period, Immediate Action Required**
    - Communicate this to HQ Payroll (subject line=retirement) that a new hire has made PERS 3 plan choice during 1st pay period.
    - Please scan the MIF and include with email or fax to HQ Payroll.
    - Once the MIF is received, HQ Payroll will make the appropriate entries with DRS. HQ Payroll will contact region.
    - Region can then key the PERS 3 choice using the hire date.

**PERS 3 Choice - Continued****ii. If the MIF is received after 6/1-15 is done processing**

- Use the date the MIF is signed unless it is for a prior pay period.
- If the MIF is signed in prior pay period, use the 1<sup>st</sup> day of the current pay period
- Contact HQ payroll with the choice date. HQ Payroll will manually provide the choice date to DRS.

**D. PERS 3 Default – 3D**

- i. HRMS will automatically default after 90 days

DO NOT ENTER RETROACTIVE DATES FOR PERS 3

**✓ Re-hires**

- i. Please make sure that retirement is activated.
- ii. If the re-hire employee has already made a retirement choice, use the “copy” feature and remove the 2C or 3C leaving the choice field blank. If a 2C or 3C is in the additional field plan choice, DRS will reject the record.
- iii. A PERS 3 re-hire (employed elsewhere during break) will have a new 90 day window to make a rate option choice. Initial entry into PERS3 would be P30 with 0.00% rate. When the MIF is received, the rate option choice should be keyed using current pay period start date.  
DOES NOT APPLY TO SEASONAL REHIRS

- ✓ **Retiree Return to Work – (RRTW)** the 2<sup>nd</sup> Program Grouping of IT0171 must match the retiree status (1<sup>st</sup> Program Grouping) – usually 098 (for an eligible position). Make sure “start date” matches the “return to work date” (re-hire date)
- ✓ **Appointment change into the agency (transfers from other agencies)** – If the EE is a PERS 3 member they have a 90 day window to make a rate option choice. Initial entry to PERS 3 would be P30 with 0.00%. This also sends their start date with WSDOT to DRS. When the MIF is received; the contribution rate option should be keyed using the current pay period start date. If the EE is a PERS 2 member, nothing needs to be done. Their start date with WSDOT will transmit automatically to DRS.
- ✓ Notify HQ Payroll **IF** you find a negative retirement deduction on the payroll journal.
- ✓ Notify HQ Payroll **IF** EE is hired & separated within the same pay period.
- ✓ Notify HQ Payroll **IF** a separation is removed by HR
- ✓ Notify HQ Payroll **IF** HR makes any changes to social security numbers.
- ✓ **DO NOT** enter PERS 3 changes for prior pay periods
- ✓ **DO NOT** correct information in prior pay periods unless you are working with HQ Payroll.
- ✓ **DO NOT** change end dates on Infotype 0169 Savings Plan. The end date ***Must*** be the last day of the pay period. i.e., EE separated 2/2/2008, the end date for infotype 0169 would be 2/15/2008.

**Please use the DRS Employer Handbook for questions**

<http://www.drs.wa.gov/employer/EmployerHandbook/>; also the “New Hire Pyramid” is a great tool for quick answers [http://www.drs.wa.gov/employer/Tutorials/new\\_hire/](http://www.drs.wa.gov/employer/Tutorials/new_hire/)

**If you are still unclear send an email to HQ Payroll and we will get back to you.**