



## Instructions for the New Hire Tier Determination (Form 1002)

1. The Payroll Officer, Personnel Officer, or Retirement Coordinator of the employing agency, whichever is appropriate, should utilize this form in their agency orientation packet and ensure that all new employees (that are NOT direct transfers from another state agency) complete it for submittal to SERS within the first five (5) business days from their initial start date.
2. Please be sure that all of the responses on the form are legible. Prior to submitting the form to SERS, the employing agency will ensure that the data is complete:
  - a. Either the employee has checked that they have NEVER been a member of a reciprocal system OR that they have checked one or more of the reciprocal systems listed on the form, and identified the "Earliest Membership Date" if they worked under any of the reciprocal systems listed.
  - b. The employee has completed and signed the personal information (name, SSN, etc) on the form.
  - c. The employing agency information has been fully completed on the form.
3. SERS will query internal databases and call any reciprocal systems indicated on the form to verify the earliest membership date in any one of the reciprocal systems.
4. SERS will mark the form with the tier determination stamp and notify the employing agency of the appropriate tier coding by return fax.
5. The employing agency will use the most current Payroll Bulletin to determine the appropriate retirement deduction coding based on the Tier identification provided by SERS.
6. After reviewing the Payroll Bulletin identified in step 5, if necessary, the employing agency may still request assistance in the determination of the appropriate retirement deduction coding. Contact the SERS Accounting Division at (217) 785-7191 or (217)785-7202 for assistance.



**STATE  
RETIREMENT  
SYSTEMS**

- State Employees' Retirement System of Illinois
- General Assembly Retirement System
- Judges' Retirement System of Illinois

Internet: <http://www.srs.illinois.gov> E-Mail: [sers@srs.illinois.gov](mailto:sers@srs.illinois.gov)

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

## NEW HIRE TIER DETERMINATION

On April 14, 2010, Governor Quinn signed Senate Bill 1946 into law (P.A. 96-0889) creating a second tier of benefits and retirement rules aimed at new employees covered by SERS, effective January 1, 2011. SERS has designated these two groups of employees as: a) Tier 1- those employees who have been a member of SERS, or any other reciprocal retirement system, prior to January 1, 2011; and b) Tier 2 - those employees hired on or after January 1, 2011, and who have never been a member of SERS or any other reciprocal retirement system. **Current members of SERS (Tier 1) are not affected by this Legislation.**

Please check this box if you have **never** been a member of any of the retirement systems listed below.

If you have ever been a member of the following retirement systems within the State of Illinois prior to January 1, 2011, please check the appropriate box(es) and provide the dates of membership on the lines below:

- |   | Earliest Membership Date |
|---|--------------------------|
| <input type="checkbox"/> Chicago Teachers' Pension Fund – (312) 641-4464  | _____                    |
| <input type="checkbox"/> County Employees' Annuity and Benefit Fund of Cook County – (312) 603-1200                   | _____                    |
| <input type="checkbox"/> Forest Preserve District Employees' Annuity and Benefit Fund of Cook County – (312) 603-1200 | _____                    |
| <input type="checkbox"/> General Assembly Retirement System (GARS) – (217) 782-8500                                   | _____                    |
| <input type="checkbox"/> Illinois Municipal Retirement Fund (IMRF) – (800) 275-4673                                   | _____                    |
| <input type="checkbox"/> Judges Retirement System (JRS) – (217) 782-8500  | _____                    |
| <input type="checkbox"/> Laborers' Annuity and Benefit Fund of Chicago - (312) 236-2065                               | _____                    |
| <input type="checkbox"/> Metropolitan Water Reclamation District Retirement Fund – (312) 751-3222                     | _____                    |
| <input type="checkbox"/> Municipal Employees' Annuity and Benefit Fund of Chicago – (312) 236-4700                    | _____                    |
| <input type="checkbox"/> Park Employees' Annuity and Benefit Fund of Chicago – (312) 553-9265                         | _____                    |
| <input type="checkbox"/> State Employees' Retirement System of Illinois (SERS) – (217) 785-7190                       | _____                    |
| <input type="checkbox"/> State Universities Retirement System (SURS) – (800) 275-7877                                 | _____                    |
| <input type="checkbox"/> Teachers' Retirement System of the State of Illinois (TRS) – (800) 877-7896                  | _____                    |

Name \_\_\_\_\_ (Please print) Social Security Number \_\_\_\_\_

Signature \_\_\_\_\_ Telephone # \_\_\_\_\_ Date \_\_\_\_\_

**To be completed by Employing Agency:**

**This form must be returned to SERS within 5 business days from the employees' initial start date.** Questions regarding this form should be directed to the Accounting Division at (217)785-7191. This form can be faxed to (217)785-7019.

Agency Name \_\_\_\_\_ Telephone # \_\_\_\_\_

Agency Address \_\_\_\_\_ Fax # \_\_\_\_\_

Retirement Contributions will begin on Payperiod \_\_\_\_\_ Paycode \_\_\_\_\_

Authorized Agency Representative: \_\_\_\_\_ Date \_\_\_\_\_  
(Please print) Signature