



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

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

New Hire Tier Determination

Name _____ Social Security Number _____
(Please print)

If you have ever been a **contributing member** of any of the following reciprocal retirement systems (even if you took a refund of your contributions), please check the corresponding box(es), below.

SERS will review the form when submitted and determine your Tier status. For specific information on Tier 1 and Tier 2 benefits, visit the SERS website: https://www.srs.illinois.gov/SERS/home_sers.htm

- Chicago Teachers' Pension Fund – (312) 641-4464
- County Employees' Annuity and Benefit Fund of Cook County – (312) 603-1200
- Forest Preserve District Employees' Annuity and Benefit Fund of Cook County – (312) 603-1200
- Illinois Municipal Retirement Fund (IMRF) – (800) 275-4673
- Laborers' Annuity and Benefit Fund of Chicago - (312) 236-2065
- Metropolitan Water Reclamation District Retirement Fund – (312) 751-3222
- Municipal Employees' Annuity and Benefit Fund of Chicago – (312) 236-4700
- Park Employees' Annuity and Benefit Fund of Chicago – (312) 553-9265
- State Employees' Retirement System of Illinois (SERS) – (217) 785-7190
- State Universities Retirement System (SURS) – (800) 275-7877
- Teachers' Retirement System of the State of Illinois (TRS) – (800) 877-7896
- I have **never** been a member of any of the retirement systems listed above.

To be completed by the Accounting Division of SERS		
	Tier 1	Tier 2
Printed Name:	_____	_____
Date:	_____	_____

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

Signature _____ Date _____

To be completed by the Employing Agency:	
Agency Name: _____	Facility Name (if applicable): _____
Agency Phone #: _____	Agency Fax #: _____
Retirement Contributions will begin on Pay Period: _____	Pay Code: _____
Agency Contact Name (please print): _____	Date: _____

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. **Only SERS can determine Tier status.** The form can be faxed to (217) 785-7019 or emailed to SRSActgDiv@srs.illinois.gov.
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.
 - 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 determine the earliest membership date in any one of the reciprocal systems that have been selected.
4. SERS will mark the form with the appropriate tier determination and notify the employing agency of the appropriate tier coding by return fax to the agency.
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) 558-1311 or (217)785-7202 for assistance or via email at SRSActgDiv@srs.illinois.gov.