Retirement Status Questionnaire

To ensure we comply with state regulations regarding retirement plan participation, and to ensure no disruption to retirement benefits, please provide this questionnaire to any prospective employees prior to their start date with Penn State.

If the individual answers YES to ANY of the following questions, please contact Employee Benefits at 814-865-1473 immediately, and email the form to benefits@psu.edu.

Why are we asking for this information?

- Annuitants may negatively impact their State Employees Retirement System (SERS) or Public School Employees Retirement System (PSERS) pensions by working at Penn State.

- Active members may impact their years of service and salary contributions if enrollment is delayed.

- State regulations may require a prospective employee to enroll in a specific retirement plan based on their previous membership in the plan.

Once contacted, Employee Benefits will review the situation with the retirement system involved and then respond back to you with any potential impact on the prospective employee.
PLEASE ENSURE ALL OF THE FOLLOWING QUESTIONS ARE ANSWERED

Yes/No - Have you in the past made contributions into the State Employees Retirement System (SERS)?

YES - If you have an account with SERS you may have to join SERS immediately.

Yes/No - Have you in the past made contributions into the Public School Employees Retirement System (PSERS)?

YES - If the position is full-time you may elect PSERS, SERS or TIAA.

If the position is part-time you must enroll in PSERS immediately.

Yes/No - Are you receiving a pension from SERS?

YES - If the position is full-time, you must join SERS and stop your pension benefits.

If the position is part-time you must be an emergency rehire (HR45) or stop your pension and enroll in SERS.

Yes/No - Are you receiving a pension from PSERS?

YES - If the position is full-time, you may elect SERS or TIAA, or stop your PSERS pension and enroll in PSERS.

If the position is part-time you must be an emergency rehire (HR45) or stop your pension and enroll in PSERS.

______________________________________        ______________________________
NAME                                                                                                   DATE

_______________________________________________
PSU ID#