February 24, 2012

MEMORANDUM #012-14HR

TO: Agency Administrators

FROM: Bobbie Chappell, Director of Human Resources

VIA: Rip Colvin, Executive Director

RE: FRS New Employee Certification Form - 2012 Update

The State Board of Administration has recently revised the FRS Certification Form to include language for dually employed members as well as information for members of the SUSORP, SCCORP, and SMSOAP. Please begin using this form immediately.

Also note the following:

- When a prospective employee signs the FRS Certification Form, they are certifying they have not retired from any State of Florida administered retirement plan. This includes DROP, The Investment Plan, SUSORP, SCCORP, and SMSOAP.
- Your agency may be held jointly liable for the repayment of benefits paid to a retiree in violation of the re-employment after retirement provisions.
- This form should be signed prior to the time an offer of employment is made or prior to starting work.
- The completed form should be included in the new hire employee packet and a copy forwarded to JAC.

If the completed FRS Certification Form is not included in the new hire packet there will be a delay in adding the employee to payroll, until which time the form has been received.

If you have any questions or need additional information please contact Bobbie Chappell or Jennifer Henderson at retirementcoordinator@jac.myflorida.com.

Please note my email address has changed to: Jennifer.Henderson@jac.myflorida.com

Jennifer Henderson
Senior HR Coordinator
The Justice Administrative Commission
p: (850) 488-2415, ext 270
f: (850) 922-9445

Florida Retirement System (FRS) - Certification Form

This form is **not** an offer of employment or an enrollment form. If hired, a Retirement Choice kit may be mailed to your home with an enrollment form.

Name _____ SSN _____

Agency Name _____

Previous or Current FRS Employer _____

PLEASE COMPLETE SECTION I, II, III, OR IV

I. I have **never** been a member of a State of Florida administered retirement plan.

STOP HERE

_____ _____
SIGNATURE **DATE**

II. I was or currently am a member of the following State of Florida administered retirement plan (also complete Section III **or** IV)[1]

☐ FRS Pension Plan (incl. DROP) ☐ FRS Investment Plan ☐ State University System Optional Retirement Program (SUSORP)
☐ State Community College Optional Retirement Program (SCCORP) ☐ Senior Management Service Optional Annuity Program (SMSOAP)
☐ Other

III. I am **not retired** from any State of Florida administered retirement plan. I understand that if it is later determined that I was a retiree and was reemployed during the first 6 calendar months after I retired or after my DROP termination date, or at any time during the 7th through 12 months after I retired or after my DROP termination date, I **must repay** all unauthorized benefits received (see Section IV for details), or, if in the Investment Plan, terminate my employment. **My employer may also be liable for repaying any unauthorized benefits I received.**

_____ _____
SIGNATURE **DATE**

IV. I am **retired** from a State of Florida administered retirement plan. My FRS Pension Plan retirement effective date, DROP termination date, or date I received my first distribution from the FRS Investment Plan, SUSORP, SCCORP, SMSOAP, or other plan was _____.

If I am initially reemployed by an FRS-covered employer on or after July 1, 2010, I will not be permitted to participate in a State of Florida administered retirement plan to earn an additional retirement benefit.

I understand that as a Pension Plan retiree:

a. If I am employed by an FRS-covered employer in **any type of position**[2] during the **first 6 calendar months** after I retired or after my DROP termination date, my retirement and DROP status are voided, all retirement and DROP benefits I received **must be repaid**,[3] and I must reapply for retirement in order to receive future benefits.

b. If I am reemployed by an FRS-covered employer at any time during the 7th through the 12th months after I retired or after my DROP termination date, my monthly retirement benefit must be suspended[4] and any unauthorized benefits received must be repaid.[3] **My employer may also be liable for repaying any unauthorized benefits I received.**

I understand that as an Investment Plan, SUSORP, SCCORP, or SMSOAP retiree:

a. If I am employed by an FRS-covered employer in **any type of position**[2] during the **first 6 calendar months** after I retired, I **must repay**[3] any benefits received or terminate employment for an additional period to satisfy the 6 calendar month termination requirement.

b. If I am reemployed by an FRS-covered employer at any time during the 7th through the 12th months after my retirement, I will not be eligible for additional distributions until I terminate employment or complete 12 calendar months of retirement.[4]

_____ _____
SIGNATURE **DATE**

Retiree Definition

You are considered retired if:

1. You have received any benefits under the FRS Pension Plan (including DROP), or
2. You have taken any distribution (including a rollover) from the FRS Investment Plan, or alternative retirement programs offered by state universities (SUSORP), state community colleges (SCCORP), state government for senior managers (SMSOAP), or local governments for senior managers.

[1] If you are not retired and earned FRS service after certain periods in 2002 (depending on your employer), you must rejoin the FRS retirement plan you were enrolled in when you terminated FRS-covered employment. You may have a one-time 2nd Election to switch FRS retirement plans. Also, alternative retirement programs are available to certain employees. Contact your employer for deadline and other information.

[2] Positions include OPS, temporary, seasonal, substitute teachers, part-time, full-time, regularly established, etc.

[3] Florida law requires a return of all unauthorized Pension Plan benefit payments or Investment Plan distributions received by a member who has violated the FRS termination or reemployment provisions. Similar provisions apply to unauthorized SUSORP, SCCORP, or other state-administered plan distributions – contact that plan's administrator for details.

[4] There are no reemployment exemptions/exceptions for Pension Plan members whose effective date of retirement or DROP termination date is on or after July 1, 2010 or Investment Plan, SUSORP, SCCORP, or SMSOAP members who retire on or after July 1, 2010.