



District School Board of Pasco County
NEW HIRE FRS DECLARATION FORM
(Re-Employment after Retirement Declaration)

MIS Form #162
 Rev. 7/18

Applicant Name _____ SSN _____ Work Location _____

This form must be used for ALL new or reemployment. Any other version of this form is invalid.

PLEASE COMPLETE SECTION(S) 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 am a **current or previous** member of the following State of Florida administered retirement plan.

- FRS Pension DROP SUSORP OTHER
 FRS Investment SCCOP SMSOAP

COMPLETE SECTION III OR IV

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.

I have contacted the Florida Retirement System and confirmed my retirement status indicated above.

 SIGNATURE

 DATE

Employees completing Section IV cannot start work before verification of their retirement status.

IV. I am **retired** from a State of Florida administered. The effective date of my retirement, conclusion of DROP, or first distribution from the FRS Investment Plan was _____.
(You are retired if you are receiving monthly benefits under the FRS Pension Plan or have taken any distribution under the FRS Investment Plan or optional non-FRS plans (e.g. SCCORP, SUSORPP, or SMSOAP)).

Effective July 1, 2017, retirees of the Investment Plan, SUSORP, SCCSORP, and SMSOAP are eligible for renewed membership in the Investment Plan, SUSORP, or SCCSORP.

I understand:

- a. Pension Plan Retiree or DROP Participant
 If I am employed by an FRS employer in any type of position (temporary, seasonal, part-time or full-time, or regular position) during the first six calendar months after I retired or ended my participation in DROP under a State of Florida administered retirement system, my retirement and DROP status are voided, all retirement and DROP benefits I received **must be repaid**, and I must reapply for retirement benefits before my retirement will be effective.
- b. Investment Plan Retiree
 If I am employed by an FRS employer in any type of position (temporary, seasonal, part-time or full-time or regular position) during the first six calendar months after I take a distribution or withdraw funds from my FRS Investment Plan account, I **must repay** any benefits received or terminate employment.
- c. Retiree
- If I am reemployed at any time from the seventh through the twelfth month after my retirement or conclusion of DROP, my monthly retirement benefit **must be suspended** during months 7 - 12 of my retirement.
 - If reemployed, I am not eligible for FRS membership (second retirement plan).

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 programs offered by state universities (SUSORP) or state government for senior managers (SMSOAP), or local governments for senior managers.

 SIGNATURE

 DATE

New Hire/Re-employment Certification - To Be Complete by Employee Benefits Administration

RETIREMENT PLAN: _____ DATE OF RETIREMENT/DROP OR FIRST DISTRIBUTION: _____

ELIGIBLE FOR EMPLOYMENT NOT ELIGIBLE FOR EMPLOYMENT ELIGIBLE FOR EMPLOYMENT WITHOUT PENALTY AFTER: _____

Printed Name _____

Signature: _____ Date _____

GUIDELINES FOR EMPLOYMENT AFTER RETIREMENT

Florida Retirement System Contact Information

Please remember, if you are a retiree of the Pension Plan, a DROP participant or have taken a distribution or withdrawal from your FRS Investment Plan, you should *always* contact the Florida Retirement System before you are reemployed in any capacity with any FRS employer in your first year of retirement.

Pension Plan and DROP Participants Bureau of Retirement Calculations..... (888) 738-2252
 Investment Plan Members MyFRS Financial Guidance Line..... (866) 446-9377

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, non-FRS plans are available to certain State University (i.e. SUSORP), Community College (i.e. CCORP) and State Senior Management Class (i.e. SMSOAP) employees.
2. You are retired if you are receiving monthly benefits under the FRS Pension Plan or have taken any distribution under the FRS Investment Plan or optional non-FRS plans (e.g. SCCORP, SUSORPP, or SMSOAP).
3. The School Board may not hire a person within six (6) calendar months of the member receiving a distribution from the FRS Investment Plan. For example, if the distribution date was May 20, the person's rehire date must be Dec. 1 or later.
4. Any employee, who retires from any State of Florida administered retirement plan must end employment relationships with all FRS employers and remain off all FRS payrolls for at least six calendar months (1st to end of month) following his or her retirement date or DROP termination date. If not, the employee's retirement will be voided and all retirement benefits, including any funds accumulated during DROP participation, must be repaid. For example, if an employee terminates employment September 15, FRS considers the participant to have retired as of October 1; therefore he or she may not return to work with an FRS employer until April 1, or later.
5. Retirement under the FRS Investment Plan may occur at any age after one full year of creditable service and employment with all FRS employers ends. The School Board may not hire an Investment Plan retiree until after he or she has been retired for six calendar months. For example, if a participant terminates employment with one full year of creditable service on April 30, and receives his or her first distribution on August 20, FRS considers the participant to have retired as of August 20; therefore he or she may not return to work with an FRS employer until the following March 1, or later. Any employee who violates reemployment of the Investment Plan will be required to repay the invalid distribution.
6. After retiring under the Florida Retirement System (FRS) or concluding DROP participation, a retiree may work for any private employer or for any public employer who does not participate in the FRS without affecting his or her FRS retirement benefits. However, retirees including Investment Plan and DROP participants are subject to certain limitations with respect to their employment with any FRS employer during the first twelve (12) months of retirement. There are no limits on working for an FRS employer **after** you have been retired for 12 months.
7. Reemployed Pension Plan retirees are not eligible for renewed FRS membership (second retirement plan).
8. A disability retiree cannot work in gainful employment and continue to receive disability benefits. Disability retirees must **discontinue benefits** upon reemployment.

EARLIEST REHIRE DATE

RETIRES ARE ELIGIBLE FOR REEMPLOYMENT ON OR AFTER THE 1ST DAY OF THE MONTH

PENSION OR DROP PARTICIPANT			INVESTMENT PLAN PARTICIPANT		
EFFECTIVE DATE	WITH PENALTY	WITHOUT PENALTY	MONTH OF DISTRIBUTION	WITH PENALTY	WITHOUT PENALTY
JANUARY	JULY	JANUARY	JANUARY	AUGUST	JANUARY
FEBRUARY	AUGUST	FEBRUARY	FEBRUARY	SEPTEMBER	FEBRUARY
MARCH	SEPTEMBER	MARCH	MARCH	OCTOBER	MARCH
APRIL	OCTOBER	APRIL	APRIL	NOVEMBER	APRIL
MAY	NOVEMBER	MAY	MAY	DECEMBER	MAY
JUNE	DECEMBER	JUNE	JUNE	JANUARY	JUNE
JULY	JANUARY	JULY	JULY	FEBRUARY	JULY
AUGUST	FEBRUARY	AUGUST	AUGUST	MARCH	AUGUST
SEPTEMBER	MARCH	SEPTEMBER	SEPTEMBER	APRIL	SEPTEMBER
OCTOBER	APRIL	OCTOBER	OCTOBER	MAY	OCTOBER
NOVEMBER	MAY	NOVEMBER	NOVEMBER	JUNE	NOVEMBER
DECEMBER	JUNE	DECEMBER	DECEMBER	JULY	DECEMBER