maine PERS Public Employees Retirement System

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APPLICATION FOR MEMBERSHIP PARTICIPATING LOCAL DISTRICT

SIGN AND FORWARD TO THE MAINE PUBLIC EMPLOYEES RETIREMENT SYSTEM WITHIN 7 DAYS OF EMPLOYEE'S EMPLOYMENT DATE.

TO BE COMPLETED BY EMPLOYEE

Gender: ❑ Male ❑ Female

1 Social Security Number: _____ Date of Birth: _____ E-mail address: _____

2 Member's Name: (Last) _____ (Title) _____ (First) _____ (MI) ____

3 Mailing Address: (Street) _____ (City/Town) _____ (State) ____ (ZIP) _____

❑ I wish to join the Maine Public Employees Retirement System and understand that my application and membership are governed by MainePERS laws and rules. I agree to deductions from my compensation at the rate required by MainePERS law for the plan in which I am participating. I hereby certify that all of the statements on this application are true and correct to the best of my knowledge and belief.

❑ **FOR THOSE WITH OPTIONAL MEMBERSHIP ONLY.** I do not wish to join the Maine Public Employees Retirement System and understand that the opportunity to enroll at any future date will be subject to MainePERS laws and rules. **See Section I on reverse for an explanation of the provisions of optional membership.**

Employee Signature _____ Signature of Witness _____ Date _____

TO BE COMPLETED BY EMPLOYER

1 Employer Name: _____ First Date of Eligible Employment: _____

2 Department: _____ Title of Position: _____

3 Employer Code: _____ Position Class Code: _____ Plan Code: _____ Personnel Status Code (PSC): _____

(For #3, see the MainePERS payroll manual for explanation of codes.)

4 Employee is paid: ❑ by Calendar Year (Jan-Dec) ❑ by Fiscal Year (July-June) ❑ by School Year (Sept-Aug)

Annually, this employee is expected to work: _____weeks/year _____days/week _____hours/day

Applicable rate of pay: $_____/hr.; $_____/day; $_____/year

(For #4, provide only one rate of pay. Hourly, daily or one annual salary.)

(The position's Full Time Equivalent or FTE should be entered here.) ↓

"Full time" for all employees in this position classification is: _____weeks/year _____days/week_____hours/day $_____/year

If appointed or elected official, indicate beginning and ending dates of term _____ to _____

5 Did employee **decline membership** on first day of eligible employment? ❑ Yes ❑ No If "Yes," provide date: _____

Is employee **electing not to enroll** at this time? ❑ Yes ❑ No **If "Yes" to either**, check **ONE** of the boxes in a-d explaining on what basis the employee declined membership or is electing not to enroll (**See Section 1 on reverse for eligiblity guidelines.)**

❑ a. PLD employee in a position covered by a Social Security Section 218 agreement
❑ b. Non-PST employee of a PLD electing to participate in an employer provided defined contribution or deferred compensation plan(s) that meets the requirements of 5 MRSA §18252-B
❑ c. Elected or appointed official
❑ d. Chief administrative officer of a PLD
❑ e. PLD employee in the Consolidated Plan who is not subject to the Municipal Public Employees Labor Relations Law
❑ f. Current employee of an entity on the date that it becomes a PLD

If your PLD has joined the defined contribution (401(a)) and/or deferred compensation (457) plan(s) offered through the PLD Consolidated Plan, does this employee participate in either of those plans? ❑ Yes ❑ No

- MainePERS date stamp area -

6 Has employee ever terminated MainePERS membership based on a. or b. from Section #5 while remaining employed in your district? ❑ Yes ❑ No

Effective date employee is joining MainePERS: _____ **(See Section II on reverse for explanation.)**

7 Total hours worked in last 12 consecutive months? _____ 18 consecutive months? _____

8 The above information relating to present employment is true and correct to the best of my knowledge and belief.

Signature of Employer's Contact _____ Date _____

Please print or type name/title _____ Telephone Number _____

NOTE: *In accordance with the Personal Privacy Protection Law, you are hereby advised that pursuant to the Retirement and Social Security Law, the Retirement System is required to maintain member records. The records are necessary to determine eligibility for and calculation of benefits. Failure to provide information may result in ineligibility for benefits. The System may provide certain information to your employer.*

Form #CL-0102P
Rev. 8/10

PLEASE RETAIN A COPY FOR YOUR RECORDS

SAMPLE

SECTION I
Explanation of Provisions of Optional Membership in MainePERS

The following explanations reference the Optional Membership choice in the Employee Section 4, which the employee completes, and Employer Section 5 a.-f., which the employer completes.

MainePERS membership is optional for a/an:

- **a.** PLD employee in a position covered by Social Security under a Section 218 Agreement,
- **b.** Non-PST employee of a PLD not covered by Social Security under a Section 218 Agreement that has an employer provided alternative plan as defined in 5 MRSA §18252-B,
- **c.** Official who is elected or appointed for a fixed term,
- **d.** Chief administrative officer of a PLD,
- **e.** Employee in a position that is not subject to the Municipal Public Employees Labor Relations Law, and
- **f.** Individuals employed by a local district on the date when the participation of the district in the Retirement System begins, whether under 5 MRSA, Chapters 425 or 427.

Any employee with optional membership has only one opportunity to join or not join MainePERS. The choice the employee makes when hired applies to all periods of employment in any optional membership position with the same employer. For this purpose, "same employer" is defined as employers sharing the same Employer Identification Number (EIN).

SECTION II
Information Regarding Effective Date of Membership

For all employees, the effective date on which an employee is joining MainePERS, to be provided in Section 6 on the reverse, is the first day for which contributions will be deducted from the employee's earnable compensation; it is not the payday on which the first payroll check will have deductions for MainePERS. For example, consider a payroll period from January 1 through January 14, with a payday of January 19. An employee becomes eligible to join MainePERS on January 8 and chooses to do so. The effective date of membership is January 8, and contributions should be deducted accordingly.

Some PLD members will have a membership date that differs from their date of hire. That will be the case for employees who move from a position with optional membership to a position with mandatory membership or do not meet membership eligibility requirements upon initial date of hire. For those individuals, if membership is mandatory after the initial date of hire, the effective date they join MainePERS is the date they become eligible for mandatory membership.
If membership is optional, and if upon meeting membership eligibility requirements, an individual chooses not to join MainePERS, that individual is then subject to the membership guidelines explained in Section I.