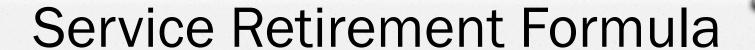
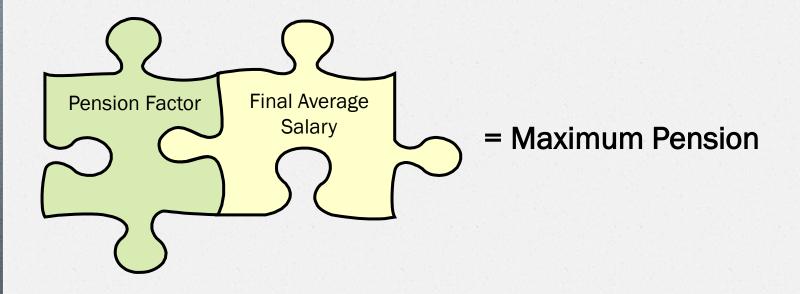
Service & Salary

What's Includable in Your Benefit & What's Not

Annual Delegates Meeting, November 6 and 7, 2016





Is It Allowable?

- Membership service
- Prior service
- Out-of-State service
- Transfer service
- Reinstatement service
- Prior subsequent service
- New York City subsequent service
- Chapter 675
- Chapter 351
- Prior SUNY graduate/teaching assistant
- Work beyond 9 months in a school year
- Private/Parochial school service
- Non-member NYS service after DOM
- Military service
- Article 19 (Tiers 1 & 2)

Member Service

- Service rendered after your date of membership in an eligible title with a NYSTRS-participating employer.
- O Types of service reportable to the System include the following:
 - O Regular teaching
 - O Substitute teaching
 - O Summer school
 - O Coaching
 - O Club advisor
- O Employers include New York State public schools and BOCES (excluding New York City), as well as charter schools that have elected to participate as an employer in NYSTRS.

Member Service

- O Must generally be paid on the regular payroll.
- O Can be full- or part-time work, including per diem.
- Most unclassified positions with a participating employer (e.g., Teacher, Teaching Assistant, Administrator) are eligible for membership.
- O Days of service are reported by employers.
- Days of service are then converted to months of credit.
- O Minimum of 20 days in one school year = 1 month.
- O 9 months = 1 year.
- O Maximum of 1 year credit in a school year (7/1 6/30).

Prior Service

- Work as an employee of a NYS public employer prior to your date of membership in NYSTRS.
- Out-of-state public teaching prior to your NYSTRS date of membership (Tier 1).
- No cost for Tiers 1-2; cost will be calculated for Tiers 3-6.
 - O Tier 3: Generally, 3% of salary received during period of service.
 - <u>Tier 4</u>: 3% of salary received during period of service + 5% annual interest.
 - O Tier 5: 3.5% of salary received during period of service + 5% annual interest.
 - Tier 6: 6% of salary received during period of service + 5% annual interest.
- O Prior Service does **NOT** change your date of membership or tier status.



- Tier 1 Out-of-state public teaching prior to your NYSTRS date of membership.
- Maximum of 10 years, and any years that place you over 35 years of service are not usable in your pension calculation.
- No cost to receive the credit.

Tier 3-6 members are not eligible for out-of-state prior service. Tier 2 members are only eligible if the service was *previously* credited under a former Tier 1 membership.

Prior Service Facts

- O To receive credit for your prior service, you must be credited with two years of member service.
- You can claim prior service at anytime; however, it is highly recommended you do so as early in your career as possible.
- O Interest continues to accrue until the payment is made. (Since Tier 6 members pay up to 6% of salary received + 5% interest, the cost can accumulate quickly. So, purchasing prior service early on is particularly important for Tier 6 members.)
- Additional service can also get you to certain milestones faster (e.g., 5 years, 10 years, 20 years, 25 years (Tier 5) or 30 years).

To apply, you must file a Prior Service Claim (PRS-2) and the applicable verification form.

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PRS-3.5 (3/14)

OFFICE SERVICES ONLY

(REQUIRED CERTIFICATION ON REVERSE SIDE)

Did You Know?

You can now file your claim for prior service through your MyNYSTRS account.



MyNYSTRS Your Information on Your Schedule.



My Service Credit — Prior Service Claim

You have not submitted a prior service claim through MyNYSTRS.

Any hardcopy Prior Service claim submitted will not be available in MyNYSTRS.

Prior service credit is credit members can receive for public service before their NYSTRS date of membership. Please see the "Prior Service" section of our publication *You Deserve the Credit* for more information.

My Retirement

My Tools

Manage Account

Add

Statue

To submit a claim, click Add.

Verified Prior Service

NYSTRS has received the following prior service verification from your previous employer(s). The System must review all verification forms before a cost can be generated. Verified service will not appear on the Purchasable service page until the review is complete, which generally takes approximately three months from the receipt of all required documents.

		Dittitus
1985 — 1987	NYS and Local Employees' Retirement System	Reviewed
1988 — 1989	NYS and Local Employees' Retirement System	Reviewed
1989 — 1990	Pine Bush Central Schools	Reviewed
2000 - 2001	Pine Bush Central Schools	Reviewed



About Me

Beneficiaries

Benefit Profile Contributions

Loans

Service Credit

Prior Service Claim

Purchasable

Cost Summary

Purchased Service

1099 Forms

Logoff



MuNYSTRS Your Information on Your Schedule.

My Retirement

My Tools

Manage Account



Once your claim is processed, your allowable service and cost will appear on your **MyNYSTRS** account.



About Me

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Purchasable

Cost Summary

Purchased Service

Prior Service Claim

1099 Forms

Logoff

My Service Credit - Cost Summary

Below is the cost to purchase the verified service rendered prior to your NYSTRS date of membership. This cost is calculated based on 3% of the salary you received during the verified time of employment plus applicable interest.

To determine the cost, select the year(s) of service you would like to purchase at this time.

School Year	Months of Service	October Cost	Select
07/01/1985 - 06/30/1986	9	\$2,541.12	
07/01/1986 - 06/30/1987	9	\$2,608.18	
07/01/1988 - 06/30/1989	1	\$289.15	
07/01/1989 - 06/30/1990	3	\$316.13	
07/01/2000 - 06/30/2001	1	\$82.05	

The total cost to purchase the service is \$0.00 if paid by October 31, 2016.

Need to send your payment later?

If you expect to send your payment by November 30, 2016:

Click here for an updated cost

Once you are satisfied with your selection click Continue.

Continue

Plus, if you need an updated cost, you can now generate your own.

o If you have verified prior service on file with us and use the Pension Estimator in MyNYSTRS, you can run comparative benefit estimates. These show the benefit increase you would receive if you purchase that prior service.



MyNYSTRS Your Information on Your Schedule.

My Retirement

My Tools

Manage Account







${\bf My \, Pension \, Estimate - Instructions}$

Pension Estimator FAQ

My Tools

Address Change

Consultation: Book Appointment

Loan Calculator & Online Application

Pension Estimator

PREP Seminar: Make Reservation

Secure Messaging: Correspond With Us

Member Search

The pension estimator is not available internally.

Two of the biggest decisions you must make at retirement are when to retire and what benefit payment option to elect. This pension estimator can help you decide both!

We encourage you to use this tool to approximate your NYSTRS service retirement benefit using various scenarios. It will show the impact that choosing different retirement dates or payment options will have on your pension. Our Benefit Comparison Table provides the tier-specific pension factors used in benefit calculations for up to 30 years of service credit, and that will help you see the importance of achieving important service and age milestones.

Due to complexities involved with calculating certain pensions, this estimator is currently designed only for members working full time who want a service retirement estimate. It assumes that any outstanding loan will be paid in full prior to retirement, and that Tier 1 and 2 members with an Annuity Savings Fund will withdraw that money at retirement.

The pension estimator cannot project benefits in certain instances. Please contact NYSTRS for an estimate in any of the following cases:

- · You are a part-time employee.
- You would like an estimate for a disability retirement.
- · You do not expect to pay off your loan in full prior to retirement.
- You are a Tier 1 or 2 member who would like your Annuity Savings Fund to be calculated into your retirement estimate.
- You are younger than 40 or older than 77.
- · You have less than five years of service credit.

Before finalizing your retirement plans, you are encouraged to schedule a benefits consultation with a NYSTRS representative who can review your membership record and provide additional guidance.

Please Note: When using this estimator, please use the links provided to move between pages. Please do not use your Web browser's Back button as that may log you out of the application.

Transfer Service

- Transfers merge active memberships between NYS public retirement systems.
- O Salaries and service are combined, often yielding a higher benefit as opposed to taking separate benefits from separate systems.
- O Certain limitations apply. Service credit is limited by law to a maximum of one year of credit per school year.
- Old If you retire with less than three years of NYSTRS service credit from the date you joined NYSTRS (or less than three years of elapsed time since you initiated the transfer), your benefit calculation can be limited.
- Contact <u>both</u> systems prior to transferring to make sure a transfer is to your advantage.
- O Transfers must be initiated with your former retirement system.

The Ins & Outs of Transfer

NYCERS WILLIAM SYMMETRIC ORD.Y F321	TRS MEMBERSHIP	TRANSFER FORM TRACHERS RETREMENT SYSTEM OF THE CHY OF NEW YORK (THIS) OF STATE ONLY ONLY YORK (THIS) OWN DRIVEN, OR YORK (THIS) OWN DRIVEN, OR YORK (THIS)	New York City Police Pension Fund	233 Broadway, 25th ft, Office use New York, NY 10279 212-693-5573/5581 www.nvc.com/nycod	G	BOARD OF EDUCATION RETIREMENT SYSTEM OF THE CITY OF NEW YORK 60 COURT STREET BROOKLYN, NEW YORK 1221-4865
cation for Transcer of Member's Accumulated Salary tions to Another Retirement System Within New York State or Youther Solary State	Please read the instructions before (NOTE: Please print in black or blue PART A: All information must be prov	ink, and initial any changes that you make on this form.)	Rollover/Refund/Transfer of Contribu			Lad Name
termined. do hearly make application to have the accumulated salary deductions, and accused interest on the	First Name	MI Last Name Social Security Number (last 4 digits only)	Tax ID II: SSN, last 4 d	mm 6d yyyy		
ding to my credit in the New York City Employees' Retirement System ONYCERS) transferred to my membership Retirement System.	Permanent Home Address	Apt. No. TRS Membership Number	Address:		Address	Apt. No.
rision of the transfer of such austreat, and spon the warmintal of such funds to the retirement system to which I am. 1, the hearly release and discharge diem may and all liability the New York City Employees' Retirement System in therewith.	Uty	State Zip Code Primary Phone Number (Oxok one Horne Work Mitchie Alternate Phone Number (Check one Horne Work Mitchie) Alternate Phone Number (Check one Horne Work Mitchie)	Daytime phone:		Oy () (State Zip Code
vice in the position of with the Department of	Disease home some assessment information	(► Reason for leaving the NYPD (check ONE box Resignation Dismissal		Work Telephone Number	Home Telephone Number
e day of .20 .2have accepted a position as a(u) with the Deportment of on the day of	so do not enter a temporary address:	instead, TRS suggests that you consult the U.S. Postal Service about having your mail forwarded changes to your permanent address (and/or phone number), please access our website or file a	2) Transfer request: or NY State agency and wish to transfer your or	dx if you are employed by another NY City attributions to its retirement system.	NEW	Department / School / District RETIREMENT SYSTEM by (TDA: if applicable) to the retirement system as indicated by my select
.30		tove, please indicate the effective date:	Agency employer: I request that the PPF make the check		Niew York City Teachen' Retirement Bystem (NYCT Niew York City Employees' Ratirement Bystem (NYCT)	(Re)
horize NYCERS to draw a check made gayable to the retirement system of which I am now a member, to be sy account in that retirement system under Membership Number	PART B: Please indicate whether you	are separated from service or on a leave of absence without pay. Check only CNE below and	payable to the following retirement system:		New York State Toachers' Retirement System (NYS	5793)
and Tier 4 members who participated in a special program exacted by Chapter 96 of the laws of 1995 only.	write your initials in the space provider Separated from Service (i.	a next to your charce. e, resigned or terminated) Leave of Absence without Pay	3) Refund / Rollover election request:	Membership date://	Other	
hereby effect to receive a refund of my share of the Additional Member Contributions required to have been by use due to my participation in one of the programs enaced by Chapter 96 of the Laws of 1995 and which ny credit is NYCES as my Entermost Enterve Paul Socious.	PART C: Please check the box next to only ONE and write your initials in the	othe name of the retrement system to which you intend to transfer your membership. Check space provided next to your choice.	▶ If you choose this section, complete Part	A (refund) or Part B (rollover) or BOTH part count paid in "B" must equal the total amount	ii.	AEMBERSHIP NUMBER
Member The GOOD NEW YORK STATE STACKES' RETREMENT SYSTEM	omo	ement System servos out m	Part A (refund): Pay \$ o amount, write "ALL"). I understand the NY portion of this refund for federal tax purpose	A 1 1	Application Transfer of Members	for Irm that you selected before submitting this application.
10 Corporate Woods Drive, Albany, NY 12211-2	_	sm (Note: Members who are currently transferred contributors to TRS may not	Part B (rollover): Pay 8	Office of the New York State Completible New York State and Local Patterment System Employment System		this page of the p
REQUEST FOR TRANSFER OF M		nt System (Note: Members who are currently transferred contributors to TRS	or eligible employer plan named in Section 4 4) Rollover information (please print):	Police and Fre Platinement System 110 State Street, Albany, New York 12044-0001	, m	nv 8/00)
Please be advised that I am registered in another New Y	rek Stato authic referenced autom and	e the payment from TRS for the balance of your ASF (for Tiers III) members) or request the NE and write your initials in the space provided next to your choice.	Financial institution or eligible plan name:		M THE NEW YORK STATE & LOCAL RETIREMENT SYSTEM TO ANOTHER I	1000
transfer of my membership in the New York State Teache	s' Refrement System, to the	nent system I checked in Part C of this form.	Plan type (check one): TRA 401(k)	This transfer application is <u>investicable</u> . Once this transfer a Under certain circumstances it may not be beneficial to transfe covered by a special plan, you should contact Benefit Information	application is filed or received by the Retirement System your transfer is effec or your membership. If you have any questions concerning your transfer or if you are on Services at 1-868-805-8090 <u>before</u> completing this application.	before me the said
tc.Number Work Planc Number Name of Refirement System		name, you payment see EFT eligibility requirements on page 2.	Account #:	INSTRUCTIONS Please print all requested information in ink. Forms completed	t in gencil will be rejected. Sign the completed form and have it notarized. Return the test your employer). Your transfer will be effective on the date we receive the complete.	ned thoroin are true.
Sign this form and have i	(Mode) SOCIAL SECURITY	ie to receive your payment via EFT, a check will be mailed to your home address.)	Gity:	application accurring you meet all legal requirements, although "Social Security No:	h the administrative processing will take several months to complete. Registration No. (if known Name)	Notary Public or Commissioner of Deeds (Pyrochans on official and, planes offici).
Det July Street (FT) 643-000 www.mycers.df ADDRESS (Street)	EMPLID		Pension Computation	Name	Date of Birth.	Page 1 of 2
(City) (State)	(Zp Code) DATE OF BIRTH			Address	Work Phone ()	
FION				Former Employer	Date Terminated Leave of Absence	
NUMBER ()				Current Employer	Date Appointed	
Is this address your PERMANENT address to be used by the				TO THE COMPTROLLER OF THE STATE OF NEW YOR I request that my membership, reserves, and accumulated cont transferred to the	NRC: tributions, if any, standing to my credit in the New York Clate & Local Retirement Dys Retirement System where I am currently resistance as a m	uten be
Have you taught in a New York State public school, other NO YES If yes, please list the sci		chool year®		I understand that this application to transfer is inevocable.	Cate	iones.
	Con demonstra			ACKNOWLEDGEMENT TO BE COMPLETED BY A NO State of	OTARY PUBLIC County of	
				On theday of in the year before me, the u personally known to me or proved to me on the basis of satis	undersigned personally appeared_ infactory evidence to be the individual(s) whose name(s) in (are) subscribed to the the same in his her/their capacitaties), and that by his her/their signalure(s) on the inst	s within runest,
					NOTARY PUBLIC (Please sign and affix stamp) IOT WRITE BELOW THIS LINE	
Mean This said				(To be completed to	CERTIFICATION by the system to which transfer is being made)	
DATE CEASED TEACHING IN NYS PUBLIC SCHOOLS (OUTSII				I cerify that the above named individual has been registered System on(date of membership) undo requested membership is currently active and the requested	ler membership number I further certify the	inement hal the
title of new position:	Starting Date			The date last reported to our system was	Signature	
(Name of Department, School or G	ther Unit Where Employed)				1990	
	(Signature)				Policinaria ed Disca Discale Lina, ha finite en Clyden in regional i mariba mariba. The mariba en morano in the Mariba ha	olyten.

Reinstatement Service

- O Reinstate an earlier membership (tier) in a NYS public retirement system.
- This will add service credit to your membership.
- No cost for Tiers 1-2.
- O The cost for Tiers 3-6 is a one-time lump sum payment of the contributions refunded under the former membership plus 5% interest per year.
- Reinstatement is irrevocable; contact a System representative to discuss advantages or disadvantages before applying.

O To apply you must file an Election to Reinstate (RIS-1).

5-1 (3/12)				OFFICE SERVICES ONLY			
	/ YORK STATE TEACHERS' RETIREMENT SYS Corporate Woods Drive, Albany, NY 1221						
	ELECTION TO	REINSTAT	E				
FIRST NAME	M.L. LAST		SOCIAL SECURITY NUMBER				
STREET ADDRESS			EMPLID				
JINEEL PLOOTESS							
CITY		STATE	ZIP CODE				
PHONE NUMBER							
s this address vour	PERMANENT address to be used by the	System?	es 🗆 No				
EINSTATEMENT I	•	.,					
PLEASE CHECK ALL THAT	APPLY:	DATES OF SERVICE					
FORMER NYS PUBLIC	C RETIREMENT SYSTEM(S)						
☐ New York Sto	ate Teachers' Retirement System	FORMER NAMES (if or	oplicable)				
■ New York Cit	ly Teachers' Retirement System						
	ate & Local Retirement System	FORMER RETIREMENT SYSTEM NUMBER (# known)					
		_					
	claiming credited in any NYS public retirement stem:	system? 🔲 1	res 🗆 No				
	er of the New York State Teachers' Retiremer dance with Sections 645 or 646 of the Retiren			earliest date of			
	ed the Important Reinstatement Information p inging membership dates and the effects it m			plaining the			
•	This election must be signed an						
Signature of	Married women must use their given name (Mar	y Smith not Mrs. John S	Smith)				
Applicant							
itate of							
County of							
	ofin the year						
itate, personally appea			known to me or proved to m				
	be the individual whose name is subscribed to the						
ame in his/her capacity executed the instrumer	r, and that by his/her signature on the instrument, t nt.	ne individual, or the p	erson upon behalf of which th	e individual acted,			
Signature of Notary:			Expiration Date:				

Prior Subsequent Service

This credit is available to members who had an opportunity to purchase credit for prior service but, before doing so, reinstated or transferred an earlier membership date to NYSTRS. As a result, that credit (which previously had been "prior" to their membership date) is now "subsequent" to their current membership date.

Chapter 351

Did you join the Optional Retirement Plan (ORP) after becoming a NYSTRS member?

- If the answer is "yes" and you were denied public school service during your discontinued period, you should contact the System.
- Chapter 351 of the Laws of 2002 allows members who have returned to employment with an employer other than the one from which they entered the ORP to receive credit for service rendered between 12/1/91 and 6/30/02.

To apply, you must file a Subsequent Service Claim for Discontinued Members (for service rendered 12/1/91-6/30/02) (MAC-4).

MAC-4 (2/10)



NEW YORK STATE TEACHERS' RETIREMENT SYSTEM 10 Corporate Woods Drive, Albany, NY 12211-2395

OFFICE SERVICES ONLY

SUBSEQUENT SERVICE CLAIM FOR DISCONTINUED MEMBERS

(FOR SERVICE RENDERED 12/1/91 - 6/30/02)

		EmpliD
tate	Zip Code	Phone Number
YES 🗆	NO	Former Name(s)
	NYS Teach	tate Zip Code J YES D NO NYS Teachers' Retirement: lege and contributing to the

NAME OF EMPLOYER	SCHOOL YEAR ENDING JUNE 30

I certify that I have reviewed the information provided on the reverse side of this claim explaining the consequences of activating my "discontinued membership" and the effects it may have on my future benefits.

Signature of Claimant	Date	

Chapter 352 (NYC Subsequent Service)

Chapter 352 allows current members to receive credit for NYC teaching service if:

- Their City service was rendered before 7/1/90 but after their current date of membership in NYSTRS; and
- They were not able to join the City Teachers' or Board of Education Retirement Systems.

To apply for Chapter 352, you must file a New York City Subsequent Service Under Chapter 352 of the Laws of 2002 form (MAC-79).

MAC-79 (2/10)



NEW YORK STATE TEACHERS' RETIREMENT SYSTEM 10 Corporate Woods Drive, Albany, NY 12211-2395

NEW YORK CITY SUBSEQUENT SERVICE UNDER

Chapter 352 allows current members to receive credit for NYC teaching service if:

Your City service was rendered before July 1, 1990 but after your current date of membership in NYSTRS.

AND
 You were not able to join the City Teachers' or Board of Education Retirement Systems.

TO THE MEMBER: Please type or print in ink all items in Part 1 and 2 of this form and then forward it to the New York City Department of Education for completion of Part 3 on back of form.

CHAPTER 352 OF THE LAWS OF 2002

ADDRESS: New York City Department of Education

Division of Financial Operations Office of Employment Records Research 65 Court Street - Room 1703 Brooklyn, NY 11201

PART 1					
Date NYC F			Number		Social Security Number
First Name		Last Name		EmpliD	
Home Address				Apt. Number	Maiden Name(s)
City			State	Zip Code	Phone Number
Employee Signature					

PART 2					
Type of Service (Check all that apply)	Dates of Employment Month, Day, Year From - To	School/Office (Location of Employment)	District/Boro		
☐ Regular Teacher	-				
☐ Regular Substitute	-				
☐ Per Diem	_				
☐ Evening Community Center	-				
☐ After School Playground	-				
☐ Vacation Playground	-				
☐ Youth Board	-				
☐ Hourly School Lunch (E741)	-				
☐ Paraprofessional (E743)	_				
School Aides, Guards (E744)	-				
☐ Administrative (J740 or H740)	-				
☐ Annual School Lunch	-				
☐ Hourly Admin Mechanics (2740)	-				
Other (Specify)	-				

Include additional information and unique requests in the comment box below.

Only service performed during time periods when employee was not a member of a retirement system can be verified by the Office of Employment Records Research.

Chapter 675 Service

- Chapter 675 of the Laws of 2006 allows members to obtain credit for service earned in another New York State public retirement system subsequent to their NYSTRS membership, even if their membership in the other system has ceased.
- To claim this credit, you must have been an active NYSTRS member on or after 6/30/06.
- You must have at least two years of NYSTRS service.

To apply for Chapter 675, you must file a Claim for Service Credit Under Chapter 675 of the Laws of 2006 (MAC-80).



NEW YORK STATE TEACHERS' RETIREMENT SYSTEM 10 Corporate Woods Drive, Albany, NY 12211-2395

CLAIM FOR SERVICE CREDIT UNDER CHAPTER 675 OF THE LAWS OF 2006

OFFICE SERVICES ONLY

hapter 675 of the Laws of 2006 allows members to tritement system subsequent to their NYSTRS memb o claim this credit, you must have been an active ast two years of NYSTRS service.	bership, even i	if their m	embership in th	ne other system has ceased.		
be completed by member:						
EmpliD		Social	Security Numb	er		
			-	-		
RST NAME	MIDDLE INTIAL	LAST NAM	ış.			
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Y	STATE		ZIP CODE	PHONE NUMBER		
S THIS A PERMANENT ADDRESS TO BE USED BY THE SYSTEM	ν? 🗆 1	res	П мо			
with to claim credit under Chapter 675 of the Laws of 2006. I understand that NYSTRS will contact my previous firement system for verification of the service and I will be advised of the allowable service, along with the ppropriate cost once the verification has been evaluated.						
ame of Former nys public retirement system			FORMER RETREMEN OR MEMBERSHIP NU	IT SYSTEM REGISTRATION IMBER		
ORMER NAME(S)			DATE OF BIRTH			
ATES OF SERVICE						
IGNATURE			DATE			

- NYSTRS cannot control the time it will take to get appropriate verification from your former system.
- Tier 1 and 2 members: The service will be credited at no cost.
- Tier 3 and 4 members: The cost is 3% of salary received during the period of service plus interest of 5% per year to the date of payment.

Great News!

- o If your prior SUNY Graduate or Teaching Assistant service rendered from 7/1/82 6/30/91 was previously ineligible, this service is now allowable and is retroactive.
- To apply:
 - If this prior service was previously denied, call the System at 800-348-7298, Ext. 6250 (or send us a secure message through your MyNYSTRS account) and request a review.
 - If you have never applied, file a Prior Service Claim form (PRS-2) and have SUNY complete a Prior Service Verification form (PRS-3).

Service Not Allowable for Credit

- Charter school service rendered prior to the school electing participation with NYSTRS.
- Service rendered with a non-participating charter school.
- Service rendered after your NYSTRS date of membership in a non-teaching capacity while not a member of the covering retirement system.
- Service rendered with the Research Foundation of SUNY.
- Private or Parochial Service.
- Out-of-State service for Tiers 3-6.

Military Service

- <u>Prior</u>: Active duty rendered prior to joining NYSTRS.
 - O Chapter 41
 - O Chapter 548
- O Interrupting: Worked full- or part-time under contract prior to military duty.
 - O Section 243
 - Federal Reemployment Act (FRA)
 - Uniformed Services Employment and Reemployment Rights Act (USERRA)
 - O Chapter 326
- Verification: Submit a copy of your honorable military discharge Form DD214.

Great News!

- Chapter 41 of the Laws of 2016 removed the specific periods of war or conflict requirements of Chapter 548 of the Laws of 2000. To qualify:
 - You must have been an active NYSTRS member on or after 5/31/16.
 - You must have at least five years of service credit since the date you last entered our System.

Total credit under this law cannot exceed <u>three</u> years or exceed the "net active service" indicated on the honorable military discharge Form DD214.

Military Service Prior to Date of Membership

- Chapter 548 of the Laws of 2000 provides for the crediting of military service prior to your joining NYSTRS if rendered during specific periods of war or conflict. To be eligible, you must:
 - O Be a full-time or part-time member, or a member who retired on or after 12/21/98; and
 - O Have been in active military service prior to joining NYSTRS; and
 - Have at least five years of service credit since the date you last entered our System; and
 - O Meet at least one of the military periods on the following list.

Chapter 548 Military Periods

- World War II (12/7/41 to 12/31/46)
- Korean Conflict (6/27/50 to 1/31/55)
- Vietnam Era (2/28/61 to 5/7/75) or

You received the Armed Forces, Navy or Marine Corps Expeditionary Medal for service in:

- O Lebanon (6/1/83 to 12/1/87)
- O Grenada (10/23/83 to 11/21/83)
- O Panama (12/20/89 to 1/31/90) or

You served in the theater of operations on or after 8/2/90, including the Persian Gulf and Iraq.

Total credit under this law cannot exceed <u>three</u> years or exceed the "net active service" indicated on the honorable military discharge Form DD214.

Cost for Chapter 548 or Chapter 41 Military Service

- O The cost is based on the salary earned during the 12 months of credited service in the school year preceding the claim.
 - 0 3% for Tiers 1-5
 - 0 6% for Tier 6
- O The cost is good for one school year from the date of our letter.
- There is no interest charged on service granted under Chapter 548 or Chapter 41.

Interrupting Military Service Section 243

- O The military service must be:
 - Active service.
 - Rendered on or after 7/1/40, and must not be service voluntarily entered upon between 1/1/47 and 6/25/50.
- O The claimant must:
 - O Be a teacher in the public schools of New York State and a member of NYSTRS at the time of entry into military service.
 - Return to public school teaching within one year after the date of honorable discharge.
- O No minimum service credit requirement.

Total credit under this law cannot exceed <u>four</u> years or exceed the "net active service" indicated on the honorable military discharge Form DD214.

Cost for Service Under Section 243

- O The cost is the amount the member would have contributed had the employment been continuous during the period of military service. This payment is waived for Tier 3 or 4 members called to active duty on or after 8/1/90, and prior to 1/1/93.
- O If the claimant did not have an employer during such period of military service, the claimant must also pay the amount the employer would have contributed to the System had employment been continuous during such period. No interest is calculated on this portion of the member payment.
- O The cost must be paid within five years of returning to public school teaching.

FRA

- Must be an active member of the retirement system and under contract. (Per diem substitutes are not covered.)
- O Must be active service as a member of the U.S. Armed Forces.
- Olf discharged between the start of the school year and 4/1, must return to service within 90 days of discharge. If discharged on or after 4/1, must generally return to teaching by the start of the school year.
- O No cost for Tiers 1-2. Tier 3-4 members pay 3% of the contract salary they would have received.
- No minimum service credit requirement.
- O Requires reemployment effective on or before 12/13/94.

Total credit under this law cannot exceed <u>four</u> years or exceed the "net active service" indicated on the honorable military discharge Form DD214.



- O USERRA requires reemployment effective after 12/13/94.
- No minimum service credit requirement.
- No cost for Tiers 1-2 or for Tiers 3-4 members who stopped making mandatory contributions before entering military service. Otherwise, the cost is based on the rates below and the salary the member would have received for the school year(s) in which the military service occurred.

Tiers 3-4: 3%

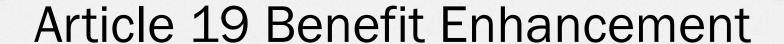
Tier 5: 3.5%

Total credit under this law cannot exceed <u>five</u> years or exceed the "net active service" indicated on the honorable military discharge Form DD214.

Chapter 326 of the Laws of 2005

- O Must be called to active duty on or after 9/11/01 and prior to 1/1/06.
- No cost regardless of tier.
- O Mandatory membership contributions for Tier 4 members are required after the military period ended if the member had not yet met the provisions of Article 19.

Total credit under this law cannot exceed <u>four</u> years or exceed the "net active service" indicated on the honorable military discharge Form DD214.



- O Eligibility:
 - O Must be Tier 1 or 2.
 - O Must be credited with at least one month of service credit in any one school year after 7/1/92.
- O Additional Credit Provided:
 - O 1/12 year X total service credit at retirement to maximum additional credit of two years.
- O Examples:

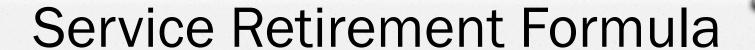
Article 19 Credit
1.0 Years
1.5 Years
2.0 Years (Max.)

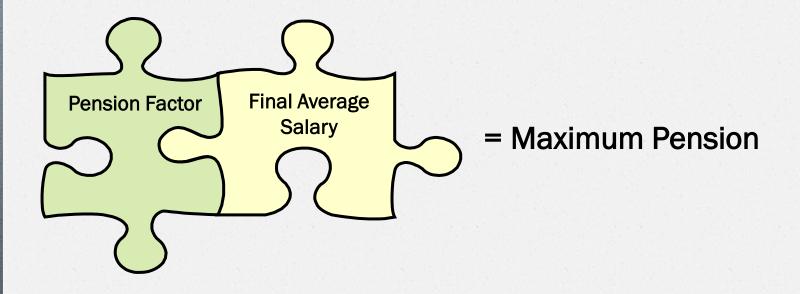


Visit the Library page on our website at NYSTRS.org and see the following publications:

- You Deserve the Credit
- Claiming Military Service







Is It Pensionable?

- Salary increases
- Tier-specific salary limits
- Regular salaries
- Transferred salaries
- Payments for leaves
- Leaves tied to resignation
- Termination payments
- Non-regular compensation
- Non-reportable salary
- Consultants



















Classification of Earnings

Under the Education Law, the System classifies payments that teachers and administrators receive from a school district into four categories:

- Regular Salary
- Termination Payments
- Non-Regular Compensation
- Non-Reportable Salary

Contract Review

- NYSTRS reviews all contracts—both collectively bargained and individual agreements.
- The review determines regular salary, termination pay, non-regular compensation or non-reportable salary. The district is then notified of the determination so they report your salaries correctly.

What can you do to help?

Look at your *Benefit Profile* each year and make sure your salary information looks correct. If you see an error, speak to your district so it can be corrected.

What Is The FAS?

The Final Average Salary (FAS) is the average of your three or five highest consecutive school years of regular salary earned, depending on your tier of membership.

- For most Tier 1-5 members, the FAS is a 3-year average. For some Tier 1 members, a 5-year average can be used.
- O Tier 6 members use a 5-year average.
- FAS is typically the average of the last three or five school years of salary, but not always.
- Certain limits apply for includable salary and salary increases.
- O When applicable, we will build an FAS with three or five school years of 100% earnings.

Salary Limits

- Section 401(a)(17) of the Internal Revenue Code (IRC) limits the amount of annual compensation that can be used in computing benefits for members, effective with membership dates of 7/1/96 or later.
 - The limit for the 2016-2017 school year is \$265,000.
- Chapter 18 of the Laws of 2012 supersedes IRC section 401(a)(17) limits for Tier 6 members.
 - Any wages earned during a fiscal school year in excess of the New York State governor's annual salary (currently \$179,000) are excluded from pension calculations.

Tier-Specific Salary Limits

Your FAS excludes yearly increases in regular salary that exceed the following limits:

- <u>Tier 1</u>: 20% of the previous year's salary.

- <u>Tier 6</u>: 10% of the average of the previous four years' salaries.
- Also for Tier 6: For those with multiple employers, and 200+ days of service with a single employer, pensionable salaries are limited to the two highest-grossing positions per school year.

Regular Salary

- Regular salary includes only payments made by the school district to a teacher or administrator for the service that is reasonably incidental to the duties of a full-time teacher or administrator.
- The terms of the payment are generally set forth in a collective bargaining agreement or a long-standing employment agreement.
- In addition to salary earned for full-time teaching or administrative services, regular salary may also include:
 - Coaching
 - Tutoring
 - Summer School
 - Driver Education
 - Supervision of traditional after-school clubs
 - Teaching or administration of educational after-school programs

Regular Salary

Does not include compensation for...

- Duties or services assigned on a preferential basis; or
- Services performed outside or unrelated to the regular, fundamental components of the school district's educational program; or
- Payments made on the eve of retirement
 - Either in exchange for resignation or;
 - Which would result in the inflation of the FAS.

A great source of reference is the Delegate News, such as Issue Numbers 2008-6, 2015-2, and 2016-3.

Transferred Salaries

- Salary information included in a direct transfer of membership can increase your FAS if those salaries fall in your highest consecutive years.
- O These salaries would be subject to any limitations applicable by statute.

Payments for Leave

- Salary received while on an approved medical, military or maternity leave and paid by the school is usable in the FAS.
- If you are on Workers' Compensation and being paid by the New York State Workers' Compensation Board, those payments are not usable in your FAS (nor would you receive service credit for the corresponding time).

Termination Payments

What are termination payments?

- Payments made at retirement, such as retirement incentives, longevity payments, and payments of unused leave.
 - O Such payments are included in a collective bargaining agreement or a long-standing employment agreement.
 - O The receipt of these payments is not contingent upon the performance of a service.
- Termination payments are reportable only for members with a date of membership prior to 6/17/71.

Non-Regular Compensation

- Non-regular compensation (NRC) includes, but is not limited to, payments such as:
 - Taxable fringe benefits.
 - Bonuses.
 - Payments in lieu of health insurance.
- NRC is reportable only for members with a date of membership prior to 7/1/73 and only usable in a 5-year FAS.

Non-Reportable Salary

- Payments made outside of the collective bargaining agreement or long-standing employment agreement.
- Payments made on the eve of retirement, often in exchange for resignation, which would result in the inflation of the FAS.
- Any additional payments to a member to purchase health insurance through the district.
- Buyouts.
- Earnings from the following positions (classified service): Bus driver, computer maintenance work, district clerk, clerk of the board, school attorney or legal services provided by an attorney, master teacher presenter and similar positions.
- Payments for services as a consultant or independent contractor.

Consultants

- NYSTRS defines a consultant as someone who is an independent contractor, not an employee of the district.
- A consultant cannot perform a function that normally would be performed by a teacher or administrator in that district.

Reporting Error?

What happens if a district makes a reporting error?

By NYS Education Law, the System is required to make the adjustment to your earnings as soon as we are notified. This could mean even after you're retired!

What can you do?

- O Review your Benefit Profile each year.
- If you see an error with your salary or service, contact your district for correction sooner rather than later.