

**STATEMENT OF PERSONAL INELIGIBILITY  
FOR MEMBERSHIP IN THE  
WASHINGTON PUBLIC EMPLOYEES' RETIREMENT SYSTEM**

Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Home Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**1. Have you ever been a member of a Washington State Retirement System:**

Yes  No  Do not know

**2. Have you ever retired from one of the above Washington State Retirement**

**Systems?** Yes  No  If yes, please indicate the name of agency \_\_\_\_\_

I certify that I am enrolled as a full-time student (10 or more credits), and that my employment is incidental to my education as a student at Eastern Washington University. I elect to waive membership in the Public Employees Retirement System [PERS].

I also understand that I may later become a member of the PERS Retirement System if conditions change (i.e., I am hired into a PERS eligible position) and I decide that employment is no longer in furtherance of my education. However, my service credit shall be based only on service rendered after I begin participation in PERS.

In the event that I cease to be a full-time student, I agree to notify the Benefits Office immediately because my continued employment at Eastern Washington University may include membership in the Public Employees Retirement System. The Benefits Office is located in Showalter Hall, Room 318.

I have read and understood the provisions of WAC 415-108-520 printed on the following page of this statement.

Signature of Employee: \_\_\_\_\_

Date: \_\_\_\_\_

**WAC 415-108-520 Membership exceptions -- Student and spouse of student.**

(1) A person employed by a Washington state institution of higher education or community college (employer), who is employed at such institution or college primarily for the purpose of furthering her/his education or the education of the person's spouse, is excepted from membership in PERS when:

- (a) The person is a full-time student or the spouse of a full-time student; and
- (b) The person is employed at the same institution where she/he is a full-time student or where the person's spouse is a full-time student; and
- (c) The person determines her/his employment is primarily an incident to and in furtherance of her/his education or training, or the education or training of the person's spouse.

(2) For purposes of this section, RCW 41.40.023(7) shall be administered as follows:

(a) When a person begins employment in a PERS eligible position, a determination shall be made by the person as to whether the provisions of this section apply. If this section applies to the person, she/he shall determine her/his membership status as either being excepted from membership in PERS, or being a member of PERS, based upon whether employment at the institution of higher education or community college is primarily as an incident to and in furtherance of her/his education or training, or the education or training of the person's spouse. The person shall notify the employer in writing of her/his determination of membership status no later than two months after commencing employment in a PERS eligible position. Based upon the provisions herein and the written notification of status, the person shall either be excepted from membership in PERS or become a member of PERS. In the event that no written notification of status is provided to the employer, based upon the provisions of this section, the employer shall make the presumption:

(i) That the person shall remain a member of PERS where the person is employed in a PERS eligible position and is a member of PERS at the time the person, or his or her spouse, becomes a full-time student; (ii) That the person shall be excepted from PERS membership where the person or the person's spouse is a full-time student at the time of becoming employed in a PERS eligible position.

(b) A person employed in a PERS eligible position at the time of becoming a full-time student or becoming the spouse of a full-time student, shall remain a member of PERS; except, at the time of becoming a full-time student or becoming the spouse of a full-time student, the person may elect to waive her/his membership in PERS, based upon the provisions of this section excepting membership. The person must provide written notification of the waiver to the employer. If the person elects to waive membership in PERS, she/he cannot later elect membership in PERS unless there is a change of status of the person or of the person's spouse, as set forth below, and the employer has received written notification from the person of the change of status.

(c) A person who is a full-time student or who is the spouse of a full-time student at the time of becoming employed in a PERS eligible position, shall not be eligible for membership in PERS; except, at the time of becoming employed in a PERS eligible position, the person may elect to become a member of PERS, based upon the person's determination that the provisions of this section excepting membership do not apply. The person must provide written notification of the election to be a member of PERS to the employer. If the person elects to become a member of PERS, she/he cannot later waive PERS membership unless there is a change of status of the person or of the person's spouse, as set forth below, and the employer has received written notification from the person of the change of status.

(d) For purposes of this section, status is defined as:

- (i) Student status - is full-time student, part-time student or nonstudent. Part-time student and nonstudent status do not meet the threshold for exception from PERS; only full-time student status meets the threshold;
- (ii) Employment status - is employment in a PERS eligible position, employment in a PERS ineligible position, or unemployment. Unemployment refers to termination of employment from a Washington state institution of higher education or community college employer;
- (iii) Marital status - is single, married, widowed or divorced.

(3) The department shall rely upon the institutions of higher education and community college employers to:

- (a) Notify each person, at the time of hire, of the provisions of this section;
- (b) Request all written notifications from persons electing membership or waiving membership under this section;
- (c) Retain and make available to the department upon request, all written notifications electing membership or waiving membership on a sixty-four year record retention schedule.
- (4) It is recommended, but not required, that no less than annually employers provide notice that employees are required to notify the employer of any change in status as set forth in this section.

[Statutory Authority: RCW 41.50.050. 99-14-008, § 415-108-520, filed 6/24/99, effective 7/25/99; 91-21-083, § 415-108-520, filed 10/18/91, effective 12/31/91.]