**Attachment to Retirement Division Memorandum 2017- 04**

|  |
| --- |
| **RETIREMENT PLAN ELIGIBILITY**  |
| **TYPE OF AGENCY CHANGE**  | **ELIGIBLE TO ELECT NEW RETIREMENT PLAN** |
| NEW HIRE - Higher Education Agency    | YES - must make initial election prior to or on date of hire. |
| NEW HIRE - Non-Higher Education Agency    | YES - must make initial election prior to or on date of hire. |
| REHIRE - Higher Education Agency to Higher Education Rehire without Permanent Break in Service    | NO - If no permanent break would be reinstated to the same plan was in at separation. |
| REHIRE - Higher Education Agency to Non-Higher Education Rehire without Permanent Break in Service    | YES - If was in ARP or Hybrid at separation but not offered at non higher education agency would be placed into the SERS plan that corresponds with the date of rehire. |
| REHIRE - Non-Higher Education Agency to Higher Education Rehire without Permanent Break in Service    | NO - Must remain in same plan; no option. |
| REHIRE - Non-Higher Education Agency to Non-Higher Education Rehire without Permanent Break in Service    | NO - If no permanent break would be reinstated to the same plan was in at separation. |
| REHIRE - with Permanent Break in Service    | NO - Must remain in same plan, except if was in ARP or Hybrid at separation and plan not offered at non-higher education agency then would be placed into SERS plan that corresponds with the date of rehire. |
| TRANSFER - Higher Education Agency to Higher Education Agency    | NO - Must remain in same plan; no option. |
| TRANSFER - Higher Education Agency to Non-Higher Education Agency    | YES - If in ARP or Hybrid since not offered at non higher education agency, at time of transfer would be placed into the SERS plan that corresponds with date of hire not date of transfer. |
| TRANSFER - Higher Education Agency to Non-Higher Education Agency Transfer and subsequently transfers back to Higher Education Agency    | NO - Must remain in same plan; no option. |
| TRANSFER - Non-Higher Education Agency to Higher Education Agency    | NO - Must remain in same plan; no option. |
| TRANSFER - Non-Higher Education Agency to Non-Higher Education Agency    | NO - Must remain in same plan; no option. |

[Return to Retirement Services Division Memorandum 2017-](http://www.osc.ct.gov/2017memos/retirement/201703r.htm)04