



BRAD HENRY  
GOVERNOR

STATE OF OKLAHOMA  
TEACHERS' RETIREMENT SYSTEM OF OKLAHOMA

October 2003

**TO: Superintendent of Schools and/or Financial Officers**  
**FROM: Tommy C. Beavers, Executive Secretary**  
**SUBJECT: SPECIAL MEMBERSHIP OPTION FOR SUPPORT PERSONNEL**

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THIS NOTICE IS INTENDED FOR SUPPORT PERSONNEL WHO STOPPED MAKING CONTRIBUTIONS TO THE TEACHERS' RETIREMENT SYSTEM WHILE CONTINUING TO BE EMPLOYED BY A PUBLIC SCHOOL.

In 2001, the State Legislature enacted House Bill 1754. The purpose of this new law was to allow former members of TRS to re-enroll in the retirement program after terminating membership. The new law was conditional on TRS receiving a favorable private letter ruling from the Internal Revenue Service. TRS received a favorable ruling during the last school year.

UNDER THE LAW ENACTED IN 2001 AND ADMINISTRATIVE RULES ADOPTED BY THE TRS BOARD, A FORMER MEMBER WHO TERMINATED MEMBERSHIP IN TRS BY ELECTING TO WITHDRAW CONTRIBUTIONS OR WHO STOPPED MONTHLY CONTRIBUTIONS WHILE STILL EMPLOYED MAY RE-ENROLL IN THE RETIREMENT SYSTEM EFFECTIVE JULY 1, 2003.

- To receive credit for the 2003-04 school year, the member must make contributions for the school year dating back to July 1, 2003.
- The member may voluntarily purchase credit for the 2001-02 and 2002-03 school years by making contributions plus interest on earnings for these two years. The contributions for these years must be paid (or installment payments commenced) prior to June 30, 2004, to qualify for the past service.
- Members cannot purchase credit for employment between the time they withdrew from membership in TRS and the time they resume contributions. This includes individuals who may have voluntarily stopped making contributions regardless of whether a full or partial refund of contributions was made by TRS.
- Purchasing credit for the school years 2001-02 and 2002-03 is optional. To purchase credit for these two years the member (or school district) must request an Oklahoma Service Verification Form from TRS. The school's payroll office must complete the form giving TRS total earnings for each of the two years. The member will then be billed for the past service.

**IF A MEMBER STOPS MAKING CONTRIBUTIONS WHILE CONTINUING TO BE EMPLOYED, MEMBERSHIP IN TRS IS CANCELED AND THE MEMBER CANNOT BE RETIRED AT A LATER DATE. IF THE MEMBER SUBSEQUENTLY REJOINS TRS, PREVIOUS EMPLOYMENT WILL NOT COUNT TOWARD RETIREMENT.**

AN OPEN ENROLLMENT PERIOD IS AVAILABLE TO ALL SUPPORT PERSONNEL WORKING HALF-TIME OR MORE WHO ARE ELIGIBLE TO JOIN TRS AS A NEW MEMBER (includes those who have never joined TRS or who may have terminated employment in past years and withdrew TRS contributions).