



Department of Management & Budget  
 Office of Retirement Services  
 www.michigan.gov/ors (800) 381-5111  
 P.O. Box 30171  
 Lansing MI 48909-7671

# Application to Transfer State of Michigan Service

*For Public School Employees*

MEMBER'S NAME (LAST, FIRST, M.I.)	DAYTIME PHONE NUMBER ( )	MEMBER ID OR SSN
MAILING ADDRESS		DATE OF BIRTH
CITY, STATE, ZIP CODE		RETIREMENT/TERMINATION DATE:

## Section I – State of Michigan Service See the back side for eligibility requirements.

CHECK ONE  My request is for informational purposes only.  
 I authorize the State Employees' Retirement System to transfer any eligible monies and service to the Michigan Public School Employees Retirement System.

NAME WHILE EMPLOYED (IF DIFFERENT THAN CURRENT)	JOB TITLE/CLASSIFICATION	EMPLOYEE NUMBER
DEPARTMENT/AGENCY	EMPLOYMENT START DATE	EMPLOYMENT END DATE

NAME WHILE EMPLOYED (IF DIFFERENT THAN CURRENT)	JOB TITLE/CLASSIFICATION	EMPLOYEE NUMBER
DEPARTMENT/AGENCY	EMPLOYMENT START DATE	EMPLOYMENT END DATE

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## Section II: Certification

*I certify the above statements are true to the best of my knowledge and belief.*

\_\_\_\_\_  
 Applicant's Signature

\_\_\_\_\_  
 Date

**Send completed application to the address above.**

R0317C (Rev. 8/2009)  
 Authority: 1980 P.A. 300, as amended



# Requirements

This application is used for the transfer of eligible service to the Michigan Public School Employees Retirement System.

## Eligibility

As a member of the Michigan Public School Employees Retirement System, you may receive retirement credit for the years you worked for the state of Michigan and were a member of the State Employees' Retirement System Defined Benefit plan.

State service performed as a participant in the state of Michigan Defined Contribution plan is *not* transferable.

Note: If you first hired into the state on or after March 31, 1997, you were a participant in the Defined Contribution plan and are not eligible to transfer your state service.

## Conditions

- You must purchase or transfer all of your prior service with the state. No partial credit can be received.
- Your purchase or transfer must be paid in full before any service credit will be granted.
- You must have an employer-employee relationship with a Michigan public school.
- You may use this service credit to satisfy vesting requirements.
- Any concurrent service in both the state of Michigan and Michigan public schools will be subject to the maximum limit of one year in the corresponding fiscal year.
- You must have terminated employment with the state of Michigan.

## Cost

Your cost, if any, depends on when you performed the service under the state's Defined Benefit plan.

**Defined Benefit service before July 1, 1974.** If you were a Defined Benefit plan member with service before July 1, 1974, your cost is based on your actual earnings in the state system and the contribution schedule in effect at that time in the Michigan Public Schools Retirement System. In addition, interest is charged for each year that has elapsed since you performed the service. If your contributions and accrued interest remain in the state's Defined Benefit plan, these funds will be applied to your cost and your *Member Billing Statement* will reflect only the balance due.

**Defined Benefit service on or after July 1, 1974.** If you were a Defined Benefit plan member, there is no cost for your state service earned from July 1, 1974, through December 31, 1986. For service performed on or after January 1, 1987, your cost as a MIP member is 1.5 percent of any state wages received after that date, plus 8 percent interest is charged for each year that has elapsed since you performed the service. If your state of Michigan service includes purchases that are creditable in the Michigan Public Schools Retirement System, these purchases may be transferred, however additional costs may apply.

*Note:* Basic Plan members have no cost for post-1986 service because there are no additional MIP benefits to fund.

## Application Process

1. Send your completed application to:  
Office of Retirement Services  
P.O. Box 30171  
Lansing, MI 48909-7671
2. ORS will review your application upon receipt. If you are eligible to receive the credit at *no cost*, you will be notified of the credit granted to you. If there *is a cost*, you will be sent a *Member Billing Statement* along with information on payment options. This statement lists the amount of service you are eligible to purchase, the cost, and the due date. Although it is called a billing statement, you're not obligated to buy this credit.
3. To complete the purchase, follow the instructions on the billing statement.