



Illinois Municipal Retirement Fund

Manual For Authorized Agents 2003

Issued by Authority of the Board of Trustees of the
Illinois Municipal Retirement Fund
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www.imrf.org



IMRF Mission Statement, Vision, and Values

IMRF Mission Statement

It is the mission of this Fund to efficiently and impartially develop, implement, and administer programs that provide income protection to members and their beneficiaries on behalf of participating employers in a prudent manner.

Adopted September 26, 1991

IMRF Vision

To be the best provider of retirement services for public employees in the State of Illinois.

IMRF Values

HonestyBe truthful in what you think, say and do

AccuracyWhat you do affects the lives of others

EmpathyBe aware of the feelings of others

AccountabilityAnswer for one's conduct and obligations

CourageConfront new ideas and to change



2003 IMRF Board of Trustees

Executive Trustees

Elected by Participating Units of Governments (IMRF Employers)

John Lotus Novak		DuPage County
W. Thomas Ross	Vice President	Winnebago County
Martha H. Rademacher	Secretary	Park District Risk Management Agency
R. Steven Sonnemaker		Peoria County

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Elected by Participating Members (Employees who participate in IMRF)

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Rita J. Miotti		Village of Matteson
Marvin R. Shoop, Jr.		City of Peoria

Annuitant Trustee

Elected by IMRF Annuitants (Individuals receiving IMRF retirement benefits)

Sharon U. Thompson	(formerly) Lee County
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Quick Reference Guides to assist Authorized Agents

1. Procedure Check Lists

- Use the checklists as a **reference document** only, or
- Photocopy the checklists to complete and put in a member's file
- Order more checklists via Form 2.50, or
- Print additional copies via IMRF's website: www.IMRF.org/pubs/lists.htm

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1. **Should this Employee Be Enrolled?**
3. **Steps for Enrolling Employees in IMRF**
5. **Termination Check List**
7. **Disability Check List**
9. **Retirement Application Check List**
11. **Death Benefit Check List**

2. Forms Charts

- Indicate what form(s) should be used for specific situations.

- We suggest you refer to both the Check List and Forms Chart to ensure that all documentation/information needs are met.

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13. Current Year Reporting forms

- When a member enrolls in IMRF
- Correction/change to IMRF member record

14. • Reporting employer and member earnings and contributions
- Member is taking leave of absence
 - Reporting service for members paid irregularly
 - Reporting seasonal leave
 - Termination of IMRF participation status

15. Application for Benefits

- When a member retires
- When a member stops participating in IMRF

16. • Death of a member
- Member becomes disabled

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17. Reporting/changing service or wages for a PRIOR year

- Member's wages and/or contributions were reported in error
- Member was reported as Regular IMRF, should have been reported as SLEP
- Member wants to convert military service to IMRF service credit
- Member wants to repay a separation refund
- Member wants to purchase retroactive service

18. • Member wants to purchase omitted service
- Member wants to purchase prior service
 - Member wants to purchase out-of-state service
 - General Assembly member wants to purchase service earned as an elected official
 - ECO member wants to convert existing Regular or SLEP service to ECO service
 - Member payment for past service