

# Should this employee be enrolled in IMRF?

DO NOT submit this checklist to IMRF—for employer's use only.

Use this checklist to determine whether an employee should be enrolled in IMRF. (Use this checklist as a reference only or place a copy in the member's file. Do **NOT** submit it to IMRF.) This checklist also provides **documentation which should be placed in the employee's personnel file** for future use. (You can also refer to Section 3, "Coverage," in the Manual for Authorized Agents for details regarding which employees are covered by IMRF.) **If the employee is returning from retirement, see the IMRF web site for the most up to date Return to Work and Separation of Service rules.**

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

Member ID: \_\_\_\_\_ Date: \_\_\_\_\_

## Is this employee receiving an IMRF pension or in the process of applying for a pension?

Yes  
Stop completing this checklist.  
**Call IMRF at 1-800-728-7971**

No  
Continue completing this checklist.

### Check one:

New hire or rehire

New position

Promotion or employee assumed additional duties

Annual review of non-participants to evaluate the hourly requirement of their respective positions

### 1. What is the hourly standard of your employer? (Refer to your Employer Access account if you are not sure.)

600 hours effective \_\_\_\_\_

1,000 hours effective \_\_\_\_\_

### 2. If your employer adopted the 1,000-hour standard after it joined IMRF, did the employee work for your employer in a position requiring at least 600 hours before the 1,000-hour standard was adopted? (Refer to your Employer Access account if you are not sure when/if your employer adopted the 1,000-hour standard.)

Yes  
If yes, employee is grandfathered under the 600-hour standard for your employer only and must be enrolled if it is determined that his or her current position requires, equals, or exceeds 600 hours. This is true even if your employer is under the 1,000-hour standard. If you are enrolling the employee, complete the enrollment checklist, then create an Enrollments Data Collection in Employer Access.

No  
If no, go to question 3.

### 3. Determine the hourly requirements of the employee's position. Use the exact hours, if known. If not, make a good faith evaluation based on the job description, the history of the position, and the time required to do similar work.

a. Number of hours per day \_\_\_\_\_

Multiply a x b = \_\_\_\_\_

b. Number of days per week \_\_\_\_\_

Multiply the total of a x b by c = \_\_\_\_\_

c. Number of weeks per year \_\_\_\_\_

This total is the expected number of hours the position requires.

**4. If the employee will occupy or serve in more than one position with your employer, repeat the procedure in number 3 for each position.**

If the position or total of all positions requires, equals, or exceeds your employer's hourly standard, the employee should be enrolled immediately. Complete the enrollment checklist and create an Enrollments Data Collection in Employer Access.

**5. Is employee a police chief eligible for transfer into IMRF for SLEP coverage?**

Yes

If yes, does the position require the annual hourly standard? If the position qualifies, the police chief can choose to participate only if they participated in IMRF prior to 1/1/2019. If he or she elects participation, enroll the police chief by creating an Enrollments Data Collection in Employer Access. Eligible Police Chiefs have a three-month window to choose this option. See the [Authorized Agent manual section 3.80](#) for more information.

No

If no, go to question number 6.

**6. Is employee performing teacher aide duties?**

Yes

(the employee will provide instructional support in the classroom, tutor, supervise students, or perform clerical tasks required by teachers)

If yes, does the position require the annual hourly standard?

If the position qualifies, the teacher aide should be enrolled immediately by creating an Enrollments Data Collection in Employer Access.

No

If no, go to question number 7.

**7. Is employee a governing body official?**

Yes

If yes, has your governing body:

- Determined that this position requires the hourly standard?\*
- Filed a resolution with IMRF certifying that the position meets the hourly requirement?\*

(You can view your Employer's IMRF resolutions through your Employer Access account.)

If the answer to both of these questions is yes, the official can choose to participate at any time. Once the official chooses to participate, the decision cannot be revoked later. If he or she elects participation, have them fill out the Election to Participate for Qualifying Position form and enroll the official by creating an Enrollments Data Collection in Employer Access.

*\*If this employee was first elected or appointed to this position on or after 1/1/2018, the position must require 1,000 hours to be eligible for IMRF participation.*

No

If no, go to question number 8.

**8. Is employee a city hospital worker or a non-governing body elected official?**

Yes

If yes, does the position require the annual hourly standard?

If the position qualifies, the employee can choose to participate at any time. Once the employee chooses to participate, the decision cannot be revoked later. If he or she elects participation, have them fill out the Election to Participate for Qualifying Position form and enroll the employee by creating an Enrollments Data Collection in Employer Access.

No

If no, this checklist has been completed. You should have determined whether this employee should be enrolled.