

Joining or Enlarging Process QRG – Employer

Use this Quick Reference Guide (QRG) for steps to join PERF, TRF, or the 1977 Fund or enlarge for PERF only.

1. Joining

Contact INPRS to inform INPRS that you want to join. To initiate the process, you may contact our Employer Advocate (EA) Team directly at (888) 876-2707. All instructions, forms, and documentation for joining are only available from the EA Team.

Joining or Enlarging Process

- **Joining (by Fund)**
 - PERF
 - TRF
 - 1977 Fund
- **Enlarging**
 - PERF

1.1 PERF

Prior to beginning this process, consider reviewing the fact sheets provided on the INPRS website.

- [PERF My Choice Plan Information for Political Subdivision Employers](#)
- [PERF Hybrid vs. My Choice Plan Fact Sheet for Local Government Units \(PSD\)](#)

You may participate in PERF by completing the following steps:

- a. An assigned Employer Advocate (EA) determines your current participation status to determine if you are eligible to join. If an employer is not eligible to join PERF, the EA informs you and provide the applicable Indiana Code(s).
- b. If you are eligible join PERF, the EA informs you of the plans provided by the Indiana Public Retirement System. The EA also provides the following forms to you in an email to initiate and complete the joining process:
 - 1) **New Unit Initial Information** email
 - 2) **Actuarial Survey**, if applicable. This is only required if your unit wants to purchase prior service in the PERF Hybrid Plan.
 - 3) **PERF Employer Joining Resolution:** [Resolution Electing to Join the Public Employees' Retirement Fund \(PERF\) Hybrid Plan as Administered by the Indiana Public Retirement System](#) or [Resolution Electing to Join the Public Employees' Retirement Fund \(PERF\) My Choice Plan as Administered by the Indiana Public Retirement System](#) is only available from the EA Team.
 - 4) **Authorized Agent:** [Authorized Agent Designated to Perform Necessary Duties \(State Form 54190\)](#) is available by this link and from the INPRS website.
 - 5) **ERM Data Setup:** [Employer Reporting and Maintenance \(ERM\) System Online Data Setup and User Authorization \(State Form 54851\)](#) is available by this link and from the INPRS website.
- c. The EA follows-up with you via a phone call within a week following the date the forms above were completed and received by INPRS. In this phone call, the EA confirms if you want to move forward or purchase prior service. The EA also confirms what plans your unit is considering participation.
- d. Once the resolution is submitted, the EA reviews the resolution for accuracy.
- e. The EA emails you with a new unit approval letter attached and the original resolution containing a PERF seal. Also, a new unit submission number is provided.

Joining or Enlarging Process QRG – Employer

- f. You begin reporting and entering information into Employer Reporting and Maintenance (ERM). For further information about ERM go to the [Employer Reporting & Maintenance](#) page on the INPRS website.

NOTE: INPRS collaborates with you to set an agreed effective date. Employer participation in PERF is effective after receiving acceptance by INPRS and approval by the unit's governing board.

1.2 TRF

Contact INPRS to inform INPRS that you want to join. To initiate the process, you may contact our Employer Advocate (EA) Team directly at (888) 876-2707. All instructions, forms, and documentation for joining are only available from the EA Team.

Prior to beginning this process, consider reviewing the fact sheets provided on the INPRS website.

- [TRF Hybrid Plan at a Glance](#)
- [TRF My Choice: Retirement Savings Plan at a Glance](#)
- [TRF Hybrid vs. My Choice: Retirement Savings Plan Fact Sheet](#)

Under [IC 5-10.4](#) and [35 IAC 14-1](#), if you are a public school, you are required to join both plans (Hybrid and My Choice); however, Charter Schools are not eligible for My Choice.

- a. An assigned EA determines your current participation status to determine if you are eligible to join. If an employer is not eligible to join the EA informs you and provide the applicable Indiana Code(s).
- b. If you are eligible join the EA informs you of the plans provided by INPRS. The EA also provides the following forms to you in an email to initiate and complete the joining process:
 - 1) **TRF Employer Enrollment:** [Teachers' Retirement Fund \(TRF\) Employer Enrollment \(State Form 53268\)](#) or the [Teachers' Retirement Fund \(TRF\) Indiana Charter School Participation Election \(State Form 54664\)](#), as applicable are only available from the EA Team.
 - 2) **TRF Resolution for Employer Pick-up of Mandatory Member Contributions:** [Resolution for Employer Pick-up of the Mandatory Member Contribution \(State Form 55544\)](#) is only available from the EA Team.
 - 3) **Authorized Agent:** [Authorized Agent Designated to Perform Necessary Duties \(State Form 54190\)](#) is available by this link and from the INPRS website.
 - 4) **ERM Data Setup:** [Employer Reporting and Maintenance \(ERM\) System Online Data Setup and User Authorization \(State Form 54851\)](#) is available from the EA Team.
 - 5) **Member Election:** [Teachers' Retirement Fund \(TRF\) Retirement Fund Election \(State Form 55195\)](#)
- c. The EA follows-up with you via a phone call one week following the date the forms above were submitted to you and returned to INPRS. In this phone call, the EA confirms if you desire to move forward.
- d. Once the [Teachers' Retirement Fund \(TRF\) Employer Enrollment \(State Form 53268\)](#) is submitted, the EA reviews it for accuracy.
- e. The EA emails you with a new unit approval letter attached. Also, a new unit submission number is provided.

Joining or Enlarging Process QRG – Employer

- f. You begin reporting and entering information into ERM. For further information about ERM go to the [Employer Reporting & Maintenance](#) page on the INPRS website.

NOTE: Teachers in private teaching services, charter schools, turnaround academies, or other alternative educational schools are not eligible to be members of TRF My Choice. ([35 IAC 14.1-4-1](#))

1.3 1977 Fund

Contact INPRS to inform INPRS that you want to join. To initiate the process, you may contact our Employer Advocate (EA) Team directly at (888) 876-2707. All instructions, forms, and documentation for joining are only available from the EA Team.

Prior to beginning this process, consider reviewing the fact sheets provided on the INPRS website.

- [Police and Firefighters Membership at a Glance](#)
- a. Access the [1977 Fund Eligibility Assessment Questionnaire](#) from the [Administering PERF TRF and the 1977 Fund as an employer](#) page of the [INPRS website](#). Complete it and submit it to the EA Team by fax, email, or delivered to INPRS at:
 - One North Capitol Avenue, Suite 001
 - Indianapolis, IN 46204-2014
 - Fax: (317) 234-6692
 - E-mail: eppa@inprs.in.gov
- b. Upon receipt and review of the [1977 Fund Eligibility Assessment Questionnaire](#) the EA gathers additional information to determine if you are eligible to join the 1977 Fund.
- c. If you are eligible to join, the EA provides the following forms that are needed to initiate and complete the joining process:
 - 1) **1977 Fund Employer Joining Resolution:** [Resolution Electing to Join the 1977 Police Officers' and Firefighters' Pension and Disability Fund as Administered by the Indiana Public Retirement System](#) is only available from the EA Team.
 - 2) **Actuarial Survey**, if applicable. This is only required if your unit wants to purchase prior service in the 1977 Fund.
 - 3) **Authorized Agent:** [Authorized Agent Designated to Perform Necessary Duties \(State Form 54190\)](#) is available by this link and from the INPRS website.
 - 4) **Certified Salary:** [1977 Fund Certification of Salary for First-Class Police Officers and Firefighters \(State Form 53007\)](#) is only available from the EA Team.
 - 5) **ERM Data Setup:** [Employer Reporting and Maintenance \(ERM\) System Online Data Setup and User Authorization \(State Form 54851\)](#) is available from the EA Team.
 - 6) **Employee Application:** [1977 Police Officers' & Firefighters' Fund Application for Membership \(State Form 4928\)](#) is only available from the EA Team. This form is also referred to as the Statewide Baseline Examination and variations thereof.

To join, a member must pass the requirements outlined in the [1977 Police Officers' & Firefighters' Fund Application for Membership \(State Form 4928\)](#) (Statewide Baseline Examination)

Joining or Enlarging Process QRG – Employer

NOTE: The age requirement is waived when the new unit joins.

You begin reporting and entering information into the ERM. For further information about ERM refer to the [Employer Reporting & Maintenance](#) page on the INPRS website.

2. Enlarging

Only PERF allows enlargement.

Contact INPRS to inform INPRS that you want to enlarge your membership. To initiate the process, you may contact our Employer Advocate (EA) Team directly at (888) 876-2707. All instructions, forms, and documentation for joining are only available from the EA Team.

2.1 PERF

- a. To enlarge the positions covered by PERF within your organization, contact the INPRS EA Team directly at (888) 876-2707
- b. The person contacting INPRS must be an Authorized Agent/Designee in ERM.
The EA verifies the submission unit number, address, phone number, email, and the title/types of positions that you want to add.
 - 1) The EA verifies that the titles/types of positions you want to add are not already covered.
- c. The EA informs you that an actuarial survey is required if purchasing prior service.
- d. The EA prepares an email to you that includes attachments:
 - 1) **PERF Employer Enlarging Resolution:** *Resolution Electing to Enlarge the Public Employees' Retirement Fund (PERF) Hybrid Plan as Administered by the Indiana Public Retirement System* or *Resolution Electing to Enlarge the Public Employees' Retirement Fund (PERF) My Choice Plan as Administered by the Indiana Public Retirement System*, as applicable, is only available from the EA Team.
 - 2) **Actuarial Survey**, if applicable. This is only required if your unit wants to purchase prior service in the PERF Hybrid Plan.
- e. The EA contacts you one week before the information is due if it has not already been received at INPRS. If the information has not been received, a reminder email with the due date is sent to you.

NOTE: Effective December 31, 2009, employers are to submit contributions, records, and reports electronically in a uniform format through a secure connection over the Internet. Set up of employer, users, wage and contribution submissions and instructions on completing tasks are included in the manuals and QRGs available on the [ERM – Manuals](#) page and the [ERM – Quick Reference Guides](#) page of the INPRS website.

Joining or Enlarging Process QRG – Employer

NOTE: Effective July 1, 2022, SEA 78 provides that if INPRS determines that a new full-time police officer or full-time firefighter in PERF should be a member of the 1977 Fund, INPRS shall require the employer to transfer the member into the 1977 Fund and contribute the amount that INPRS determines is necessary to fund fully the member's service credit in the 1977 Fund for all service earned as a full-time police officer or full-time firefighter in PERF. Provides that a police officer or firefighter who is an active member of the 1977 Fund with an employer that participates in the 1977 Fund, separates from that employer, and more than 180 days after the date of the separation becomes employed as a full-time police officer or full-time firefighter with the same or a second employer that participates in the 1977 Fund, is a member of the 1977 Fund without meeting the age limitations under certain circumstances. However, the individual must pass the statewide baseline physical and local board mental examinations. ([IC 36-8-8-3](#), [IC 36-8-8-5](#), [IC 36-8-8-7](#))