



III. Membership

1. Employer Responsibility

- a. It is the responsibility of employers to identify employees who are required by statute to become members of TRS as well as to determine the eligibility of all other employees and enroll them accordingly.

2. Classified (Mandatory) TRS Membership

- a. All classified personnel are to become members of TRS as a condition of their employment, regardless of the number of hours worked or the age of the employee.

Governance

70 O.S. § 17-103 Membership of Retirement System

(1) All classified personnel shall become members of the retirement system as a condition of their employment;

- b. The term "classified" is not to be confused with "certified."
- c. The following employees are considered to be "classified personnel" by TRS and are required to be members with the exception of employees of Comprehensive Universities subject to the Alternate Retirement Plan:
 - i. Any teacher, principal, superintendent, supervisor, administrator, librarian, certified or registered nurse, college professor, or college president whose salary is paid wholly or in part from public funds.
 - ii. Any employee of any state department, board, board of regents or board of trustees, who is in a supervisory or an administrative position, the function of which is primarily devoted to public education (at the discretion of the Board of Trustees of the Teachers' Retirement System).
 - iii. The term "teacher" also includes instructors and counselors employed by the Department of Corrections and holding valid teaching certificates issued by the State Department of Education. Provided that a person employed by the Department of Corrections as an instructor or counselor shall have been actively engaged in the teaching profession for a period of not less than three (3) years prior to employment to be eligible to participate in TRS. The Department of Corrections shall contribute the employer's share to TRS.



Governance

70 O.S. § 17-103 – Membership of Retirement System

(2) All full-time nonclassified optional personnel regularly employed for more than one (1) year may join the Teachers' Retirement System subject to the rules and regulations adopted pursuant to this act. Subject to the outcome of the private letter ruling request (2003) submitted by the Board of Trustees to the Internal Revenue Service (2001), the retirement system shall permit eligible nonclassified optional personnel who have ceased to make otherwise required employee contributions after having made an election to become a member of the retirement system to resume employee contributions. No service shall be credited to any such member for any period of time during which employee contributions were not made;

70 O.S. § 17-101 – Definitions

(3) "Classified personnel" shall mean any teacher, principal, superintendent, supervisor, administrator, librarian, certified or registered nurse, college professor, or college president whose salary is paid wholly or in part from public funds. An employee of any state department, board, board of regents or board of trustees, who is in a supervisory or an administrative position, the function of which is primarily devoted to public education, shall be considered classified personnel under the meaning of this act, at the discretion of the Board of Trustees of the Teachers' Retirement System. The term "teacher" shall also include instructors and counselors employed by the Department of Corrections and holding valid teaching certificates issued by the State Department of Education. Provided, that a person employed by the Department of Corrections as an instructor or counselor shall have been actively engaged in the teaching profession for a period of not less than three (3) years prior to employment to be eligible to participate in the Oklahoma Teachers' Retirement System. The Department of Corrections shall contribute the employer's share to the Oklahoma Teachers' Retirement System.

3. Non-Classified (optional) TRS Membership

- a. Non-classified personnel who are eligible for membership may join TRS if they so choose if they have been regularly employed for more than (1) year.
- b. Non-classified optional personnel includes teacher's aides, cooks, janitors, non-supervisory maintenance personnel, bus drivers, non-certified or non-registered nurses, non-certified librarians and clerical employees.
- c. The function of the employee must be primarily devoted to public education.
- d. The salary of the employee must be paid wholly or in part from public funds.
- e. Employee must work 20 hours or more per week.
- f. Employee must be in a non-supervisory position.
- g. Upon being regularly employed for more than one (1) year, non-classified optional employees may choose to join TRS at any time. However, contributions cannot be paid on a partial year if the employee works the full year. See "Contributions for Membership Service" for more detail
- h. Non-classified members may opt out of membership while continuing employment. See section on "Optional Withdrawal" for more information on the consequences of an optional withdrawal from membership.



- i. Retirees of TRS are not required to be active members of TRS but may choose to suspend their monthly retirement benefit and return to active contributing status. If the retiree does not suspend their retirement benefit, postretirement contributions must be paid by the employer. See section on "Postretirement Employment" for more information.

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70 O.S. § 17-101 – Definitions

(4) "Nonclassified optional personnel" shall include cooks, janitors, maintenance personnel not in a supervisory capacity, bus drivers, noncertified or nonregistered nurses, noncertified librarians, and clerical employees of the public schools, state colleges, universities or any state department, board, board of regents or board of trustees, the functions of which are primarily devoted to public education and whose salaries are paid wholly or in part from public funds.

715:10-1-4. Optional TRS membership

The following employees are eligible to be members of the Teachers' Retirement System at their option:

(1) "Non-classified" employees employed by the public, state-supported educational institutions in Oklahoma for twenty (20) hours or more per week at a rate of compensation comparable to other persons employed in similar positions and receive payment for service by a school or state warrant, recorded on a warrant register with standard payroll deductions, and receive benefits generally provided to regular employees.

(2) Any member absent from the teaching service who is eligible to continue membership under special provisions of 70 O.S. 17-116.2, provided that such employee continues to be employed by a governmental agency.

(3) A visiting professor from another state or nation.

(4) Classified and Non-Classified members employed after retirement. (See OAC 715:10-17-13).

(5) Full-time, non-classified optional personnel who previously have opted out of TRS under OAC 715:10-11-2 may revoke their election and return to TRS participation. Providing, however, that such member is not eligible to redeposit the account withdrawn under OAC 715:10-11-2 or purchase credit for service performed after termination of membership and re-instatement of membership.



4. Ineligible for TRS Membership

- a. Non-retired employees working in the following positions are ineligible for TRS membership:
 - i. Non-classified employees working less than 20 hours per week,
 - ii. Substitute, irregular, seasonal, graduate assistant, fellowship recipient, adjunct supplemental or temporary employees,
 - iii. Consultants or contractors as approved by TRS,
 - iv. Student employees,
 - v. Employees whose compensation comes from federal or other funds and is not administered by an Oklahoma public education employer (not paid by the employer on a state warrant),
 - vi. Employees hired after July 1, 1991 who are covered by another federal, state, county or local public retirement plan,
 - vii. Employees of non-governmental employers,
 - viii. Employees of the University of Oklahoma, Health Sciences Center or Oklahoma State University who elected to participate in the alternate retirement plan.

- b. Retirees working in the above-listed positions will have postretirement contributions remitted to TRS on work performed. See "Postretirement Employment" for more information.



Governance

[715:10-1-5. Ineligible for TRS membership](#)

The following employees are ineligible to be members of the Teachers' Retirement System. (Note: Ineligible employment cannot be combined with eligible employment.)

- (1) A non-classified employee working less than 20 hours per week.
- (2) A substitute, irregular, seasonal, graduate assistant, fellowship recipient, adjunct supplemental or temporary employee. (Note: Certain substitute and adjunct employment may qualify for service credit. See OAC 715:10-5-2 and OAC 715:10-5-34).
- (3) Persons employed as a consultant or persons contracting with a public school to transport students, to provide food service, or to provide any other services, who are not "regular" employees of the school. (NOTE: School bus drivers or food service personnel who are regular employees of the school are eligible for membership, subject to the requirements of OAC 715:10-1-2, 10-1-4, 10-1-5.)
- (4) An employee whose primary function at a school or institution is that of a student. If both the following conditions apply, a person employed in an Oklahoma public school, college or university shall be considered to be a student employee.
 - (A) The employment is conditional upon the employee's being enrolled as a student at the same institution; and
 - (B) The employee has no other employment during the same payroll period which is eligible for membership in TRS.
- (5) Any persons whose employment compensation comes from federal or other funds and is not administered by an Oklahoma public education employer. (Note: If the employee is not paid by the school on a state warrant, the employee is not considered to be an employee of the school or the State of Oklahoma. Regular employees whose salaries are paid in part or in whole by federal or other funds are eligible for membership if they were hired by the school and paid by the school.)
- (6) Any person employed by the public schools of Oklahoma after July 1, 1991, who is covered by another federal, state, county or local public retirement plan which will provide benefits on the employment service covered by the Teachers' Retirement System.
- (7) Employees of employers that are not governmental employers within the definition of Internal Revenue Code Section 414 and 70 O.S. 17-116.2J.
- (8) Any person employed by the University of Oklahoma or Oklahoma State University or the entities of either comprehensive university who elects to participate in an alternative retirement plan provided by the comprehensive university as provided by the Alternate Retirement Plan for Comprehensive Universities Act.



5. Enrolling in TRS

- a. Electronic enrollment through monthly submission reports
 - i. New employees are automatically enrolled with their first monthly submission of contributions. Subsequent submissions will update the employee's information if any changes are made.
 - ii. The personal information to be submitted is:
 1. Tax number and tax number type,
 2. First Name, Middle Name, Last Name and Suffix. Middle Name and Suffix may be blank if non-applicable,
 3. Birth Date: Format is YYYY-MM-DD,
 4. Gender, and
 5. Address1, Address2, City, State, Zip Code. Address 2 may be blank if non-applicable.
 - iii. See section on Monthly Reports for more information.
- b. Personal Data Form
 - i. TRS must have a current Personal Data Form for every member, both active and retired.
 - ii. Active (non-retired) members use TRS FORM 1A
<https://www.ok.gov/TRS/documents/Form1R-Personal-Data-Form.pdf>
 - iii. Retired members use TRS FORM 1R
<https://www.ok.gov/TRS/documents/Form1R-Personal-Data-Form.pdf>
 - iv. The form should be completed under the following circumstances:
 1. New employees who will participate in TRS,
 2. Employees who transferred from another district or educational institution,
 3. Employees who have changed any portion of their personal information (i.e. name, address, position worked, etc.).
- c. Beneficiary Forms
 - i. TRS must have a current beneficiary designation for every member, both active and retired.
 - ii. Active (non-retired) members use TRS FORM 2A
<https://www.ok.gov/TRS/documents/Form2A-Designation-of-Beneficiary-NotRetired.pdf>
 - iii. Retired members use TRS FORM 2R
<https://www.ok.gov/TRS/documents/Form2R-Designation-of-Beneficiary-Retired.pdf>
 - iv. TRS must receive the beneficiary form before it is valid.
- d. Forms may be mailed to PO Box 53524 Oklahoma City OK 73152 or faxed to 405-522-2521.
- e. For security reasons, please do not email forms.

**6. Personal Information Changes**

- a. Changes may be made in writing with TRS forms.
 - i. Active (non-retired)) members use TRS FORM 1A
<https://www.ok.gov/TRS/documents/Form1R-Personal-Data-Form.pdf>
 - ii. Retired members use TRS FORM 1R
<https://www.ok.gov/TRS/documents/Form1R-Personal-Data-Form.pdf>
 - iii. Forms may be mailed to PO Box 53524 Oklahoma City OK 73152 or faxed to 405-522-2521.
 - iv. For security reasons, please do not email forms.
- b. Changes may be made in the member portal.
 - i. Enroll in MyOTRS at <https://myotrs.trs.ok.gov/>