



Employer Portal Post Retirement Manual



Post Retirement Data Collections

If your agency takes part in Post Retirement employment, information regarding reporting requirements follows. Post Retirement Sheet is shown on page 2. This is a guide on how to report post retirement employment and who is required to report their time.

Post Retirement Employment:

Can I work? How much can I earn? Who can I work for?

Rhode Island law limits when, how much and for whom retirees from the Employees' Retirement System of Rhode Island can work. There are also certain reporting requirements that employers and retirees must follow. It is important to understand and follow the rules because if you don't your pension payments may be suspended.

Below is ERSRI's Post Retirement Employment Cheat Sheet and [Post Retirement Employment Frequently Asked Questions](#).

If you're still wondering how the post retirement employment statutes affect you, please contact ERSRI by e-mail at our [Contact Us](#) page.

Note: Effective October 1, 2016, retirees must have a 45 day break in service prior to beginning post retirement employment.



Post Retirement Employment Overview

What's Allowed and What's Required?

You have Retired and Want to Work for...	Post Retirement Work Allowed?	45 Day Break in Service Required? (1)	Gross Income Limit (2)	Day Count Limit (3)	Reporting Requirements
State of Rhode Island	No	N/A	N/A	N/A	N/A
Rhode Island State College, University or School	Yes, with limits	Yes	\$18,000 per calendar year	No	Completion of the Monthly Notification of Post Retirement Employment form
Rhode Island State Nursing Facility (4)	Yes, with limits	Yes	No	75 Full Days, 150 Half Days per CALENDAR year	Completion of the Monthly Notification of Post Retirement Employment form
MERS City or Town	Yes, with limits	Yes	No	75 Full Days, 150 Half Days per CALENDAR year	Completion of the Monthly Notification of Post Retirement Employment form
Rhode Island Public School	Yes, with limits	Yes	No	90 Full Days, 180 Half Days per SCHOOL year	Completion of the Monthly Notification of Post Retirement Employment form. School districts must also send ERSRI an annual "good faith" letter for any vacant position.
Non-MERS City or Town	Yes	No	No	No	None
Private Company or Non-Profit (excludes consulting to the State of RI, MERS cities or towns, and RI public schools)	Yes	No	No	No	None
Out of State Public Sector Work (eg. MA or CT)	Yes	No	No	No	None

(1) **45 Day Break in Service:** As of 10/1/16 retirees must wait 45 calendar days (previously 30 days) between their retirement date and first day of post retirement employment.

(2) **Gross Income Limit:** The gross annual income allowed by retirees in post retirement employment prior to suspending their pension. Income is counted for the year it was earned regardless of the date a retiree was paid.

(3) **Day Count Limit:** The number of days a retiree is allowed to work in post retirement employment prior to suspending their pension.

(4) Retired nurses may also be employed as a faculty member at a state college or university under the same day count limit.



To create a Post Retirement Data Collection, click on Business Function, Data Collection, and New. Next, select the “Post Retirement Employment” configuration and fill required information. Click “Submit For Creation”

New/Edit data collection

×



Configuration * :	<input type="text" value="Post-Retirement Employment"/>	▼
Name * :	<input type="text" value="1301_SMITH_04302016_PR"/>	
Employer * :	<input type="text" value="1301"/>	▼
Plan * :	<input type="text" value="ERS"/>	▼
Period Start Date * :	<input type="text" value="4/1/2016"/>	
Period End Date * :	<input type="text" value="4/30/2016"/>	

[← Return To List](#)

[Submit For Creation](#)



[Return to the Data Collections screen and select the file which was created.](#)

Home Members Business Functions Reports & Documents Administration Help

1301_SMITH_04302016_PR (CAS-36579-S6S2G4)
Configuration : Post-Retirement Employment
Employer : 1301 Plan : ERS

Definition Data Input Summary Validation Summary Process Summary

File Input

+ Add File Delete

File Name	Status	Message

Data Input Summary

+ Add Edit Delete

Post-Retirement Employment	Input Type
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In the Data Input Summary page, Double Click “ Add” and click on the “Post-Retirement Employment”. The data Input Detail template will open. Enter all information as required. All fields must be filled. Add zeros in the Financial Information section as needed.



Post-Retirement Employment Position Codes

Financial information

Post-Retirement Wages

Post-Retirement Days Worked

PRIS - Retired employee who returned to work as a substitute or vacant position at a state school

PRSB - Retired teacher who returned to work as a substitute teacher

PRAM - Retired teacher who returned to work as a teacher or other certified position in a school department (vacant position)

PRME - Retired employee who returned to work as a municipal employee

When selecting the type of post retirement for the member, refer to the “Post Retirement Employment Positions” on pages 10 and 11 in order to better understand which code is required.



DATA INPUT DETAIL

Complete all fields. Choose the position code from the drop down menu. Enter the days worked during the begin and end date that was submitted. Click save.

Note: All teachers report their “Financial Information” in the “Post Retirement Days Worked” box except teachers who are currently working for RI state College, University or School. These teachers report their Gross Income for Post Retirement. MERS and RI Public School Employees report their Days Worked.

Data Input Detail

Input Type : Post-Retirement Employment Source : Manual Entry

Key fields

Social Security Number *	000000000
Organization Code *	1301
Begin Date *	4/1/2016
End Date *	4/30/2016

Employee personal information

Last Name *	SMITH
First Name *	JANE
Position Code *	PRST - Retired employee who returned to work at a

Financial information

Post-Retirement Wages	1,200.00
Post-Retirement Days Worked	0.00

Save Cancel



Post Retirement Data Corrections

If you have any corrections to post-retirement reporting, you may make changes to previous periods by entering the change as a negative.

When validated, it will give you a warning. Highlight the row and approve the warning. This will allow the correction to post.

Data Input Detail ✕

Input Type : Post-Retirement Employment Source : Manual Entry ?

Key fields

Social Security Number *	<input type="text" value="000000000"/>
Organization Code *	<input type="text" value="1571"/> ▼
Begin Date *	<input type="text" value="9/1/2016"/> 📅
End Date *	<input type="text" value="9/30/2016"/> 📅

Employee personal information

Last Name *	<input type="text" value="SMITH"/>
First Name *	<input type="text" value="Mary"/>
Position Code *	<input type="text" value="PRAM - Retired teacher who returned to work as a t"/> ▼

Financial information

Post-Retirement Wages	<input type="text" value="0.00"/>
Post-Retirement Days Worked	<input type="text" value="-12.00"/>

💾 Save ✕ Cancel



At completion of adding all the post retirement records, click on **Validate**.

1301_04012016_04302016_pr (CAS-01846-Z6S4X6) Status : Initial Data Entry
 Configuration : Post-Retirement Employment (w/o verification) Period : 4/1/2016 to 4/30/2016
 Employer : 1301 Plan : ERS

Definition **Data Input Summary** Validation Summary Process Summary

File Input

[+ Add File](#) [Delete](#) [View Extraction Report](#) [Get Template](#)

File Name	Status	Message

[Synchronize](#)

Data Input Summary

[+ Add](#) [Edit](#) [Delete](#) View : All

Error	Source	Input Type	Last Name	First Name
	Manual Entry	Post-Retirement Employment	DiSerio	Giuseppe
	Manual Entry	Post-Retirement Employment	Rodrigues	Suzanne

[Return To List](#) [Validate](#) [Validate & Load](#)



Data Collections

[+ New](#) [Start/Continue](#)

Employer Number	Employer Name	Plan	Case Id	Name	Configuration	Status	Start date	End date
1412	City of Pawtucket	MERS	CAS-169596-D3X9W1	City of Pawtucket- Jan 2017-PR	Post-Retirement Employment	Action Definition	1/1/2017	1/31/2017

To view possible errors or warning, highlight the data collection and click [Start/Continue](#)



1301_04012016_04302016_pr (CAS-01846-Z6S4X6) Status : Action Definition

Configuration : Post-Retirement Employment (w/o verification) Period : 4/1/2016 to 4/30/2016

Employer : 1301 Plan : ERS

Definition | Data Input Summary | Validation Summary | Process Summary

Open | Export View : All Validations

Severity	Ariel Record	Ariel Field	Message Id	Message	Cases With Action	Members With Action
Warning	Employment		2939	Please provide a good faith letter.	0/1	0/1

After validation, if this warning appears, highlight the row and approve the warning. Click validate.



At completion of adding all the post retirement records, click on Validate.

1301_04012016_04302016_pr (CAS-01846-Z6S4X6) Status: Initial Data Entry
 Configuration: Post-Retirement Employment (w/o verification) Period: 4/1/2016 to 4/30/2016
 Employer: 1301 Plan: ERS

Definition | Data Input Summary | Validation Summary | Process Summary

File Input

+ Add File | Delete | View Extraction Report | Get Template

File Name	Status	Message

Synchronize

Data Input Summary

+ Add | Edit | Delete | View: All

Error	Source	Input Type	Last Name	First Name
	Manual Entry	Post-Retirement Employment	DiSerio	Guiseppe
	Manual Entry	Post-Retirement Employment	Rodriguez	Suzanne

Return To List | Validate | Validate & Load

1301_04012016_04302016_pr (CAS-01846-Z6S4X6) Status: Action Definition
 Configuration: Post-Retirement Employment (w/o verification) Period: 4/1/2016 to 4/30/2016
 Employer: 1301 Plan: ERS

Definition | Data Input Summary | Validation Summary | Process Summary

Open | Export | View: All Validations

Severity	Ariel Record	Ariel Field	Message.Id	Message	Cases With Action	Members With Action
Warning	Employment		2939	Please provide a good faith letter.	0/1	0/1

After validation, if this warning appears, highlight the row and approve the warning. When the quality ratio and target ratio are 100% on the “Process Summary” tab, click on

Validate & Load



Employees' Retirement
System of Rhode Island

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1111 Sept Postretirements (CAS-178809-T9L2W5)

Configuration : Post-Retirement Employment

Employer : 1111

Plan : ERS

Definition Data Input Summary Validation Summary Process Summary

Open Export

Severity	Ariel Record	Ariel Field	Message Id	Message
Complete Member Error	Person		1798	The provided Social Security Number does not match any employee currently in the database. Please validate the information.

If an incorrect SSN has been entered, delete the data collection and start the process again.



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City of Pawtucket- Jan 2017-PR (CAS-169596-D3X9W1)

Configuration : **Post-Retirement Employment**

Employer : **1412**

Plan : **MERS**

[Definition](#) [Data Input Summary](#) [Validation Summary](#) [Process Summary](#)

Open

Export

Severity	Ariel Record	Ariel Field	Message Id	Message
Complete Member Error	Service Event	Target Date	6704	null

For this error, highlight the error, and click open.



Validation Detail

Ariel Record : Service Event Ariel Field : Target Date

Message Id : 6704

Message :

Severity : Complete Member Error

Open Member

View : All Members

<input type="checkbox"/>	S S N	Last Name	First Name	M... Id	Message	Act... E...	Hig... Severit	Err... with Action	Wa... with Action	Conflict
<input type="checkbox"/>	0...	Dubois	Barry	6704	The target date of the transaction 1/31/2017 must be equal to or after the date o...	Undefin...	Comple...	0/1	0/0	<input type="checkbox"/>
<input type="checkbox"/>	0...	Cassidy	Michael	6704	The target date of the transaction 1/31/2017 must be equal to or after the date o...	Undefin...	Comple...	0/1	0/0	<input type="checkbox"/>

To fix this error, please call the W&C staff at ERSRI.



Employees' Retirement
System of Rhode Island

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cderhagopian@ersri.org

City of Pawtucket- Jan 2017-PR (CAS-169596-D3X9W1)

Status : Action Definition

Configuration : Post-Retirement Employment

Employer : 1412

Plan : MERS

Period : 1/1/2017 to 1/31/2017

Definition Data Input Summary Validation Summary **Process Summary**

Open Export

View : All Validations

Severity	Ariel Record	Ariel Field	Message Id	Message	Cases With Action	Members With Action
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When all errors have been corrected and warnings have been approved, the screen will look like this. Click on the “Process Summary” tab.



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City of Pawtucket- Jan 2017-PR (CAS-169596-D3X9W1)

Configuration : Post-Retirement Employment
Employer : 1412

Plan : MERS

- Definition
- Data Input Summary
- Validation Summary
- Process Summary

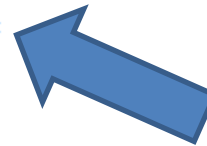
Current Quality Ratio : 100 % Target : 100 %

Member Action Summary

Action	Total
Data Correction	0
Load Member With Approved Warnings	0
Load Member	3
Undefined	0
Total	3

Reports

- [D0000tra.xlsx](#)
- [D0000sta.xlsx](#)
- [D0000ctl.xlsx](#)



To check the totals of the data entered, click on “D0000sta.xlsx” report.



Client Name	Employees Retirement System of Rhode Island	
Summary of	1371_MCGOVERN_08312017_PR (CAS-180747-C4H3Q1)	
Employer# / Name	1371	North Kingstown School Dept.
File Name		
File Status	Final	
Total Records Processed	1	
No Error With Warnings		
Service Event PSRE Service		3.5

Verify the data matches what was entered. For example, the number of days should be the total entered for all retirees. Exit out of the excel spreadsheet to return to the “Process Summary” tab.



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City of Pawtucket- Jan 2017-PR (CAS-169596-D3X9W1)

Configuration : **Post-Retirement Employment**

Employer : **1412**

Plan : **MERS**

[Definition](#)[Data Input Summary](#)[Validation Summary](#)[Process Summary](#)

Current Quality Ratio :

100 %

Target :

100 %

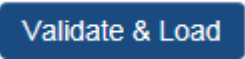
Member Action Summary

Action	Total
Data Correction	0
Load Member With Approved Warnings	0
Load Member	3
Undefined	0
Total	3

Reports

- [D0000tra.xlsx](#)
- [D0000sta.xlsx](#)
- [D0000ctl.xlsx](#)

At the bottom right corner of this screen, click the data collection.



. This completes



Post-Retirement Employment Positions

PRSB – Substitute Teaching Position – Return to work as a substitute teacher.

- Monthly pension benefits WILL be suspended if there is no 45 day break in service after retirement date
- Limit: 90 full days or 180 half-days in any one school year
 - ▣ After this limit, the monthly pension benefits need to be suspended

PRAM – Vacant Teaching Position – return to work as an administrator, guidance counselor, or other certified position in a school department (vacant position).

- Monthly pension benefits WILL be suspended if there is no 45 day break in service after retirement date
- Limit: 90 full days or 180 half-days in any one school year
 - ▣ After this limit, the monthly pension benefits need to be suspended
- The employer needs to certify in writing that it has made a good faith effort to fill the position with a non-retired employee without success.

PRIS – Substitute or vacant position at a state school – returned to work as an instructor at a state school.

- Monthly pension benefits WILL be suspended if there is no 45 day break in service after retirement date
- Limit: Gross wages cannot exceed \$18,000 in any one calendar year
 - ▣ After this limit, the monthly pension benefits need to be suspended



Post-Retirement Employment Positions

PRME – Participating Municipalities Position – Return to work as a municipal employee

- Monthly pension benefits **WILL** be suspended if there is no 45 day break in service after retirement date
- Limit: 75 full days or 150 half-days in any one calendar year
 - After this limit, the monthly pension benefits need to be suspended

PRMS – Participating Municipalities Position – Return to work as a municipality employee in a School.

- Monthly pension benefits **WILL** be suspended if there is no 45 day break in service after retirement date
- Limit: 75 full days or 150 half-days in any one school year
 - After this limit, the monthly pension benefits need to be suspended

PRNR – Registered Nurses Position – return to work as a registered nurse in a state facility or employed as a faculty member of a nursing program at a state-operated college or university

- Monthly pension benefits **WILL** be suspended if there is no 45 day break in service after retirement date
- Limit: 75 full days or 150 half-days in any one calendar year
 - After this limit, the monthly pension benefits need to be suspended



Frequently Asked Questions

Post Retirement Employment Frequently Asked Questions

The post retirement employment rules apply to public sector jobs with employers that participate in the Employees' Retirement System of Rhode Island. If you want to work for a private company, a private non-profit, or a public sector employer from another state you may do so without restrictions.

However, if you were a teacher and want to work as a substitute in your school district, a nurse at a state facility, a retiree who would like to work as a consultant, or state or municipal employee looking to work part time for a city or town that participates in MERS please keep reading to learn what the rules are and how to follow them.

When can I go back to work?

- Effective October 1, 2016, retirees must take a break of 45 calendar days prior to beginning post retirement employment.

Can I work for the State of Rhode Island?

- If you are retired from ERSRI, you may not work for the state unless you suspend your pension. This includes consulting work for the state through a private company or non-profit.

Can I Work for a City or Town?

- Retired state and municipal workers may be employed by a MERS participating municipality for up to 75 working days or 150 half days per calendar year.
- If you exceed 75 working days or 150 half days, your pension will be suspended. (For teachers, a "half day" is defined as working up to 3 hours. A "full day" is defined as working more than 3 hours. For non-teachers, a "half day" is defined as working up to 4 hours. A "full day" is defined as working more than 4 hours.)
- You may work without restrictions for any municipality that does not participate in MERS.

Can I Work for a State School, College or University?

- If you are a retiree, you can work as a classroom instructor, an academic advisor or a coach at any state college, university or state school.
- You may not earn more than \$18,000 gross income in any calendar year without suspending your pension.

For Teachers and "Non-Certified" Employees Working in a School, How is the "School Year" Defined?

- August 25th is the beginning of the school year and working days are counted through August 24th of the next year.



Frequently Asked Questions

Can I Work as a Nurse in a State Facility?

- Retired nurses can provide per-diem nursing care and/or services at a state facility, or be employed as a faculty member at a state college or university.
- You may be employed for up to 75 working days or 150 half days per calendar year. (For nurses, a "half day" is defined as working up to 3 hours. A "full day" is defined as working more than 3 hours.)

Can I Work for a Rhode Island Public School?

- Retired teachers may substitute teach, or fill **vacant** positions including – but not limited to – teacher, administrators, guidance counselors, coaches or tutors.
- If you are a retired teacher, you may not work more than 90 days or 180 half days in any one school year (including summer months) without suspending your pension. (A "half day" is defined as working up to 3 hours. A "full day" is defined as working more than 3 hours.)

Will I Earn Additional Service Credit or Make Contributions into the Pension System?

- No. You will not earn additional service credit or make additional contributions into the pension once you retire and begin collecting a pension.

What are Employer and Employee Reporting Requirements?

- Retirees and employers must report gross income or days worked (depending on the employer type) to ERSRI on a monthly basis by completing the Monthly Post Retirement Employment form. This form must be signed by the retiree and the employer.
- The Monthly Post Retirement Employment form is available in the "ERSRI Forms" section of www.ersri.org.
- Rhode Island public schools that employ retirees are also required to send an annual "good faith" letter stating that the district has made a good faith effort to fill any vacant position with a person who is not retired. This letter must be sent to the school district's union as well.

What about consulting?

- Consulting can be a little complicated. We strongly advise that before accepting a consulting opportunity you contact ERSRI at our [Contact Us](#) page with questions about your individual situation.
- Generally speaking, the post retirement rules for state agencies and municipalities apply to you if you are providing consulting services to the state, a public school, or a MERS municipality. In other words, retirees are not allowed to work for the state and as a general rule, they are not allowed to work as consultants to the state. If you were providing consulting services to a Rhode Island public school, or a MERS municipalities you would have the same day count restrictions and reporting requirements as a retiree working directly for the school district or municipality.

Where does it say all this?

- Post retirement employment is governed by R.I General Laws (RIGL 36-10-36, 45-21-54 and for teachers, RIGL 16-16-24. (You can learn more about these laws at www.rilin.state.ri.us/statutes/.)