



Request to Hire a SURS Annuitant

In accordance with Illinois State University policy 3.1.28, all offers to individuals who have retired from a SURS-covered employer must receive advanced approval. When candidates for vacant positions are identified by Human Resources as SURS annuitants, this form must be completed by the supervisor of the position (if Civil Service) or the search committee chair (for academic positions). This form must be routed for approval through Chair/Director, Dean/AVP and (if rehiring an affected annuitant) Vice President prior to the execution of any written or verbal agreement for employment.

Applicant Information

Name: _____ UID (if applicable): _____
If applicable, retirement date at ISU (initial break in employment from ISU must be at least 26 weeks): _____

Department Information

Employing Department: _____ Supervisor of position: _____
Contact Person (if other than supervisor): _____
Contact Phone: _____ Contact Email: _____

Before routing this form for signature, Human Resources **must** have received the annuitant's SURS Earning Limitation Letter and Rehired Report of Other SURS Employment form. Human Resources will reach out to the department to confirm receipt of these two items and provide earning limitation information necessary to complete this form.
For more information, review instructions on page two of this document.

Position Information

Job Title: _____ Position Number: _____
Employee Group: _____ Proposed Start Date: _____
Proposed FTE (hours per month if hourly): _____ Proposed End Date: _____
Proposed monthly/hourly rate: \$ _____

To Be Completed By Department Based Upon HR Notice of Earning Limitations

Annual Earnings Limit:

Earnings SURS YTD: _____ as of: _____

Total Limit Available: _____

Monthly Earnings Limit:

New Monthly Request: _____

Any months exceeding monthly rate: _____

REQUIRED SIGNATURES

Supervisor:	Date: _____	Printed Name: _____
Chair/Dir/Dept Head:	Date: _____	Printed Name: _____
Dean/AVP:	Date: _____	Printed Name: _____

*Vice Presidential signature required **ONLY** when rehiring an **affected annuitant***

Vice President:	Date: _____	Printed Name: _____
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Step 1 – The employing department requests the annuitant to provide two documents (listed below) to Human Resources using one of the following methods:

- An email attachment to tmlong2@ilstu.edu (SendTo may be utilized for secure sending)
- By campus mail to Campus Box 1300 Human Resources, Attn: Todd Long
- By hand delivery to Human Resources, Room 101, Nelson Smith Building
- By fax to 309-438-7421, Attn: Todd Long

Document 1 is a SURS form called the ***SURS Certification of Retirement***. This form must show the applicant's highest annual earnings at retirement and their annual earning limitation. Individuals who retired prior to age 60 will also have a monthly limitation which will be included on the form.

If the applicant retired prior to age 60 and wants the University to consider the 3% compound interest they have received since retirement in their monthly earning limitation, they will also need to provide a copy of their currently monthly annuity check advice showing their gross income from SURS.

If the applicant does not have any of the above documentation, they must request it from SURS by calling 1-800-275-7877. SURS will mail or email this information to the applicant.

Document 2 is a completed ***Rehired Retiree Report of Other SURS Employment*** form found on the HR website found at: hr.illinoisstate.edu/downloads/Rehired_Retiree_Report_of_Other_SURS_Employment.pdf

If the applicant indicates they were a participant of the Retirement Savings Plan or received a lump sum benefit in lieu of an annuity and therefore does not have an earning limitation, contact Todd Long at tmlong2@ilstu.edu for confirmation and instructions on how to proceed.

Step 2 – Human Resources calculates the limitation summary using information from the requested form in Step 1 in conjunction with rules set forth in [policy 3.1.28](#) and emails the hiring department the annuitant's limitations.

Step 3 – The employing department utilizes the annuitant limitation information from the email to complete the ***Request to Hire SURS Annuitant*** form and routes the form for signature.

Step 4 – The employing department sends the signed form from Step 3 to their [HR Employment Consultant](#) along with the PAF, if required, and any other paperwork that is needed to complete the hiring process.

Step 5 – The HR Employment Consultant ensures:

- The ***Request to Hire SURS Annuitant*** form is complete with required information and signatures.
- The paperwork submitted to HR Data Management conforms to the approved format.
- The employee is fully provisioned and onboarded.