

## **Work After Retirement Information for Oregon Public Service Retirement Plan (OPSRP) Retirees**

If you return to employment with a private or non-PERS employer, your OPSRP Pension Program and IAP retirement benefits will continue unchanged.

However, if you return to employment with a PERS-participating public employer after retirement, Oregon statutes impose certain limitations on that employment. **It is your responsibility to be aware of these limitations and to track your hours to ensure compliance.** If you decide to return to work with a PERS-participating employer after retirement, you can control the number of hours you work and, accordingly, whether you comply with or violate the limitation. It is your responsibility to remain in compliance with the limitations applicable to you if you do not want your retirement benefits to stop.

**Compliance with the statutory limitations is your responsibility. If you exceed the work hour limitations, you will be accountable.** PERS recommends that you track the hours you work in order to avoid exceeding the work-hour limitations for each calendar year. The following paragraphs describe the limitations.

### **Work Restrictions After Retirement for OPSRP Pension Program and IAP Retirees**

If you are an OPSRP Pension Program or IAP retiree (collectively referred to as “OPSRP retiree”) who is receiving a monthly pension or installment payment, and you become employed in a “qualifying position” by a participating employer, you will become an active member of the Pension Program and the IAP immediately, and all payments will cease. You are employed in a “qualifying position” if your employer reports the position as “qualifying,” based upon hire intent, OR, if you work a total of 600 hours or more in a calendar year for one or more participating employers (regardless of hire intent). Hours worked with all participating employers in a calendar year count toward the 600-hour limitation.

If you are an OPSRP retiree receiving a monthly pension or installment payment and become employed in a non-qualifying position, you will remain an OPSRP retiree and continue to receive your monthly pension/installment payment provided you do not work more than 599.99 hours in a calendar year. If you work more than 599.99 hours in any calendar year, you will become an active member of the Pension Program and the IAP, effective back to the later of the first of that year or your date of hire in that year. All retirement benefit payments will cease, and retirement benefits paid after active membership is re-established must be repaid. The Oregon Administrative Rule (OAR 459-075-0300) amendment - adopted at the July 31, 2015 Board meeting - clarifies PERS administration for OPSRP retirees who return to work for a PERS employer after retirement, and explains how PERS restarts the clock if an OPSRP retiree returns to work in a non-qualifying position in the same year in which they retire, and counts post-retirement hours separately from pre-retirement hours.

If you are an OPSRP retiree who received a lump-sum retirement benefit payment and become employed in a “qualifying position,” you will return to active membership effective back to the later of the first of the year or your date of hire in that year. If you resume active membership on or before the date your payment is issued, you will have to repay the benefit payment. If you resume active membership after the date your payment is issued, you do not have to repay the benefit.

If you are an OPSRP retiree who received a lump-sum retirement benefit payment and you become employed in a “non-qualifying position,” you do not have to repay the benefit. However, if you are hired into a “non-qualifying position” but work more than 599.99 hours post-retirement in the calendar year you receive the payment, you will become an active member of the Pension Program, effective back to the later of the first of the year or your date of hire in that year. If that date is before the date your payment was issued, you will have to repay the benefit.

The employer’s designation of an eligible employee’s position as “temporary” or “permanent” has no effect on the applicability of these limitations. Any employment by a person who is not specifically excluded by statute as an “eligible employee” with a participating employer may count toward the 599.99-hour limitation. Whether that employment is in a qualifying or non-qualifying position will determine whether you return to active membership, and whether you will be able to continue receiving your monthly pension, installment payments, or keep your lump sum payment.

### **Elected or Appointed Officials**

An “elected or appointed official” is a person who is appointed by the governor to an office as head of a department or a person elected or appointed to an office with a fixed term, other than a member of the Legislative Assembly. If you are an OPSRP retiree who becomes an elected or appointed official, you are subject to the same restrictions as any other OPSRP retiree unless you make a written election to not become a member of the OPSRP Pension Program and IAP within 30 days of taking office.

### **Address Changes**

After you retire, keep PERS informed of your correct mailing address. That way, you will continue to receive tax reporting forms, retiree health insurance information, *Perspectives* newsletters, and other important information. For your protection, address changes must be in a signed and dated letter or you can use the [Information Change Request Form](#). Send address changes to:

PERS  
P.O. Box 23700  
Tigard, OR 97281-3700