

Membership KPERS (school)

Who Is a Member?

Under Kansas law, KPERS membership is mandatory for any employee in a “covered” position. It is a condition of employment. “Covered” means the position is eligible for KPERS benefits.

Covered position requirements

- Covered by Social Security
- At least 630 hours of paid work per year
- Continuously or consistently employed
- Not temporary (temporary is less than 6 months)
- Not seasonal (snow removal, summer mowing, etc.)

It’s critical to track the hours an employee works. Carefully monitor temporary and seasonal employees and those working less than 630 hours. An employee hired in a non-covered position might later be in a covered position due to a change in position or job responsibilities.

Is a part-time job covered?

YES: The position is at least 630 hours a year (e.g., 3.5 hours a day) and meets the other requirements.

NO: An employee works over 630 hours, but only during the spring and summer mowing, etc. This is seasonal.

NO: Someone is hired to do a special project or substitute teach for only a few months. These are temporary positions.

NO: Someone works an hour or two each day. This position is not covered. But monitor hours. If he or she consistently works at least 3.5 hours per day, you need to revisit your position description for this job. If the employee continues to work 630 or more hours a year, you need to enroll the employee in KPERS.

Independent contractors

Whether a worker is an employee or an “independent contractor” is a federal tax issue. It is your responsibility to determine if an individual performing services is an independent contractor or employee. If the worker is considered an employee by the IRS and the position meets KPERS membership requirements, the person must be enrolled as a KPERS member.

The IRS has created tests to determine whether a worker is an independent contractor or an employee. Test factors are grouped into three categories:

1. Behavioral control
2. Financial control
3. Relationship of the parties

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The test includes questions like: What training is required? Who hires, supervises and pays for assistants? Who determines the individual's hours? Will the individual work on the employer's premises? Who supplies tools and materials? Does the employer control how results are achieved? Does the worker have an opportunity to make a profit or take a loss? Does the worker have employee benefits like health insurance and paid vacation?

If the employer controls the worker in largely the same way the employer controls employees, then the worker is most likely not an independent contractor according to the IRS. If you hire someone you consider an independent contractor, we recommend you consult an attorney or your normal source for guidance on payroll withholding and tax matters. See [IRS publication: Independent Contractor or Employee?](#)

Kansas Board of Regents institutions

Generally, classified employees become KPERS members and unclassified employees become members of the Kansas Board of Regents Mandatory Retirement Plan.

Employees working at a Board of Regents institution who are transferred or reclassified to a job covered by the other retirement plan have a one-time chance to stay in the plan they've been in. Employees transferring to a KBOR institution from another State agency also have this choice.

To stay in the retirement plan they had before reclassification or transfer, employees complete an **Retirement Plan Election for Kansas Board of Regents Employees** form ([KPERS-3BOR](#)). KPERS must receive the form before the first day of the first complete payroll period after the reclassification or transfer. Employees who do not submit this form are considered as electing to participate in the retirement plan provided by the position they are transferring to or being reclassified to.

The election is irrevocable unless the member ends employment and:

- Withdraws.
- Is not vested and is inactive more than five years.
- Is again reclassified or transferred.

Employees cannot contribute to the KBOR Mandatory Retirement Plan and KPERS at the same time. KPERS members won't receive credit for any service during which they are enrolled in the Regents mandatory plan.

Employees can contribute to the Regents voluntary plan and KPERS at the same time.

Employees with green cards

Issued by U.S. Citizenship and Immigration Services (USCIS), a Permanent Resident Card – commonly known as the “Green Card” – gives immigrants the legal right to live and work in the United States. A covered employee with a green card is a KPERS member.

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Employees with work visas

YES: Foreign workers on a visa (except J-1 or F-1) who have an SSN.

NO: Employees with a J-1 or F-1 visa.

Who Is Not a Member?

Anyone who is:

- Contributing to the Kansas Board of Regents Mandatory Retirement Plan.
- A State officer or in certain unclassified positions who elected KPERs 457, the State's Deferred Compensation Plan, instead of KPERs.
- Contributing to United States Civil Service or the Federal Employees Retirement System. This does not affect those receiving a pension, just those contributing.
- Paid by the Comprehensive Employment and Training Act (CETA) as type II or VI.
- Exempt from Social Security coverage.
- Working in this country on a J-1 or F-1 visa.

Types of Members

KPERs has three benefit structures: KPERs 1, KPERs 2, and KPERs 3. All new employees hired in KPERs-covered positions should be enrolled in KPERs 3.

Hint: When you enroll employees on the employer web portal, the system will tell you in which benefit structure they're enrolled.

KPERs 1

Active members hired before July 1, 2009, who were:

- Contributing members on July 1, 2009.
- On military leave and returned to work.
- On leave of absence up to one year and returned to work.
- Active Board of Regents members who have KPERs service and have had no break in service.
- Inactive members vested with at least 9.5 years of service before July 1, 2009.
- Members hired before July 1, 2009, who are inactive because they moved to a non-covered position with the same employer with no break in service (started a new position within three days).

Grace Period — Non-vested school members have a grace period from May 1 to September 30 of the same year if they transfer from school to school. If they leave outside of these dates, the grace period is 30 days. If they go from school membership to non-school membership, they have a 30-day grace period.

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Note: In 2008, Julie worked for USD 259 Wichita Public Schools as a KPERS 1 member with three years of service (not vested). Julie ended employment with USD 259 at the end of that school year and went to work for USD 305 Salina in August. Julie was within the grace period and continued as a KPERS 1 member.

If Julie had ended employment with USD 259 and not gone to work for another school by September 30, she would have become a KPERS 2 member if she returned to work before 2015. She became a KPERS 3 member if she returned Jan 1, 2015, or after.

Remember: After leaving employment as a non-vested member, Julie continues to earn interest for 5 years (3 years if KPERS 3 member). If she does not return to KPERS-affiliated employment in 5 years, she must withdraw contributions and interest.

KPERS 2

- All members first employed in covered positions on or after July 1, 2009, and before January 1, 2015
- Inactive members who were not vested on July 1, 2009 (had less than 9.5 years), and returned to employment before January 1, 2015
- KPERS 1 members who left employment before vesting and returned to employment before January 1, 2015
- Former members who withdrew their accounts and began a new membership on or after July 1, 2009, and before January 1, 2015

KPERS 3

- All members first employed in covered positions on or after January 1, 2015
- KPERS 1 or KPERS 2 members who left employment before vesting and returned to employment on or after January 1, 2015
- Former members who withdrew their accounts and began a new membership on or after January 1, 2015

Working Extra Jobs at the Same Employer (Totality of Employment)

Totality of employment affects a member when he or she is paid for working extra jobs with the same employer (e.g., lawn work, janitorial work, coaching etc.). A member working in a KPERS-covered position must have contributions deducted from all pay earned from all work with the same employer.

While this increases a member's salary, it doesn't add additional service credit. By law, members can earn only one calendar quarter of service credit for any employment within any quarter.

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Working For More Than One Employer (Dual Employment)

Dual membership is when an employee works for two or more KPERs employers and all positions have KPERs benefits.

Each employer submits an enrollment. The second KPERs employer enrolls the employee as a **dual employee**. The employee's membership date is the one established with the first employer.

Both employers deduct member contributions. Both employers make employer contributions. If an employee is purchasing service credit by payroll deduction, KPERs service purchase contributions will be deducted by each KPERs employer. Dual employment will increase the member's salary, but won't add additional years of service credit. By law, members can earn only one calendar quarter of participating service credit for any employment within any quarter.

Dual employment is **not** working in a covered position at one employer and in a non-covered position with another employer.

Example 1: Dan works 630 hours a year with USD 501 Topeka. He also works 630 hours a year with USD 437 Auburn-Washburn. Both positions meet KPERs eligibility requirements. He is a member at both employers. Contributions are made on both salaries.

Example 2: Dan works 630 hours a year with USD 501. He also works 500 hours a year with USD 437. Only the USD 501 position meets KPERs eligibility requirements. Only USD 501 enrolls him and deducts contributions.

Concurrent employment

Concurrent employment is when an employee combines hours from two or more school employers to reach the 630 hours to be eligible for membership. KPERs school membership requires 630 hours of paid work per school year. Employees in this situation need to elect membership. It is not automatic. Once they elect membership, the employer is required to enroll them. [Quick Vids: Enrollments](#)

- Position covered by Social Security
- Employed with two or more school employers at the same time
- A combined total of at least 630 hours of paid work per school year
- Continuous or consistent employment
- Not temporary (temporary is less than 6 months)
- Not seasonal (snow removal, summer mowing, etc.)

Each school year, on the first day of employment, provide a **School Employee – Certification of Concurrent Employment form** ([KPERs-1C](#)) to all non-seasonal, permanent employees whose positions require fewer than 630 hours or fewer than 3.5 hours per day for 180 days. If the employee marks "yes," to elect membership, submit the completed form to KPERs and begin deducting KPERs contributions. If the employee marks "no," keep the form for the employee's record, but do not send the form to KPERs. The employee needs to complete a form for each employer every year.

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The KPERs-1C form is for the current school year only. Once a school year passes and the employee did not elect participation, he or she cannot go back and pick up past years.

With concurrent employment, both employers deduct member contributions. Both employers make employer contributions. If an employee is purchasing service credit by payroll deduction, KPERs buyback contributions are deducted by each KPERs employer. Concurrent employment will increase the member's salary, but won't add additional years of service credit. By law, members can earn only one calendar quarter of participating service credit for any employment within any quarter.

Employers must recertify concurrent employees each year to continue membership. If an employee is working enough hours in any position for it to be a KPERs-covered position on its own, then concurrent employment does not apply.

Example 1: Amy works 430 hours a year with USD 327 Ellsworth. She also works 200 hours a year with USD 328 Lorraine. Both positions are covered by Social Security and meet the other KPERs eligibility requirements except for hours worked. She can combine employment hours to be eligible for membership. Contributions are made with both employers on both salaries.

Example 2: Amy works 630 hours a year with USD 327 Ellsworth. She also works 200 hours a year with USD 328 Lorraine. The position with USD 327 Ellsworth is a covered position on its own. The USD 328 Lorraine position is not KPERs-covered. This is not concurrent employment. Contributions are made only on the USD 327 Ellsworth salary.

If an employee leaves one employer and the remaining position(s) don't meet the 630-hour requirement, the remaining employers stop contributions and submit an end date for the employee record in the EWP using "non-covered" as the reason code. The system automatically generates a "non-covered" employee record and removes him or her from the pay report. See: [Moving To and From Covered Position](#)

If an employee leaves one employer and the remaining employer increases the employee's hours to create a covered position, the employer notifies KPERs and completes a regular online enrollment.

Positions unique to schools

Substitute Teacher (Daily Call) — A daily-call substitute teacher is one who is paid on a daily basis for services rendered. A substitute teacher is not appointed to a covered position and is generally appointed to a position for that day. This position is not eligible for KPERs membership.

Long-Term Substitute Teacher — If a school district hires a substitute teacher who is required to regularly work over 630 continuous hours per year, that substitute teacher is in a covered position. KPERs membership is required. Long-term substitutes should become KPERs members on their first day of employment, not after they've worked 630 hours.

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Temporary Teacher — A school district may appoint a teacher to a temporary position. Temporary positions are not eligible for KPERs membership. If the temporary teacher is appointed permanently to the position because the regular teacher is not able to return to work, the temporary teacher now becomes the replacement teacher. KPERs participation is then required for the replacement teacher.

Replacement Teacher — If a replacement teacher is hired during the year to replace a teacher who, for whatever reason, could not complete the school year, and the replacement is assigned permanently to the position held by the former teacher, that replacement teacher is in a covered position. KPERs membership is required.

Moving To and From Covered Positions

When employees move from a covered position to a non-covered position, they stop making contributions and earning service credit. They are no longer eligible for disability coverage or group life insurance. Submit an end date for their employee record in the EWP using “Non-covered” as the reason code. The system automatically generates a “Non-covered” employee record. [Quick Vid: End Date](#)

While officially considered “inactive,” these members can’t withdraw contributions because they are still employed by a KPERs employer. This includes employees moving from a KPERs-covered position to one covered by the Regents Mandatory Retirement Plan. They can withdraw contributions when they end employment.

If this person returns to a covered position, enter an end date in the non-covered record with a “Return to payroll” reason. If the person ends employment in the covered position, enter an end date with “Termination” reason.

Leave of Absence, Military Service or Disability

When employees leave

When an employee takes a personal or medical leave of absence, enter an end date in his or her employee record on the EWP with the “Leave of absence” reason. The system automatically generates a leave of absence record. If it’s a military leave, choose “Military leave” reason.

Leave of Absence — An employer can grant a leave of absence for up to one year without affecting the employee’s KPERs membership. After one year of absence, the employee automatically becomes an inactive member. Employees cannot withdraw during leaves of absence and do not earn service credit. See the Leave of Absence section of [Leaving KPERs-Covered Employment](#).

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Military Service — Membership during military service is protected as long as the employee is in active service and doesn't withdraw. Members in active military service have other continuing benefits.

- Continuing basic life insurance while on active duty at no cost to member.
- Continuing optional life insurance for 16 months. The member continues to pay the premiums. After 16 months, he or she has an option to convert or port to an individual policy.
- Optional coverage is reinstated if member returns to work within five years, even if he or she did not choose to convert or port to an individual policy.
- There is no disability coverage during military service.
- If in the middle of a service credit purchase when called to active duty, the member's purchase resumes when he or she gets back and nothing changes.

Disability — Membership is protected while receiving KPERS disability benefits. Members continue to earn service credit and are covered for basic group life insurance. They may also continue any optional group life insurance at their current group rate.

When employees come back to work

Enter an end date in his or her leave of absence or military leave record using "Return to payroll" as the reason. This will populate the system and you **do not re-enroll**.

Returning active military personnel are eligible to reinstate their previous optional life insurance if they had it through your employer when they left. Also, they may be eligible for granted or purchased service. See [Service Credit](#).

Leave of Absence Chart for Life Insurance

Type of Leave	Basic Coverage	Optional Coverage
MILITARY	Continued during active military duty, paid from KPERS fund	Can choose direct-pay* and continue coverage for 16 months during military leave. After 16 months, must convert or port to keep coverage
return to work	Reinstated	If employee returns w/in 5 years, coverage is reinstated, even if did not elect continuation

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Type of Leave	Basic Coverage	Optional Coverage
EMPLOYEE ILLNESS under age 65 Including KPERs Long-term Disability	Employer pays coverage if employee on payroll (using sick leave, short-term disability, etc.) Employee off payroll, employer stops paying, employee still covered for first 180 days Move out of insured plan into self-funded plan after 180-day waiting period for eligibility under the KPERs Long-term Disability Plan (LTD)	Can choose direct-pay and continue coverage until the earliest of the following: recovery, retirement, reach age 65, withdraw
return to work	Reinstated	If employee returns w/in 3 months, coverage is reinstated, even if did not elect continuation. If returns after 3 months, employee can apply for coverage, but must answer health questions
EMPLOYEE ILLNESS age 65 & over Including KPERs Long-term Disability	Continue employer-paid coverage if employee on payroll Employee off payroll, employer stops paying, employee still covered for 180 days Move out of insured plan into self-funded plan after 180-day waiting period for eligibility under the KPERs Long-term Disability Plan (LTD)	Terminated. Must convert or port to continue coverage
return to work	Reinstated	Must convert or port (port up to age 70) to continue coverage
FAMILY ILLNESS	Terminated	Can choose direct-pay and continue coverage for 12 months After 12 months, must convert or port to keep coverage
return to work	Reinstated	If employee returns w/in 3 months, coverage is reinstated, even if did not elect continuation If returns after 3 months, employee can apply for coverage but must answer health questions
SCHOOL EMPLOYEE during summer	Continued	Continued. Employer deducts premium in advance of summer
return to work		Can apply for new coverage, but must answer health question

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Type of Leave	Basic Coverage	Optional Coverage
STATE EMPLOYEE on furlough	Continued up to 12 months	Can choose direct-pay and continue coverage for 12 months After 12 months, must convert or port to keep coverage
return to work	Reinstated	If employee returns w/in 3 months, coverage is reinstated, even if did not elect continuation If returns after 3 months, employee can apply for coverage but must answer health questions
KBOR EMPLOYEE non-medical leave	Can choose direct-pay and continue coverage	Can choose direct-pay and continue coverage up to 3 years
return to work	Reinstated	If employee returns w/in 3 months, coverage is reinstated, even if did not elect continuation If returns after 3 months, employee can apply for coverage but must answer health questions
OTHER LEAVE	Terminated	Can choose direct-pay and continue coverage for 12 months After 12 months, must convert or port to keep coverage
return to work	Reinstated	If employee returns w/in 3 months, coverage is reinstated, even if did not elect continuation If returns after 3 months, employee can apply for coverage but must answer health questions

*Employee is billed and pays The Standard directly instead of through payroll deduction.

Hiring a Retiree

1. While working or during the waiting period after retirement, prearrangements to return to work are not allowed.
2. Retirees do not make contributions, unless they are returning to a different retirement plan as an active member (e.g. KP&F retiree returning to KPERS).
3. Employers pay the statutory contribution rate on all retiree pay for the first \$25,000. It's 30% after pay passes \$25,000. See [Working After Retirement](#).

Waiting period (working after retirement)

KPERS Age 62+ = 60 days
KPERS Under age 62 = 180 days
KP&F 30 days

To calculate the waiting period, count the day after the retirement date as day one. This is their Retirement System retirement date, not their last day on payroll.

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Membership Date

Membership date is the date an employee becomes a member. Purchasing service credit doesn't change it. Rules and benefits are sometimes affected by membership date.

What if Someone Should Have Been a Member and Wasn't Enrolled?

If an employee appears to be retroactively eligible for KPERS:

1. Retrace the employee's work history and determine the date the employee began to work in a KPERS-covered position.
2. Enroll the member. [Quick Vid: Enrollment](#)
3. Complete an adjustment [Quick Vid: Adjustments](#).

In addition to enrolling the employee, past contributions are also due. KPERS will collect them as part of the adjustment process.

What if KPERS Has the Wrong Date of Birth, SSN or Other Incorrect Member Information?

Complete a **Request for Member Information Change** form ([KPERS-12](#)) to change or correct a member's personal information record. You'll need to include a copy of the appropriate documentation that reflects the new or corrected information. See the form for details.

You can mail this and other forms and proof documents to KPERS, or you can send it to us using the EWP message function.

Contributions

Both active members and employers contribute to KPERS.

Member contribution rates

KPERS 1	6%
KPERS 2	6%
KPERS 3	6%
Judges	6%
KP&F	7.15%

Contribution rates are set by Kansas law. Contributions are made on gross pay from each pay period on a pre-tax basis. See [Quick Vid: Pay Report](#).

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Member contributions are credited to the member's account under his or her name and Social Security number. **Kansas law does not allow members to borrow from their KPERS account.**

Contributions are not included in the employee's income for federal income tax, but are included for Kansas state income tax purposes. Employees need to make a specific entry on their Kansas income tax return. Some employers provide this amount in Box 14 on the W-2 form (labeled KPERS).

KPERS 1 and KPERS 2 interest is credited annually on June 30, based on the account balance for the previous December 31 (e.g., interest credited June 30, 2018, is based on account balance as of December 31, 2017). KPERS 3 interest is credited quarterly

- Member before July 1, 1993 (KPERS 1), interest = **7.75%**
- Member on or after July 1, 1993 (KPERS 1 or KPERS 2), interest = **4%**
- Member on or after January 1, 2015 (KPERS 3), interest = **4%** + possible additional according to statutory formula, based on KPERS investment returns.

Vested members who leave employment continue to earn interest. Non-vested members earn interest for five years but must withdraw their money after five years (two years for KPERS 3 members) unless working in a non-covered position.

For KPERS 1 and KPERS 2 members, account balance has no effect on retirement benefits, which are determined by final average salary and years of service. Account balance is only important if a member withdraws or dies before retirement.

For KPERS 3, retirement benefits are affected by a member's account balance.

Employer contributions

Employer contribution rates can change annually based on actuarial calculations. The legislature governs how much they can increase. Rates are the same for KPERS 1, KPERS 2 and KPERS 3. [Employer Contribution Rates](#)

Contributions are based on gross compensation before any deductions. They are not deposited into members' accounts. They stay with KPERS to fund the System even if members end employment.

Contributions are paid to KPERS each pay period through the employer web portal. See [Employer Manual: Pay Reporting](#).

Vesting

Employees earn service credit working in a covered position. Kansas law governs other types of service that can be purchased or granted. See [Employer Manual: Service Credit](#).

All active KPERS members vest with **five** years of service. A total of 18 quarters (4.5 years) rounds to five years of service. If members have service credit in one of the other retirement plans (KP&F and Judges), they can combine service to vest in KPERS. This is

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called “portability” (not to be confused with portability of group life insurance). Please contact KPERS with questions.

Benefits of vesting

- Receive a lifetime retirement benefit, even if employee leaves employment
- Continue to earn interest on account balance after leaving employment

Vested members need to keep their contributions with KPERS after leaving employment to be eligible for account interest and retirement. Non-vested members who leave employment must withdraw their money after five years (two years for KPERS 3 members) unless working in a non-covered position or they return to work in a KPERS covered position within the five year period. Vesting does not mean a member has claim on employer contributions.

Employer Checklist

- Does the employee’s position meet membership requirements?
- Check to see if the employee has ever been a KPERS member or is working for another employer that provides KPERS benefits. You will be able to confirm this during the online enrollment process. The System will also tell you if the employee is KPERS 1, KPERS 2 or KPERS 3.
- Complete an enrollment on the employer web portal. It’s important to complete an enrollment as soon as an employee is hired.
- Begin deducting KPERS contributions immediately.
- Talk with the employee about purchasing any available service credit.
- Direct employee to designate a beneficiary using member online account or with a **Designation of Beneficiary** form ([KPERS-7/99](#)).
- Provide information about the **KPERS 457** deferred compensation plan. If your employer does not currently offer KPERS 457, [learn more](#).
- Provide information about **basic** and **optional life** insurance. If your employer does not currently offer optional life, [learn more](#).
- KPERS will send the employee a welcome letter with a Benefits at a Glance. [Sample Welcome Letter](#) (PDF, 30KB)
 - Benefits at a Glance:
 - [KPERS 1](#) (PDF, 235KB)
 - [KPERS 2](#) (PDF, 235KB)
 - [KPERS 3](#) (PDF, 587KB)
 - [Correctional KPERS 1](#) (PDF, 242KB)
 - [Correctional KPERS 2](#) (PDF, 246KB)

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- The EWP will keep track of enrollments that have started but have not been submitted. Keep an eye on your EWP To-Do list. [Quick Vid: Home Page](#)
- Continue monitoring employee hours for employees working less than 630 hours.
- Enter an end date when someone leaves employment.

An Ounce of Prevention

Problem	Prevention
A person is enrolled when the position doesn't require 630 hours.	When someone is hired, have a good idea of the hours the position needs. Review frequently to be sure the employee is still on track for 630 hours for the year.
A person isn't enrolled when the position probably does take 630 hours.	Error on the side of enrollment if you think the employee will be close to 630. It is easier to change them to a non-covered position later than to miss an enrollment that causes an arrearage.
An employee working part time for more than one school district and eligible for concurrent membership is not enrolled.	Have all part-time employees complete a Certification of Concurrent Membership form (KPERS-1C) at the beginning of every school year.
Employee is missing on the pay report.	Make it a practice to enroll covered employees as soon as they are hired . This will help you avoid arrearages in the future.
KPERS has duplicate member records because of incorrect SSN.	When making SSN corrections in your payroll records, be sure to let KPERS know by completing a KPERS-12 form.

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