



STATE PENSION ENROLLMENT

Enrollment is mandatory and protects your pension and death benefits

As a condition of employment, eligible employees are required to properly enroll in the State Pension Plan. State law requires the enrollment be completed within 30 days of employment. Failure to complete your enrollment in a timely manner may result in a \$100 fine assessed to MCPS by the State Retirement Agency. Any such fines will be deducted from your future pay. Enrollment is completed in the three easy steps shown below.

Complete—

▲ State Form 1: Application for Membership

▲ State Form 4: Designation of Beneficiary

Links to both forms are available at <https://www.montgomeryschoolsmd.org/departments/ersc/employees/benefits/retirement-savings/pension.aspx>

Do not use cross outs, overwrites, or white-outs when completing forms.

▲ Attach a copy of your driver's license or birth certificate as proof of date of birth.

Send completed forms and documents to ERSC by mailing them to the address below. If the notary seal is clearly visible, you may scan and e-mail them to ERSC instead of mailing them.



EMPLOYEE and RETIREE SERVICE CENTER (ERSC)

45 West Gude Drive, Suite 1200 • Rockville, MD 20850

Phone: 301.517.8100 • E-mail: ersc@mcpsmd.org

Web: www.montgomeryschoolsmd.org/departments/ersc/

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DOS & ... DON'TS

- Complete and submit the current Application for Membership (Form 001) and Designation of Beneficiary (Form 004) forms, available at www.montgomeryschoolsmd.org/departments/ersc/employees/benefits/retirement-savings/pension.aspx
- Submit an old version of the Application for Membership or Designation of Beneficiary forms.
- Provide proof of your date of birth by providing a legible copy of your current, valid driver's license, birth certificate, or passport.
- Forget to provide proof of your date of birth.
- Leave the Retirement Coordinators section of the Application for Membership blank. Employee and Retiree Service Center (ERSC) staff will complete this section before submitting the form to the Maryland State Retirement Agency.
- Complete the Retirement Coordinators section of the Application for Membership. ERSC will complete this section.
- Sign both the Application for Membership and Designation of Beneficiary forms.
- Forget to sign the both forms.
- Answer questions 1-5 on the Application for Membership.
- Overlook questions 1-5 on the Application for Membership.
- Make sure to format the birthdate(s) on your Designation of Beneficiary form as follows:
Sample: 01 08 2012
 MONTH DAY YEAR
- Use less than two digits for months and days, or less than four digits for years.
- Include each beneficiary's full address on the Designation of Beneficiary form.
- Write "same" or "same address" in the space for a beneficiary's address. Provide the full address.
- Sign the Designation of Beneficiary form at the time you have it notarized. Make sure the date you sign it and the date it is notarized are the same. Review the graphic at right to see examples of correctly and incorrectly notarized forms.
- Have the Designation of Beneficiary form notarized on a different date than you sign it or make other errors when having your form notarized (see graphic at right).
- Check to be sure you have entered your social security number correctly.
- Insert an incorrect social security number.
- Either mail originals of your completed Application for Membership, Designation of Beneficiary, and date of birth proof to: Employee and Retiree Service Center, 45 West Gude Drive, Rockville, Maryland 20850 OR, if the notary seal is clearly visible, you may scan and e-mail the forms/documents to: ERSC@mcpemd.org
- Complete and submit a new form if you must make a correction.
- Submit required forms or documentation with cross-outs, overwrites or correction fluid on them.
- If you complete a new form, you must resubmit ALL of the documentation: the Application for Membership, Designation of Beneficiary, and date of birth proof.
- Fax your Application for Membership or Designation of Beneficiary forms.
- Submit corrected forms without all other required documentation.

Notarize Correctly to Avoid Delays in Form Processing

The graphics below show some of the common errors made when notarizing the Designation of Beneficiary form. Work with your notary to ensure your form is signed and notarized correctly to avoid delays in processing your state pension enrollment forms.

- Remember—
- You must sign the Designation of Beneficiary form in the presence of your notary.
- The date you sign the form must be the same date it is notarized.
- No cross-outs, overwrites or correction fluid may be on the form.

Example 1: Dates do not match. Signature not clearly visible.

Example 2: Signature not clearly visible. Date not clearly visible.

PERFECT!