



Montana Teachers' Retirement System

P.O. Box 200139, Helena, MT 59620-0139
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TRS Employer: Retain the employee's signed form in your personnel files.

FORM 106: MEMBERSHIP ELECTION – SUBSTITUTE TEACHER or PART-TIME TEACHERS' AIDE/PARAPROFESSIONAL

Alternative accessible formats of this document will be provided upon request.

PLEASE TYPE OR PRINT LEGIBLY IN DARK INK

NEW EMPLOYEE INFORMATION

Full Name: First			Middle	Last	Suffix (<i>Jr., Sr., etc.</i>)	XXX - XX -
Maiden or Other Name Previously Reported to TRS			Birth Date (<i>mm/dd/yyyy</i>)		Last 4 Digits of SSN	
Mailing Address: Street or P.O. Box			City	State	Telephone Number	
					ZIP Code (<i>use Zip+4 if known</i>)	

– INSTRUCTIONS FOR EMPLOYER –

This election form is to be completed **only** by a **substitute teacher or part-time teacher's aide/paraprofessional** who:

- is **not** already a member or retiree of the Montana Teachers' Retirement System, and
- is **not** currently a Montana University System Retirement Plan (MUSRP) participant (TIAA).

Active or inactive (terminated) TRS members who have contributions on account with TRS and retired members who receive monthly benefits from TRS **must be reported** from their first day of employment, regardless of the number of hours they are expected to work.

Under TRS law, substitute teachers and part-time teacher's aides/paraprofessionals who are not TRS members or retirees may elect *either* to become members of TRS on their first day of service *or* to defer (postpone) membership in TRS until they have provided at least 210 hours (30 days) of service in a single fiscal year. To ensure membership is activated after the threshold is reached, all TRS employers must report hours and wages for these non-contributing employees.

IMPORTANT: Permanently retain this completed form as proof of the employee's election. A substitute teacher or part-time teacher's aide/paraprofessional who eventually becomes vested in TRS has the right to purchase service for any deferral period. If it cannot be shown that the employee voluntarily elected to defer TRS membership, the employer may be required to pay the employee's contributions for that time period [19-20-302(4)(d), MCA].

EMPLOYEE QUESTIONNAIRE AND MEMBERSHIP ELECTION

For more information, read the TRS Fact Sheet, *Substitute Teaching and Elective Membership Deferral* at trs.mt.gov.

(A) Are any of these statements true? *If you mark any box in (A), sign and date this form below. Do not complete (B).*

- I am an active or inactive TRS member with contributions on account with TRS.
- I am a retired member of TRS receiving a monthly benefit.
- I am an active MUSRP / TIAA member who will work *concurrently* for a unit of the Montana University System (MUS) *and* one or more TRS employers.

(B) If **none** of the statements in (A) apply, make a TRS membership election by initialing *one* box and signing below.

- (Initial) I elect to participate as a member of TRS beginning with my **first day** of service. I understand that my employer will deduct contributions from my pay and remit them to TRS on my behalf.
- (Initial) I elect to **defer (postpone) membership in TRS until I have worked at least 210 hours** as a substitute teacher or part-time teacher's aide/paraprofessional in a fiscal year (July 1–June 30) for one or more TRS employers. I understand I will not accrue creditable service with TRS unless/until I become an active, contributing member.

SIGN AND RETURN
THIS FORM TO
YOUR EMPLOYER ►

Signature

Date