



**SUPPORTING DOCUMENTS REQUIRED FOR APPOINTMENTS
LSU AGCENTER**

<i>Note: Please read all instructions and notes carefully</i>		ACD/ UNCL	CLS	TRANS ¹	STD ¹	GA
W-4 FEDERAL TAX & L-4 STATE TAX (Copy of SS to verify name)		X ²	X	X	X	X
SUPPLEMENTAL EMPLOYMENT FORM		X	X	X	X	X
I-9 AND COPY OF ATTACHMENTS		X	X	X	X	X
DRUG POLICY CERTIFICATION		X	X	X	X	X
CAR INSURANCE AGREEMENT (LCES ONLY)		X				
NAME TAG INFORMATION		X				
BANK DEPOSIT AUTHORIZATION FORM		X ²	X	X	X	X
VEHICLE AUTHORIZATION (****Do NOT return form to HRM****)		X	X	X	X	X
INSUR	Submit for appointments of 121 days, or longer and 75% effort or greater.	Group Benefits Enrollment Document	X	X		
		LSU System Voluntary Benefits Enrollment form and Summary Sheet	X	X		
		Optional Insurances Election Form (Overall Checklist)	X	X		
		Extension Benevolent Insurance Election Form (LCES only)	X			
TAX SAVER FLEXIBLE BENEFITS PLAN ENROLLMENT FORM		X	X			
LEAVE ACCRUAL RATE ELECTION FORM		X				
RETIREMENT	Determine the proper option(s) to offer. Then submit those documents that correspond to the option selected.	LASERS - Enrollment generally for classified employees on regular appointments. (attach copy of SS card)		X ³		
		TRSL - Enrollment generally for academic employee on regular appointment.	X ³			
		Statement Concerning Your Employment in a Job Not Covered by Social Security	X	X		
		Ret. Election Form (Pink) - (Temp/Academic/PT-50% or less/Classified) choosing b/t Soc Sec. & other options	X ³	X ³		
		ORP - Enrollment (Blue Form) & Elected Carrier Form copy	X ³			
		Deferred Compensation Enrollment Form if not ORP or SS	X ³			
		Soc. Sec. - Coverage is generally mandatory for transients and classified employees on restricted & job appts. <i>Note: No enrollment form is required.</i>	X ³	X ³	X ³	
ALIEN TAX INFO. REQUEST (Complete for paid non-U.S. Citizens only except Perm Res)		X ²	X	X	X	X
WORK PERMIT from ISO		X	X	X	X	X
EMPLOYMENT OF A MINOR (For any employee under age 18)		X	X	X	X	
PROOF OF STUDENTS F/T ENROLLMENT STATUS (non-LSU only)					X	X
POSITION ADVERTISEMENT AND SELECTION RECORD		X	X			
CLASSIFIED APPLICATION **May req transcripts or demotion letter**			X			
APPLICATION PACKAGE (documents required on the advertisement) (Omit if previous grad. asst. in unit where appt is being made for associate posn)		X ²				
LETTERS OF OFFER & ACCEPTANCE (Only <i>REQUIRED</i> for LAES Asst Prof and up and all LCES faculty)		X ²				
EMPLOYMENT CONTRACT (PER-25)(Submit for all joint with LSUBR)		X ²				
SELECTIVE SERVICE REGISTRATION (for males 18-25 yrs)		X	X	X	X	X
NEW EMPLOYEE ORIENTATION CHECKLIST		X	X	X	X	X
NEW EMPLOYEE INITIAL PERFORMANCE PLANNING SESSION FORM		X				
EMPLOYMENT SCREENING FORM (new employees only - NOT AgCenter transfers)		X	X			

¹STUDENT-TRANSIENT EMPLOYEES (TITLE CODE S998) ARE COVERED BY THE STUDENT COLUMN, NOT THE TRANSIENT COLUMN.

²OMIT FOR GRATIS APPOINTMENTS

³REFER TO OTHER CHARTS AND WRITTEN INSTRUCTIONS WHEN DETERMINING THE APPROPRIATE RETIREMENT SYSTEM TO OFFER

GUIDELINES FOR DETERMINING RETIREMENT ENROLLMENT OR SOCIAL SECURITY COVERAGE-Appointments, Continuations, Changes in Percent Effort and/or Changes in Visa Status require that you review this chart for each action. (If employee is transferring in (i.e., currently employed by another LSU campus or state agency), see Kathy to determine if same rules apply.)

Faculty, Other Academic, & Unclassified

Is employee retired from TRSL?* NOTE: Always check with Kathy if this employee was previously covered by the U.S. Civil Service Retirement System and is being appointed by LCES.	YES* -Did employee participate in TRSL DROP, TRSL OPTION 5 provision or disability retirement?*		YES -See Kathy regarding "Return to Service" options. A TRSL Disability retiree will lose disability benefits if re-employed in a position covered by TRSL. NO -See Kathy regarding "Return to Service" options.					
	NO -Is employee retired from another La. retirement system?*	YES -Is employee on appointment for 2 years or less or for 50% effort or less?	YES -No retirement or SS					
			NO -Does employee have 5 or more years creditable service in LASERS, but not retired from LASERS?	YES -Does employee have 5 or more years creditable service in LSERS, but not retired from LSERS?	YES -Has employee ever been a member of the La. ORP?	YES -Choice of ORP, LASERS or LSERS NO -Choice of TRSL, ORP, LASERS or LSERS		
				NO -Has employee ever been a member of the La. ORP?	YES -Choice of ORP or LASERS NO -Choice of TRSL, ORP or LASERS			
			NO -Does employee have 5 or more years creditable service in LSERS, but not retired from LSERS?	YES -Has employee ever been a member of the La. ORP?	YES -Choice of ORP or LSERS NO -Choice of TRSL, ORP or LSERS			
	NO -Has employee ever been a member of the La. ORP?	YES -Enroll in ORP NO -Choice of TRSL or ORP						
	NO -Does employee have 10 or more years of creditable service in a La. retirement system?	YES -See ● below. (EXCEPTION: Dual Employment -see ♠ below.)						
		NO -Is employee on appointment for 2 years or less or for 50% effort or less?	YES -Is employee on F-1 or J-1 visa?	YES -Is employee considered a resident alien for tax purposes?***		YES -Choice of LDCP or SS NO -No retirement or SS		
			NO -Choice of ORP, LDCP or SS (If currently participating in TRSL, continue in TRSL.)					
		NO -Is employee on F-1 or J-1 visa?	YES -Is employee considered a resident alien for tax purposes?***	YES -Choice of LDCP or SS NO -No retirement or SS				
NO -Does employee have 5 or more years creditable service in LASERS or LSERS, but not retired from LASERS or LSERS?	YES -Has employee ever participated in La. ORP		YES -Choice of ORP or LASERS/LSERS NO -Choice of TRSL, ORP or LASERS/LSERS					
		NO -Has employee ever participated in La. ORP	YES -Enroll in ORP NO -Choice of TRSL or ORP					

DEFINITIONS:
LASERS = Louisiana State Employees' Retirement System; **LSERS** = Louisiana School Employees' Retirement System; **TRSL** = Teachers' Retirement System of Louisiana; **ORP** = Optional Retirement Plan; **LDCP** = Louisiana Deferred Compensation Plan; **SS** = Social Security.

*Re-employed retirees of TRSL are not eligible for enrollment in TRSL and re-employed retirees of LASERS are not eligible for enrollment in LASERS nor do they have to pay Social Security. (See exceptions noted in ** below). Earnings will be limited unless the employee chooses to suspend his/her retirement benefit. (Limitations are determined by the system from which retired.) Earnings will not be limited for a retiree of LASERS who is employed in a position covered by TRSL (must enroll in TRSL). Earnings will not be limited for a retiree of TRSL employed in a position covered by LASERS (must enroll in LASERS).

When a TRSL DROP retiree or TRSL Option 5 retiree is re-employed, the following applies: 1) if employment has been terminated for less than 24 months, retiree **must suspend retirement benefit and **must** again contribute to TRSL; 2) If employment has terminated for 24 months, retiree may choose to suspend benefit and earn any amount or continue benefit and earn up to 50% of benefit. Contributions must again be made to TRSL; 3) If retiree had 30 years of service, he/she needs to be out of service only 12 months with the option to suspend benefit and earn any amount or continue benefit and earn up to 50% of benefit. Contributions must again be made to TRSL. (This does not apply to a LASERS DROP retiree.)

Disability Retirees: 1) TRSL Disability Retiree -if employed in a position covered by TRSL, disability benefits will cease (has earnings limit if re-employed outside of the education system); 2) LASERS Disability Retiree -may be employed under an earnings limit.

***The following lists when an individual on an F or J visa is considered a "Resident Alien for tax purposes:"
 • An employee on an F-1 or J-1 Student visa in the US for more than 5 calendar years (including part years) and at least 183 days in the sixth year.
 • An employee on a J-1 Non-student visa who is present in the US more than 2 calendar years (including part years) and at least 183 days in the third year.

- ♥ -YES -Offer LASERS, TRSL (if at least 5 years credit, never in the La. ORP and not a TRSL retiree), or LSERS (if at least 5 years credit), otherwise no retirement or SS.
- ★ -YES -Choice of LASERS, TRSL (if at least 5 years credit, never in the La. ORP and not a TRSL retiree), or LSERS (if at least 5 years credit)
- ⊙ - If temporary (2yrs or less) or part-time (50% effort or less), must continue in current system. If >2 yrs & >50% effort, has **choice** of current system or LASERS and if age 60 or old, also has choice of SS.)
- - If temporary (2yrs or less) or part-time (50% effort or less), must continue in current system. If >2 yrs & >50% effort, has **choice** of current system, TRSL (if never participated in La. ORP) or ORP.
- ♣ - YES -Choice of LASERS, SS, TRSL (if at least 5 years credit, never in the La. ORP and not a TRSL retiree), or LSERS (if at least 5 years credit)
- ♠ - **Dual Employment** -If an individual is employed by two agencies covered by different retirement systems, that employee is required to be a contributing member of both systems. However, if that employee will be in a temporary and/or part-time position requiring social security coverage, but that employee has 10 or more years of credit in the other agency's retirement system, the employee is required to participate in the other agency's system in lieu of social security.

Note: If appointed less than 51% and later increased to 51% or greater, 2 year eligibility rule begins with the change date, not with the date of original appointment.