Enrollment Worksheet

This worksheet is provided to help Retirement Coordinators gather the necessary information on each employee eligible for membership in OPERS. Please do not submit this paper worksheet. The data contained on this worksheet should be submitted via the secure member enrollment site at **https://connect.opers.state.ok.us**. Effective June 30, 2009, OPERS no longer accepts enrollment forms on paper.

MEMBER INFORMATION

Name (First, Middle, Maiden, Last)

Member's Social Security Number

Mailing Address

Member's Date of Birth

Member's Gender

Marital Status (Check one)

- ☐ Married, but separated
- ☐ Married
- ☐ Never married
- ☐ Divorced
- ☐ Widowed

Spouse's Full Name (First, Middle, Maiden, Last)

Member's Telephone Number

Spouse's Date of Birth

Spouse's Social Security Number

	YES	NO
1. Is the employee an elected official?	☐	☐
2. Has the employee previously worked for this employer or another employer participating in OPERS?	☐	☐
If yes, did the employee elect to participate in the 2.5% Step-Up Program?	☐	☐
3. Is the employee currently contributing to any other retirement system created under the laws of the State of Oklahoma?	☐	☐

If yes, give the name of the retirement system: _____

(Ex: Oklahoma Firefighters Pension and Retirement System, Oklahoma Police Pension and Retirement System, Oklahoma Law Enforcement Retirement System, Oklahoma Teachers' Retirement System, Uniform Retirement System for Justices and Judges)

4. Is the employee currently contributing to the Federal Civil Service Retirement System? ☐ ☐

List the above named employee's service with any OPERS participating employers. List temporary and permanent employment separately. (Attach additional sheets if necessary.)

	Monthly Gross Compensation	PERMANENT	TEMPORARY	SEASONAL	Beginning Employment Date *MM/DD/YY*	Ending Employment Date *MM/DD/YY*
Current Position	$	☐	☐	☐		
Former Position		☐	☐	☐		
Former Position		☐	☐	☐		

REMINDERS

- Enroll new employees online (OPERS will not accept paper enrollments)
- Give employees the following:
  - *Essential*OPERS or Member Handbook (both available online)
  - Beneficiary Designation Form
  - 2.5% Step-Up Brochure
- You can print the data entered on the online enrollment site for your records.

If you have any questions about the enrollment process or the online enrollment website, please contact OPERS.

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