LASERS

Louisiana State Employees' Retirement System

OPEN FORUM

[FALL 2026]

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LASERS
Louisiana State Employees' Retirement System

AGENCY OPEN FORUM

TUESDAY, NOVEMBER 17, 2026 | 9:30 - 11:30 A.M.

WELCOME & INTRODUCTIONS *[LASERS Update]*	**Travis McIlwain** *Executive Director*
INVESTMENT PERFORMANCE *[Asset Allocation & Summary]*	**Bobby Beale, CFA, CAIA** *Chief Investment Officer*
LEGISLATIVE SESSION OUTCOME *[2026 Update]*	**Tina Grant** *Executive Counsel*
REHIRED RETIREES & AGENCY ONTRIBUTIONS *[Contribution Rate Changes, ESS Information]*	**Amanda Kimble** *Accountant Manager*
REHIRED RETIREES *[Option 1A Earnings Calculation]*	**Ashley Chutz** *Human Resources Supervisor* *Division of Administration*
EMPLOYER EDUCATION *[Membership Eligibility, Enrollments, Retirement Processes]*	**Wendy Kinchen** *Retirement Benefits Supervisor*
RETIREMENT READINESS *[Deferred Compensation Plan]*	**Chad Anderson** *Retirement Plan Advisor* *Empower*
QUESTIONS & ANSWERS	

THANKS FOR ATTENDING!

Presentations are available at www.lasersonline.org/employers.

A recording of the webinar will be posted on our website soon.

NOTES

WELCOME & INTRODUCTIONS

LASERS UPDATE

[TRAVIS McILWAIN]

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Louisiana State Employees' Retirement System

Agency Update

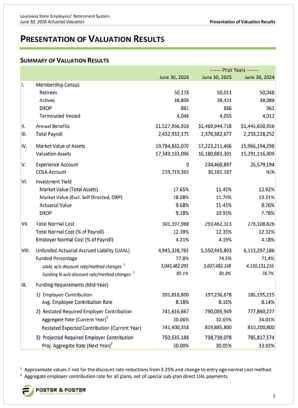
Travis McIlwain
LASERS Executive Director

November 17, 2026



Financial Health of the System

- LASERS achieved an **18.7% investment return** for the fiscal year ending June 30, 2026.
- Our actuarial **valuation** was presented in September and yielded **positive news** for the System:
  - Market value of assets exceeds **$19.8 billion**.
  - Funded ratio increased to **77.8%.**
  - Employer contribution rate will decrease to **30.0%.**
- Awaits approval at the PRSAC meeting in December.
- The Actuarial Valuation is available on our **website** at www.lasersonline.org/publications/annual-reports/



Louisiana State Employees' Retirement System
June 30, 2026 Actuarial Valuation
Presentation of Valuation Results

PRESENTATION OF VALUATION RESULTS

SUMMARY OF VALUATION RESULTS

		June 30, 2026	Prior Years June 30, 2025	June 30, 2024
I.	Membership Census			
	Retirees	50,178	50,011	50,048
	Actives	38,809	39,431	39,089
	DROP	861	886	901
	Terminated Vested	4,046	4,055	4,012
II.	Annual Benefits	$1,527,906,918	$1,469,944,718	$1,441,650,056
III.	Total Payroll	2,422,952,175	2,376,582,877	2,258,338,252
IV.	Market Value of Assets	19,784,892,070	17,223,211,406	15,966,194,298
	Valuation Assets	17,349,593,096	16,180,883,301	15,291,116,909
V.	Experience Account	0	234,660,897	26,579,194
	COLA Account	219,719,365	36,181,187	N/A
VI.	Investment Yield			
	Market Value (Total Assets)	17.65%	11.45%	12.92%
	Market Value (Excl. Self Directed, ORP)	18.08%	11.74%	13.31%
	Actuarial Value	9.68%	11.45%	8.56%
	DROP	9.18%	10.91%	7.76%
VII.	Total Normal Cost	301,397,988	293,462,313	275,338,826
	Total Normal Cost (% of Payroll)	12.39%	12.35%	12.32%
	Employer Normal Cost (% of Payroll)	4.21%	4.19%	4.18%
VIII.	Unfunded Actuarial Accrued Liability (UAAL)	4,945,378,765	5,550,445,803	6,113,297,186
	Funded Percentage	77.8%	74.5%	71.4%
	UAAL w/o discount rate/method changes [1]	3,047,402,093	3,077,482,148	4,130,131,210
	Funding % w/o discount rate/method changes [1]	85.1%	85.0%	78.7%
IX.	Funding Requirements (Mid-Year)			
	1) Employer Contribution	201,818,800	197,236,678	181,195,215
	Avg. Employee Contribution Rate	8.18%	8.31%	8.14%
	2) Restated Required Employer Contribution	741,416,667	790,085,949	777,860,227
	Aggregate Rate (Current Year) [2]	30.06%	33.65%	34.91%
	Restated Expected Contribution (Current Year)	741,400,358	819,885,800	810,200,800
	3) Projected Required Employer Contribution	750,535,188	798,739,078	781,817,574
	Proj. Aggregate Rate (Next Year) [2]	30.00%	30.05%	33.92%

[1] Approximate values if not for the discount rate reductions from 8.25% and change to entry age normal cost method.
[2] Aggregate employer contribution rate for all plans, net of special sub-plan direct UAL payments.

FOSTER & FOSTER

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Beware of Companies Falsely Representing LASERS

- **Agencies play a vital role in protecting member data.**
- **Stay alert:** Do **not** click on suspicious emails or links.
  You can hover your mouse over the email or link to see the real address.
- **Decline unsolicited meetings:** LASERS does **not** send representatives to meet with members outside our office.
- **Protect personal information:** Never share sensitive data unless you are certain of the request.
- **Report concerns immediately:**
  - 225-922-0600 (Baton Rouge)
  - 1-800-256-3000 (Toll-Free)



What to Look for in Communications from LASERS

- **Verify the source:** Confirm the sender before acting on any message, especially those about LASERS benefits.
- **Check the email address:** Official emails will always come from **@lasersonline.org**.
- **Expect clear identification:** LASERS representatives will always state who they are.
- **Look for official branding:** Authentic messages include the LASERS logo and contact information.

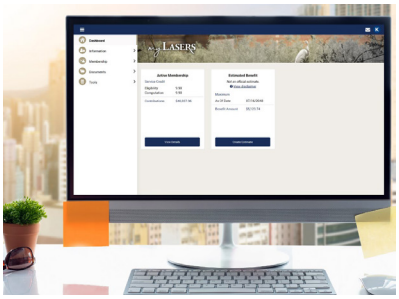
Charles McBride
Cyber Security Administrator | LASERS

225.922.0379 | cmcbride@lasersonline.org
8401 United Plaza Blvd. | Baton Rouge, LA 70809
www.lasersonline.org

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Sign up for myLASERS

- **Create your account today:** Manage your retirement information anytime, anywhere.
- **Quick start guides:** Flyers and QR cards are in your book and at the registration table.
- **Learn more online:** Access instructional videos and resources at lasersonline.org/mylasers-info.
- **Use your personal email:** This ensures LASERS can stay in touch if you change agencies or retire.



INVESTMENT PERFORMANCE

ASSET ALLOCATION & SUMMARY

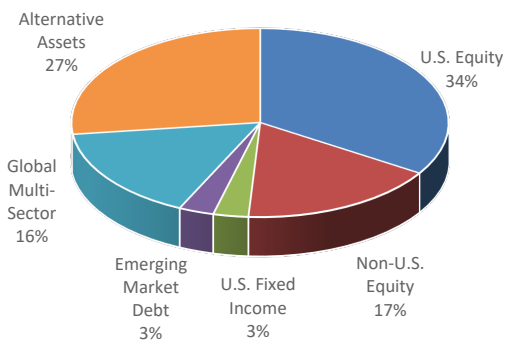
[BOBBY BEALE, CFA, CAIA]

Investment Performance

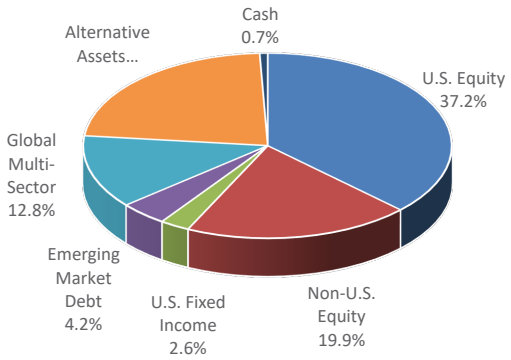
Asset Class	Mkt. Value ($millions)	Fiscal YTD	2 Years	3 Years	4 Years	5 Years	7 Years	10 Years
U.S. Equity	$6,983.7	27.4	19.7	20.4	20.4	12.7	14.5	13.8
Non-U.S. Equity	$3,745.9	31.9	26.4	22.0	19.5	10.7	11.7	11.1
U.S. Fixed Income	$490.0	4.5	5.2	4.4	4.2	1.2	2.7	3.6
Emerging Market Debt	$785.8	8.1	8.3	8.7	9.1	6.3	5.2	4.6
Global Multi-Sector	$2,405.9	6.2	7.9	10.0	9.6	7.3	7.8	7.7
Alternative Assets	$4,250.7	8.3	8.7	7.9	7.0	7.7	10.1	10.0
Cash	$131.5							
S&P 500		*22.3*	*18.7*	*20.6*	*20.4*	*13.4*	*16.1*	*15.5*
MSCI World Ex-USA		*21.6*	*20.5*	*17.5*	*17.6*	*9.9*	*10.8*	*10.4*
Bloomberg US Aggregate		*3.8*	*4.9*	*4.2*	*2.9*	*0.1*	*1.2*	*1.5*
TOTAL PLAN	**$18,793.5**	**18.7**	**15.5**	**15.0**	**14.2**	**9.5**	**10.8**	**10.5**

As of June 30, 2026

Target Allocation



Actual Allocation



As of June 30, 2026

LOUISIANA LEGISLATIVE SESSION OUTCOME

[TINA GRANT]



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Louisiana State Employees' Retirement System

2026 Session Outcomes

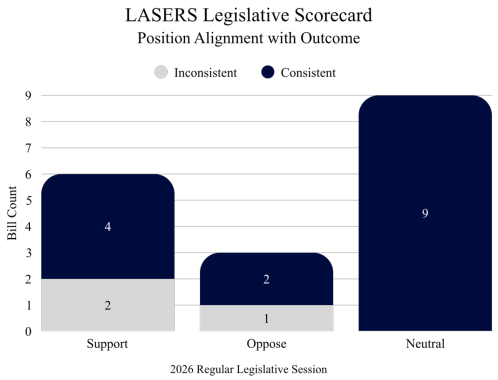
Agency Open Forum

LASERS Legal Division – Fall 2026

2026 Regular Legislative Session

At-a-glance

- The LASERS Board of Trustees took a position on 18 bills during the 2026 Regular Legislative Session
  - Opposed 3: 1 enacted; 2 failed
  - Supported 6: 4 enacted; 1 failed; 1 withdrawn
  - Neutral on 9: all 9 enacted



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2026 Regular Legislative Session

Highlights – Major Successes

Overall, LASERS had a very successful legislative session, advancing major priorities for the System and its members.

- **Act 280** delivered the first COLA to LASERS retirees since 2016.
- **Act 961** provided a $145.4 million supplemental appropriation effectively paying off the OAB (IUAL) and reducing the EEAB (UAL), further improving LASERS long-term financial position.

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2026 Regular Legislative Session

Act 280 - COLA

Authorizes a 2% COLA for eligible retirees and beneficiaries.

- Retirees saw increase effective July 1, 2026.

The 2% increase applies to the first $81,201 of the annual benefit.

Eligibility is based on age and length of time receiving a benefit.

- Age 60 or older by 7/1/26 and have received benefits for at least one year.
- Beneficiaries qualify if benefits have been paid for at least one year and the retiree would have reached age 60 by 7/1/26.
- Disability retirees and beneficiaries qualify after one year of benefits, with no age requirement.
- Survivors receiving a benefit based on the death of an active member are not eligible.

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2026 Regular Legislative Session

COLA Transition

Act 280 of the 2026 Legislative Session is being funded under the current COLA structure, which uses the Experience Account.

However, Louisiana law changed the future funding structure for COLAs through Act 184 of the 2023 Legislative Session.

Under Act 184, LASERS will use a new funding model in which employers directly fund future COLAs through a dedicated COLA account.

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2026 Regular Legislative Session

COLA Transition

Old COLA Method (2016 & 2026 COLA)	New COLA Method
60 years of age; retired at least 1 year	62 years of age; retired at least 2 years
2% of the first $81,201 (CPI-U)	2% of the first $60,000
Granted infrequently	Granted every 2-3 years
Indirectly funded from excess investment earnings	Directly funded by employer contributions

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2026 Regular Legislative Session

Funding

Act 961 - Provides a $145.4 mil supplemental appropriation to LASERS to reduce the unfunded accrued liability.

Act 606 - Proposes a constitutional amendment to remove the requirement that new monies be applied to the oldest UAL. **This amendment was rejected by voters earlier this month.*

Act 230 - Terminates additional amortization hurdles after an original amortization base is liquidated.

Act 198 - Renames the State Employee Retired license plate to the RSEA plate and redirects proceeds from LASERS to RSEA.

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2026 Regular Legislative Session

Board Meetings

Act 19 - Extends authorization for legislative staff to attend retirement system executive sessions from one to four years.

Act 226 - Decreases required educational hours for members of retirement system boards of trustees from 16 hours to 12 hours.

- Investment training – Reduced from 8 to 7 hours
- Actuarial science information education – Reduced from 4 to 2 hours
- Laws, rules, and regulations education – From 2 hours to 1 hour
- Fiduciary duty and ethics instruction – Remains at 2 hours; not reduced

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2026 Regular Legislative Session

Judges

Act 267 - Provides relative retired judges who return to work on assignment.

Act 705 - Creates a Back-Deferred Retirement Option Program for certain judges in LASERS.

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2026 Regular Legislative Session

Act 267

Ad-hoc Judicial Compensation

- Provision impacts LASERS by redefining membership so as to allow 'new' judges with prior time in any state system to join the old judicial plan; however,
- They must make the election within 30 days of employment.

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2026 Regular Legislative Session

Act 705 – Backdrop for Judges

Back-DROP applies only to a judge who is:

- Otherwise eligible for retirement;
- Holds a judgeship designated to be abolished upon retirement;
- Voluntarily retires before the end of the current term; and,
- Does not seek election to another judicial office.

The election is irrevocable, may be made only once, and does not apply to someone who has already participated in DROP.

At retirement, the member selects the Back-DROP period in whole months, subject to statutory caps. The selected Back-DROP period cannot exceed the lesser of:

- 36 months;
- The number of months of service accrued after first regular retirement eligibility; or,
- The number of months remaining in the judge's current unexpired elected term.

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2026 Regular Legislative Session

Act 705 – Section 2 Eligibility

Section 2 of the Act creates a separate, temporary early-retirement window for certain judges, even if they would not otherwise have met regular LASERS eligibility at that time, if they meet the conditions:

- Available to certain judges not otherwise eligible for regular LASERS retirement
- Applies if the judgeship will be abolished by operation of law.
- Requires the judge to agree not to seek reelection.

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2026 Regular Legislative Session

Act 263 - Corrections Critical Shortage Rehires

Act 263 provides reemployment rules for LASERS retirees filling critical shortage positions in DPS&C.

Creates a new rehired retiree option for only those members hired in “critical shortage positions” in the Department of Public Safety & Corrections.

- To be certified by the agency secretary.

A retiree rehired under this option shall:

- **Continue to receive full benefits**
- **Shall not earn additional service credit or accrue any additional retirement benefits**
- **Upon termination, retiree shall be refunded his employee contributions; LASERS will retain employer contributions**

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2026 Regular Legislative Session

Other Bills of Interest

Act 25 – Makes various technical changes in LASERS statutes.

Act 609 – Transfers eligible nonhazardous duty employees from LASERS to MPERS.

Act 266 - Allows certain district and parish court employees to join PERS and make an irrevocable election to transfer from LASERS or other systems.

Act 269 - Creates an exception so the Gaming Control Board chair is eligible for LASERS membership.

SR 141 - Requests state retirement systems to identify China-connected holdings and to report on how to divest from such investments in a prudent and orderly manner.

Act 293 - Increases the max property value that qualifies for a small succession from $125,000 to $200,000.

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REHIRED RETIREES & AGENCY CONTRIBUTIONS

CONTRIBUTION RATE CHANGES, ESS INFORMATION

[AMANDA KIMBLE]

Important Information for Employers

- **Rehired Retirees**
- **Updating Agency Contact/Employee Information**
- **ESS Login**
- **Employer Forms**
- **Employer Contribution Rate Change**

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Rehired Retirees

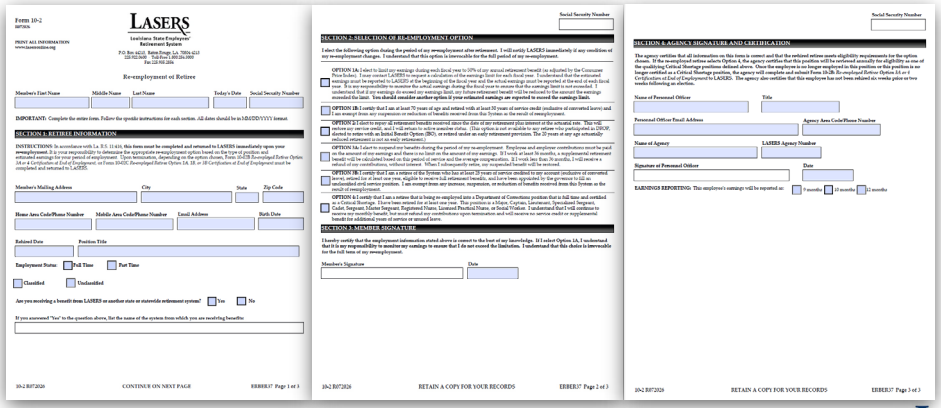
- **Human Resources determines when hiring a Retiree if the position is LASERS-eligible.**
  - Consult with your agency's legal team.
  - Submit a question through ASKLASERS
- **Check at the time of hire if the employee is a Rehired Retiree**
  - LaGov
  - LASERS Employer Self-Service (ESS) under **Member Inquiry.**
- **There is no waiting period for a member to be rehired once they have retired.**

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Rehired Retirees – Rehire From

Form 10-2: Re-employment of Retiree

- Must be completed within **45** days of re-employment.
- Member defaulted to Option 3, by statute, if form is not submitted timely.



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Rehired Retirees

Form 10-2: Re-employment of Retiree - Options

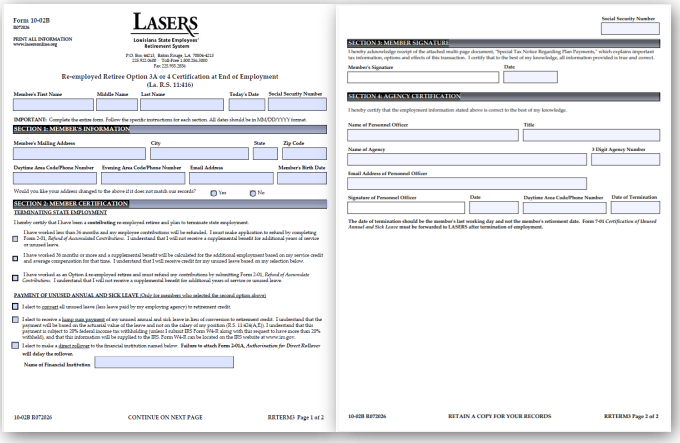
A Retiree hired in a LASERS-eligible position must select 1 of the 6 options:

Option 1A	Option 1B	Option 2	Option 3A	Option 3B	Option 4
May earn 50% of annual retirement benefit - adjusted by the CPI-U	Unlimited earnings, exempt from suspension of benefits	Regain LASERS Membership	Suspend benefit and start contributing	Governor appointed	Department of Corrections' critical shortage positions only
	Age 70+	Pay back any benefit + interest	After 36 months, Retiree will receive a supplemental benefit	Must have 25 years – exclusive of converted leave	Do not suspend benefit + pay contributions
	30 Years of Service	Start contributing again		Retired for at least 1 year	No supplemental benefit earnings; must refund
	E-mail LASERS to verify eligibility (AskLASERS)				

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Rehired Retirees – Termination Forms

10-02B: Re-employed Retiree Option 3A or 4 Certification at End of Employment



Form 10-02B

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Louisiana State Employees' Retirement System

Re-employed Retiree Option 3A or 4 Certification at End of Employment
(La. R.S. 11:416)

Member's First Name | Middle Name | Last Name | Today's Date | Social Security Number

IMPORTANT: Complete the entire form. Follow the specific instructions for each section. All dates should be in MM/DD/YYYY format.

SECTION 1: MEMBER'S INFORMATION

Member's Mailing Address | City | State | Zip Code

Daytime Area Code/Phone Number | Evening Area Code/Phone Number | Email Address | Member's Birth Date

Would you like your address changed to the above if it does not match our records? Yes No

SECTION 2: MEMBER CERTIFICATION

TERMINATING STATE EMPLOYMENT

I hereby certify that I have been a **contributing** re-employed retiree and plan to terminate state employment.

I have worked less than 36 months and any employee contributions will be refunded. I must make application to refund by completing Form 2-51, *Refund of Accumulated Contributions*. I understand that I will not receive a supplemental benefit for additional years of service or unused leave.

I have worked 36 months or more and a supplemental benefit will be calculated for the additional employment based on my service credit and average compensation for that time. I understand that I will receive credit for my unused leave based on my selection below.

I have worked as an Option 4 re-employed retiree and must refund my contributions by submitting Form 2-51, *Refund of Accumulated Contributions*. I understand that I will not receive a supplemental benefit for additional years of service or unused leave.

PAYMENT OF UNUSED ANNUAL AND SICK LEAVE (Only for members who selected the second option above)

I elect to convert all unused leave (less leave paid by my employing agency) to retirement credit.

I elect to receive a lump sum payment of my unused annual and sick leave in lieu of conversion to retirement credit. I understand that the payment will be based on the actuarial value of the leave and not on the salary of my position (R.S. 11:424(A)(2)). I understand that this payment is subject to 22% federal income tax withholding (26 U.S.C. 3402(a)(2)(A)(ii)). I have the right to request to have more than 22% withheld, and that this information will be supplied to the IRS. Form W-4 P can be found on the IRS website www.irs.gov.

I elect to make a direct rollover to the financial institution named below. **Failure to attach Form 2-05A, *Authorization for Direct Rollover*** will delay the rollover.

Name of Financial Institution

10-02B R072026 CONTINUE ON NEXT PAGE RRTERM3 Page 1 of 2

Social Security Number

SECTION 3: MEMBER SIGNATURE

I hereby acknowledge receipt of the attached multi-page document, "Special Tax Notice Regarding Plan Payments," which explains important tax information, options and effects of this transaction. I certify that to the best of my knowledge, all information provided is true and correct.

Member's Signature | Date

SECTION 4: AGENCY CERTIFICATION

I hereby certify that the employment information stated above is correct to the best of my knowledge.

Name of Personnel Officer | Title

Name of Agency | 3 Digit Agency Number

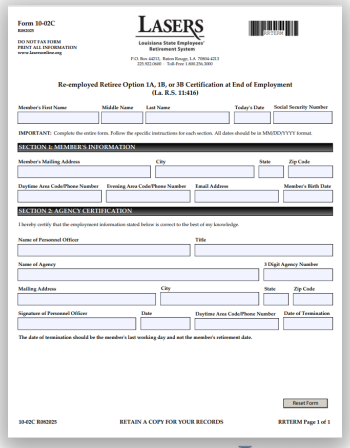
Email Address of Personnel Officer

Signature of Personnel Officer | Date | Daytime Area Code/Phone Number | Date of Termination

The date of termination should be the member's last working day and not the member's retirement date. Form 7-01 *Certification of Unused Annual and Sick Leave* must be forwarded to LASERS after termination of employment.

10-02B R072026 RETAIN A COPY FOR YOUR RECORDS RRTERM3 Page 2 of 2

10-02c: Re-employed Retiree Option 1A, 1B, or 3B Certification at End of Employment



Form 10-02C

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Louisiana State Employees' Retirement System

DO NOT FAX FORM
PRINT ALL INFORMATION

Re-employed Retiree Option 1A, 1B, or 3B Certification at End of Employment
(La. R.S. 11:416)

Member's First Name | Middle Name | Last Name | Today's Date | Social Security Number

IMPORTANT: Complete the entire form. Follow the specific instructions for each section. All dates should be in MM/DD/YYYY format.

SECTION 1: MEMBER'S INFORMATION

Member's Mailing Address | City | State | Zip Code

Daytime Area Code/Phone Number | Evening Area Code/Phone Number | Email Address | Member's Birth Date

SECTION 2: AGENCY CERTIFICATION

I hereby certify that the employment information stated below is correct to the best of my knowledge.

Name of Personnel Officer | Title

Name of Agency | 3 Digit Agency Number

Mailing Address | City | State | Zip Code

Signature of Personnel Officer | Date | Daytime Area Code/Phone Number | Date of Termination

The date of termination should be the member's last working day and not the member's retirement date.

Reset Form

10-02C R082025 RETAIN A COPY FOR YOUR RECORDS RRTERM Page 1 of 1

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Rehired Retirees

Option 1A Rehired Retirees

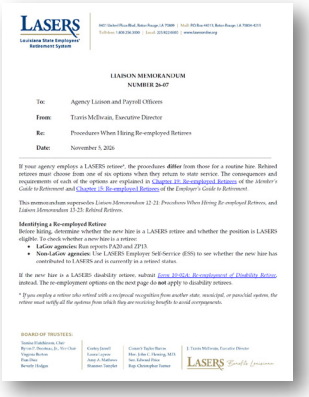
- **Allowable Earnings Letters are mailed in the following ways:**
  - Member + Agency when rehired
  - Member + Agency in August
  - Member request
- **Verification of Earnings mailed in July**
  - All earnings **except** for Termination Pay (paid when the member retires)
  - **Only** the earnings earned while an Option 1A
  - Termination date field completed with member terms from Rehired Retiree position or left blank

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Rehired Retirees

Form 10-2: Re-employment of Retiree – Contact Information

If you have questions, contact **Myia Knighten** at mknighten@lasersonline.org or **Kelly Leggette** at kleggette@lasersonline.org.



LIAISON MEMORANDUM
NUMBER 26-07

To: Agency Liaison and Payroll Officers

From: Travis McIlwain, Executive Director

Re: Procedures When Hiring Re-employed Retirees

Date: November 5, 2026

Refer to Liaison Memoranda:

- *26-07: Procedures When Hiring Re-employed Retirees*

www.lasersonline.org/employers/liaison-memoranda/

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Updating Agency Contact Information

Where do I go?

- **Log in** to Employer Self-Service (ESS).
- Click on **Employer Maintenance**.
- Then click **Next** until you see the contact type that you would like to update.
- If you like to add a new contact type, click **New**.
- Contact Types
  - Payroll Coordinator
  - Agency Director
  - ACR Contact
  - HR and Payroll
  - HR Liaison
  - CFO
  - GASB68 Info



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Updating Employees' Addresses

These should be updated in 2 areas depending on how your agency submits:

FTP Agencies:

1. FTP File
2. Member Maintenance in ESS if needed immediately

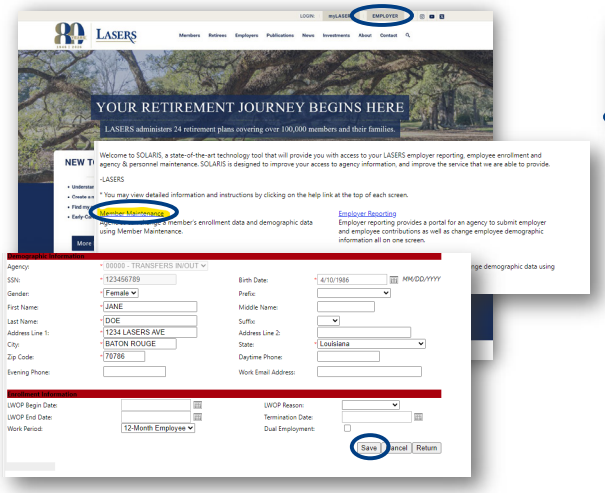
ESS Agencies:

1. Member Maintenance in ESS
2. Under the individual's information in Employer Reporting

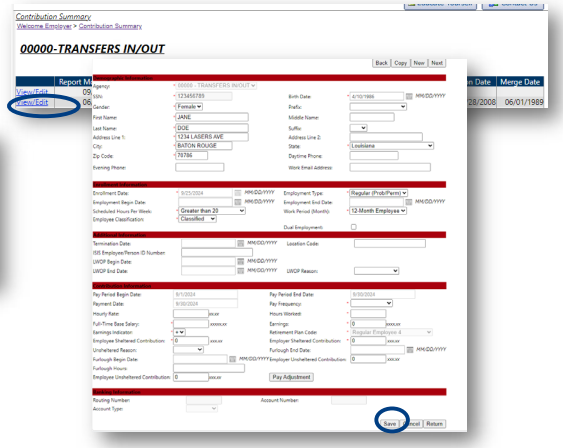
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Updating Employees' Addresses

Member Maintenance



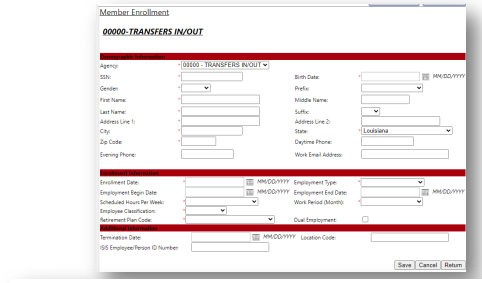
Employer Reporting

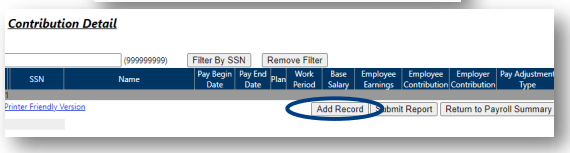


LASERS

Enrolling & Reporting New Hires in ESS

- Ensure this is a LASERS eligible position
  - If it is not, ensure the employee can retain their LASERS membership
- Look under **Employer Inquiry** in ESS to verify retirement plan
- Enroll member under **Member Enrollment**
- Select **Add Record** in the template under **Employer Reporting,** ensuring that you are reporting in the correct month





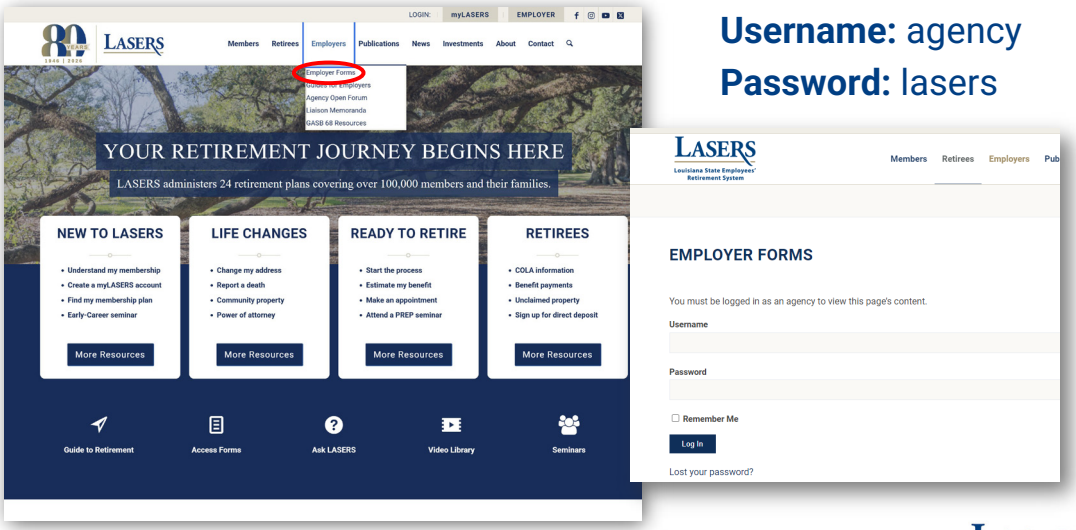
LASERS

Employer Self Service (ESS) Login Requests

- **New User Login**
  - An employee that has a login (if possible) should send an email to AskLASERS, Kelly, or Myia.
  - Please provide agency number, name, email address, and phone number for the new user.
- **Locked Out/Forgot Password**
  - An email should be sent to AskLASERS, Kelly, or Myia requesting a new password
  - Please provide agency number and username in the email.

LASERS

Accessing Employer Forms



Username: agency
Password: lasers

LASERS

Employer Contribution Rate Changes

When do the rates change and where do I find them?

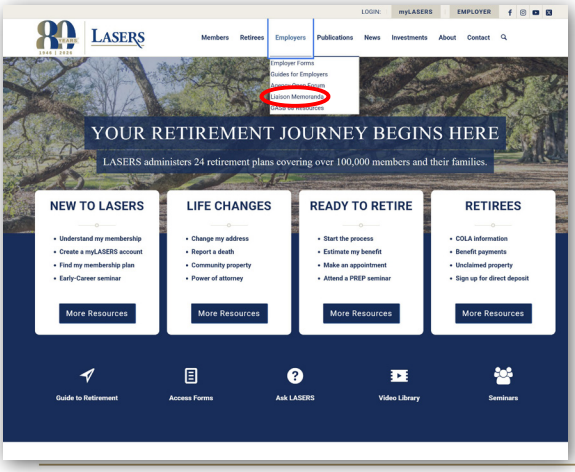
- **Employer Contribution rate changes July 1 each year.**
- **Rate change begins with the first paycheck date in July.**
  - *ex: Pay period start date is 6/14, pay period end date is 6/27, paycheck date is 7/2. Your rate change would begin with this pay period.*
- **Memos:**
  - Emailed near the beginning of each calendar year
  - A link to the new rates is on the Fiscal Year End Memorandum sent in May

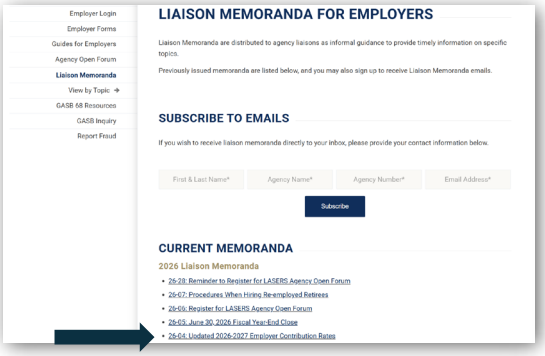
LASERS

Employer Contribution Rate Changes

Where do I find this?

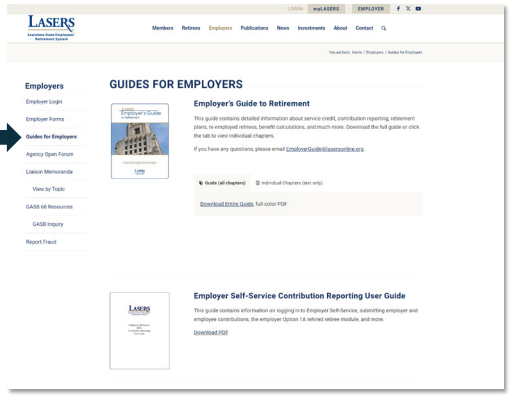
Hover over **Employers→** click **Liaison Memoranda→ XX:XX Employer Contribution Rates**

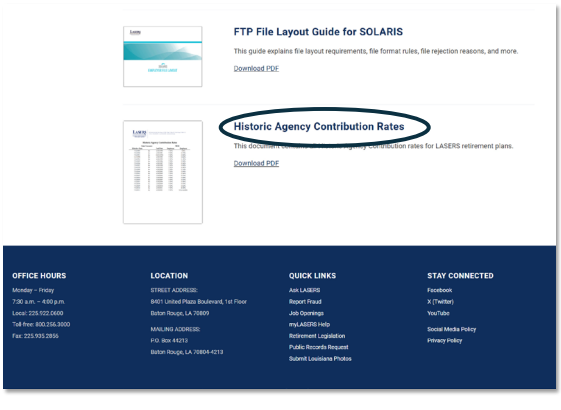




Historical Contribution Rate Changes

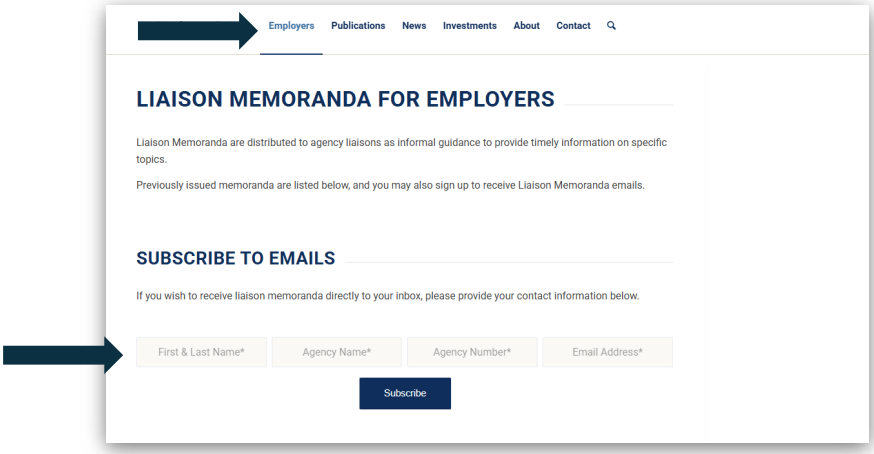
Where do I find this?





Subscribe to Liaison Memoranda Emails

Click on **Employers** → **Liaison Memoranda** → enter the information requested



LASERS



Q&A

Amanda Kimble | *Accountant Manager*

LASERS

REHIRED RETIREES

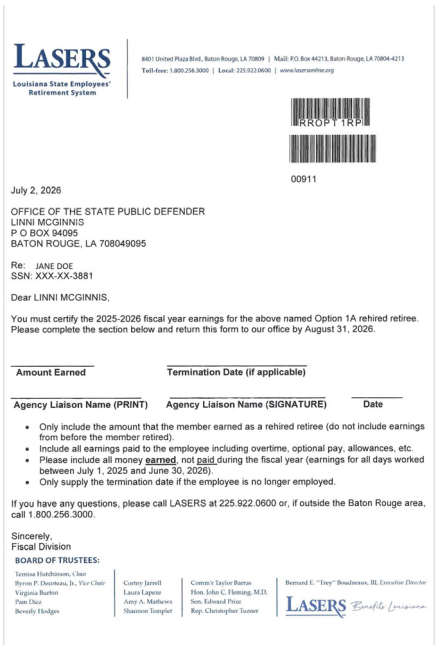
OPTION 1A EARNINGS CALCULATION

[ASHLEY CHUTZ]

Certification of Fiscal Year Earnings

Ashley Chutz
Human Resources Supervisor
Division of Administration, Office of Human Resources

LASERS Agency Open Forum
November 17, 2026



LASERS
Louisiana State Employees' Retirement System

8401 United Plaza Blvd, Baton Rouge, LA 70809 | Mail: P.O. Box 44213, Baton Rouge, LA 70804-4213
Toll-free: 1.800.256.3000 | Local: 225.922.0600 | www.lasersonline.org

PROP 1 TRP

00911

July 2, 2026

OFFICE OF THE STATE PUBLIC DEFENDER
LINNI MCGINNIS
P O BOX 94095
BATON ROUGE, LA 708049095

Re: JANE DOE
SSN: XXX-XX-3881

Dear LINNI MCGINNIS,

You must certify the 2025-2026 fiscal year earnings for the above named Option 1A rehired retiree. Please complete the section below and return this form to our office by August 31, 2026.

Amount Earned | Termination Date (if applicable)

Agency Liaison Name (PRINT) | Agency Liaison Name (SIGNATURE) | Date

- Only include the amount that the member earned as a rehired retiree (do not include earnings from before the member retired).
- Include all earnings paid to the employee including overtime, optional pay, allowances, etc.
- Please include all money earned, not paid during the fiscal year (earnings for all days worked between July 1, 2025 and June 30, 2026).
- Only supply the termination date if the employee is no longer employed.

If you have any questions, please call LASERS at 225.922.0600 or, if outside the Baton Rouge area, call 1.800.256.3000.

Sincerely,
Fiscal Division

BOARD OF TRUSTEES:

Temisa Hutchinson, *Chair*
Byron P. Decoteau, Jr., *Vice Chair*
Virginia Burton
Pam Diez
Beverly Hodges
Cortny Jarrell
Laura Lapeze
Amy A. Mathews
Shannon Templet
Comm'r Taylor Barras
Hon. John C. Fleming, M.D.
Sen. Edward Price
Rep. Christopher Turner
Bernard E. "Trey" Boudreaux, III, *Executive Director*

LASERS *Benefits Louisiana*

Certification of Earnings

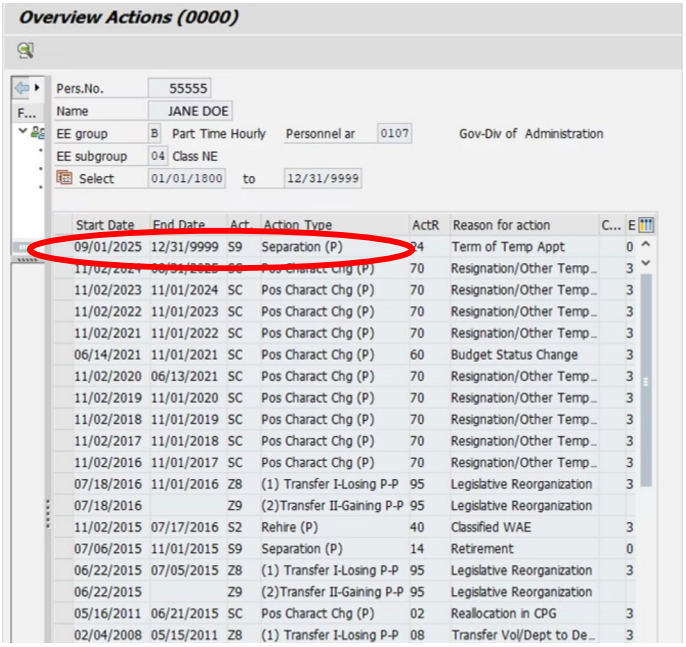
1. Include the **amount earned as a rehired retiree** during the fiscal year: July 1st of the previous year to June 30th of the current year, including overtime, optional pay, allowances, etc.

2. Include the termination date only if the employee separated from their WAE (rehired retiree) position.

Action History

1. Review **Action History** for retirement this fiscal year, any break in service, or separation.

2. If they retired or separated this fiscal year, enter that information into the calculator.

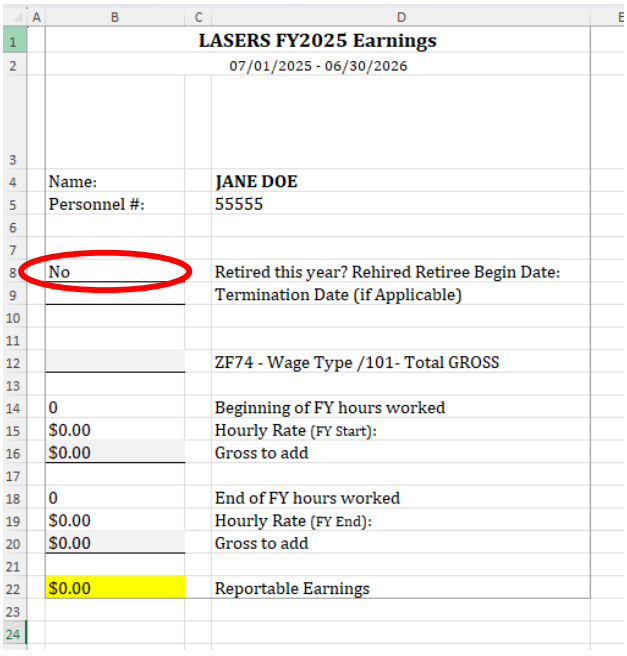


Overview Actions (0000)

Pers.No. 55555
Name JANE DOE
EE group B Part Time Hourly Personnel ar 0107 Gov-Div of Administration
EE subgroup 04 Class NE
Select 01/01/1800 to 12/31/9999

Start Date	End Date	Act.	Action Type	ActR	Reason for action	C...	E
09/01/2025	12/31/9999	S9	Separation (P)	24	Term of Temp Appt	0	
11/02/2024	08/31/2025	SC	Pos Charact Chg (P)	70	Resignation/Other Temp..	3	
11/02/2023	11/01/2024	SC	Pos Charact Chg (P)	70	Resignation/Other Temp..	3	
11/02/2022	11/01/2023	SC	Pos Charact Chg (P)	70	Resignation/Other Temp..	3	
11/02/2021	11/01/2022	SC	Pos Charact Chg (P)	70	Resignation/Other Temp..	3	
06/14/2021	11/01/2021	SC	Pos Charact Chg (P)	60	Budget Status Change	3	
11/02/2020	06/13/2021	SC	Pos Charact Chg (P)	70	Resignation/Other Temp..	3	
11/02/2019	11/01/2020	SC	Pos Charact Chg (P)	70	Resignation/Other Temp..	3	
11/02/2018	11/01/2019	SC	Pos Charact Chg (P)	70	Resignation/Other Temp..	3	
11/02/2017	11/01/2018	SC	Pos Charact Chg (P)	70	Resignation/Other Temp..	3	
11/02/2016	11/01/2017	SC	Pos Charact Chg (P)	70	Resignation/Other Temp..	3	
07/18/2016	11/01/2016	Z8	(1) Transfer I-Losing P-P	95	Legislative Reorganization	3	
07/18/2016		Z9	(2)Transfer II-Gaining P-P	95	Legislative Reorganization		
11/02/2015	07/17/2016	S2	Rehire (P)	40	Classified WAE	3	
07/06/2015	11/01/2015	S9	Separation (P)	14	Retirement	0	
06/22/2015	07/05/2015	Z8	(1) Transfer I-Losing P-P	95	Legislative Reorganization	3	
06/22/2015		Z9	(2)Transfer II-Gaining P-P	95	Legislative Reorganization		
05/16/2011	06/21/2015	SC	Pos Charact Chg (P)	02	Reallocation in CPG	3	
02/04/2008	05/15/2011	Z8	(1) Transfer I-Losing P-P	08	Transfer Vol/Dept to De..	3	

Calculator : Enter Status



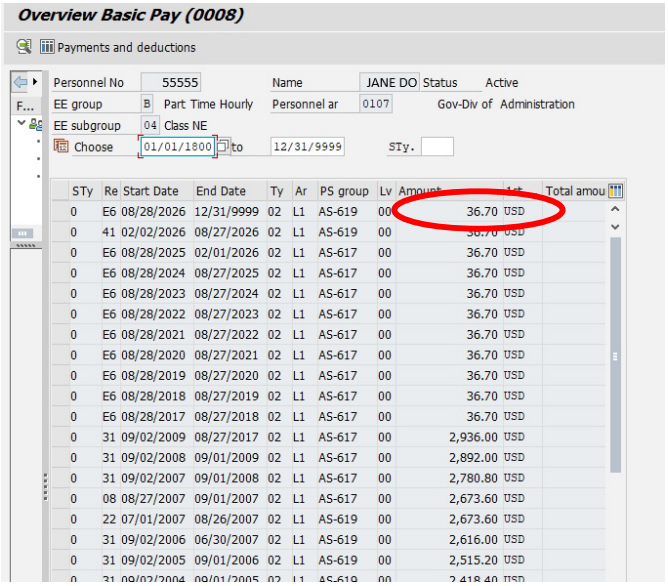
LASERS FY2025 Earnings

07/01/2025 - 06/30/2026

Name:	**JANE DOE**
Personnel #:	55555
No	Retired this year? Rehired Retiree Begin Date:
	Termination Date (if Applicable)
	ZF74 - Wage Type /101- Total GROSS
0	Beginning of FY hours worked
$0.00	Hourly Rate (FY Start):
$0.00	Gross to add
0	End of FY hours worked
$0.00	Hourly Rate (FY End):
$0.00	Gross to add
$0.00	Reportable Earnings

Basic Pay

1. Review **Basic Pay for the hourly rate** at the **beginning** and **end** of the fiscal year.
2. Enter the **hourly** rates into the calculator.



STy	Re	Start Date	End Date	Ty	Ar	PS group	Lv	Amount		Total amou
0	E6	08/28/2026	12/31/9999	02	L1	AS-619	00	36.70	USD	
0	41	02/02/2026	08/27/2026	02	L1	AS-619	00	36.70	USD	
0	E6	08/28/2025	02/01/2026	02	L1	AS-617	00	36.70	USD	
0	E6	08/28/2024	08/27/2025	02	L1	AS-617	00	36.70	USD	
0	E6	08/28/2023	08/27/2024	02	L1	AS-617	00	36.70	USD	
0	E6	08/28/2022	08/27/2023	02	L1	AS-617	00	36.70	USD	
0	E6	08/28/2021	08/27/2022	02	L1	AS-617	00	36.70	USD	
0	E6	08/28/2020	08/27/2021	02	L1	AS-617	00	36.70	USD	
0	E6	08/28/2019	08/27/2020	02	L1	AS-617	00	36.70	USD	
0	E6	08/28/2018	08/27/2019	02	L1	AS-617	00	36.70	USD	
0	E6	08/28/2017	08/27/2018	02	L1	AS-617	00	36.70	USD	
0	31	09/02/2009	08/27/2017	02	L1	AS-617	00	2,936.00	USD	
0	31	09/02/2008	09/01/2009	02	L1	AS-617	00	2,892.00	USD	
0	31	09/02/2007	09/01/2008	02	L1	AS-617	00	2,780.80	USD	
0	08	08/27/2007	09/01/2007	02	L1	AS-617	00	2,673.60	USD	
0	22	07/01/2007	08/26/2007	02	L1	AS-619	00	2,673.60	USD	
0	31	09/02/2006	06/30/2007	02	L1	AS-619	00	2,616.00	USD	
0	31	09/02/2005	09/01/2006	02	L1	AS-619	00	2,515.20	USD	
0	31	09/02/2004	09/01/2005	02	L1	AS-619	00	2,418.40	USD	

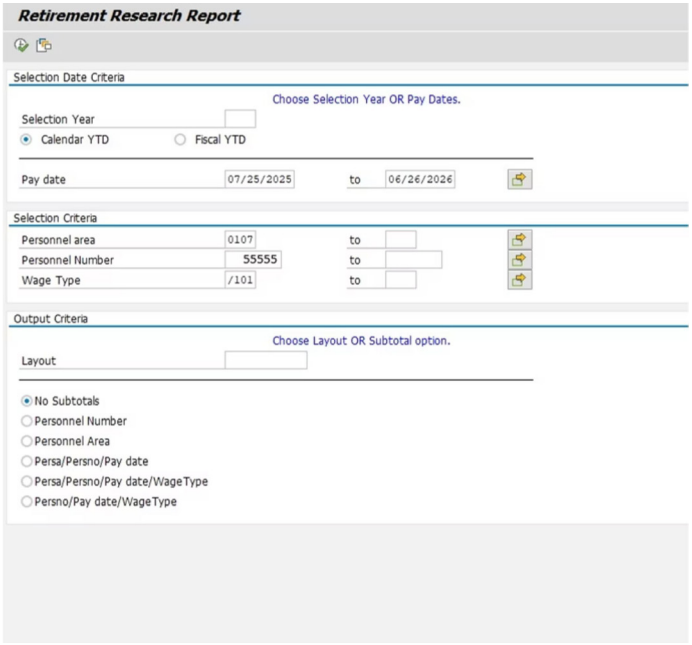
Calculator: Enter Hourly Rates

	A	B	C	D
1		**LASERS FY2025 Earnings**		
2		07/01/2025 - 06/30/2026		
3				
4		Name:		**JANE DOE**
5		Personnel #:		55555
6				
7				
8		No		Retired this year? Rehired Retiree Begin Date:
9				Termination Date (if Applicable)
10				
11				
12		$0.00		ZF74 - Wage Type /101- Total GROSS
13				
14		0		Beginning of FY hours worked
15		$36.70		Hourly Rate (FY Start):
16		$0.00		Gross to add
17				
18		0		End of FY hours worked
19		$36.70		Hourly Rate (FY End):
20		$0.00		Gross to add
21				
22		$0.00		Reportable Earnings
23				

Run ZF74

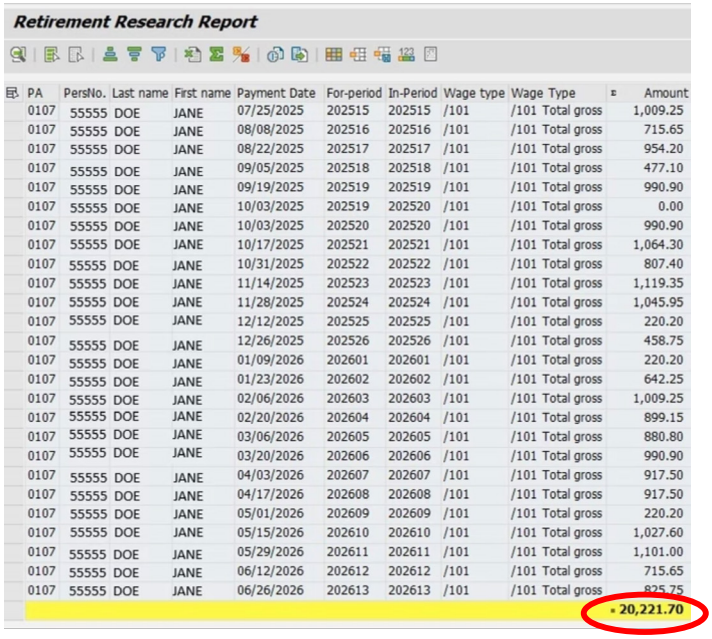
1. Set the **Pay Date from the first full check to the last full check** of the fiscal year.
2. Enter the **Personnel Area** and **Personnel Number.**
3. Set Wage Type to **/101.**

Do not use Fiscal YTD because you will have to readjust the calculator.



ZF74 Results

Copy the total to the calculator.


Retirement Research Report

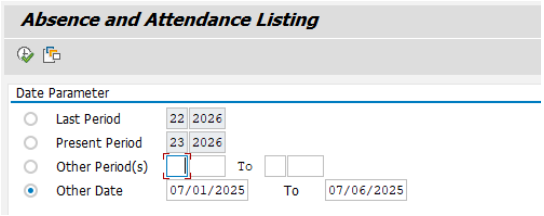
PA	PersNo.	Last name	First name	Payment Date	For-period	In-Period	Wage type	Wage Type	Amount
0107	55555	DOE	JANE	07/25/2025	202515	202515	/101	/101 Total gross	1,009.25
0107	55555	DOE	JANE	08/08/2025	202516	202516	/101	/101 Total gross	715.65
0107	55555	DOE	JANE	08/22/2025	202517	202517	/101	/101 Total gross	954.20
0107	55555	DOE	JANE	09/05/2025	202518	202518	/101	/101 Total gross	477.10
0107	55555	DOE	JANE	09/19/2025	202519	202519	/101	/101 Total gross	990.90
0107	55555	DOE	JANE	10/03/2025	202519	202520	/101	/101 Total gross	0.00
0107	55555	DOE	JANE	10/03/2025	202520	202520	/101	/101 Total gross	990.90
0107	55555	DOE	JANE	10/17/2025	202521	202521	/101	/101 Total gross	1,064.30
0107	55555	DOE	JANE	10/31/2025	202522	202522	/101	/101 Total gross	807.40
0107	55555	DOE	JANE	11/14/2025	202523	202523	/101	/101 Total gross	1,119.35
0107	55555	DOE	JANE	11/28/2025	202524	202524	/101	/101 Total gross	1,045.95
0107	55555	DOE	JANE	12/12/2025	202525	202525	/101	/101 Total gross	220.20
0107	55555	DOE	JANE	12/26/2025	202526	202526	/101	/101 Total gross	458.75
0107	55555	DOE	JANE	01/09/2026	202601	202601	/101	/101 Total gross	220.20
0107	55555	DOE	JANE	01/23/2026	202602	202602	/101	/101 Total gross	642.25
0107	55555	DOE	JANE	02/06/2026	202603	202603	/101	/101 Total gross	1,009.25
0107	55555	DOE	JANE	02/20/2026	202604	202604	/101	/101 Total gross	899.15
0107	55555	DOE	JANE	03/06/2026	202605	202605	/101	/101 Total gross	880.80
0107	55555	DOE	JANE	03/20/2026	202606	202606	/101	/101 Total gross	990.90
0107	55555	DOE	JANE	04/03/2026	202607	202607	/101	/101 Total gross	917.50
0107	55555	DOE	JANE	04/17/2026	202608	202608	/101	/101 Total gross	917.50
0107	55555	DOE	JANE	05/01/2026	202609	202609	/101	/101 Total gross	220.20
0107	55555	DOE	JANE	05/15/2026	202610	202610	/101	/101 Total gross	1,027.60
0107	55555	DOE	JANE	05/29/2026	202611	202611	/101	/101 Total gross	1,101.00
0107	55555	DOE	JANE	06/12/2026	202612	202612	/101	/101 Total gross	715.65
0107	55555	DOE	JANE	06/26/2026	202613	202613	/101	/101 Total gross	825.75
									20,221.70

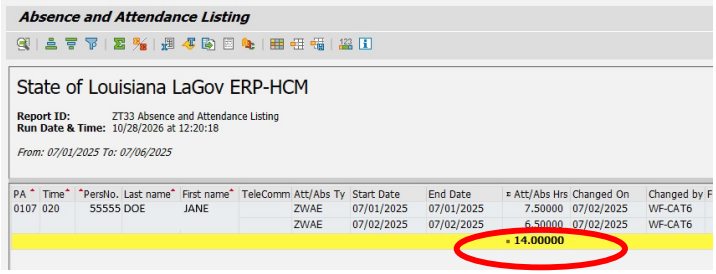
Calculator: Enter ZF74 Total

	A	B	C	D	E
1		**LASERS FY2025 Earnings**			
2		07/01/2025 - 06/30/2026			
3					
4		Name:		**JANE DOE**	
5		Personnel #:		55555	
6					
7					
8		No		Retired this year? Rehired Retiree Begin Date:	
9				Termination Date (if Applicable)	
10					
11					
12		$20,221.70		ZF74 - Wage Type /101- Total GROSS	
13					
14		0		Beginning of FY hours worked	
15		$36.70		Hourly Rate (FY Start):	
16		$0.00		Gross to add	
17					
18		0		End of FY hours worked	
19		$36.70		Hourly Rate (FY End):	
20		$0.00		Gross to add	
21					
22		$20,221.70		Reportable Earnings	
23					

ZT33: Beginning of Year

1. Run **ZT33** to determine hours worked at the beginning of the fiscal year, but not included in the first full PP.
2. Enter the **hours worked** on the calculator.



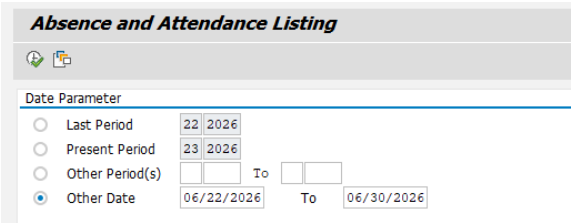


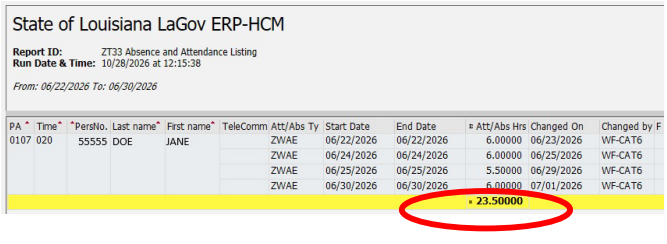
Calculator: Enter Beginning -of- Year Hours

	A	B	C	D	E
1		**LASERS FY2025 Earnings**			
2		07/01/2025 - 06/30/2026			
3					
4		Name:		**JANE DOE**	
5		Personnel #:		55555	
6					
7					
8		No		Retired this year? Rehired Retiree Begin Date:	
9				Termination Date (if Applicable)	
10					
11					
12		$20,221.70		ZF74 - Wage Type /101- Total GROSS	
13					
14		14		Beginning of FY hours worked	
15		$36.70		Hourly Rate (FY Start):	
16		$513.80		Gross to add	
17					
18		0		End of FY hours worked	
19		$36.70		Hourly Rate (FY End):	
20		$0.00		Gross to add	
21					
22		$20,735.50		Reportable Earnings	
23					

ZT33: End of Year

1. Run **ZT33** to determine hours worked at the end of the fiscal year but not included in the first full PP.
2. Enter the **hours worked** on the calculator.





Reportable Earnings

Copy the **reportable earnings** from the calculator.

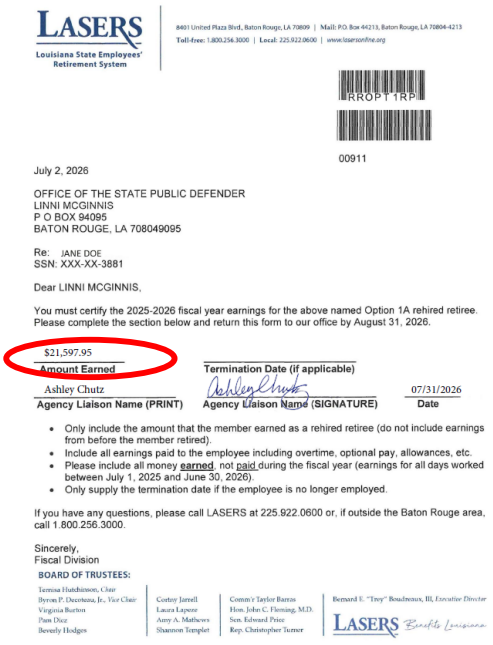
LASERS FY2025 Earnings

07/01/2025 - 06/30/2026

Name:	**JANE DOE**
Personnel #:	55555
No	Retired this year? Rehired Retiree Begin Date:
	Termination Date (if Applicable)
$20,221.70	ZF74 - Wage Type /101- Total GROSS
14	Beginning of FY hours worked
$36.70	Hourly Rate (FY Start):
$513.80	Gross to add
23.5	End of FY hours worked
$36.70	Hourly Rate (FY End):
$862.45	Gross to add
$21,597.95	Reportable Earnnings

Reportable Earnings

Enter the **reportable earnings** from the calculator on the LASERS certification of earnings form.



LASERS
Louisiana State Employees' Retirement System

8401 United Plaza Blvd, Baton Rouge, LA 70809 | Mail: P.O. Box 44213, Baton Rouge, LA 70804-4213
Toll-free: 1.800.256.3000 | Local: 225.922.0600 | www.lasersonline.org

RROPT1RP1

00911

July 2, 2026

OFFICE OF THE STATE PUBLIC DEFENDER
LINNI MCGINNIS
P O BOX 94095
BATON ROUGE, LA 708049095

Re: JANE DOE
SSN: XXX-XX-3881

Dear LINNI MCGINNIS,

You must certify the 2025-2026 fiscal year earnings for the above named Option 1A rehired retiree. Please complete the section below and return this form to our office by August 31, 2026.

$21,597.95
Amount Earned

Termination Date (if applicable)

Ashley Chutz
Agency Liaison Name (PRINT)

Agency Liaison Name (SIGNATURE)

07/31/2026
Date

- Only include the amount that the member earned as a rehired retiree (do not include earnings from before the member retired).
- Include all earnings paid to the employee including overtime, optional pay, allowances, etc.
- Please include all money **earned**, not paid during the fiscal year (earnings for all days worked between July 1, 2025 and June 30, 2026).
- Only supply the termination date if the employee is no longer employed.

If you have any questions, please call LASERS at 225.922.0600 or, if outside the Baton Rouge area, call 1.800.256.3000.

Sincerely,
Fiscal Division

BOARD OF TRUSTEES:

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LASERS *Benefits Louisiana*

Retirement/ Other Temp

- Employees who retire and go directly into a **WAE position**.
- On the **ZF74**, you will need to use the **first check date** that does **not** include any full-time earnings or term annual leave.

Full-Time Rehired Retirees

- Employees who retire, are rehired into a full-time position, and elect **option 1A.**
- You will need to adjust the calculator to the **daily rate of pay** and **number of days worked** at the beginning and end of the FY.

[REHIRED RETIREE CALCULATOR]

LASERS FY25 Earnings

07/01/2025 - 06/30/2026

Name:	**JANE DOE**
Personnel #:	55555
_____	Retired this year? Rehired Retiree Begin Date:
_____	Termination Date (if Applicable)
$0.00	ZF74 - Wage Type /101- Total GROSS
0	Beginning of FY hours worked
$0.00	Hourly Rate (FY Start):
$0.00	Gross to add
0	End of FY hours worked
$0.00	Hourly Rate (FY End):
$0.00	Gross to add
$0.00	Reportable Earnnings

EMPLOYER EDUCATION

MEMBERSHIP ELIGIBILITY, ENROLLMENTS, RETIREMENT PROCESSES

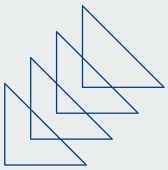
[WENDY KINCHEN]

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EMPLOYER EDUCATION & RESOURCES

LASERS Agency Outreach



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TODAY'S ROADMAP

Today's Discussion



- **LASERS RESOURCES** — Employer's Guide, Member's Guide, and Liaison Memoranda
- **CONTRIBUTION REPORTING** — Requirements, recurring errors, and corrections
- **EMPLOYER SELF-SERVICE (ESS)** — Enrollment, maintenance, reporting, and inquiries
- **END-OF-EMPLOYMENT PROCEDURES** — Retirement applications, important dates, and leave certification
- **MEMBERSHIP & ENROLLMENT** — HR responsibilities, accurate enrollment, and common errors
- **TRAINING & SUPPORT** — Agency Training and member seminars

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THE BIG PICTURE

Five measures that help prevent costly errors

1. Verify prior service credit
2. Double-check important dates
3. Apply current contribution rates
4. Submit reports and documents on time
5. Confirm receipt by LASERS

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WHAT ARE YOU SEEING?

What creates the most difficulty for your agency?

1. Membership and enrollment?
2. Contribution reporting?
3. DROP?
4. Termination and retirement dates?
5. Final processing?
6. Something else?

What could LASERS explain more clearly?

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YOUR LASERS Toolkit

Resources for agency HR and payroll personnel



EMPLOYER'S GUIDE

Instructions and guidance for employer processes



MEMBER'S GUIDE

Retirement information and an additional reference for HR



LIAISON MEMORANDA

Guidance on new requirements, procedures, and recurring issues

AGENCY TRAINING

Virtual and in-person training tailored to agency needs



EMPLOYER FORMS

Forms provide procedural guidance, instructions, and submission requirements

EMPLOYER SELF-SERVICE (ESS)

Your primary tool for enrollment, maintenance, and reporting

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ESS AT WORK Employer Self-Service

Your employer workspace

MEMBER MAINTENANCE

Maintain member and enrollment information

MEMBER ENROLLMENT

Enroll eligible new hires

EMPLOYER INQUIRY

Verify prior service and review contribution exceptions

EMPLOYER REPORTING

Report earnings and contributions

OPT 1A REHIRED RETIREE

Report monthly earnings

EMPLOYER MAINTENANCE

Keep your agency contact information current

Did You Know? ESS flags errors immediately but does not prevent report submission

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INSIDE THE Employer's Guide

One guide for agency tasks

MEMBERSHIP & ENROLLMENT

Membership eligibility and plan selection

SERVICE CREDIT

Service credit types, purchases, and transfers

CONTRIBUTION REPORTING

Earnings, contributions, and reporting corrections

REFUNDS

Refund requests and required procedures

SURVIVOR BENEFITS

Death reporting and required documentation

EMPLOYER MAINTENANCE

Agency information and member record updates

Chapters include employer quick checks, flowcharts, FAQs, and reference materials

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THE EMPLOYEE LIFE CYCLE The Agency's Role

From hire to final reporting

HIRE → **ENROLL** → **REPORT & MAINTAIN**

SEPARATE OR RETIRE → **FINALIZE**

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ENROLLMENT
Get It Right from the Start

Before enrolling an employee, verify the following

- LASERS membership eligibility
- Prior unrefunded service in a state retirement system
- First eligible employment date if have prior unrefunded service
- Employment type
- Applicable LASERS retirement plan, if any

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NEW HIRE ONBOARDING
Four Steps to Accurate Enrollment

Form 01-01: Membership Registration

Complete with every new hire

Verify Prior Unrefunded Service

Years of service in LASERS: check ESS

Years of service in TRSL, LSERS, or LSPRS: check with new hire (*Form 01-01*)

Enroll Correctly

Enroll eligible new hires in the correct LASERS retirement plan

Documentation

Submit required forms to LASERS; Retain copies in the employee's personnel file

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OPTIONAL MEMBERSHIP
Document the Election

Employees in some positions may elect to opt out of LASERS membership

Before documenting the election, confirm:

- The position is eligible for optional membership
- The employee understands the available election
- The appropriate election form is completed and retained
- ESS and agency records reflect the election

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FORM 01-01
Membership Registration

Complete the form together with every new hire

PURPOSE	BENEFITS	BEST PRACTICES
Determine membership eligibility	Provides guidance through enrollment	Review the form with the employee
Identify the correct retirement plan	Helps prevent enrollment errors	Complete the form together
Document an opt-out election, if applicable	Creates a record for future reference	Keep a copy in the personnel file

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A NEW HIRE DOESN'T Always Mean a New Plan

Prior unrefunded service may determine the applicable plan

LASERS | **TRSL** | **LSERS** | **LSPRS**

NEW HIRE ≠ MOST CURRENT PLAN

A new hire does not automatically belong in the most current LASERS retirement plan

Before Enrollment

- Check ESS for prior unrefunded service
- Verify previous membership in LASERS, TRSL, LSERS, or LSPRS
- Confirm the applicable retirement plan

When Prior Unrefunded Service Is Identified

- Determine the applicable plan based on the original membership date
- For qualifying membership in TRSL, LSERS, or LSPRS before July 1, 2015, submit Form 01-10 to certify prior state-system membership

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COMMON ENROLLMENT Oversights

Common errors and how agencies can correct them

ERROR	FIX
Incorrect enrollment date	Correct the effective date through ESS or SOLARIS
Incorrect Social Security number	Coordinate among the employee, agency, and LASERS, Provide the required supporting documentation
Incorrect retirement plan	Correct the plan in ESS and SOLARIS; review affected contributions
Enrolled in wrong system	Coordinate termination, transfer, and correct LASERS enrollment
Not enrolled in any system	Enroll with the correct effective date and correct prior reporting

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PROACTIVE BEATS REACTIVE

Prevent enrollment errors before they require corrections

BE THOROUGH: Complete ***Form 01-01 Membership Registration*** in its entirety with the employee

PREVENTION: Review enrollment information before submission

1. Verify prior unrefunded service in ESS
2. Check for transposed numbers
3. Confirm accurate enrollment date
4. Verify all personal information

TAKE YOUR TIME: Enrollment errors can delay benefits and require time-consuming corrections

Pro Tip For enrollment questions, contact LASERS through askLASERS

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LET'S TALK Enrollment Challenges

What is the hardest part of enrollment?

YOUR EXPERIENCE
Which enrollment errors occur most often at your agency?

PREVENTION TIPS
What practices have helped your agency prevent errors?

LEARNING TOGETHER
What can other agencies learn from your experience?

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LIAISON MEMORANDA
Enrollment Guidance

Additional resources for membership and enrollment

MEMO	TOPIC
17-28	Optional Membership / Social Security
16-07	Use of Leave When Returning to State Service
13-23	Rehired Retirees
12-27	Additional Steps in Hiring Process
12-21	Procedures When Hiring Re-Employed Retirees
16-14, 13-16, 11-14	Enrollment for Part-Time, Intermittent, Temporary, Emergency, WAE, Job Appointment Employees
08-02	LASERS Dual Employment Eligibilities
08-01	LASERS Membership Eligibility
07-04	Employment Status of LASERS Members

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REPORTING
Monthly Requirements

Contribution reporting essentials

CERTIFIED MONTHLY REPORTS

Include earned compensation, base pay, and employee and employer contributions

! ACCURACY

Verify earnings, contributions, and member information before submitting

TIMELY SUBMISSION

Reports and payments are due within 15 days after each calendar month ends

% RATES

Apply updated employer contribution rates beginning with July payroll, even for pay earned before July 1

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THE PAY That Counts

Understanding reportable compensation

EARNED COMPENSATION

Includes base pay and qualifying emoluments, such as certain allowances

NON-RECURRING COMPENSATION

Rewards, incentive awards, and lump sum optional pay generally do not qualify

PERMANENT OPTIONAL PAY

Considered earned compensation and subject to LASERS contributions

CONTRIBUTION REPORTING

Include reportable emoluments in base pay and report their cash value

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NOT EVERYTHING ON A Paycheck is Reportable

Verify compensation types before reporting

When unsure, ask LASERS before reporting

GENERALLY REPORTABLE	GENERALLY EXCLUDED OR REQUIRES VERIFICATION
Eligible base pay	Overtime pay*
Qualifying housing allowances	Per diem*
Qualifying car allowances	Differential pay
Qualifying food allowances	Payment in kind
Qualifying clothing allowances	Premium pay
Qualifying cell phone allowances	Other expense-related allowances

*Certain Legislative employees have statutory exceptions for overtime and per diem pay

See Liaison Memoranda: 12-23 (Optional Pay) and 13-13 (Contribution Wage Types)

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EMPLOYMENT STATUS Still Requires Reporting

Some changes must be reported even when contributions are not due

Leave Without Pay (LWOP)

Report full or partial leave without pay, as applicable

Employment Status Changes

Update employee status and changes in work arrangements

Other Reportable Changes

Report changes that affect the LASERS member record

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REPORTING LEAVE Without Pay

LWOP reporting for LaGov and non-LaGov agencies

LaGov Agencies

LWOP is included in system data transfers; no duplicate ESS entry is needed

Non-LaGov Agencies

Report full or partial days in ESS using the eight-hour workday rule

Entering LWOP in ESS

Enter the start and end dates
For a single day with fewer than eight hours of LWOP, use the same start and end date
Include the reason for the LWOP entry

Example Entry

LWOP Taken	Start Date	End Date
2 hours on 5/20/2025	5/20/2025	5/20/2025
2 hours per day, 9/5/2025–9/30/2025	9/5/2025	9/30/2025

NOTE: LASERS may contact agencies to clarify wage discrepancies or previously unreported LWOP

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WHEN DROP STARTS
Contributions Stop

Verify DROP entry dates before submitting reports

Employee Contributions Stop

Employer Contributions Stop

Employee and employer contributions stop during DROP

- Verify entry dates, including mid-pay-period dates
- Contributions reported during DROP require corrections
- After DROP ends, contributions resume if the member works after DROP (WAD)
- Do not wait for confirmation from LASERS to review DROP status

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RECURRING ERRORS
Reporting Gone Wrong

Common payroll reporting errors identified across agencies

ERROR	DETAILS
Wrong Contribution Rate	Using outdated or incorrect contribution rates
Omissions	Failing to report eligible employees, earnings, or contributions
Incorrect Base Pay	Reporting incorrect base pay, including for dually employed members
LWOP	Omitting or incorrectly reporting leave without pay
Ineligible Wages	Ineligible wage types reported as retirement earnings
DROP Reporting	Contributions reported during DROP or not resumed for work after DROP

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REPORTING
Resolving Exceptions

ESS alerts and agency follow-up

ERRORS CREATE EXCEPTIONS

Resolve reported exceptions within 30 days

NOTIFICATION

Review the ESS alert and respond to LASERS notifications

ESS ACCESS

Use Employer Inquiry in ESS to review exceptions

SUBMITTING REPORTS IN ESS

ESS may accept a report with exceptions; the agency must still correct them

NOTE: See Appendix B of the Self-Service Contribution Reporting Guide for exception definitions

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REPORTING ADJUSTMENTS
Within 12 Months

Correct reporting errors within 12 months using ESS pay adjustments

USE PAY ADJUSTMENT FEATURES

Enter retroactive pay adjustments through ESS

SUBMIT SALARY BREAKDOWN

Provide a month-by-month breakdown for correct allocation

CALCULATE CONTRIBUTIONS

Calculate employee and employer contributions using rates for each affected month

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ADMINISTRATIVE ERRORS
Beyond 12 Months

Reporting errors older than 12 months require an administrative-error request



SUBMIT ADMINISTRATIVE ERROR REQUEST ON AGENCY LETTERHEAD

Include Form 02-10B with a month-by-month breakdown



CALCULATE REQUIRED PAYMENT

Employee and employer contributions, plus applicable interest or actuarial cost



ACTUARIAL FEE: $200

Required only when the correction affects the member's service credit

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THE YEAR THAT
Didn't Count

Case study: Missing contributions and the effect on service credit

SCENARIO

An employee's earnings and contributions went unreported for more than 12 months

IMPACT ON EMPLOYEE

Service credit may be missing, eligibility dates may be wrong, and benefit estimates may be inaccurate

CORRECTION

Submit the administrative-error documentation and required payment; $200 actuary fee if service credit is affected

LESSON

Conduct regular self-audits to identify missing contributions early

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LET'S TALK Reporting Mistakes

Today's Discussion

FREQUENT ISSUES

Which reporting errors occur most often at your agency?

ERROR RESOLUTION

How does your agency resolve ESS exceptions or LASERS notices?

PEER SOLUTIONS

What reporting practice would you recommend to other agencies?

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LIAISON MEMORANDA Reporting Guidance

Reporting requirements and recurring errors

MEMO	TOPIC
20-03	Reporting Leave Without Pay (LWOP) for Non-LaGov Agencies
16-28	Reporting Base Pay for Members with Dual Employment
13-13	Retirement Eligible Contributions & Wage Types
12-23	Retirement Eligibility on Optional Pay
09-21	Contributions for Furloughed Employees / Unclassified Employees
07-10	Emoluments
07-09	Interest on Delinquent Contributions

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GUIDING EMPLOYEES Through Retirement

HR responsibilities before retirement and after termination

BEFORE RETIREMENT OR DROP ENTRY

- Provide the Application
  - Provide the appropriate application for Regular Retirement, DROP, IBO, or Disability Retirement
- Verify Important Dates
  - Confirm the termination, retirement, or DROP entry date
- Review for Completeness
  - Check required entries, certifications, and supporting documents
- Submit on Time
  - Send applications to LASERS before the effective retirement or DROP date

AFTER TERMINATION

- Record Termination
  - Enter the accurate termination date in ESS and SOLARIS
- Certify Unused Leave
  - Submit Form 07-01 within 30 days of termination
- Report Final Pay
  - Report final earnings and contributions accurately

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CRITICAL DIFFERENCE Termination vs. Retirement

One day can make a significant difference

TERMINATION DATE

The employee's final day of employment and the last day for reporting wages

RETIREMENT DATE

The later of:

1. Day after termination, or
2. Date LASERS receives the application

Termination date ≠ retirement date

Termination date and retirement date are not interchangeable

NOTE

POSSIBLE CONSEQUENCES OF LATE APPLICATION

- Reduced retirement benefits
- Change in retirement eligibility or status
- Loss of eligibility for certain unused leave benefits
- Possible impact on OGB coverage

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SMALL MISTAKES Big Headaches

Avoid delays by catching these before submission

LATE SUBMISSION

LASERS receives the application after the requested retirement or DROP effective date

WRONG APPLICATION TYPE

Wrong application submitted, such as Regular instead of IBO

TERMINATION DATE MISMATCH

Termination date differs among the application, ESS, and Form 07-01

DROP ENTRY ISSUES

Requested DROP start date is incorrect or inconsistent

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ADMINISTRATIVE ERROR Retirement Applications

Preventing application errors and requesting corrections

BEFORE SUBMISSION
- Provide the correct retirement application
- Verify the termination or DROP entry date
- Submit the application before the effective retirement date or DROP entry date

IF AN AGENCY ERROR OCCURS
- Submit an administrative error request on agency letterhead
- Explain the specific error and circumstances
- Include the corrected application and supporting documentation

Only qualifying agency errors may be corrected through the administrative error process

An employee changing their mind does not constitute an agency administrative error

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RETIREMENT DOES NOT End the Agency's Role

Agency responsibilities continue after an employee leaves

- **RECORD TERMINATION**
  - Enter the correct date in ESS
- **REPORT FINAL EARNINGS**
  - Submit final payroll information accurately and on time
- **CERTIFY UNUSED LEAVE**
  - Submit Form 07-01 within 30 days of termination
- **CHECK DATE CONSISTENCY**
  - Use the same termination date across LASERS documents
- **RESPOND PROMPTLY**
  - Answer analyst questions and provide requested corrections

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FORM 07-01: Leave Certification

Form 07-01: Certification of Unused Annual and Sick Leave

SUBMIT WITHIN 30 DAYS OF TERMINATION

Including when the leave balance is zero

ACCURATE REPORTING

Exclude agency-paid leave, then convert remaining hours to days using eight hours per day

DATE CONSISTENCY

Use the same termination date as the retirement application

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NON-RETIRING MEMBERS
When to Certify Leave

Form 07-01 guidance when an employee separates without retiring

LASERS recommends Form 07-01 when either condition applies

- The member has five or more years of service credit
- The member has more than 300 hours of unused leave

Certification is not necessary when the member refunds or transfers to another LASERS-eligible position

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DATES MUST TELL THE
Same Story

One employee, one termination date

Verify the same termination date in
ESS > SOLARIS > Retirement Application > Form 07-01

Retirement Application

Termination date on application: 8/31/2026

Leave Certification

Termination date on Form 07-01: 9/1/2026

What happens when these dates do not match?

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WHEN AN ACTIVE Employee Dies

Date of death = Termination date

1. Report the date of death as the termination date in ESS
2. Report eligible earnings through the date of death
3. Submit Form 07-01 for Regular Plan 3 and 4 members; not required for Regular Plan 1 and 2

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EASY TO MISS Hard to Fix

Common errors on Form 07-01

MISMATCHED TERMINATION DATE

Form 07-01 and retirement application show different termination dates

INCORRECT LEAVE REPORTING

Includes agency-paid leave or fails to report remaining leave accurately

LWOP DATES ERRORS

Dates omitted or reported incorrectly

MISSING AGENCY CERTIFICATION

Missing Personnel Officer initials and signature

FAILURE TO SUBMIT FORM

Form omitted even when the member has zero eligible leave

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SUBMITTING FORMS TO LASERS

Submission Check: Ready for LASERS

Complete
Are all required documents complete and included?

Readable
Legible, not too dark or light, and nothing cut off

Identifiable
Enough identifying information to match the member record

FORMS AND NON-LEGAL DOCUMENTS
- Submit by fax, mail, or hand delivery
- Use the current version of each form
- When faxing, group related pages and do not mail duplicate originals

LEGAL DOCUMENTS
- Submit an original or certified copy
- Do not fax
  - Examples include spousal consent, judgment of divorce, and power of attorney

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TERMINATION DATE Mismatch

Illustrative example: Conflicting termination dates

CONFLICTING TERMINATION DATES
Application: 8/31/2026 Form 07-01: 9/1/2026

POTENTIAL IMPACT
Conflicting dates may delay processing and affect retirement status, unused leave, and OGB coverage

Required Correction
For an agency error, submit an administrative error request on agency letterhead with corrected forms

Prevention
Verify that the termination date matches in ESS, the retirement application, and Form 07-01

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LET'S TALK End of Employment

Today's Discussion



DATES MATTER

What is your process for verifying termination and retirement dates?



LEAVE CERTIFICATION

How do you ensure Form 07-01 matches the application and ESS?



VERIFICATION

How does your agency confirm LASERS received documents on time?

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LIAISON MEMORANDA End-of-Employment Guidance

Guidance for agency responsibilities when an employee retires

MEMO	TOPIC
26-03	Administrative Errors on Retirement Applications (current guidance)
23-01	Selecting a retirement date: important reminders
16-24	Submitting LASERS documents by fax
16-16	Steps to Retirement: checklist for employees and agencies
14-10	Leave certification suggestions
13-19	Selecting a retirement date
13-02	Leave certification requirements
10-12	Termination date guidance
10-06	Required documents and retirement benefit payments
06-14	Certification at end of employment

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THE BIG FIVE

Do Not Forget

1 Verify Prior Service
Check ESS for prior unrefunded service for each new hire

2 Check Dates
Confirm matching termination and retirement dates

3 Apply Current Rates
Use updated employer rates beginning with July payroll

4 Submit On Time
Submit reports and forms by LASERS deadlines

5 Confirm Receipt
LASERS sends written confirmation; verify receipt

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STAYING SHARP

LASERS Training & Education

Resources for agencies and members

AGENCY TRAINING

HR-focused sessions on enrollment, ESS, reporting, and LASERS-related agency duties

MEMBER SEMINARS

Refer employees for information on retirement eligibility, benefit estimates, DROP, IBO, and retirement preparation

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LET'S TALK
Questions & Discussion
Your questions, your experiences
ASK ANYTHING
Questions about enrollments, reporting, or retirement processing?
SHARE EXPERIENCES
What has worked well at your agency? What could others adopt?
HELP US IMPROVE
What could LASERS clarify or improve to better support your agency?
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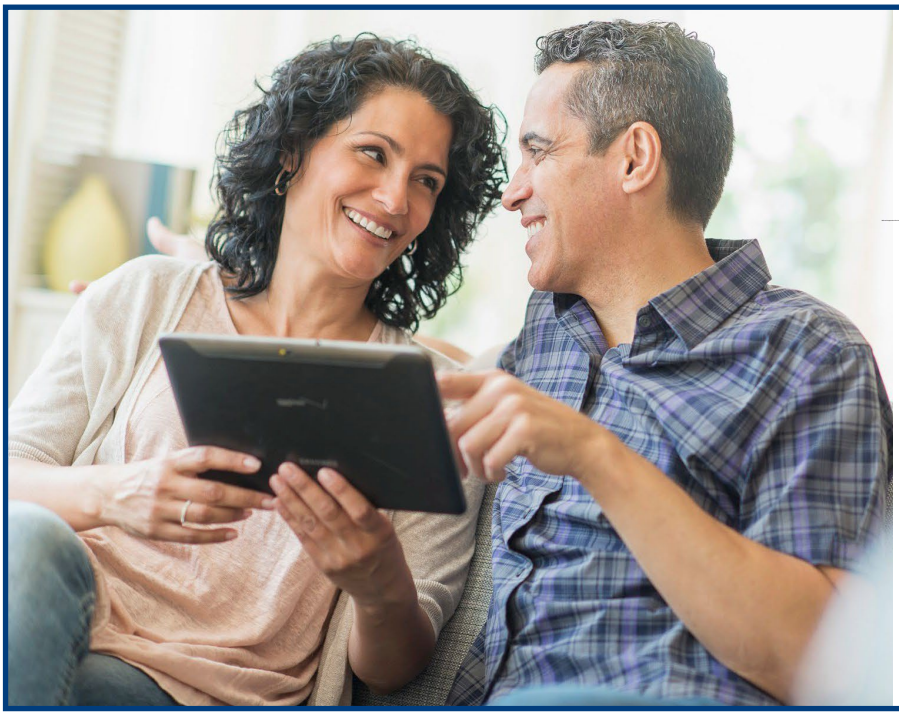
NOTES

NOTES

RETIREMENT READINESS

DEFERRED COMPENSATION PLAN

[CHAD ANDERSON]



LASERS
Louisiana State Employees' Retirement System

Deferred Compensation Plan Overview

Chad Anderson, CRPC
Retirement Plan Advisor
Southeast Louisiana Region

EMPOWER

What is the Louisiana Deferred Compensation Plan?

Our goal is to help you replace — for life — the income you made while working.

As your partner, we're here to:

- Help you plan for the retirement you imagine.
- Give you a better view of your retirement picture.
- Help you reach your financial goals.
- Offer ongoing support and guidance.
- Provide recommendations at no extra cost to you.



Your retirement income

Where can your money come from after you retire, and will you have enough to live the retirement you imagine?



Where Your Retirement Income Can Come From

Social Security may not be enough. For many, Social Security will only replace a portion of income in retirement.



Social Security



Pensions and retirement plans



Income from assets



Income from earnings



Other

Many financial planners say you'll need between 70% and 90% of your pre-retirement income to live comfortably in retirement.

Your retirement plans could be good sources for replacing that income.

Benefits of Your Plan

Here are some of the reasons why enrolling in your plan is a great idea.



One of the Easiest Ways to Save for Your Future

After you sign up, your employer automatically deducts the amount you specify from your paycheck and puts it into your plan account. You don't have to write a check or move money around yourself.

- Consider increasing your contribution each year — even if it's by just a little.
- Many financial professionals recommend that you gradually work your way up to saving 10%-15% of your pay.



What is a Retirement Plan?

A retirement plan is an employer-sponsored defined contribution plan that allows employees to save a portion of their salary in a tax-advantaged manner.

Tax benefits

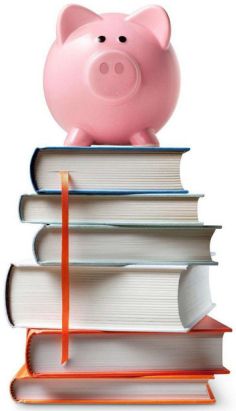
- **Pretax:** Tax-deferred savings
- **Roth:** Potential tax-free withdrawals

You control

- How much to contribute
- How to invest
- How to use the money in retirement
- Who gets the account if something happens to you

Portability

- Your account can go with you if you change jobs or retire



The Different Ways to Add to Your Account

One account, many ways to save



Pretax



Roth



Leave Pay/Lump Sum (300 hours) – Applies to final employment check from eligible employers



Rollover

Consider all your options, including taxes, fees and expenses, before moving money between accounts. Assess all benefits of current accounts before moving money.

You Are In Charge

You choose the dollar amount or percentage you want to save and the types of investments you'd like to make.

After all, it's your future you're saving for. But remember, we're always here to help.

- Save as little as $10 per pay period or as you much as you like (up to the IRS maximum).
- You can change your contribution rate anytime.
- Invest in a way that suits your needs.



How Much You Can Contribute

As with all things in life, there are some rules for contributing to your plan.

- IRS limit for an individual: **$24,500**
- Catch-up contributions: An additional **$8,000** for people **50 and older***
- Additional catch-up option: An additional **$11,250** for people **age 60-63**
- **457 catch-up****
- **Up to double the maximum limit:**
- Within three years of your plan's designated normal retirement age if you undercontributed in earlier years



If you had more than $150,000 in wages subject to FICA in the prior calendar year, you will be required to make any catch-up contributions as Roth contributions beginning January 1, 2026. Check with your plan administrator to find out if there are any applicable exceptions...

How Pre-Taxed Contributions Work

Contributions are made before taxes are taken out.

On the plus side

- Any growth is tax-deferred.
- Your current taxable income may be lowered.
- You may pay lower taxes later.



How Roth Retirement Plan Contributions Work

Roth retirement plan contributions are deducted from your paycheck after taxes are taken out, and any earnings* are also federal tax-free for qualified withdrawals

On the plus side

- May be a good option if you expect to be in the same tax bracket you are in now, or higher, when you retire.
- Money you save today has the potential for long-term growth if you don't plan to access it for many years.

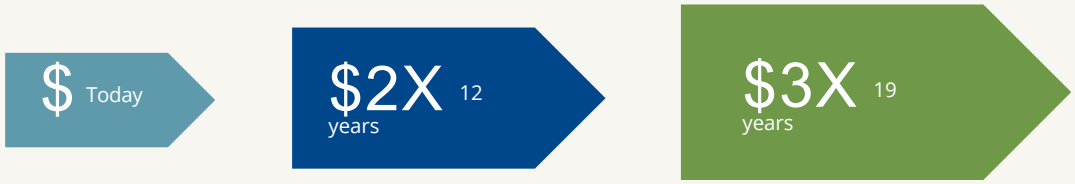


* Roth withdrawals are federally tax-free if they are qualified distributions as defined by the IRS. For a distribution to be qualified, the account must have been open for at least five years, and the withdrawal must occur after age 59½, death, or disability. Earnings withdrawn before those conditions are met may be subject to taxes and penalties. Tax laws are subject to change. State and local taxes may still apply.

The Beauty of Compound Earnings

With the potential of compound earnings, not only would your contributions potentially grow, but you also could gain earnings on any earnings.

The money you start saving today could theoretically double in just 12 years — and triple in 19 years.



FOR ILLUSTRATIVE PURPOSES ONLY. This hypothetical illustration does not reflect a particular investment and is not a guarantee of future results. This is a demonstration of the mathematical rules of 72 and 114 used to approximate the number of years it takes a given investment to double and triple in value. It assumes a 6% rate of return. Rates of return may vary. This illustration does not reflect any associated charges, expenses, or fees, which could change the outcomes provided. This is not intended to be investment, fiduciary, financial, legal, or tax advice.

The Power of One – Rolling Money In

You can roll money from previous employers into your Louisiana Deferred Compensation Plan. That way you only have one account to manage.

- You can roll qualified balances into your account:
  - Employer sponsored retirement plans, including Governmental 457(b), 403(b), 401(k) and 401(a)
  - Individual Retirement Accounts (Traditional IRA)
  - Eligible pension programs and lump sums
  - Excess leave (employer eligibility required)
  - Accumulated leave over and above the first 300 hours can be rolled into LADCP account
- Rollovers don't count as part of your annual contribution limits.
- Contact your local Retirement Plan Advisor for assistance with the rollover process.



Consider all your options, including taxes, fees and expenses, before moving money between accounts. Assess all benefits of current accounts before moving money.

Funds rolled into a governmental 457 plan from another type of plan or account may still be subject to the 10% early withdrawal penalty if taken before age 59½.

Plan Fees

- Annual fees are assessed quarterly
- Disclosed on Activity section of quarterly statements
- Tiered based administrative fee structure:
- Participants pay $1.75 quarterly flat fee on the first $5,000 of their balance ($7 annually)
- Participants pay 0.14% annual fee (0.035% quarterly) on the next balance amount of $5,000.01 to $50,000
- There is no fee on balances at $50,000.01 and above

- **Example:**
- **For a $10,000 balance, total fee is $3.50 quarterly/$14 annually**
- $1.75 quarterly flat fee for first $5,000
- 0.035% for the remaining $5,000 balance or $1.75 quarterly ($5,000 x 0.00035 = $1.75)

- **For a $100,000 balance, total fee is $17.50 quarterly/$70 annually**
- $1.75 quarterly flat fee for first $5,000
- 0.035% for the remaining $45,000 balance or $15.75 quarterly ($45,000 x = $15.75)
- No fees for the remaining $50,000.01 balance

In-Service Withdrawal Strategies

You may have access to funds while you are working through a qualifying distributable event, from previously rolled over sources of funds or if your employer allows for loans.

Distributable events are as follows:

- Attainment of age 59½
- Unforeseeable emergency (as defined by the Internal Revenue Code)
- In-service transfer to purchase service credit
- Rollover sources of funds are always eligible for withdrawal
- Death (your beneficiary receives your benefits)

Withdrawals may be subject to income tax.
Earnings on Roth contributions will be taxed unless withdrawals are a qualified distribution as defined by the IRS.

In-Service Loans

In the event a loan is needed, your Plan allows you to borrow the lesser of $50,000 or 50% of your total account balance.

- Employers may opt out of loan availability
- Minimum loan amount: $1,000
- General purpose loan: Up to five years
- Residential loan: Up to 15 years
- You are only permitted one outstanding loan at any time
- Loan origination ($75) and quarterly maintenance fee ($12.50) apply
- The quarterly maintenance fee is assessed against your remaining account balance
- Loan payments are deducted from payroll
- Interest rate: 2% over prime rate as published by The Wall Street Journal on first business day of the month before loan originated
- 30-day waiting period between loan payoff and issuance of a new loan

Withdrawals may be subject to income tax.
Earnings on Roth contributions will be taxed unless withdrawals are a qualified distribution as defined by the IRS.

Separated from Service Withdrawal Strategies

Distributions options are flexible:

- 457(b) contribution sources are not subject to a 10% early distribution penalty from the IRS
- Leave the value of your account in plan
- Set up payment(s) in one of the following forms;
  - Periodic payments
  - Partial lump sum
  - Lump sum

Distributable events are as follows:

- Retirement
- Severance of employment (as defined by Internal Revenue Code provisions)
- Required Minimum Distributions
- Death (your beneficiary receives your benefits)

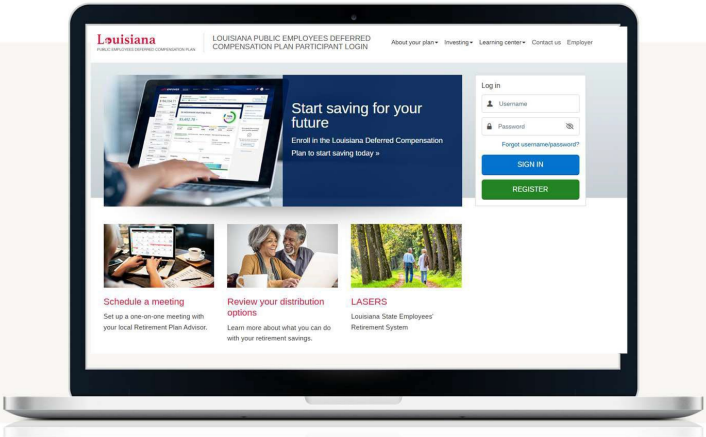
Please note, you must be separated from service for at least 30 days and have a qualifying distributable event in order to process a distribution. Federal and state income taxes may be due upon withdrawal.

How to Enroll and Resources



Enrolling Is Easy

Here's how it works.

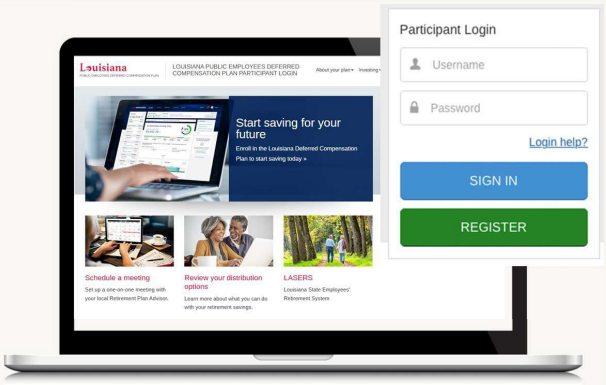


LouisianaDCP.com

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Start Saving with Easy Enrollment

It takes just a few simple steps.



LouisianaDCP.com

FOR ILLUSTRATIVE PURPOSES ONLY.

- Click on the *Register* button.
- Select *I have a plan enrollment code*.
- Enter VB6bZCvT.
- Enter plan enrollment code.

Get the Most Out of Your EMPOWER Account in 5-steps

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Register your account if you haven't already. Select *Register* on your plan homepage. Follow the prompts to create your username and password.	**Name your beneficiary** or beneficiaries to ensure your savings go where you want them to.	**Set your communication preferences** to let us know how you would like to receive important information from us.	**Sign up for our newsletter, The Currency**™ at **empower.com/newsletter**, to stay in the know about financial matters.	**Download our app** to access your financial information anywhere.

We're Here to Help You

1. **Get answers to your money questions.**
2. **Review and understand your current financial situation.**
3. **Plan for the financial future you want.**

To get started, login to LouisianaDCP.com or call 800-937-7604.

Weekdays: 7:00 a.m. to 9:00 p.m. Central time

Saturdays: 8:00 a.m. to 4:30 p.m. Central time

Automated system available 24/7. Password required.

TTY: 1-800-766-4952

Scan the QR code to schedule time with your Retirement Plan Advisor

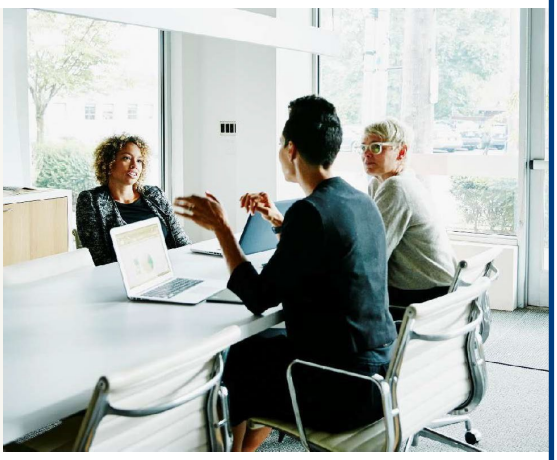
Take Advantage of Personalized Help

We can help you with:

- Saving for retirement
- Investment planning
- Estimating retirement income
- Account consolidation

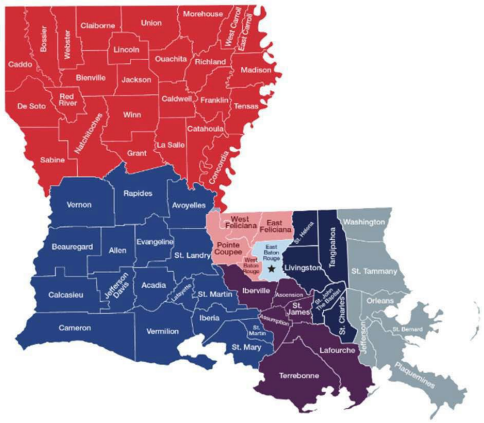
Call **800-937-7604.** to get started. Or schedule a time to talk at **chad.anderson.empowermytime.com**.

Consider all your options, including taxes, fees and expenses, before moving money between accounts. Assess all benefits of current accounts before moving money.



Point-in-time advice provided by an Empower representative may include savings, investment allocation, distribution, and rollover advice, including advice on consolidating outside retirement accounts. Point-in-time advice is provided by an Empower representative registered with Empower Financial Services, Inc. at no additional cost to account owners. There is no guarantee provided by any party that use of the advice will result in a profit.

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