

Ohio Retirement Study Council

**A History Of Benefit Changes  
in the Public Employee  
Retirement Systems Of Ohio  
1968 - 2009**

January 2009

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## **PREFACE**

Since its creation in 1968, the Ohio Retirement Study Council has advised the General Assembly on all proposed changes in the benefits provided by the five state pension funds: the Public Employees Retirement System (PERS), the State Teachers Retirement System (STRS), the School Employees Retirement System (SERS), the Ohio Police and Fire Pension Fund (OP&F), and the Highway Patrol Retirement System (HPRS).

This report provides a historical record of all benefit changes enacted into law from 1968 to the present.

The report lists each benefit change in chronological order under one of the following categories: Age and Service Benefits, Cost-of-Living Benefits, Death Benefits, Disability Benefits, Health Care Benefits and Survivor Benefits.

For each benefit change listed, the report specifies the bill which created the change, the date on which the change became effective, the retirement system(s) affected by the change, a brief description of the change and the Revised Code sections(s) amended to activate the change.

The purpose of the report is twofold: (1) To trace the development of our state retirement benefit programs - from where they have come to where they have arrived - since the creation of the Council, and (2) To provide a practical resource for determining the latest improvements or other changes made in the benefits offered by our state pension funds.

The report is not intended to be relied upon as a substitute for the laws governing our state retirement benefit programs. A review of the laws is necessary for a complete description and understanding of these benefit programs.

## AGE AND SERVICE BENEFITS

1968

### H.B. 959 - Eff. 6-10-68 - PERS, STRS, SERS

(Benefit provisions effective 7-1-68)

- Formula increased from 1.75 to 1.9 percent of FAS
- FAS - \$25,000 ceiling removed
- Minimum benefit increased from \$76 to \$82 per YOS
- Maximum benefit increased from 75 to 80 percent of FAS
- Maximum benefit for persons retiring over age 65 or with 41 or more YOS increased by 5 percent for each year between age 66 to 70, or for each YOS between 41 to 45, with a maximum FAS limitation of 85 percent

§145.33, §3307.38, §3309.36

1969

### H.B. 215 - Eff. 11-25-69 - OP&F

(Benefit provisions effective 1-1-70)

- Minimum annual benefit for members with 25 YOS at age 52 increased from \$1,500 to \$1,650

§742.37

1970

### H.B. 349 - Eff. 9-14-70 - PERS

- Retiree who is elected to public office and who has received a retirement allowance for at least 2 months (18 months if reelected to office previously held) shall receive both allowance and salary

§145.381

1971

### H.B. 100 - Eff. 12-31-71 - PERS, STRS, SERS

(All monthly benefits effective between 6-29-71 and 12-31-71 recalculated in accordance with H.B. 100)

- Formula increased from 1.9 to 2 percent of FAS
- Minimum benefit increased from \$82 to \$86 per YOS
- Bonus in benefits for persons retiring over age 65 or with 41 or more YOS remains in effect until 9-1-76

- FAS redefined to mean 5 highest calendar years salary divided by 5 (formerly 5 highest years salary divided by service credited during that period)

§145.01, §145.33, §3307.01, §3307.38, §3309.01, §3309.36

1972

H.B. 910 - Eff. 3-23-72 - HPRS

- Provides for a deferred pension payable at age 52 with 20 YOS

§5505.16

S.B. 137 - Eff. 6-28-72 - OP&F

- Provides for an annual pension of 2 percent of average annual salary at age 62 with 15 YOS, with a maximum average annual salary limitation of 66 percent
- Provides for a deferred pension payable at age 52 with 25 YOS
- Extends age and service benefit of 1.5 percent of average annual salary to members who voluntarily resign after 15 YOS, payable at age 52
- Average annual salary defined to mean 5 highest years salary divided by 5

§742.01, §742.37

S.B. 464 - Eff. 10-16-72 - PERS, STRS, SERS, HPRS

- Any pension, annuity, allowance or other benefit subject to individual state income tax

§145.56, §3307.71, §3309.66, §5505.22

1973

H.B. 430 - Eff. 11-20-73 - PERS, STRS, SERS

(All monthly benefits effective between 6-29-73 and 11-20-73 recalculated in accordance with H.B. 430)

- Service requirements for normal retirement at any age reduced from 35 to 32 years
- Benefit schedule for early retirement at age 55 with 25 YOS increased by 5 percent for each YOS between 25 to 30
- Maximum benefit increased from 80 to 90 percent of FAS

- Eliminates bonus in benefits for persons retiring over age 65 or with 41 or more YOS
- Service requirement of 3 years of employment within the last 10 years immediately prior to retirement to qualify for formula benefit removed
- Permits a retirees who is reemployed as a state department head or in a position appointed by the governor with consent of the Senate to have his retirement allowance recalculated based on total contributions and service credit accrued during all service as a public employee (PERS only)

§145.01, §145.32, §145.33, §145.34, §145.382, §3307.01, §3307.38, §3309.01, §3309.34, §3309.36, §3309.38

S.B. 48 - Eff. 11-20-73 - OP&F

- Average annual salary based on 3 highest years salary (formerly 5 highest years)

§742.01

1974

H.B. 1235 - Eff. 6-25-74 - PERS

- Exempts medical doctors who have retired from the Department of Mental Health and Mental Retardation and who in times of critical need are reemployed under a contract from forfeiting retirement allowance

§145.391

H.B. 1034 - Eff. 9-26-74 - PERS, STRS, SERS

(All monthly benefits effective between 6-29-74 and 9-26-74 recalculated in accordance with H.B. 1034)

- FAS based on 3 highest years salary (formerly 5 highest years)

§145.01, §3307.01, §3309.01

H.B. 1050 - Eff. 9-30-74 - HPRS

- FAS based on 3 highest years salary (formerly 5 highest years)

§5505.01

1975

H.B. 1312 - Eff. 3-4-75 - PERS-LE

- PERS-LE program established for sheriffs and deputy sheriffs
- Eligibility for normal retirement at age 52 with 25 YOS formula established at 2.5 percent of FAS times 20 years plus 1.5 percent of FAS times years over 20
  - Maximum benefit of 66 percent of FAS
- Eligibility for age and service benefit at age 55 with 15 YOS
  - Formula established at 1.5 percent of FAS times YOS
- No more than 4 years of free military service and 3 years of purchased military service may be used in calculating benefit under the PERS-LE program

§145.01, §145.33

H.B. 83 - Eff. 8-12-75 - OP&F

- Provides that members who elected to receive, but have yet to receive on 8-12-75, a benefit from a local police or firemen's relief and pension fund may elect to receive a benefit from OP&F

§742.37

1976

H.B. 268 - Eff. 8-20-76 - PERS, STRS, SERS

- Service requirement for normal retirement at any age reduced from 32 to 30 years
- Benefit schedule for early retirement at age 55 with 25 YOS increased by 10 percent for each YOS between 25 to 30
- Number of days that retired teacher may be employed as substitute or temporary teacher reduced from 100 to 70 (STRS only)
- Retiree who is elected to public office and who has received a retirement allowance for less than 2 months (18 months if reelected to office previously held) permitted to waive compensation to continue receiving allowance (PERS only)

§145.32, §145.33, §145.34, §145.381, §3307.38, §3307.381, §3309.34, §3309.36

H.B. 268 - Eff. 8-20-76 - PERS-LE

- Gives sheriffs and deputy sheriffs option of retiring under the regular PERS age and service program or the special PERS-LE age and service program
- Purchased credit as policeman or highway patrolman may be used in calculating retirement allowance for sheriffs and deputy sheriffs under the PERS-LE program

§145.33

H.B. 268 - Eff. 8-20-76 - OP&F

- Eliminates minimum annual benefit of \$1,650

§742.37

1979

H.B. 754 - Eff. 3-15-79 - PERS-LE

- Number of years of purchased military service credit that may be used in calculating the age and service retirement allowance under the PERS-LE program increased from 3 to 5

145.33

H.B. 509 - Eff. 12-27-79 - PERS-LE

- Township police officers eligible for PERS-LE program
- Extends age and service benefit of 1.5 percent of FAS to members who voluntarily resign after 15 YOS, payable at age 55

§145.33

1980

H.B. 228 - Eff. 1-17-80 - STRS

- Number of days which retired teacher may be employed as substitute or temporary teacher increased from 70 to 85 days

§3307.381

H.B. 182 - Eff. 2-28-80 - OP&F

- Formula increased to 2.5 percent of average annual salary times 20 years, plus 2 percent of average annual salary times next 5 years, plus 1.5 percent of average annual salary times years over 25 (formerly 2 percent of average annual salary times YOS)
- Maximum benefit increased from 66 to 72 percent of average annual salary
- Early retirement on reduced pension at age 48 with 25 YOS established

§742.37

1981

S.B. 133 - Eff. 11-18-81 - HPRS

- Formula increased to 2.5 percent of FAS times 20 years, plus 2 percent of FAS times next 5 years, plus 1.5 percent of FAS times years over 25 (formerly 2.5 percent of FAS times 20 years plus 1.5 percent of FAS times years over 20)
- Maximum benefit increased from 66 to 72 percent of FAS
- Early retirement on reduced pension at age 48 with 20 YOS established

§5505.16, §5505.17

1982

S.B. 185 - Eff. 2-2-82 - HPRS

- Extends age and service benefit of 1.5 percent of FAS to members who voluntarily resign after 15 YOS, payable at age 55

§5505.17

H.B. 548 - Eff. 10-8-82 - PERS-LE

- Formula increased to 2.5 percent of FAS times 20 years, plus 2 percent of FAS times next 5 years, plus 1.5 percent of FAS times years over 25 (formerly 2.5 percent of FAS times 20 years plus 1.5 percent of FAS times years over 20)
- Maximum benefit increased from 66 to 72 percent of FAS

- Provides for an annual pension at age 62 with 15 YOS
- Age requirement for age and service benefit of 1.5 percent of FAS decreased from 55 to 52
- Early retirement on reduced pension at age 48 with 25 YOS established

§145.33

1983

H.B. 410 - Eff. 8-7-83 - STRS, SERS

- Permits establishment of early retirement incentive plans whereby employer may purchase the lesser of 5 years or 1/5 of the total service credited to the participant

§3307.35, §3309.33

1984

H.B. 232 - Eff. 2-16-84 - PERS

(This provision effective 2-1-84)

- Formula increased from 2 to 2.1 percent of FAS

§145.33

H.B. 265 - Eff. 9-20-84 - All five systems

- Any pension, annuity, allowance, refund or other non-survivor benefit of a member convicted of theft in public office subject to withholding as restitution

§145.40, §145.56, §145.57, §742.37, §742.61, §742.47, §3307.46, §3307.71, §3307.72, §3309.42, §3309.66, §3309.67, §5505.05, §5505.13, §5505.17, §5505.26

S.B. 243 - Eff. 9-26-84 - PERS-LE

- County narcotics agents eligible for PERS-LE program

§145.33

1985

S.B. 378 - Eff. 4-4-85 - PERS

- Permits elected official who has retired independently under STRS or SERS and who continues contributing to PERS to combine his total contributions and service credit accrued during all public service upon termination of such elective service

§145.202

1986

H.B. 502 - Eff. 4-24-86 - PERS, STRS, SERS

- Redefines “compensation” or “earnable salary” to mean all salary, wages, and other earnings paid to a member by reason of the member’s employment.

§145.01, §3307.01, §3309.01

H.B. 509 - Eff. 9-17-86 - All five systems

(This provision effective 12-1-86)

- Any pension, annuity, allowance, refund or other benefit subject to withholding for the purpose of paying alimony and child support

§145.56, §742.47, §3307.71, §3309.66, §5505.22

H.B. 721 - Eff. 7-24-86 - OP&F

- Permits members who have 15 or more YOS as of 1-1-87 to elect to have any future benefit or pension calculated on the basis of their recalculated average annual salary, including terminal pay
  - Election shall be made no later than 1-1-88 and shall preclude the member from receiving automatic cost-of-living adjustments

§742.3716

H.B. 706 - Eff. 12-15-86 - PERS

- Permits establishment of early retirement incentive plans whereby employing unit may purchase the lesser of 5 years or 1/5 of the total service credited to the participant
- Mandates establishment of early retirement incentive plans in the event of a proposal to close or lay off employees within a 6 month period at a state institution or state employing unit

§145.297, §145.298

1987

H.B. 178 - Eff. 6-24-87 - PERS, STRS, SERS

- Eliminates mandatory retirement age of 70 except for law enforcement officers in PERS and tenured professors at state universities and colleges in STRS

§145.32, §3307.37, §3309.34

H.B. 231 - Eff. 10-5-87 - OP&F

- Permits members who have 15 or more YOS as of 1-1-89 (formerly as of 1-1-87) to elect to have any future benefit calculated on the basis of their recalculated average annual salary, including terminal pay
  - Election shall be made no later than 1-1-90 (formerly 1-1-88) and shall preclude the member from receiving automatic cost-of-living adjustments

§742.3716

1988

S.B. 138 - Eff. 7-20-88 - PERS

- Permits retiree who is elected to any public office of this state or political subdivision and who has received a retirement allowance for at least 2 months (18 months if reelected to office previously held) to elect either to receive the retirement allowance and the elective salary or to receive the elective salary and begin contributions on the elective service (formerly only retirees elected to state office who were state elected officials when they retired were given the option to receive the elective salary and begin contributions on the elective service)

§145.38

H.B. 290 - Eff. 9-9-88 - SERS

- Formula increased from 2 to 2.1 percent of FAS

§3309.36

H.B. 389 - Eff. 9-9-88 - OP&F

- Age requirement for normal retirement reduced from 52 to 48, with 25 YOS
- Age requirement for age and service benefit of 1.5 percent of average annual salary reduced from 52 to 48.

§742.37

H.B. 760 - Eff. 9-26-88 - PERS

(Benefit provisions effective 1-1-89)

- Formula changed from a flat 2.1 percent of FAS times YOS to 2.1 percent of FAS for the first 30 YOS, plus 2.5 percent of FAS for each subsequent YOS
- Maximum benefit increased from 90 to 100 percent of FAS

§145.33

H.B. 552 - Eff. 12-15-88 - PERS-LE

- Drug agents, liquor control investigators, park officers, forest officers, game protectors, state water craft officers, park district police officers, conservancy district officers, Ohio veterans' home policemen, special policemen for mental health institutions, special policemen for institutions for mentally retarded and developmentally disabled, and municipal police officers (other than those covered under OP&F) eligible for PERS-LE program
- Formula increased to 2.5 percent of FAS for the first 20 years plus 2.1 percent of FAS for years in excess of 20 (formerly 2.5 percent of FAS for the first 20 years, plus 2 percent of FAS for the next 5 years, plus 1.5 percent of FAS for years in excess of 25)
- Maximum benefit increased from 72 to 90 percent of FAS

§145.01, §145.33

1989

H.B. 293 - Eff. 9-15-89 - STRS

(Benefit provisions effective 7-1-89)

- Formula increased from 2 percent of FAS times YOS to 2.1 percent of FAS times YOS, plus 2.5 percent of FAS times YOS in excess of 30 which are contributing service or service associated with approved leaves of absence
- Maximum benefit increased from 90 to 100 percent of FAS

§3307.38

H.B. 340 - Eff. 11-2-89 - HPRS, OP&F

- Makes members eligible to retire with full benefits at age 48 with 25 YOS (HPRS only)
- Extends the time period (from 1-1-90 to no later than at the time of application for retirement) during which certain members must make an election to retire either under the cost-of-living provision or the terminal pay provision (OP&F only)

§742.3716, §5505.16

1990

S.B. 182 - Eff. 7-13-90 - SERS

- Clarifies the effective date of age and service retirement
  - Later of the last day for which compensation was paid or the attainment of minimum age and service credit eligibility for service or commuted service retirement

§3309.34

S.B. 240 - Eff. 7-24-90 - All five systems

- Prohibits payment of an age and service benefit that exceeds the applicable limits under I.R.C. Section 415
  - Lesser of \$90,000 as indexed, or 100 percent of average compensation for the highest three consecutive years
- As the I.R.C. Section 415 limits are adjusted annually, the retirement systems are authorized to make corresponding adjustments to the annual retirement benefits of those persons whose benefits were limited at the time of retirement by the application of the Section 415 limits
- Clarifies the effective date of age and service retirement under SERS
  - Later of the last day for which compensation was paid or the attainment of minimum age and service credit eligibility for service or commuted service retirement

§145.01, §145.33, §145.331, §145.34, §742.01, §742.37, §742.3719, §3307.01, §3307.38, §3307.4012, §3309.01, §3309.34, §3309.36, §3309.38, §3309.3711, §5505.01, §5505.17, §5505.175

S.B. 3 - Eff. 4-17-91 - All five systems

- Excludes from "compensation" any differential pay paid by public employers to public employees who are called into active military duty for more than 31 days due to an executive order issued by the President or an act of Congress
- "Final average salary" redefined in HPRS to include the amount of salary a state trooper would have earned while on military leave or workers' compensation
- OP&F membership retained for the duration of active military duty for police and firefighters who are called into active duty due to an executive order by the President or an act of Congress (formerly 12 months after any leave of absence)

§145.01, §742.01, §742.011, §3307.01, §3309.01, §5505.01

H.B. 382 - Eff. 6-30-91 - HPRS

- Final average salary redefined to include professional achievement payments

§5505.01

H.B. 382 - Eff. 6-30-91 - PERS, STRS, SERS, OP&F

- Part-time and temporary exemptions from compulsory membership in PERS, STRS or SERS eliminated with few exceptions
- Prohibition against reemployed retirees contributing to another state pension fund repealed
- Reemployment guidelines for retirees revised in PERS, STRS, SERS and OP&F
  - Contributions required from reemployed retirees as of the first day of employment
  - Waiting period for retirees who are employed full-time reduced from 18 months to 2 months in PERS and SERS (18-month waiting period for STRS retirees who are employed as full-time teachers retained); 59-day restriction on temporary employment eliminated in PERS and SERS (85-day restriction on substitute or temporary teaching retained in STRS)
  - Reemployed retirees who satisfy applicable waiting period eligible to receive both retirement allowance and compensation; reemployed retirees forfeit retirement allowance for each month they are employed prior to the expiration of the applicable waiting period
  - Reemployed retirees eligible for money purchase benefit upon later of termination of employment or age 65 (60 in OP&F); benefit consists of

single life annuity having a reserve equal to the amount of the retiree's contributions, an equal amount from employer contributions, plus interest; benefit payable as a lump sum payment or monthly annuity if \$25 or more -Reemployed retirees deemed *not* to be members, and therefore eligible for no other rights or benefits provided under the plan

§145.01, §145.012, §145.02, §145.03, §145.38, §742.01, §742.26, §3307.01, §3307.381, §3309.01, §3309.23, §3309.341

H.B. 382 - Eff. 6-30-91 - PERS-LE

- Law enforcement officers electing to retire under the law enforcement division of PERS eligible for money purchase benefit based on any non-law enforcement service covered by PERS (formerly eligible for refund of employee contributions only)
  - Benefit consists of single life annuity having a reserve equal to the member's contributions on non-law enforcement service, an equal amount from employer contributions, plus interest

§145.33

H.B. 180 - Eff. 10-29-91 - STRS

- Excludes certain payments made by an employer from "compensation"
- Excludes certain excess compensation from "final average salary", and provides an appeals procedure for any amounts excluded, up to a maximum of \$7,500

§3307.01, §3307.013

H.B. 104 - Eff. 11-1-91 - PERS, STRS, SERS, HPRS

- Any pension, annuity, allowance or other benefit subject to school district income tax

§145.56, §3307.71, §3309.66, §5505.22

1992

S.B. 10 - Eff. 4-16-92 - All five systems

- Any pension, annuity, allowance, refund or other benefit subject to administrative withholding order issued by a child support enforcement agency (formerly subject to court-issued withholding orders only)

§145.56, §742.47, §3307.71, §3309.66, §5505.22

S.B. 346 - Eff. 7-29-92 - PERS, STRS, SERS

- Age and service benefit established for disability benefit recipients whose allowance is terminated upon attainment of age 65 or expiration of applicable payment period

-Benefit equal to the greater of the following amounts:<sup>1</sup>

- 2.1% of FAS times YOS, including service credit for period of disability, provided benefit shall not exceed 45% of FAS; or
- Age and service benefit formula, excluding credit for period of disability, provided benefit shall not exceed 100% of FAS (90% in SERS)

§145.331, §3307.39, §3309.381

1993

S.B. 124 - Eff. 4-16-93 - PERS-LE

- Criminal bailiffs and chief court constables eligible for PERS-Law Enforcement program

§145.01, §145.33

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<sup>1</sup>Benefit shall include any 3% cost-of-living allowances and ad hoc increases member would have received had the member retired as of the effective date of the disability benefit

1994

H.B. 151 - EFF. 2-9-94 - PERS

- Waiting period for PERS retirees who are reemployed in positions covered by PERS increased from 2 months to 6 months; pension forfeited for reemployment period prior to 6 months
- Prohibits elected officials from retiring 31 days prior to reelection or 31 days after a new term begins

§145.38

S.B. 306 - Eff. 9-21-94 - HPRS

- Allows service retirees to elect among several joint and survivor benefit options at retirement, providing the retiree with the actuarial equivalent of his or her pension in a lesser amount for his or her life and the continuation of such pension or some portion thereof to a surviving designated beneficiary
- Includes purchased military service that did not interrupt employment and cadet-training service toward the minimum 25-year service credit requirement

§5505.162, §5505.202, §5505.25

1995

H.B. 223 - Eff. 11-15-95 -SERS

- Requires school board members to make a onetime, irrevocable decision of whether or not to participate in SERS

§3309.012, §3309.311

H.B. 226 - Eff. 11-24-95 - SERS

- Corrects technical problems with H.B. 223 above

§3309.012

1996

H.B. 308 - Eff. 3-6-96 - SERS

- Requires governing board members to make a onetime irrevocable decision of whether or not to participate in SERS

§3309.012

H.B. 308 - Eff. 6-5-96 - HPRS

- Establishes a minimum monthly pension of \$850 for members who retire on a reduced pension between the ages of 48 and 52 with less than 25 years of service
- Lowers member's contribution rate from 10.5% to 10% of annual salary

§5505.15, §5505.16

H.B. 117 - Eff. 6-30-95 - PERS

- Requires the purchase of a minimum 3 years of service credit under the mandatory early retirement incentive plan due to the proposed closing of a state institution by the Department of Mental Health prior to 7-1-97

§145.298

H.B. 379 - Eff. 11-6-96 - PERS-LE

- State University law enforcement officers and Hamilton County Municipal Court bailiffs eligible for PERS-LE program

§145.01, §145.33

H.B. 668 - Eff. 12-6-96 - All five systems

- Any pension, annuity, allowance, refund or other non-survivor benefit of a member convicted of felonious sexual offense subject to withholding as restitution to victim.

§145.27, §145.57, §145.76, §742.41, §742.461, §3307.21, §3307.72, §3309.22, §3309.67, §5505.04, §5505.26

S.B. 82 - Eff. 3-7-97 - All five systems

- Establishes a maximum 30-year funding period for amortizing each system's unfunded actuarial accrued liabilities, other than post-retirement health care benefits
- Requires each system to report separately their pension and health care costs on an annual basis to the ORSC and standing committees of both Houses
- Requires each system to have prepared an actuarial analysis of any introduced legislation having a measurable financial impact on the system
- Requires PERS, STRS and SERS to develop for legislative consideration, within one year after the effective date of the act, an alternative benefit plan for their members
- Grandfathers in STRS and SERS members who first established membership prior to 7-1-96 under the higher compensation limits permitted under prior federal law. [The lower compensation limits (\$150,000, as indexed), upon which retirement contributions may be based, would apply to all members who join either system on or after 7-1-96]
- Prohibits PERS retirees, who held public office at the time of retirement and who are subsequently elected or appointed to the same office for the remainder of the term or for the immediately succeeding term, from electing to receive both their retirement allowance and compensation for elective office (Eff. 12-6-96)

§145.22, §145.221, §145.38, §742.14, §742.16, §3307.01, §3307.20  
§3307.201, §3309.01, §3309.21, §3309.211, §5505.12, §5505.121, Section 3  
of Am. Sub. S.B. 82, Section 4 of Am. Sub. S.B. 82

H.B. 586 - Eff. 3-31-97 - PERS, STRS, SERS

- Establishes an alternative defined contribution plan for academic and administrative employees of public institutions of higher education in lieu of membership in PERS, STRS or SERS.
- Requires STRS to pay interest upon the withdrawal of the member's accumulated contributions, along with a 50% matching amount from employer contributions (if the member had at least five years of service credit)

Chapter §3305, §3307.46, §3307.80

Am. H.B. 339 - Eff. 8-6-97 - STRS

- Increases the formula for teachers who retire as of 7-1-97 with over 31 YOS to 2.1% for the first 30 YOS, plus:

<b>Years of Contributing Service Credit</b>	<b>Benefit Multiplier for that Year</b>
30.01 - 31.00	2.5%
31.01 - 32.00	2.6%
32.01 - 33.00	2.7%
33.01 - 34.00	2.8%
34.01 - 35.00	2.9%
35.01 - 36.00	3.0%
36.01 - 37.00	3.1%
37.01 - 38.00	3.2%
38.01 - 39.00	3.3%
39.01 - 40.00	3.4%
40.01 - 41.00	3.5%
41.01 - 42.00	3.6%
42.01 - 43.00	3.7%

§3307.38

1998

Sub. H.B. 648 - Eff. 9-16-98 - HPRS

- Benefit formula changed to 2.5% of FAS for the first 20 YOS, plus 2.0% of FAS for each subsequent YOS.

§5505.17

Am. Sub. H.B. 673 - Eff. 12-8-98 -SERS

- Benefit formula changed for members who retire as of 7-1-98 from flat 2.1% of FAS to 2.1% of FAS for the first 30 YOS, plus 2.5% of FAS for each subsequent YOS.

§3309.36

2000

Sub. S.B. 189 - Eff. 6-30-00 - HPRS

- Benefit formula changed to 2.5% of FAS for the first 20 YOS, plus 2.25% of FAS for the next 5 YOS, plus 2.0% of FAS for each subsequent YOS.
- Reduces the employee contribution rate from 10.0% to 9.5% of annual salary
- Increases the minimum monthly benefit for members who retire on normal age and service credit to \$1000.
- Increases the minimum monthly benefit for members who retired on a reduced benefit to \$900.
- Allows retirants who retired prior to September 21, 1994 to select a joint and survivor annuity within 60 days of the effective date of the bill.

§5505.15, §5505.16, §5505.17, §5505.171, §5505.18, §5505.163

Sub. S.B. 190 - Eff. 7-13-00 - STRS

- Benefit formula changed to 2.2% of FAS for the first 30 YOS except members with at least 35 YOS receive 2.5% of FAS for the first 30 YOS, plus:

<u>Years of Contributing Service Credit</u>	<u>Benefit Multiplier for that Year</u>
31	2.5%
32	2.6%
33	2.7%
34	2.8%
35	2.9%
36	3.0%
37	3.1%
38	3.2%
39	3.3%

- Requires the board to establish a defined contribution plan.

§3307.58, §3307.81

Sub. S.B. 190 - Eff. 7-13-00 - All Systems

- Authorized systems to establish qualified governmental excess benefit arrangements

§3307.461

Sub. S.B. 144 - Eff. 9-21-00 - PERS

- Requires PERS to pay interest on refunds of member contributions.

§145.40

Sub. S.B. 144 - Eff. 9-14-00 - PERS, STRS, SERS

- Changes the minimum waiting period for reemployment to two months and allows members with concurrent service to retire from the higher paying position and continue contributing on the other position(s).

§145.38, §3307.35, §3309.34, §145.383, §3307.351, §3309.343

Sub. S.B. 628 - Eff. 9-21-00 - PERS

- Changes the benefit formula to 2.2% of FAS for the first 30 YOS, plus 2.5% for each subsequent year.
- Requires the board to establish a defined contribution plan.

§145.33, §145.81

Sub. S.B. 628 - Eff. 9-21-00 - PERS-LE

- Changes the benefit formula to 2.5% of FAS for the first 25 YOS, plus 2.1% for each subsequent YOS.

§145.33

**2001**

Sub. H.B. 416 - Eff. 01-01-01 - PERS-LE

- Reduced the normal retirement age from 52 to 48 with 25 YOS while serving as a sheriff; deputy sheriff; or township constable or police officer.

§145.33

Am. Sub. H.B. 535 - Eff. 4-01-01 - PERS-LE

- Sets employee contribution rate for sheriffs, deputy sheriffs, and township constables and police officers at 1.1% higher than the rate established for other members of PERS-LE

§145.49

Am. Sub. H.B. 535 - Eff. 4-01-01 - PERS, STRS, SERS

- Provides if death of benefit recipient is caused by beneficiary, retirement system cannot pay beneficiary absent a court order

§145.43, §3307.562, §3309.44

Am. Sub. S.B. 270 - Eff. 4-9-01 - SERS

- Changes the benefit formula to 2.2% for the first 30 years of service
- Increases the maximum service retirement benefit to 100% of FAS

§3309.36

Am. H.B. 84 - Eff. 7-31-01 - PERS

- Prohibits elected officials who retire from PERS and are reelected or appointed to the same office for the remainder of their term or the term immediately following from receiving their retirement allowance while drawing a salary for that office, unless member files notice of intent to retire at least 90 days prior to election.

§145.38

Sub. H.B. 94 - Eff. 9-05-01 - PERS-LE

- House sergeant-at-arms and assistant sergeant-at-arms eligible for PERS-LE program

§145.01, §145.33

Am. Sub. S.B. 164 - Eff. 11-20-01 - All Systems

- Excludes from “compensation” any differential pay paid by public employers to public employees who are called into active military duty for more than 31 days due to an executive order issued by the President or an act of Congress.

§145.01, §742.01, §3307.01, §3309.01, §5505.01

Am. Sub. H.B. 405 - Eff. 12-13-01 - All Systems

- Corrects typographical error in Am. Sub. S.B. 164

**2002**

Am. Sub. H.B. 535 - Eff. 1-01-02 - All five systems

- Allows systems to make payment to a member’s former spouse for the purpose of dividing a retirement benefit or lump sum payment

§145.56, §3307.41, §3309.66, §742.462, §5505.22

Sub. H.B. 158 - Eff. 2-1-02- PERS-LE

- Regional transit authority and state highway patrol police officers eligible for PERS-LE program
- Reduces normal retirement age from 52 to 48 with 25 YOS for all members of PERS-LE except Hamilton County Municipal Court Bailiffs.
- Allows all members of PERS-LE to receive enhanced refund
- Sets employee contribution rate for all members of PERS-LE except Hamilton County Municipal Court Bailiffs at 10.1%

§145.01, §145.33, §145.40, §145.49

Sub. H.B. 157 - Eff. 2-1-02- PERS

- Allows township to establish an early retirement incentive plan for a township department

§145.297

Sub. S.B. 134 - Eff. 7-23-02 - OP&F

- Creates deferred retirement option plan

§742.43

Sub. S.B. 247 - Eff. 10-01-02 - PER, STRS, SERS

- Establishes partial lump-sum option payment

§145.46, 3307.60, §3309.46

**2003**

Sub. H.B. 373 - Eff. 03-24-03 - HPRS

- Establishes partial lump-sum-payment
- Increases employee contribution rate from 9.5% to 10.0% of the member's salary

§5505.15, §5505.162

**2004**

H.B. 230 - Eff. 09-16-04 - HPRS

- Increases mandatory retirement age from 55 to 60.

§5505.16

## **2005**

### **Am. H.B. 10 - Eff. 3-07-2005 - PERS, STRS, SERS, HPRS**

- Requires election of joint and survivor annuity plan to be made no later than one year after date of marriage or remarriage of retired member and makes election effective upon receipt of board approved application form.

§145.384, §145.46, §3307.60, §3309.46, §5505.162

### **Am. Sub. H.B. 66 - Eff. 09-29-2005 - PERS LE**

- Municipal public safety officers eligible for PERS-LE program

§145.01, §145.33

## **2006**

### **Am. S.B. 206 - Eff. 06-15-2006 - HPRS**

- Creates deferred retirement option plan.

§5505.50

## **2008**

### **Sub. S.B. 148 - Eff. 5-14-2008 - SERS**

- Requires new members to attain age 55 in order to participate in an early retirement incentive plan.
- Changes early retirement reduction factors for new members from a statutory schedule to the actuarial equivalent of the member's normal age and service retirement allowance
- Increases the minimum number of years of service a new member needs for retirement from 5 to 10
- Increases the age for early retirement eligibility from 60 to 62 with 10 YOS and from 55 to 60 with 25 YOS
- Requires new members who have 30 YOS to be at least age 55 before eligible for normal retirement

§3309.33, §3309.34, §3309.36

Sub S.B. 3 - Eff. 5-13-2008 - All five systems

- Requires member who pleads guilty to or is convicted of a specified offense committed while serving in a position of honor, trust, or profit to forfeit right to any benefit other than member's accumulated contributions.

§145.572, §742.463, §3307.372, §3309.672, §5505.262

**2009**

Am. Sub. S.B. 267 - Eff. 03-24-2009 - PERS-LE

- Allows board to set employee contribution rate for law enforcement officers at not more than 2% higher than the rate set for public safety officers.
- Law enforcement and public safety officers can convert up to 5 years of regular PERS service to law enforcement credit.
- Removes municipal public safety officers from PERS-LE.

§145.49, §145.2914, §145.01, §145.33

## **COST-OF-LIVING BENEFITS**

1968

### S.B. 59 - Eff. 6-4-68 - PERS, STRS, SERS

- Ad hoc adjustments to recipients retired or disabled before 7-1-68 and their beneficiaries
  - Percentage increase of 2 to 24.3 percent, depending upon the year of retirement

§145.322, §3307.402, §3309.373

1969

### H.B. 215 - Eff. 11-25-69 - OP&F

(Benefit provisions effective 1-1-70)

- Ad hoc adjustment to recipients who retired or were disabled before 1-1-67, who attained age 65 by 1-1-70, and who were receiving a pension on 12-31-69
  - Percentage increase of 10 percent
- Ad hoc adjustment to survivors on the rolls on 12-31-69
  - Widows - flat benefit increased from \$90 to \$130 per month
  - Surviving child - flat benefit increased from \$35 to \$45 per month
  - Dependent parent - flat benefit increased from \$30 to \$60 per month for each parent, or \$120 per month for one

§742.37

1970

### S.B. 448 - Eff. 7-14-70 - PERS, STRS, SERS

- Automatic annual adjustment for recipients who on 6-30-71 have received an allowance or benefit for 3 years
  - Percentages increase of 1.5 percent in any year in which the Consumer Price Index increases 1.5 percent ; first increase is payable on or after 7-1-71

§145.323, §3307.403, §3309.374

1971

H.B. 284 - Eff. 12-31-71 - All five systems

- Ad hoc adjustment to recipients retired or disabled before 7-1-68 and their beneficiaries
  - Additional monthly payment of \$2 for each year between the date of retirement or disability and 12-31-71, with a maximum increase of \$50 per month (In OP&F and HPRS, the additional payment applied only to age and service and disability retirees)

§145.326, §742.374, §3307.404, §3309.376, §5505.171

1972

H.B. 377 - Eff. 12-30-72 - PERS, STRS, SERS

- Ad hoc adjustments to survivors of active members who died before 7-1-68
  - Additional monthly payment of \$2 for each year between the date of death and 12-31-72, with a maximum increase of \$50 per month

§145.327, §3307.406, §3309.377

1973

S.B. 48 - Eff. 11-20-73 - OP&F, HPRS  
(Benefit provisions effective 1-1-74)

- Ad hoc adjustment to survivors eligible before 1-1-74
  - OP&F - flat benefit increased from \$130 to \$160 per month to surviving spouse, from \$45 to \$55 to each dependent child, and from \$60 to \$75 to dependent parent
  - HPRS - flat benefit increased from \$130 to \$160 per month to surviving spouse; additional monthly benefit of \$45 for each dependent child increased to \$55

§742.377, §5505.17

H.B. 214 - Eff. 12-19-73 - All five systems

- Ad hoc adjustment to recipients retired and disabled between 7-1-68 and 7-1-71 and their beneficiaries
  - Additional monthly payment of \$2 for each year between the member's date of retirement, disability, or death and 7-1-73, with a maximum increase of \$10 per month. (In OP&F and HPRS, the additional payment applied only to age and service and disability retirees.)

§145.328, §742.378, §3307.407, §3309.378, §5505.172

1974

H.B. 1476 - Eff. 7-27-74 - PERS, STRS, SERS

(These provisions effective 10-1-74)

- Ad hoc adjustment to age and service and disability retirees eligible before 6-30-55 and their beneficiaries
  - Minimum benefit of \$140 per YOS established, with a maximum increase of \$4,480
- Ad hoc adjustment to age and service and disability retirees eligible between 6-30-55 and 6-30-71 and their beneficiaries
  - Percentage increase of 33 percent - 6-30-55 - 6-29-59
  - Percentage increase of 21 percent - 6-30-59 - 10-31-65
  - Percentage increase if 14 percent - 11-1-65 - 6-30-68
  - Percentage increase of 5 percent - 7-1-68 - 6-30-71
- Ad hoc adjustment to survivors of active members eligible between 6-14-51 and 8-27-70
  - Percentage increase of 20 percent

§145.329, §3307.371, §3309.379

1976

H.B. 268 - Eff. 8-20-76 - HPRS

- Ad hoc adjustment to surviving spouses on the rolls prior to 8-20-76
  - Surviving spouse - flat benefit increased from \$160 to \$250 per month

§5505.17

H.B. 268 - Eff. 8-20-76 - OP&F

(This provision effective 7-1-76)

- Ad hoc adjustment to age and service and permanently and totally disabled retirees who were receiving a benefit on 12-31-73
  - If benefit is less than \$2,700, benefit increased to \$3,000
  - If benefit is \$2,700 or more, benefit increased by \$300
- Ad hoc adjustment to survivors on the rolls before 7-1-76
  - Surviving spouse - flat benefit increased from \$160 to \$200 per month
  - Surviving child - flat benefit increased from \$55 to \$65 per month

§742.37, §742.3710

H.B. 268 - Eff. 8-20-76 - PERS, STRS, SERS

- Automatic annual adjustment to recipients increased from 1.5 to 2 percent
- Waiting period for first automatic annual adjustment decreased from 3 years to 2 years; on and after 7-1-77 waiting period decreased from 2 to 1 year for STRS only
- Ad hoc adjustment to recipients who retired between 6-30-55 and 7-1-71
  - Minimum benefit of \$120 per YOS in PERS, \$140 per YOS in STRS, and \$86 per YOS in SERS
  - (The 90 percent of FAS limitation is removed for these recipients and the number of YOS is limited to 32)

§145.323, §145.324, §3307.382, §3307.403, §3309.361, §3309.374

H.B. 1543 - Eff. 10-12-76 - STRS

- Eliminates language which reduces waiting period for first automatic annual adjustment from 2 to 1 year on and after 7-1-77

§3307.403

1977

H.B. 270 - Eff. 10-21-77 - OP&F

- Ad hoc adjustment to age and service retirees with less than 25 YOS and partial and off-duty disability retirees, who retired before 12-31-73
  - Flat dollar increase of \$300 per year

§742.37

1979

H.B. 204 - Eff. 7-30-79 - PERS, STRS, SERS

(Benefit provisions effective 7-1-79)

- Automatic annual adjustment to recipients increased from 2 to 3 percent
- Waiting period for first automatic annual adjustment decreased from 2 to 1 year
- Ad hoc adjustment to age and service and disability retirees who retired before 7-1-74 and their beneficiaries
  - Percentage increase of 5 percent of the first \$5,000 of the allowance
- Ad hoc adjustment to survivors of active members who died between 6-14-51 and 8-26-70
  - Percentage increase of 5 percent

§145.323, §3307.403, §3309.374, Section 122 of H.B. 204 of the 113th General Assembly

H.B. 204 - Eff. 7-30-79 - OP&F, HPRS

(Benefit provisions effective 7-1-79)

- Ad hoc adjustment to age and service and disability retirees who retired before 7-1-74 (10-1-74 for HPRS retirees)
  - Percentage increase of 5 percent of the first \$5,000 of the allowance
- Ad hoc adjustment to survivors of active members whose allowance was based upon an award made before 7-1-79
  - Percentage increase of 5 percent of the first \$5,000 of the allowance

Section 122 of H.B. 204 of the 113<sup>th</sup> General Assembly

1980

H.B. 1237 - Eff. 9-30-80 - STRS

- Supplemental benefit (at the board's discretion) for recipients on the rolls for 1 year
  - Lump sum payment in December ("13th check") from excess investment income during the previous year

§3307.408

1981

H.B. 126 - Eff. 6-13-81 - PERS, SERS

(Benefit provisions effective 7-1-81)

- Ad hoc adjustment to all recipients on the rolls before 1-1-77
  - Percentage increase of 6 percent or \$600, whichever is less
- Ad hoc adjustment to all recipients on the rolls between 1-1-77 and 1-1-80
  - Percentage increase of 4 percent or \$400, whichever is less

§145.461, §3309.362

H.B. 638 - Eff. 7-2-81 - All five systems

(This provision effective 7-1-81)

- Made permanent the temporary pension and survivor benefit increases provided in H.B. 204 of the 113th General Assembly (1979)
- Ad hoc adjustment to survivors of active members whose allowance was based on an award made between 7-1-79 and 7-1-81 (OP&F, HPRS)
  - Percentage increase of 5 percent of the first \$5,000 of the allowance

§145.3210, §742.3712, §3307.409, §3309.3710, §5505.173

H.B. 694 - Eff. 11-15-81 - OP&F

- Ad hoc adjustment to age and service and disability retirees retired before 2-28-80 and surviving spouses on the rolls as of 11-15-81
  - Flat dollar increase of \$46 per month

§742.3713

S.B. 133 - Eff. 11-18-81 - HPRS

- Automatic annual adjustment for all retirees age 62 or older and all survivors regardless of age who have received a benefit for 1 year
  - Percentage increase of 3 percent in any year in which the Consumer Price Index increases 3 percent; first increase is payable on or after 12-1-81
- Minimum monthly benefit of \$425 for all former members retired or disabled in line of duty with 20 or more YOS prior to 7-1-81

§5505.17, §5505.171, §5505.174 (Adjustment in accordance with S.B. 133)

H.B. 552 - Eff. 11-24-81 - OP&F

- Ad hoc adjustment to surviving spouses on the rolls after 11-15-81 and before 11-24-81
  - Flat dollar increase of \$46 per month

§742.3713

1984

H.B. 232 - Eff. 2-16-84 - PERS, STRS, SERS

(This provision effective 2-1-84)

- Ad hoc adjustment to recipients of an allowance, benefit or pension eligible before 2-1-84 (2-1-83 for STRS and SERS)
  - Percentage increase of 5 percent

§145.462, §3307.4010, §3309.353

1986

S.B. 112 - Eff. 7-24-86 - OP&F

(This provision effective 1-1-86)

- Ad hoc adjustment to recipients of an allowance, benefit, or pension in an amount less than \$13,000 per year based upon an award made prior to 2-28-84
  - Increase of \$600 per year or amount necessary to increase benefit to \$4,200 after adjustments
- Ad hoc adjustment to surviving spouses and dependent children on the rolls as of 7-24-86
  - Surviving spouse - flat benefit increased from \$256 to \$310 per month
  - Dependent children - flat benefit increased from \$68 to \$93 per month

§742.37

H.B. 721 - Eff. 7-24-86 - OP&F

- Automatic annual adjustment to recipients receiving an age and service, disability, or joint and survivor benefit for at least 1 year based on an award made on or after 7-24-86
  - Percentage increase of 3 percent in any year in which the Consumer Price Index increases 3 percent; first increase is payable on or after 7-1-88

§742.3716

1988

S.B. 305 - Eff. 3-29-88 - STRS

(Benefit provisions effective 2-1-88)

- Ad hoc adjustment to recipients of an allowance, benefit, or pension eligible before 7-1-79
  - Annual benefit increased by 4.15 percent for those eligible before 7-1-71, by 2.65 percent for those eligible from 7-1-71 to 8-31-76, and by 1.4 percent for those eligible from 9-1-76 to 6-30-79

§3307.4011

H.B. 10 - Eff. 5-6-88 - HPRS

- Funds the automatic annual cost-of-living adjustment the same as all other benefits, and removes the requirement that the annual cost-of-living adjustment

be granted only upon the availability of sufficient money in a separate cost-of-living fund

- Establishes a cost-of-living bank identical to that of the other state retirement systems
- Changes from April to September the month in which the board determines whether the automatic annual cost-of-living adjustment will be paid

§5505.174

S.B. 162 - Eff. 7-20-88 - STRS

- Ad hoc adjustment for those retired with 30 or more YOS and who were receiving a benefit of less than \$6,000 or its actuarial equivalent on 7-20-88
  - Benefit increased to \$6,000

§3307.384

H.B. 290 - Eff. 9-9-88 - SERS

- Ad hoc adjustment to recipients of an allowance, benefit, or pension eligible before 2-1-83
  - Percentage increase of 2 percent
- Ad hoc adjustment to recipients of an allowance, benefit, or pension eligible on or after 2-1-83 but prior to 9-9-88
  - Percentage increase of 5 percent

§3309.354

H.B. 389 - Eff. 9-9-88 - OP&F

(Benefit provisions effective 7-1-88)

- Automatic annual adjustment for those who retired on an age and service, disability, or joint and survivor benefit prior to 7-24-86 and whose benefit is less than \$18,000
  - Flat dollar increase of \$360 or its actuarial equivalent in any year in which the Consumer Price Index increases 3 percent
- Ad hoc adjustment for those who retired with 25 or more YOS or who were permanently and totally disabled, and who were receiving a pension or benefit of less than \$5,000 on 9-9-88
  - Pension or benefit increased to \$5,000 (formerly \$4,200)
- Ad hoc adjustment to surviving spouses and dependent children on the rolls as of 9-9-88
  - Surviving spouse - flat benefit increased from \$310 to \$410 per month
  - Dependent children - flat benefit increased from \$93 to \$118 per month

§742.3711, §742.3717, §742.3718

H.B. 760 - Eff. 9-26-88 - PERS  
(Benefit provisions effective 1-1-89)

- Ad hoc adjustment to recipients of an allowance, benefit, or pension made on or before 12-31-88
  - Percentage increase of ½ percent times the number of full years not exceeding 30 from the effective date of the allowance, benefit or pension to 12-31-88

§145.3211

1989

H.B. 293 - Eff. 9-15-89 - STRS

- Removes the minimum 10 percent of excess investment income for the optional supplementary "13th check"

§3307.408

H.B. 340 - Eff. 11-2-89 - HPRS

- Ad hoc adjustment to surviving spouses on the rolls prior to 11-2-89
  - Flat benefit increased from \$425 to \$600 per month
- Ad hoc adjustment to age and service and on-duty disability retirees whose benefit was payable prior to 11-2-89
  - Minimum monthly benefit increased from \$425 to \$600
- Minimum monthly benefit of \$600 established as the new base for future cost-of-living adjustments
- Eligibility age reduced from 62 to 60 for age and service and disability retirees to receive their first cost-of-living adjustment
- Clarifies that the accumulation of excess Consumer Price Index points commences on the later of 5-5-88 or the effective date of the pension, disability benefit, or survivor benefit

§5505.17, §5505.171, §5505.174

1990

S.B. 240 - Eff. 7-24-90 - All five systems

- Prohibits payment of the automatic annual cost-of-living adjustment to those persons whose annual benefit exceeds or would exceed the applicable limits under I.R.C. Section 415
  - Lesser of \$90,000, as indexed, or 100 percent of average compensation for the highest three consecutive years

§145.323, §742.3711, §742.3716, §742.3717, §3307.403, §3309.374, §5505.174

1991

S.B. 329 - Eff. 4-10-91 - STRS  
(Benefit provisions effective 6-1-90)

- Ad hoc adjustment to recipients of an allowance, benefit, or pension eligible before 7-1-79
  - Annual benefit increased by 4.15 percent for those eligible before 7-1-71, by 2.65 percent for those eligible from 7-1-71 to 8-31-76, and by 1.4 percent for those eligible from 9-1-76 to 6-30-79

§3307.4011

1993

H.B. 152 - Eff. 7-1-93 - OP&F

- Onetime payment to each person receiving a pension or benefit between 6-30-92 and 7-1-93 who would be eligible for 3% COLA had the average percentage change equaled 3%

Section 175 of H.B. 152

1994

S.B. 306 - Eff. 9-21-94 - HPRS

- Lowers eligibility age for 3% COLA from 60 to 57 for service and disability retirees, or any age if on disability retirement for 5 years.
- Ad hoc adjustment to age and service and disability retirees whose benefit was payable prior to 9-21-94
- Minimum monthly benefit increased from \$600 to \$1000

§5505.171, §5505.174

1996

H.B. 308 - Eff. 6-5-96 - HPRS

- Lowers eligibility age for 3% COLA from 57 to 53 for service and disability retirees
- Ad hoc adjustment for those who are receiving a reduced pension of less than \$850 per month prior to 6-5-96
  - Reduced pension increased to \$850 per month

- Ad hoc adjustment to surviving spouses and dependent children on the rolls as of 6-5-96
  - Surviving spouse - flat benefit increased from \$600 to \$850 per month
  - Dependent children - flat benefit increased from \$100 to \$150 per month

§5505.174

H.B. 365 - Eff. 9-9-96 - All Five Systems

- Authorizes the boards to increase benefits by the actual percentage change in the CPI-W, or the actual change plus the accumulation in the recipient's COLA bank, (up to a maximum of 3%) in any year in which the percentage change in the CPI-W increases by less than 3%
- Ad hoc adjustment to PERS recipients whose benefit became effective prior to 1978 as follows:

Effective Benefit Year	Percentage Increase
1954 or earlier	3.0%
1955	17.1%
1956	6.3%
1957	3.0%
1958	3.0%
1959	3.0%
1960	6.7%
1961	3.9%
1962	4.6%
1963	6.1%
1964	7.4%
1965	11.3%
1966	17.8%
1967	18.0%
1968	18.3%
1969	19.3%
1970	17.1%
1971	24.1%
1972	27.3%
1973	22.4%
1974	12.0%
1975	6.7%
1976	2.8%
1977	0.4%

§145.323, §145.3212, §742.3711, §742.3716, §742.3717, §3307.403, §3309.374, §5505.174

1997

Am. H.B. 339 - Eff. 8-6-97 - STRS

- Ad hoc adjustment for those retired with 30 or more YOS and who were receiving a benefit of less than \$9,600 or its actuarial equivalent on 8-6-97.
  - Benefit increased to \$9,600
- Ad hoc adjustment to those who are receiving, as of 8-6-97, a service disability or survivor benefits that have been payable for at least 12 months.
  - Annual Benefit increased to 70% of the member's original benefit amount, plus 70% of original benefit X cumulative percentage change in the CPI-W from December 31 of the year immediately preceding the year of retirement to 12-31-96.

§3307.384, §3307.4013

1998

Sub.H.B. 194 - Eff. 12-21-98 -OP&F

- Ad hoc adjustment for individuals receiving a normal service, permanent and total, or off-duty disability benefit that is less than \$550 per month on 7-1-99
  - Benefit increased to \$550 per month

§742.3718, §742.39

2000

Sub. H.B. 275 - Eff. 3-17-00 - OP&F

- Annual pension cap on members retiring prior to 7-24-86 in order to qualify for an annual COLA eliminated

§742.3711

Sub. S.B. 189 - Eff. 6-30-00 - HPRS

- Provides an ad hoc increase for age and service and disability retirees who retired prior to 6-30-00 with more than 20 YOS equal to 0.25% of all YOS between 21 and 25 multiplied by the member's pension amount as of 6-30-00
- Adhoc adjustment for members receiving a normal age and service or disability benefit that is less than \$1,000 per month
  - Benefit increased to \$1,000 per month
- Ad hoc adjustment for members receiving a reduced benefit and surviving spouse that is less than \$900 per month.
  - Benefit increased to \$900 per month

§5505.176, §5505.16, §5505.17, §5505.171, §5505.18

Sub. S.B. 190 - Eff. 7-13-00 - STRS

- Ad hoc increase to any benefit payable on July 1, 1999 that is less than 85% of the original benefit amount, as adjusted for inflation
- Provides for a recalculation for retirees receiving a service retirement benefit on July 1, 1999 using the 2.1% defined benefit formula.

§3307.6914, Section 6

Am. Sub. H.B. 628 - Eff. 9-21-00 - PERS

- Requires PERS board to recalculate all benefits granted prior to 9-21-00 based on the 2.2% multiplier for members of the state and local divisions and the 2.5% multiplier for all members of PERS-LE.
- Ad hoc increase to individuals receiving a benefit on or before 12-31-79
  - Percentage increase determined by the year the member began receiving a benefit.
- Ad hoc adjustment for individuals receiving a survivor benefit.
  - Monthly benefit for one survivor increased to \$250, two survivors increased to \$400, three or more survivors increased to \$500

§145.332, §145.3213, §145.45

**2001**

Sub. H.B. 94 - Eff. 6-6-01 - PERS, STRS, SERS, HPRS

- Eliminates General Revenue Fund Appropriations for funding ad hoc increases enacted prior to 1982.

Sub. H.B. 157 - Eff. 2-1-02 - All Systems

- Changes cost of living allowance to flat 3% increase
- Eliminates the COLA bank

§145.323, §742.3716, §3307.67, §3309.374, §5505.174

## DEATH BENEFITS

1973

### H.B. 430 - Eff. 11-20-73 - PERS, STRS, SERS

- Burial allowance of \$500 provided to the estate of an age and service or disability retirees

§145.451, §3307.40, §3309.50

1976

### H.B. 268 - Eff. 8-20-76 - PERS, STRS, SERS

- Burial allowance payable to designated beneficiary, or if none, to person responsible for burial expenses (formerly to deceased member's estate only)

§145.451, §3307.40, §3309.50

### H.B. 1010 - Eff. 8-27-76 - DBF

(Certain provisions effective 5-28-76)

- OPSODBF established for members of OP&F, HPRS and certain members of PERS including sheriffs, deputy sheriffs, correction officers and university police
  - If member of fund is killed in line of duty, benefits are provided to surviving spouse and children
- Monthly benefit equals monthly salary of deceased member
- Benefit increases as salary would have increased
- Benefit ceases on date member would have retired or if spouse remarries or when child reaches age 18 (or 22, if full-time student)
- Benefit is paid in lieu of survivor benefits provided in PERS, OP&F or HPRS
- Payable also to surviving spouses and children of persons deceased before 8-27-76, if such person would have been covered under H.B. 1010

§145.45, §742.37, §742.63, §5505.17

1977

H.B. 10 - Eff. 8-18-77 - OPSODBF

- Eligibility for benefits under the OPSODBF extended to surviving spouse and children of a full-time police officer or fireman in a municipality or township who is covered under PERS
- Eligibility for benefits under the OPSODBF extended to surviving spouse and children of a full-time police officer or fireman in a municipality or township who is covered under PERS and who died in the line of duty before or after 8-20-76

§742.63

H.B. 586 - Eff. 8-26-77 - OPSODBF

- Prohibition against receipt of survivor benefits from PERS, OP&F, and HPRS removed
- Benefit under OPSODBF reduced by amount of survivor benefits received from PERS, OP&F or HPRS

§145.45, §742.37, §742.63, §5505.17

1981

H.B. 803 - Eff. 4-9-81 - OPSODBF

- Eligibility for benefits under the OPSODBF extended to survivors of law enforcement officers of the department of natural resources, of park districts, of conservancy districts, and of city parks who die in the line of duty and county or municipal correction officers who die in the line of duty

§742.63

1984

H.B. 268 - Eff. 4-25-84 - OPSODBF

(Surviving spouse or dependent children of a deceased member who were denied benefits under the OPSODBF since 8-27-76 eligible for benefits provided in H.B. 268)

- Provides benefit to surviving spouse or dependent children of a deceased member whose benefits under the OPSODBF are terminated on the member's retirement eligibility date

- Monthly benefit of 50 percent of member's monthly salary prior to death, reduced by amount of any joint and survivor retirement benefit provided by PERS, OP&F or HPRS
- Provides benefit to surviving spouse or dependent children of a deceased member who reached his retirement eligibility date prior to death
  - Monthly benefit of 50 percent of member's monthly salary prior to death, reduced by amount of any joint and survivor retirement benefit provided by PERS, OP&F or HPRS

§742.63

H.B. 270 - Eff. 7-26-84 - OPSODBF

- Eligibility for benefits under the OPSODBF extended to dependent parent of a member who died on or after 1-1-80, if no surviving spouse or dependent children

§742.63

S.B. 85 - Eff. 9-20-84 - OPSODBF

- Eligibility for benefits under the OPSODBF extended to surviving spouse and children of a full-time liquor control investigator

§742.63

1988

H.B. 760 - Eff. 9-26-88 - PERS

(Benefit provisions effective 1-1-89)

- Burial allowance changes from \$500 to \$500 for retirees with 5 but less than 10 YOS, \$1,000 for retirees with 10 but less than 15 YOS, \$1,500 for retirees with 15 but less than 20 YOS, \$2,000 for retirees with 20 but less than 25 YOS, and \$2,500 for retirees with 25 or more YOS

§145.451

1989

H.B. 293 - Eff. 9-15-89 - STRS

- Burial allowance increased from \$500 to \$1,000
- Authorizes establishment of an optional supplementary death benefit plan for age and service and disability retirees to be paid for by the participants

§3307.40

H.B. 340 - Eff. 11-2-89 - OPSODBF

- Eliminates the requirement that the spouse must have been married to the deceased member while in active service to be eligible for benefits under the OPSODBF

§742.63

H.B. 377 - Eff. 11-2-89 - OP&F, HPRS

- Burial allowance of \$1,000 provided to the surviving spouse of an age and service or disability retirees, or if there is no surviving spouse, to the estate of the retirees

§742.58, §5505.30

1990

H.B. 167 - Eff. 7-24-90 - PERS, STRS, SERS

- Both parents eligible to share in the lump sum refund of the deceased member's contributions as well as the burial allowance (formerly older parent only)

§145.43, §145.451, §3307.48, §3309.44

1992

H.B. 383 - Eff. 5-4-92 - OPSODBF

- Eligibility for benefits under OPSODBF extended to surviving spouses and children of a full-time fireman employed by the state or a joint fire district

§742.63

1993

H.B. 638 - Eff. 4-16-93 - HPRS

- Eliminates provision that lump sum refund of deceased member's contributions shall be forfeited if not claimed within seven years of member's death

§5505.21

**1998**

Am. Sub. H.B. 673 - Eff. 12-8-98 - SERS

– Burial allowance increased from \$500 to \$1,000.

§3309.50

**1999**

Am. Sub. H.B. 283 - Eff. 6-30-99 -OPSODBF

– Eliminated the remarry penalty and reinstated the monthly benefits of surviving spouses whose benefits were terminated due to remarriage

§742.63

**2000**

Sub. S.B. 189 - Eff. 6-30-00 - HPRS

– Burial allowance increased to \$5,000

§5505.30

**2009**

Am. Sub. S.B. 267 - Eff. 03-24-2009 - OPSODBF

- Drug agents and investigators of the Bureau of Criminal Identification and Investigation eligible for benefits.

§742.63

## **DISABILITY BENEFITS**

1968

H.B. 959 - Eff. 6-10-68 - PERS, STRS, SERS

(Benefit provisions effective 7-1-68)

- Formula increased from 1.75 to 1.9 percent of FAS
- Minimum benefit increased from \$76 to \$82 per YOS
- FAS - \$25,000 ceiling removed

§145.36, §3307.43, §3309.40

1969

H.B. 215 - Eff. 11-25-69 - OP&F

(Benefit provisions effective 1-1-70)

- Minimum annual benefit for members on partial disability with 25 YOS increased from \$1,500 to \$1,650

§742.37

1971

H.B. 100 - Eff. 12-31-71 - PERS, STRS, SERS

- Formula increased from 1.9 to 2 percent of FAS
- Minimum benefit increased from \$82 to \$86 per YOS

§145.36, §3307.43, §3309.40

1972

S.B. 464 - Eff. 10-16-72 - PERS, STRS, SERS, HPRS

- Any pension, annuity, allowance or other benefit subject to individual state income tax

§145.56, §3307.71, §3309.66, §5505.22

1973

H.B. 430 - Eff. 11-20-73 - PERS, STRS, SERS

- Maximum benefit increased from 60 to 75 percent of FAS
- Removes provision that required disability retirees whose allowance has been terminated to make application for an age and service allowance within 3 years of such termination

§145.36, §145.39, §3307.43, §3309.40, §3309.41

1975

H.B. 83 - Eff. 8-12-75 - OP&F

- Provides that members who elected to receive, but have yet to receive on 8-12-75, a benefit from a local police or firemen's relief and pension fund may elect to receive a benefit from OP&F

§742.37

1976

H.B. 268 - Eff. 8-20-76 - PERS, STRS, SERS

- Minimum benefit of 30 percent of FAS established
- Eligibility denied to members receiving disability benefits under another Ohio state or municipal retirement system (PERS only)

§145.35, §145.36, §3307.43, §3309.40

1980

H.B. 182 - Eff. 2-28-80 - OP&F

- Benefit for on-duty permanent and total disability increased from 66 to 72 percent of salary for last year of active service
- Maximum benefit for on-duty partial disability increased from 50 to 60 percent of average annual salary; formula for members with at least 25 YOS increased to 2.5 percent of average annual salary times 20 years, plus 2 percent of average annual salary times the next 5 years, plus 1.5 percent of average annual salary times years over 25, with the maximum benefit increased from 66 to 72 percent of average annual salary (formerly 2 percent of average annual salary times YOS)

- Formula for off-duty disability after 5 YOS increased to 2.5 percent of average annual salary times 20 years, plus 2 percent of average annual salary times next 5 years, plus 1.5 percent of average annual salary times over 25, with the maximum benefit increased from 50 to 60 percent of average annual salary (formerly 2 percent of average annual salary times YOS)

§742.37

1981

S.B. 133 - Eff. 11-18-81 - HPRS

- Formula increased to 2.5 percent of FAS times 20 years, plus 2 percent of FAS times next 5 years, plus 1.5 percent of FAS times years over 25 (formerly 2.5 percent of FAS times 20 years plus 1.5 percent of FAS times years over 20)
- Minimum benefit of 60 percent of FAS; maximum benefit increased from 66 to 72 percent of FAS
- Off-duty disability benefit provided: minimum benefit of 50 percent of FAS; maximum benefit of 72 percent of FAS

§5505.18

1983

S.B. 348 - Eff. 3-15-83 - OP&F

- Cardiovascular and respiratory disease presumed to have occurred "in the line of duty"

§742.37

1984

H.B. 232 - Eff. 2-16-84 - PERS  
(This provision effective 2-1-84)

- Formula increased from 2 to 2.1 percent of FAS

§145.36

H.B. 265 - Eff. 9-20-84 - All five systems

- Any pension, annuity, allowance, refund or other non-survivor benefit of a member convicted of theft in public office subject to withholding as restitution

§145.40, §145.56, §145.57, §742.37, §742.461, §742.47, §3307.46, §3307.71, §3307.72, §3309.42, §3309.66, §3309.67, §5505.05, §5505.13, §5505.17, §5505.26

1986

H.B. 502 - Eff. 8-24-86 - PERS, STRS, SERS

- Disability benefits denied to any person who is receiving an age and service benefit or has withdrawn his accumulated contributions

§145.35, §3307.42, §3309.39

H.B. 509 - Eff. 9-17-86 - All five systems

(This provision effective 12-1-86)

- Any pension, annuity, allowance, refund or other benefit subject to withholding for the purpose of paying alimony or child support

§145.56, §742.47, §3307.71, §3309.66, §5505.22

1988

H.B. 290 - Eff. 9-9-88 - SERS

- Formula increased from 2 to 2.1 percent of FAS

§3309.40

H.B. 389 - Eff. 9-9-88 - OP&F

- Establishes minimum benefit of \$5,000 per year for off-duty disability retirement

§742.37

H.B. 552 - Eff. 12-15-88 - PERS-LE

- Immediate eligibility upon employment for on-duty disability benefits under PERS-LE program

§145.35

1989

H.B. 701 - Eff. 3-17-89 - VFFDF

- Increases from \$100 to \$200 per month the benefit payable to a volunteer fire fighter totally and permanently disabled in line of duty
- "Totally and permanently disabled" defined to mean "unable to engage in any substantial gainful employment for a period of not less than 12 months by reason of a medically determinable physical impairment that is permanent or presumed to be permanent"

§146.01, §146.12

H.B. 340 - Eff. 11-2-89 - HPRS

- Heart or cardiovascular disease presumed to have occurred in "line of duty"

§5505.18

1990

S.B. 182 - Eff. 7-13-90 - SERS

- Clarifies the effective date of disability retirement
  - Later of the last day for which compensation was paid or the date on which the member was first incapacitated by the disabling condition
- Clarifies that the disabling condition must be permanent or presumed to be permanent for 12 continuous months following the filing of an application for disability retirement

§3309.39

S.B. 240 - Eff. 7-24-90 - All five systems

- Prohibits the payment of a disability benefit that exceeds the applicable limits under I.R.C. Section 415
  - Lesser of \$90,000, as indexed, or 100 percent of average compensation for the highest three consecutive years
- Clarifies the effective date of disability retirement under SERS
  - Later of the last day for which compensation was paid or the date on which the member was first incapacitated by the disabling condition
- Clarifies that the disabling condition must be permanent or presumed to be permanent for 12 continuous months following the filing of an application for disability retirement under SERS

§145.36, §742.37, §3307.43, §3309.39, §3309.40, §5505.18

1991

H.B. 382 - Eff. 6-30-91 - OP&F, SERS

- OP&F disability benefits terminated upon employment as police officer or firefighter and service credit granted for period of disability
- SERS disability benefits terminated upon employment subject to SERS coverage, and service credit granted for period of disability if member earns additional two years of service in PERS, STRS or SERS

§742.22, §3309.41

H.B. 382 - Eff. 6-30-91 - HPRS

- Conforms the HPRS disability determination process with that established by the other state retirement systems

§5505.18

H.B. 104 - Eff. 11-1-91 - PERS, STRS, SERS, HPRS

- Any pension, annuity, allowance or other benefit subject to school district income tax

§145.56, §3307.71, §3309.66, §5505.22

1992

S.B. 10 - Eff. 4-16-92 - All five systems

- Any pension, annuity, allowance, refund or other benefit subject to administrative withholding order issued by a child support enforcement agency (formerly subject to court-issued withholding orders only)

§145.56, §742.47, §3307.71, §3309.66, §5505.22

S.B. 346 - Eff. 7-29-92 - PERS, STRS, SERS

- Nondiscriminatory disability plan established
  - Prohibition against members age 60 or older from applying for disability benefits repealed
  - Benefit equal to the greater of the following amounts:
    - 45% of FAS; or
    - 2.1% of FAS times YOS, provided benefits shall not exceed 60% of FAS
  - Benefit shall terminate upon attainment of age 65 or expiration of applicable benefit period:
    - 60 months if member disabled at age 60 or 61; 48 months at age 62 or 63; 36 months at age 64 or 65; 24 months at age 66, 67 or 68; 12 months at age 69 or older
- Provides for irrevocable election of disability coverage under old discriminatory plan or new nondiscriminatory plan for persons who are members on 7-29-92
- Clarifies that STRS disability benefits shall terminate upon employment as a teacher in any public or private school in this state or elsewhere (STRS only)

§145.35, §145.36, §145.361, §3307.42, §3307.43, §3307.431, §3307.44, §3309.39, §3309.40, §3309.401

1995

H.B. 226 - Eff. 8-25-95 - OP&F

- Prohibits application for disability benefits if made more than 12 months after termination of employment
- Requires disability retirees to undergo medical reexamination at such times as the board considers necessary and to file an annual statement of earnings and current medical information
- Grants disability retirees a three-year leave of absence while on disability retirement and requires employers to restore them to their previous employment if board physician determines that they are physically or mentally capable of resuming such employment
- Prohibits OP&F disability or service retirement benefit recipient from applying for a refund of employee contributions
- Permits members who are receiving partial disability benefits to request light-duty employment in lieu of such benefits and permits employers to provide such employment

§742.37, §742.3720, §742.3721

1996

H.B. 668 - Eff. 12-6-96 - All five systems

- Any pension, annuity, allowance, refund or other non-survivor benefit of a member convicted of felonious sex offense subject to withholding as restitution to victim

§145.27, §145.57, §145.75, §742.41, §742.461, §3307.21, §3307.72, §3309.22, §3309.67, §5505.04, §5505.26

1997

S.B. 82 - Eff. 3-7-97 - All five systems

- Requires an annual medical reexamination of all disability retirees in all five systems, with board authority to waive this requirement on a case-by-case basis based on the board physician's recommendation.

§145.362, §742.3720, §3307.44 §3309.41 §5505.18

1998

Sub. H.B. 648- Eff. 9-16-98 - All five systems

- Requires disability benefit recipients to agree in writing to obtain any medical treatment recommended by the board physician and submit medical reports regarding treatment
- Requires disability benefit recipients to file annual statement of earnings
- Changes the OP&F permanent and total disability award to 72% of member's average salary during any three high years
- Changes the determination method for the OP&F off-duty disability award by authorizing the board to fix the benefit amount based on the member's impairment, up to a maximum of 60% of member's average annual salary
- Requires OP&F board to establish objective criteria to administer the disability provisions and to establish statewide minimum medical standards for the pre-employment physical
- Allows OP&F board to change an on-duty total disability award to an on-duty partial disability award
- Authorizes person acting on behalf of OP&F member to file a disability application if the member is incapacitated

§145.35, §145.362, §742.38, §742.39, §742.40, §3307.42, §3307.44, §3309.39, §3309.41, §5505.18

2000

Sub. S.B. 189 - Eff. 6-30-00 - HPRS

- Maximum benefit increased to 79.25% of FAS
- Benefit formula changed to 2.5% x first 20 YOS; plus 2.25% for the next 5 YOS; plus 2.0% for each subsequent YOS
- Minimum benefit for on-duty disability increased to 61.25% of FAS

§5505.17, §5505.171, §5505.18

Sub. S.B. 190 - Eff. 7-13-00 - STRS

- Benefit formula for post-1992 disability plan increased to 2.2% x FAS x YOS, up to maximum of 60% of FAS

§3307.631

Am. Sub. H.B. 628 - Eff. 9-21-00 - PERS

- Benefit formula for pre-1992 disability plan increased to 2.2% for each year of accrued service, plus projected service to age 60, up to a maximum of 75% of FAS
- Benefit formula for post-1992 disability plan increased to 2.2% x YOS, up to a maximum of 60% of FAS

§145.36, §145.361

2001

Am. Sub. S.B. 270 - Eff. 4-9-01 - SERS

- Benefit formula for pre-1992 disability plan increased to 2.2% x FAS x projected YOS, up to maximum of 75% of FAS
- Benefit formula for post-1992 disability plan increased to 2.2% x FAS x YOS, up to a maximum of 60% of FAS

§3309.40, §3309.401

2003

Sub. H.B. 373 - Eff. 03-24-03 - HPRS

- Permits disability retirement to be determined based upon medical or psychological examination.

§5505.18

## HEALTH CARE BENEFITS

1973

H.B. 430 - Eff. 11-20-73 - All five systems

- Comprehensive program of hospitalization, health and medical insurance for benefit recipients authorized
- Authorizes payment on or after 1-1-74 of all or part of the cost of the premium for health care coverage

§145.58, §742.45, §3307.74, §3309.69, §5505.202

1976

H.B. 268 - Eff. 8-20-76 - All five systems

- Permits coverage for an eligible person's spouse and other dependents
- Medicare Part B premium reimbursed on and after 1-1-77 to each recipient of an age and service, disability, or survivor benefit

§145.58, §742.45, §3307.74, §3309.69, §5505.202

1981

H.B. 126 - Eff. 6-13-81 - PERS, SERS

- Eligibility requirements for health care benefits, including Medicare equivalent benefit and Medicare Part B reimbursement, increased from 5 to 10 YOS for age and service retirees in PERS and SERS retiring on or after 6-13-86, and their spouses, and recipients of joint and survivor benefits

§145.325, §145.58, §3309.375, §3309.69

1982

H.B. 236 - Eff. 2-2-82 - All five systems

- Authorizes retirement boards to contract with health maintenance organizations (HMO's)

§145.58, §742.45, §3307.74, §3309.69, §5505.202

1985

H.B. 631 - Eff. 3-28-85 - All five systems

- Alternative coverage by health maintenance organizations (HMO's) required  
§145.58, §742.45, §3307.74, §3309.69, §5505.202

1988

H.B. 290 - Eff. 9-9-88 - SERS

- Limits reimbursement of Medicare Part B premium to an amount equal to the lesser of the basic monthly premium for such coverage or \$24.80
- Employer surcharge on the salaries of lower-paid employees to help fund health care benefits

§3309.491, §3309.69

1991

H.B. 329 - Eff. 4-10-91 - STRS

- Limits reimbursement of Medicare Part B premium to an amount equal to the lesser of the basic monthly premium for such coverage or \$29.90

§3307.74

H.B. 382 - Eff. 6-30-91 - SERS

- SERS payment for Medicare equivalent coverage reduced from 50 percent to not less than 25 percent of the cost

§3309.375

H.B. 180 - Eff. 10-29-91 - STRS, SERS

- Authorizes STRS and SERS to establish long-term health care programs under which active members, and employers on behalf of active members, may participate

§3307.741, §3309.691

1992

S.B. 346 - Eff. 7-29-92 - PERS

- Authorizes PERS board to provide health care coverage to age and service retirees with less than 10 YOS, their spouse and their beneficiary if such coverage is paid for by retirees

§145.58

H.B. 383 - Eff. 8-4-92 - PERS

- Authorizes PERS to contract with insurance companies, health care corporations, health maintenance organizations and government agencies for the provision of long-term health care policies for retirees who were covered by such policies through an employer prior to retirement

§145.581

1993

H.B. 152 - Eff. 7-1-93 - All five systems

- Requires each board to establish a long-term health care insurance program under which members, employers on behalf of members, and benefit recipients may participate

§145.581, §742.53, §742.56, §3307.741, §3309.691, §5505.203, §5505.33

1994

H.B. 151 - Eff. 2-9-94 - PERS

- Employer-provided health care coverage is primary and PERS health care coverage is secondary for reemployed retirees

§145.38, §145.58

S.B. 306 - Eff. 9-21-94 - HPRS

- Caps Medicare Part B premium reimbursement at \$41.10 per month

§5505.28

1997

S.B. 82 - Eff. 3-7-97 - All five systems

- Requires each board to adopt an administrative rule relative to the coordination of benefits among the five systems' health care plans

§145.58, §742.45, §3307.74, §3309.69, §5505.28

1998

Am. Sub. H.B. 673 - Eff. 12-8-98 - SERS

- Increases the SERS reimbursement of Medicare Part B monthly premium to \$31.80

§3309.69

Sub. H.B. 648 - Eff. 9-16-98-STRS

- Establishes a minimum Medicare Part B monthly reimbursement rate of \$29.90, along with a maximum reimbursement rate of 90% of the Medicare Part B monthly premium based on the member's YOS.

§3307.74

Sub. H.B. 648 - Eff. 9-16-98 - HPRS

- Allows HPRS board to establish the monthly Medicare Part B reimbursement

§5505.28

2001

Am. Sub. S.B. 270 - Eff. 4-9-01 - SERS

- Increases the SERS reimbursement of Medicare Part B monthly premium to \$45.50

§3309.69

2002

Sub. S.B. 247 - Eff. 10-01-02 - All five systems

- Makes the authority of the retirement boards to provide post-retirement health care benefits through an HMO permissive rather than mandatory.

§145.58, §742.45, §3307.39, §3309.69, §5505.28

**2009**

Am. Sub. S.B. 267 - Eff. 03-24-2009 - PERS, OP&F

- Allows the PERS and OP&F boards to establish the monthly Medicare Part B reimbursement at not less than \$96.40

§145.58, §742.45

## **SURVIVOR BENEFITS**

1968

### H.B. 959 - Eff. 6-10-68 - PERS, STRS, SERS

(Benefit provisions effective 7-1-68)

- Eligibility extended to dependent child(ren) of a surviving non-dependent widower
  - Benefit the same as that for minor orphans

§145.45, §3307.49, §3309.45

1969

### S.B. 409 - Eff. 11-21-69 - PERS, STRS, SERS

- Eliminates requirement that a designated beneficiary have an insurable interest in the life of the retirees (STRS only)
- Permits retirees to change selection of optional plan of payment within 30 days after retirement or before the receipt of the first payment, whichever occurs earlier
- If no payment plan is selected within 30 days, retirees will automatically receive a single life annuity, if not married, or an Option 1 joint and survivor annuity, if married (STRS and SERS only)
- Requires that payment under an optional plan of payment not exceed the amount payable to the retirees (PERS and SERS only)

§145.46, §3307.50, §3309.46

### H.B. 215 - Eff. 11-25-69 - OP&F

(Benefit provisions effective 1-1-70)

- Widow - flat benefit increased from \$90 to \$130 per month
- Surviving child - flat benefit increased from \$35 to \$45 per month
- Dependent parent - flat benefit increased from \$30 to \$60 per month for each parent, or \$120 per month for one

§742.37

1970

H.B. 210 - Eff. 8-27-70 - PERS, STRS, SERS

- Provides survivor benefit based upon a percentage of deceased member's FAS and number of dependents (formerly a flat benefit only)
  - 25 percent of FAS for 1 dependent, 40 percent for 2, 50 percent for 3, 55 percent for 4, and 60 percent for 5 or more
- Eligibility extended to dependent children until age 22, if full-time students (formerly age 18)
- Reduces service requirement from 15 to 10 years for widow or dependent widower with no children to be eligible for benefit at age 50
- Eligibility extended to surviving spouse who is physically or mentally incompetent, regardless of age (PERS, STRS)

§145.45, §3307.49, §3309.45

S.B. 502 - Eff. 9-4-70 - PERS

- Makes survivors of members employed by a public transportation utility eligible for benefits

§145.45

1971

H.B. 100 - Eff. 12-31-71 - PERS, STRS, SERS

- Eligibility requirement that surviving spouse be married to the member at least 3 years removed
- Coverage continued for 27 months following termination of employment (formerly 21 months)

§145.45, §3307.49, §3309.45

1972

H.B. 910 - Eff. 3-23-72 - HPRS

- Widow - flat benefit increased from \$90 to \$130 per month
- Widow with three dependent children - flat benefit increased from \$230 to \$265 per month; \$45 per month for each additional child

§5505.17

S.B. 137 - Eff. 6-28-72 - OP&F

- Eligibility requirement that widow be married to deceased member during active service removed
- Eligibility extended to dependent children until age 22, if full-time students (formerly age 18)

§742.37

S.B. 464 - Eff. 10-16-72 - PERS, STRS, SERS, HPRS

- Any pension, annuity, allowance or other benefit subject to individual state income tax

§145.56, §3307.71, §3309.66, §5505.22

S.B. 545 - Eff. 10-16-72 - OP&F

- Widow or dependent child of a member who retired on a deferred pension and who dies before receiving pension eligible for survivor benefits

§742.37

1973

H.B. 430 - Eff. 11-20-73 - PERS, STRS, SERS

(These provisions effective 9-1-73)

- Makes widowers eligible for the same benefits as widows of deceased members

§145.45, §3307.49, §3309.45

H.B. 430 - Eff. 11-20-73 - STRS, SERS

- Removes provision that allows member 30 days following retirement to change optional plan of payment and provision that forces retirees to select a plan of payment within 30 days after retirement by providing a single life annuity, if unmarried, or an Option 1 joint and survivor annuity, if married

§3307.50, §3309.46

S.B. 48 - Eff. 11-20-73 - OP&F  
(Benefit provision effective 1-1-74)

- Makes widowers eligible for the same benefits as widows of deceased members
- Surviving spouse - flat benefit increased from \$130 to \$160 per month
- Surviving child - flat benefit increased from \$45 to \$55 per month
- Dependent parent - flat benefit increased from \$60 to \$75 per month for each parent, or \$150 per month for one

§742.37

S.B. 48 - Eff. 11-20-73 - HPRS  
(Benefit provisions effective 1-1-74)

- Makes widowers eligible for the same benefits as widows of deceased members
- Surviving spouse - flat benefit increased from \$130 to \$160 per month; additional monthly benefit of \$45 for each dependent child increased to \$55

§5505.17

1975

H.B. 83 - Eff. 8-12-75 - OP&F

- Provides that members who elected to receive, but have yet to receive on 8-12-75, a benefit from a local police or firemen's relief and pension fund may elect to receive a benefit from OP&F

§742.37

1976

H.B. 268 - Eff. 8-20-76 - STRS

(All monthly survivor benefits being paid or payable recalculated in accordance with H.B. 268)

- Benefit to survivor of member who died prior to 7-1-73 with more than 34 but less than 35 YOS shall be calculated on 35 years
- Benefits to survivor of member who died on or after 7-1-73 with more than 31 but less than 32 YOS shall be calculated on 32 years

§3307.383

H.B. 268 - Eff. 8-20-76 - HPRS

- Surviving spouse - flat benefit increased from \$160 to \$250 per month

§5505.17

H.B. 268 - Eff. 8-20-76 - PERS

- Eligibility extended to dependent parents who are physically or mentally incompetent, regardless of age
- Permits surviving spouse who is less than 65 years old to defer receipt of joint and survivor annuity
- Eligibility extended to surviving spouse of a member who died prior to 8-27-70, and who is physically or mentally incompetent

§145.45

H.B. 268 - Eff. 8-20-76 - PERS, SERS

- Eliminates requirement that a designated beneficiary have an insurable interest in the life of the retirees

§145.46, §3309.46

H.B. 268 - Eff. 8-20-76 - OP&F

(This provision effective 7-1-76)

- Surviving spouse - flat benefit increased from \$160 to \$200 per month
- Surviving child - flat benefit increased from \$55 to \$65 per month

§742.37

H.B. 268 - Eff. 8-20-76 - PERS, STRS, SERS

- Permits return to single lifetime annuity equivalent after divorce or death of a spouse
- Permits retirees to elect a new optional plan of payment based on the single lifetime annuity equivalent following marriage or remarriage

§145.46, §3307.50, §3309.46

1978

H.B. 55 - Eff. 10-20-78 - PERS, STRS, SERS

- Eligibility of surviving spouse continues upon remarriage after age 62
- Eligibility extended to surviving spouse who remarries on or after 7-1-76 after attaining age 62

§145.45, §3307.49, §3309.45, Section 4 of H.B. 55

H.B. 220 - Eff. 10-31-78 - PERS, STRS, SERS

- Permits return to single lifetime annuity equivalent after the death of a designated beneficiary other than the spouse

§145.46, §3307.50, §3309.46

1979

H.B. 204 - Eff. 7-30-79 - HPRS

(Benefit provisions effective 7-1-79)

- Surviving spouse - flat benefit increased from \$250 to \$263 per month; additional monthly benefit of \$55 for each dependent child increased to \$58
- Surviving children - flat benefit increased from \$90 to \$95 per month, with maximum monthly benefit of \$230 increased from \$242
- Dependent parents - flat benefit increased from \$90 to \$95 per month for each parent, or \$95 per month for one

§5505.17

H.B. 204 - Eff. 7-30-79 - OP&F

(Benefit provisions effective 7-1-79)

- Surviving spouse - flat benefit increased from \$200 to \$210 per month
- Surviving child - flat benefit increased from \$65 to \$68 per month
- Dependent parents - flat benefit increased from \$75 to \$79 per month for each parent, or \$158 for one

§742.37

1980

H.B. 182 - Eff. 2-28-80 - OP&F

- Permits retirees to elect optional plan of payment providing reduced benefit continuing after death to designated beneficiary
  - Same as the non-uniformed employee retirement systems

§742.3711

1981

H.B. 974 - Eff. 4-9-81 - All Five systems

- Resumption of surviving spouse benefits if remarriage ends due to divorce, annulment, dissolution, or death within 2 years

§145.45, §742.37, §3307.49, §3309.45, §5505.17

S.B. 133 - Eff. 11-18-81 - HPRS

- Surviving spouse of active member - flat benefit increased from \$263 to \$425 per month

- Surviving spouse of retired member - provided optional benefit of 50 percent of the retired member's benefit or \$425 per month, whichever is greater
- Surviving child - flat benefit increased from \$95 to \$100 per month for each child; maximum monthly benefit limitation of \$242 per month for more than two children removed
- Children entitled to benefit in their own right
- Eligibility extended to dependent children until age 23, if full-time students (formerly age 18)
- Dependent parents - flat benefit increased from \$95 to \$154 per month for each parent, or \$154 per month for one

§5505.17

H.B. 552 - Eff. 11-24-81 - OP&F

- Surviving spouse - flat benefit increased from \$210 to \$256 per month

§742.37

1983

S.B. 194 - Eff. 10-5-83 - STRS

(All monthly survivor benefits being paid or payable recalculated in accordance with S.B. 194)

- Benefits to survivor of member who died on or after 8-20-76 with more than 29 but less than 30 YOS shall be calculated on 30 years

§3307.383

1984

H.B. 268 - Eff. 4-25-84 - OP&F

(Surviving spouse of a member who died between 2-28-80 and 4-25-84 eligible for joint and survivor annuity provided in H.B. 268)

- Allows designation of contingent dependent beneficiary
- Provides surviving spouse or contingent dependent beneficiary with a joint and survivor annuity of one-half of the member's retirement allowance if the member was eligible to retire at the time of death

§742.3714

H.B. 580 - Eff. 9-26-84 - OP&F

- Members who retired prior to 2-28-80 may choose optional plan of payment providing reduced benefits continuing after death to a surviving spouse

§742.3715

1986

H.B. 509 - Eff. 9-17-86 - All five systems

(This provision effective 12-1-86)

- Any pension, annuity, allowance, refund or other benefit subject to withholding for the purpose of paying alimony and child support

§145.45, §742.47, §3307.71, §3309.66, §5505.22

S.B. 112 - Eff. 7-24-86 - OP&F

(This provision effective 1-1-86)

- Surviving spouse - flat benefit increased from \$256 to \$310 per month
- Surviving child - flat benefit increased from \$68 to \$93 per month

§742.37

1988

S.B. 305 - Eff. 3-29-88 - STRS

- Eligibility extended to surviving spouse at any age if member had 10 or more YOS (formerly age 50)
- Resumption of surviving spouse benefits if remarriage ends due to divorce, annulment, dissolution, or death after two years, and surviving spouse attains or has attained age 62

§3307.49

H.B. 10 - Eff. 5-6-88 - HPRS

- Makes surviving spouse of a member who was eligible to retire but who continued to work or who deferred receipt of pension eligible to receive the greater of \$425 per month or 50 percent of the pension the deceased member would have received had the member retired the day before the member's death (formerly \$425 per month only)
- Eliminates requirement that the surviving spouse must have been married to the deceased member or retirees while he was in the active service

§5505.17

H.B. 389 - Eff. 9-9-88 - OP&F

- Surviving spouse - flat benefit increased from \$310 to \$410 per month
- Surviving child - flat benefit increased from \$93 to \$118 per month
- Permits member, with the consent of the designated beneficiary, to change from a joint and survivor annuity to a single life annuity

§742.3711

1989

H.B. 701 - Eff. 3-17-89 - VFFDF

- Increases from \$100 to \$200 per month the benefit payable to the surviving spouse of a volunteer fire fighter
- Increases from \$25 to \$65 per month the benefit payable to the parent, guardian, or other person responsible for each surviving dependent child of a volunteer firefighter
- Eligibility extended to dependent children until age 18 (formerly age 16, unless in secondary school, then until age 18)

§146.01, §146.12

H.B. 293 - Eff. 9-15-89 - STRS

- Additional optional plans of payment authorized
- Guarantees a spouse of a retiree a benefit of at least ½ of the retiree's benefit unless the spouse acknowledges that the retiree has selected a single life annuity or a plan of payment that provides less than ½ of the retiree's benefit, or the board waives the acknowledgment requirement due to the absence or incapacity of the spouse
- Use of PERS and SERS mortality tables authorized

§3307.50

H.B. 340 - Eff. 11-2-89 - HPRS

- Surviving spouse - flat benefit increased from \$425 to \$600 per month

§5505.17

1990

S.B. 240 - Eff. 7-24-90 - PERS, STRS, SERS, OP&F

- Guarantees a spouse of a retiree a benefit of at least ½ of the retiree's benefit unless the spouse acknowledges that the retiree has selected a single life annuity or a plan of payment that provides less than ½ of the retiree's benefit, or the board waives the acknowledgment requirement due to the absence or incapacity of the spouse (PERS, SERS, OP&F)
- Requires spousal consent or a court order to cancel a joint and survivor annuity and return to a single life annuity upon termination of marriage

§145.46, §742.3711, §742.3715, §3307.50, §3309.46

1991

H.B. 382 - Eff. 6-30-91 - PERS, STRS, SERS

- Permits PERS, STRS and SERS beneficiaries to waive in writing all claim to any benefit payable prior to receiving the first benefit

§145.562, §3307.712, §3309.661

H.B. 382 - Eff. 6-30-91 - PERS, SERS

- Provides that if a beneficiary is paid a benefit to which the beneficiary is not entitled, the benefit shall be repaid by the beneficiary or shall be recovered by the system through withholding
- Provides that if a beneficiary is not located within 90 days of member's death survivor next in order of precedence under statutory succession shall qualify as beneficiary (SERS)

§145.43, §3309.44

H.B. 104 - Eff. 11-1-91 - PERS, STRS, SERS, HPRS

- Any pension, annuity, allowance or other benefit subject to school district income tax

§145.56, §3307.71, §3309.66, §5505.22

S.B. 10 - Eff. 4-16-92 - All five systems

- Any pension, annuity, allowance, refund or other benefit subject to administrative withholding order issued by a child support enforcement agency (formerly subject to court-issued withholding orders only)

§145.56, §742.47, §3307.71, §3309.66, §5505.22

S.B. 346 - Eff. 7-29-92 - PERS

- Provides that if a beneficiary is deceased or is not located within 90 days of member's death survivor next in order of precedence under statutory succession shall qualify as beneficiary

§145.43

H.B. 721 - Eff. 12-14-92 - STRS

(Benefit provisions effective 7-1-92)

- Provides additional method of calculating survivor benefit based on deceased member's FAS and YOS

<u>YOS</u>	<u>% of FAS</u>
20	29%
21	33%
22	37%
23	41%
24	45%
25	48%
26	51%
27	54%
28	57%
29	60%

- Benefit shall be apportioned equally among qualified dependents, except surviving spouse's share of total benefit shall be 62.5% if 2 dependents, 50% if 3 dependents, 45.5% if 4 dependents and 41.67% if 5 or more dependents

- Provides that survivor next in order of precedence under statutory succession shall qualify for monthly benefits if any survivor dies before first payment is made or is not located within 90 days of member's death; if subsequently located, survivor may also qualify for benefits upon meeting eligibility requirements

§3307.48, §3307.49

1994

S.B. 306 - Eff. 9-21-94 - HPRS

- Allows retirees to elect among several joint and survivor benefit options at retirement, providing the retiree with the actuarial equivalent of his or her pension in a lesser amount for his or her life and the continuation of such pension or some portion thereof to a surviving designated beneficiary

§5505.162

1996

H.B. 308 - Eff. 6-5-96 - HPRS

- Surviving spouse flat benefit increased from \$600 to \$850 per month
- Dependent child flat benefit increased from \$100 to \$150 per month
- Allows surviving spouse to continue receiving benefit regardless of remarriage (formerly benefit terminated upon remarriage unless remarriage ceased within two years due to divorce or death)

§5505.17

H.B. 123 - Eff. 6-5-96 - PERS, STRS, SERS

- Allows surviving spouse to continue receiving benefits despite remarriage after age 55 (formerly age 62)
- Reinstates benefits to surviving spouse who had remarried on or after 2-15-95 and who had attained age 55 at the time
- Reinstates benefits to a qualified dependent due to first remarriage which ceased due to divorce, annulment, dissolution, or death if the dependent attains age 55 (STRS only)

§145.45, §3307.49, §3309.45

H.B. 365 - Eff. 9-9-96 - OP&F

- Allows surviving spouse to continue receiving benefits despite remarriage after age 55
- Reinstates benefits to surviving spouse who had remarried on or after 6-5-96 and who had attained age 55 at that time

§742.37

1998

Sub. H.B. 648 - Eff. 9-16-98 -PERS, STRS, SERS, OP&F

- Allows surviving spouse to continue receiving benefits despite remarriage
- Reinstates benefits to surviving spouses whose benefits were terminated prior to 9-16-98 due to remarriage

§145.45, §742.37, §3307.49, §3309.45

Sub. H.B. 194 - Eff. 12-21-98 - OP&F

- Ad hoc increase of statutory survivor benefit to \$550 per month effective 7-1-99 for all current surviving spouses of members who retired prior to 9-16-98, all current and future surviving spouses who cease to be eligible for OPSODBF
- Benefits, future surviving spouses of members who retired prior to 9-16-98 and die before 12-21-99 and future surviving spouses of members not eligible for service retirement at time of death and who are not killed in the line of duty
- Ad hoc increase of statutory survivors benefit for current and future surviving children under age 18 (22 if a student) from \$118 to \$150 per month effective 7-1-99
- Ad hoc increase of statutory survivor benefit for current and future dependent parents from \$79 to \$100 per month for each parent, or \$158 to \$200 per month for one parent effective 7-1-99

§742.37, §742.3718

1999

Am. Sub. H.B. 283 - Eff. 6-30-99 - OPSODBF

- Allows surviving spouses to receive benefits despite remarriage.
- Reinstates benefits for surviving spouses whose benefits were terminated due to remarriage.

§742.63

2000

Sub. H.B. 275 - Eff. 3-17-00 - OP&F

- Ad hoc increase of statutory survivor benefit to \$550 per month for all spouses excluded from HB 194 (eff. 12-21-98) except spouses receiving benefit from OPSODBF, indexed to average change in CPI-W, up to 3% beginning 7-1-00 and each year thereafter
- Ad hoc increase for all spouses excluded from H.B. 194 equal to \$140 for each month eligible to receive survivor pension between 12-22-98 and 7-1-99

§742.37

Sub. S.B. 189 - Eff. 6-30-00 - HPRS

- Allows retirants who retired prior to 9-21-94 to select a joint and survivor annuity
- Ad hoc increase of statutory survivor benefit to \$900 per month

§5505.163, §5505.17

Sub. S.B. 190 - Eff. 7-13-00 - STRS

- Ad hoc increase to 85% of deceased member's FAS, adjusted by cumulative change in CPI-W

§3307.6914

Am. Sub. H.B. 628 - Eff. 9-21-00 - PERS

- Creates alternative survivor benefit based on member's YOS in lieu of number of qualified survivors
- Increases minimum monthly survivor benefit to \$250 for one qualified survivor, \$400 for two survivors, and \$500 for three or more survivors
- Eliminates age requirement for survivors of members who had at least 10 YOS
- FAS used in calculation of benefit increased by lesser of 3% or actual change in CPI-W for each year between effective date of disability benefit and date of death
- Ad hoc increase for survivors receiving benefit on or before 12-31-79

§145.45, §145.3212, §145.323

**2001**

Am. Sub. S.B. 270 - Eff. 4-9-01 - SERS

- Creates alternative survivor benefit based on member's YOS in lieu of number of qualified survivors
- Eliminates age requirement for survivors of members who had at least 10 YOS
- FAS used in calculation of benefit increased by lesser of 3% or actual change in CPI-W for each year between effective date of disability benefit and date of death

§3309.45

**2002**

Sub. H.B. 158 - Eff 2-01-02 - PERS-LE

- Survivor coverage eligible immediately upon employment

§145.45

Sub. H.B. 157 - Eff. 2-01-02- OP&F

- Provides for a monthly survivor benefit to surviving spouses of members of former local police or firemen's pension funds whose survivor benefits were terminated or never paid due to remarriage

- Makes survivors of members of local police or firemen's pension funds eligible for benefits from OPSODBF if member was killed in the line of duty.
- Increases monthly survivor benefit to \$566.50, plus \$16.50 each year thereafter for surviving spouses.
- Increases monthly survivor benefit to \$163.50, plus \$4.50 each year thereafter, for surviving children.
- Increases monthly survivor benefit to \$109.00, plus \$3.00 each year thereafter, for each dependent parent (\$218.00 plus \$6.00 each year thereafter, for a sole dependent parent)

§742.37, §742.63

Sub. S.B. 247 - Eff. 10-01-02 - PERS, STRS, SERS

- Establishes partial lump-sum-payment for survivors

§145.45, §3307.60, §3309.45

**2003**

Am. Sub. S.B. 115 - Eff. 03-19-03 - VFFDF

- Eliminates remarriage penalty
- Increases monthly survivor benefit from \$200 to \$300 for surviving spouse of volunteer firefighter
- Increases monthly survivor benefit from \$65 to \$125 for each child of a volunteer firefighter
- Eligibility extended to child until age 23 if child is completing at least two-thirds of full-time curriculum requirements at post-secondary educational institute

§146.12

## Acronym Key

PERS	Public Employees Retirement System
PERS-LE	Public Employees Retirement System - Law Enforcement - all members
PERS-LAW A	Public Employees Retirement System - consists of Hamilton County Municipal Court bailiffs
PERS-LAW B	Public Employees Retirement System - consists of all other PERS-LE members
STRS	State Teachers Retirement System
SERS	School Employees Retirement System
OP&F	Ohio Police and Fire Pension Fund
HPRS	State Highway Patrol Retirement System
VFFDF	Volunteer Fire Fighters' Dependents Fund
YOS	Years of Service
FAS	Final Average Salary
OPSODBF	Ohio Public Safety Officers Death Benefit Fund
I.R.C.	Internal Revenue Code