



STATE OF CONNECTICUT  
TEACHERS' RETIREMENT BOARD  
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December 10, 2008

To: Transmittal Processors

RE: Substitute Service

This is to communicate procedures for reporting substitute service to the Teachers Retirement Board (TRB). It includes several changes to our policies and practices. The most significant changes are: 1) use of the term "permanent substitute" rather than "long-term substitute" ("permanent substitute" mirrors the state statutes and eliminates the confusion caused by the differences between our definition of a "long-term substitute" and the state Department of Education's use of the same term); 2) elimination of the criteria that substitute service be "in the same assignment", and 3) clarification of status changes that occur during the year.

A substitute is either "permanent" or not permanent (we'll refer to non-permanent substitutes as "regular" substitutes). A permanent substitute is one whose assignment begins on or before the first working day in September and who intends to, and ultimately does, work for the entire school year.

Permanent substitute status must encompass the entire school year. An individual who starts as a substitute after the first working day in September is not a permanent substitute.

A permanent substitute is reported on the transmittal, has mandatory contributions withheld, and earns membership credit. The Board of Education should notify us if the permanent status changes before the end of the school year, in which case we will refund mandatory contributions to the member and remove membership credit. Prior TRB membership is not required to earn membership credit as a permanent substitute.

An individual who begins the school year as a regular substitute can retroactively be reclassified as a permanent substitute – and, accordingly, submit mandatory contributions and earn membership credit for that period of time - if their substitute service extends for the entire school year (even though that may not have been the intent at the beginning of the school year) or if they become a teacher during the school year. An individual who begins the school year as a permanent substitute and then becomes a teacher would continue to be reported on the transmittal and this status change would be transparent except for a possible change in salary.

Service as a regular substitute does not establish TRB membership by itself, but an individual who is otherwise a TRB member may purchase this service as additional service credit.

Let me know if you have any questions.

Very truly yours,

Louis Laccavole

Fiscal Administrative Supervisor

C: Business Managers