## **RETIREMENT RECORD FOR CALSTRS (PSL-W052)**

Sacramento City Unified School District

#### 1.0 SCOPE:

1.1 This work instruction discusses the process for entering new or updating CALSTRS retirement records.

## 2.0 RESPONSIBILITY:

2.1 Personnel Technician II

#### 3.0 APPROVAL AUTHORITY:

- 3.1 Director of Human Resource Services
- 3.2 Supervisor III, Personnel Services

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

#### 4.0 DEFINITIONS:

- 4.1 CALSTRS California State Teachers Retirement System
- 4.2 ESCAPE Software program used to maintain and hold all of the transactions made on all district employment records.
- 4.3 NEW EMPLOYEE PACKET All the paperwork required to enter a new employee online in the Personnel Module of the Escape System.
- 4.4 SCUSD Sacramento City Unified School District
- 4.5 MEMBERSHIP STATUS this is a field in the Retirement Record that identifies whether the employee is a Member or a Non-Member

# **5.0 WORK INSTRUCTIONS:**

5.1 New Employees

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5.2.2.1.1 If there is not an existing Retirement Record online, consult with the Retirement Team in the Payroll Department for direction.

## 5.2.2.2 Existing CALSTRS Retirement Record

- 5.2.2.2.1 If there is an existing CALSTRS Retirement Record online, open up the record to check the "Membership Status" and "STRS Pay Assignment" fields.
- 5.2.2.2.2 If the "Membership Status" reflects the employee as a member <u>and</u> the "STRS Pay Assignment" field is correct, no changes are required to this record.
- 5.2.2.2.3 If the "Membership Status" reflects the employee as a Non-Member, end the existing Retirement Record and create a new record.
- 5.2.2.2.4 In the new Retirement Record change the "Membership Status" to "1" for Member and update the required fields.
- 5.2.2.2.5 In the "Comment" field enter the reason for the change.
- 5.2.2.2.6 Save the Retirement Record.

#### 5.3 Employees Retiring

- 5.3.1 Close out the existing Retirement Record.
- 5.3.2 Create a new Retirement Record and set-up as a Non-Member Retiree.

#### **6.0 ASSOCIATED DOCUMENTS:**

- 6.1 Retirement Questionnaire (PSL-F055)
- 6.2 CALSTRS Permissive Membership (ES-350) External Document
- 6.3 Vacancy Requisition

### 7.0 ASSOCIATED SOFTWARE:

7.1 ESCAPE

# **8.0 RECORD RETENTION TABLE**

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Questionnaire				