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# STRS RETIREMENT APPLICATION PROCESS (PAY-W067)

Sacramento City Unified School District

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## 1.0 SCOPE:

- 1.1 This work instruction is applied to assist the member when they have made the decision to retire and the inforee \_\_\_\_\_ ssary to provide to the retirement system for determining the retire\_

ent.

- 5.3 Employee/member should take their anticipated date of retirement; unused sick leave days; contract service days; and an estimate of their last three years of earnable compensation to the interview.
- 5.4 Employee/member should obtain an application for retirement from CALSTRS approximately six months before expected retirement date, call or write CALSTRS or visit the website at [www.calstrs.com](http://www.calstrs.com).
- 5.5 Employee/member should complete and submit the application by certified mail to CALSTRS.
- 5.6 Employee/member will provide STRS (MS0554E) - Express Benefit Report to retirement team 30-60 days prior to retirement for completion of unused sick leave days and contract service days.
- 5.7 Maintain a copy of the Express Benefit Report to retirement add-on record.

## 6.0 ASSOCIATED DOCUMENTS:

- 6.1 CALSTRS Retirement Application Packet
- 6.2 Express Benefit Report - MS0554E. (PAY-W062)

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## 7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Check and Backup	File cabinet in office	Two years, current and previous fiscal year. After two years, sent to warehouse.	None. Must keep all payroll records per Internal Audit Department.	Access with approval of Payroll Services Department.

## 8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/03/04	A	Initial Release

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