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:

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

3.1 Director of Human Resource Services

3.2 Supervisor III, Personnel Services

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

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

Identification	**Storage**	**Retention**	**Disposition**	**Protection**
Questionnaire				