
STRS MEMBERSHIP APPLICATION (PAY-W063)

Sacramento City Unified School District

1.0 SCOPE:

- 1.1 This work instruction is applied to verify the membership status of certificated employees and prior STRS members. Also, for corrections to membership forms when necessary.

2.0 RESPONSIBILITY:

- 2.1 Lead Payroll Technician
- 2.2 Fiscal Services Technician I

3.0 APPROVAL AUTHORITY:

- 3.1 Supervisor IV, Payroll Services

Signature

Date

4.0 DEFINITIONS:

- 4.1 Any person who has performed creditable service in the Defined Benefit Program for an employer and has earned compensation for that service and has not received a refund for that service.
- 4.2 STRS – State Teachers’ Retirement System
- 4.3 OASDI – Social Security

5.0 WORK INSTRUCTION:

- 5.1 Sign into Escape, selecting the Personnel module.
- 5.2 Enter Personnel, Access Method, Hit Enter, Person Locator and enter last name & first name or social security number, hit F3. Once name and ssn appear hit Enter.
- 5.3 At the employee’s name, CTRL D for the detail. Look for STRS retirement record add-on, if there is a record, tab to record, hit Enter and look at the Member status field, enter 1 if electing membership or 2 if declining membership. Hit Enter to advance to Membership Type field and enter the appropriate letter: Q for qualified or E for elected, Y for existing or R for Retirement.
- 5.4 Remember to update the Tax set-up accordingly as follows: If a member of STRS remove the Y in the OASDI; if a non-member the Y remains in the OASDI field. If the non-member is a retiree the Y is removed from the OASDI field.
- 5.5 Hit F3 twice to update record.
- 5.6 In the section ‘To Be Completed By Employer’ on membership form employer representative must sign and indicate title along with the county and district name of employer. Check boxes at the bottom of form indicating employee’s gender, birth date, membership date if applicable and assignment i.e. full time, part time or substitute.
- 5.7 Any necessary corrections will come at the direction of STRS. The corrections are generally filling in information that may have been omitted by the employee or the employer’s representative prior to submission.

STRS MEMBERSHIP APPLICATION (PAY-W063)

Sacramento City Unified School District

6.0 ASSOCIATED DOCUMENTS:

6.1 STRS Permissive Membership form (MR350).

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

*** E n d o f p r o c e d u r e ***