
RETIREMENT RECORD FOR CALPERS (PSL-W051)

Sacramento City Unified School District

1. SCOPE:

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

2. RESPONSIBILITY:

- 2.1. Personnel Technician II

3. 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. DEFINITIONS:

- 4.1. CALPERS – California Public Employees 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
- 4.6. WORK SCHEDULE – This is a field in the Retirement Record that identifies whether the employee is Monthly or Hourly.

5. WORK INSTRUCTIONS:

5.1. New Employees

- 5.1.1. New employee packets are received from Personnel Technician I's, Personnel Analysts, Substitute Office, and/or Customer Service Specialists.
- 5.1.2. The Retirement Questionnaire (PSL-F055) is pulled from the new employee packet and forwarded to the Retirement Team in Payroll.

5.2. Existing SCUSD Substitute Employees

- 5.2.1. Existing SCUSD Substitute employees picked up on contract via a Vacancy Requisition are initialized by the Personnel Analysts and forwarded to the Personnel Technician II's.
- 5.2.2. Upon receipt of the Vacancy Requisition, access the "Employee Payroll Setup Records" in Escape and check to see if there is an existing Retirement Record online.
- 5.2.3. No Existing Retirement Record

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

5.2.4. Existing CALPERS Retirement Record

5.2.4.1.1. If there is an existing PERS Retirement Record online, open up the record to check the "Membership Status" and "the "Work Schedule" fields.

5.2.4.1.2. If the "Membership Status" reflects the employee as a member and the "PERS Work Schedule" fields are correct, no changes are required to this record.

5.2.4.1.3. If the "Membership Status" reflects the employee as a Member, and the Work Schedule is incorrect, end the existing Retirement Record and create a new record.

5.2.4.1.4. In the "Comment" field enter the reason for the change.

5.2.4.1.5. Save the Retirement Record.

5.3. Employees Retiring

5.3.1. Close out the existing Retirement Record.

6. ASSOCIATED DOCUMENTS:

6.1. Retirement Questionnaire (PSL-F055)

6.2. Vacancy Requisition

7. ASSOCIATED SOFTWARE:

7.1. ESCAPE

8. RECORD RETENTION TABLE

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Questionnaire and Requisition	At the HRS Department	As need basis	Discard as Desired	Access to the district and HRS

9. REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
03/05/08	A	Initial Release and New

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