
RETIREMENT EXPRESS BENEFIT REPORT (PAY-W062)

Sacramento City Unified School District

1.0 SCOPE:

- 1.1 This work instruction is applied to assist the member when they have made the decision to retire.

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 A necessary form from the retirement package that provides CALSTRS with unused sick leave days and contract service days when computing retirement benefit for retiree.

5.0 WORK INSTRUCTION:

- 5.1 Member must initially contact State Teachers' Retirement System (STRS) to begin process for retirement.
- 5.2 Retirement Desk must complete the Express Benefit Report (SR 0554E).
- 5.3 Retirement Desk will provide employee/member with a Resignation/Retirement form to complete and attach as backup to Express Benefit Report.
- 5.4 Retirement Desk will notify Leave Balance Team of employee's anticipated date of retirement for accurate reporting of Sick Leave Balance to STRS.
- 5.5 Access ESCAPE/Personnel system to retrieve employees annual contractual days of service.
- 5.6 Fill in the County/District Code, Employment Termination Date, Last Day of Compensation and Retirement Date along with employer contact information.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Express Benefit Report
6.2 Printout of sick leave balance.

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.

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8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/14/04	A	Initial Release

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