
STRS RETIREMENT APPLICATION PROCESS (PAY-W067)

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 and the information that is necessary to provide to the retirement system for determining the retirement benefit.

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 Package of information and necessary paperwork for employee/member to complete prior to retirement.
- 4.2 STRS – State Teachers' Retirement System

5.0 WORK INSTRUCTION:

- 5.1 Employee/member is instructed to contact STRS directly to initiate process of retirement.
- 5.2 Employee/member should schedule a pre-retirement interview 12 months in advance of retirement.
- 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.
- 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

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