
RETIREMENT QUESTIONNAIRE PROCESS (PAY-W069)

Sacramento City Unified School District

1.0 SCOPE:

- 1.1 This work instruction is applied to verify employee's member status with State Teachers' Retirement System (STRS) with information provided by the employee on the retirement questionnaire.

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 Retirement questionnaire is used to determine which retirement system the employee holds membership within.
- 4.2 FTE – Full time equivalent
- 4.3 DOB – Date of Birth
- 4.4 SUB - Substitute

5.0 WORK INSTRUCTION:

- 5.1 Log into Escape, access Personnel, go to Person Locator and enter either the name or social security number of employee.
- 5.2 Hit< F3> when name appears, hit enter to go into employee personnel record.
- 5.3 Check person type, department, FTE and the OTHER box to identify F or P for individuals with FTE. Indicate 'SUB' 'F' or 'P' at the lower right corner of retirement questionnaire.
- 5.4 <Alt S> for personal information. Verify Name, DOB, and address, indicate gender on the bottom of sheet for future reference, escape out of record.
- 5.5 Access Remote Employer Access Program (REAP), which is STRS reporting system for member earnings. REAP is a secured and confidential system with access granted by STRS. Once logged into REAP, enter SSN to verify employees membership status.
- 5.6 In PERSONNEL screen, at employee's name, <CTRL D> and look for retirement add-on.
- 5.7 <ALT A>, arrow down to retirement, enter date of current month, enter STRS for retirement system, enter membership date if applicable, in membership status field enter 1 for member, 2 for nonmember; in Member type field enter Y for existing, E for

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elected or R for retirant; in STRS Pay Assignment field enter 57 for contract, 47 for contract (12 month), 54 for substitute, or 55 for hourly employee.

5.8 To update record hit <F3> twice.

6.0 ASSOCIATED DOCUMENTS:

6.1 Retirement Questionnaire.

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

*** End of procedure ***