

PAYROLL USERS GROUP

Tuesday, November 27, 2018
9:00 AM
City Centre, 1A

AGENDA

1. Payroll Authorizations
2. Auditing at Kern.org
3. Holiday Hours
4. December 28th is payday
5. December Processing Dates / Processing Dates Next Quarter
6. W-2's & 1095 C's / December is the last chance for adjustments through payroll
7. PERS Retired Annuitants
8. PERS WOC
9. CALSTRS Retirees
10. January 4th Quarter DE6 Change Software Date
11. Questions

Next PUG Meeting: February 26, 2019

OFFICE OF MARY C BARLOW
KERN COUNTY SUPERINTENDENT OF SCHOOLS

SCHOOL DISTRICT PAYROLL ORDER

District _____

Pay Name: _____

(Name)

(No.)

<u>MIDA</u>	Pay Date: _____
<u>MID B</u>	Pay Date: _____
<u>EOM</u>	Pay Date: _____

CERTIFIED AND APPROVED FOR PAYMENT

The District hereby certifies to the County Superintendent of Schools that (1) the District has caused the credential records of all employees serving in positions requiring certification qualifications and are named in this payroll order to be examined and each of those employees has held a valid certification document at all times for which payment is ordered, (2) the District has exercised due diligence and determined that it will not be subject to penalty under Education Code Section 45037, (3) the County Superintendent may reasonably rely on the District's certification.

The Superintendent of Schools and the Auditor of Kern County are hereby authorized and directed to issue individual payroll warrants to the _____ classified and certificated employees named on the attached payroll orders consisting of _____ pages in the gross amounts indicated for each, totaling \$ _____ dollars, less all authorized salary deductions.

Authorized _____

Dated _____

Rev. 2/24/17

- 11 ☐ Member
 02 ☐ Non-member
 61 ☐ Retired
 81 ☐ Elect into STRS (form attached)

Date Received at District _____

OFFICE OF MARY C. BARLOW
 KERN COUNTY SUPERINTENDENT OF SCHOOLS

CERTIFICATED RATE REQUEST

FULL NAME

_____ SOCIAL SECURITY # _____
 Last First M.I./Maiden BIRTHDATE _____
 SEX: ☐ M ☐ F

RETIREMENT STATUS

This questionnaire is required to determine your current STRS status. Please answer all questions accurately and completely. An incorrect status can result in mandatory collection of contributions due STRS.

List previous CALIFORNIA teaching, and show County:

(month) _____, (year) _____ through (month) _____, (year) _____ in _____ County
 (month) _____, (year) _____ through (month) _____, (year) _____ in _____ County

1. Do you currently have funds on deposit with STRS? Answer NO if you have recently applied for a refund. ☐ Yes ☐ No
 If you had a refund, when _____
2. Have you retired from STRS and are receiving a monthly pension from them? ☐ Yes ☐ No
 If retired, have you a physical exam form on file? ☐ Yes ☐ No
3. Are you retired from another system? ☐ Yes ☐ No
4. Do you currently have funds on deposit with PERS (Public Employees Retirement System) from service performed as a classified (non-teaching) school employee? ☐ Yes ☐ No
5. Are you currently working in a full-time position that is supported by public funds? (County, State, Federal, etc.) ☐ Yes ☐ No
 If so, where _____
6. Are you currently working full time in a school district that is in another county? ☐ Yes ☐ No
 If so, where _____
7. Are you currently employed full time in any other school district in Kern County? ☐ Yes ☐ No
 If yes, District _____
☐ certificated
☐ classified
8. If you are not a current STRS member and do not qualify for STRS membership with your current employment, would you like to elect membership? If so, an election form must be attached. ☐ Yes ☐ No

PRESENT TEACHING STATUS

District _____ Beginning Date of Work _____
☐ Full-time Contract ☐ Part-time Contract ☐ Hourly (adult education)
☐ Extended Day ☐ Home Teaching ☐ Substitute

213

Kern County
Superintendent of Schools
Office of Mary C. Barlow ...advocates for children

No. 01

August 7, 2018

TO: School District Administrators

FROM: Division of Administration, Finance & Accountability

SUBJECT: Payroll Processing Dates

Below are the payroll submission dates for October, November, December 2018:

PAYROLL SCHEDULE

	<u>Dist. Cut-Off*</u>	<u>Process</u>	<u>Period-End Date**</u>	<u>Pay Date**</u>
MID A	9/27/18	10/3,4/18	9/30/18	10/10/18
MID B	10/4/18	10/9/18	9/30/18	10/15/18
EOM	10/15/18	10/22,23,24/18	10/31/18	10/31/18
MID A	10/30/18	11/5,6/18	10/31/18	11/9/18
MID B	11/5/18	11/8/18	10/31/18	11/15/18
EOM	11/9/18	11/19,20,21/18	11/30/18	11/30/18
MID A	11/28/18	12/4,5/18	11/30/18	12/10/18
MID B	12/5/18	12/10/18	11/30/18	12/14/18
EOM	12/12/18 10	12/18,20,21/18 17,18,19	12/31/18	12/28/18

* Into County Office with signed prelist by noon.

** Use these dates for payroll prelists.

The dates listed above are consistent with our requirement for districts to qualify for a pre-audit prior to payroll running. If you find you are unable to meet the deadline, please call the Retirement Department to have your district placed on a post-payroll audit. In the event that you are on the post audit and errors are discovered, you will be required to make the changes on the next available payroll. Please call Vicki Lueck, (661) 636-4706, if you have any questions on this process.

PAQ:vll

TO: School District Administrators

FROM: Division of Administration and Finance

SUBJECT: Payroll Processing Dates

Below are the payroll submission dates for January, February, March 2019:

PAYROLL SCHEDULE

	<u>Dist. Cut-Off*</u>	<u>Process</u>	<u>Period-End Date**</u>	<u>Pay Date**</u>
MID A	12/28/18	1/4/19	1/1/19	1/10/19
MID B	1/4/19	1/9/19	1/1/19	1/15/19
EOM	1/15/19	1/22,23,24/19	1/31/19	1/31/19
MID A	1/29/19	2/4,5/19	1/31/19	2/8/19
MID B	2/5/19	2/8/19	1/31/19	2/15/19
EOM	2/12/19	2/19,20,21/19	2/28/19	2/28/19
MID A	2/26/19	3/4,5/19	2/25/19	3/8/19
MID B	3/5/19	3/11/19	2/28/19	3/15/19
EOM	3/13/19	3/20,21,22/19	3/31/19	3/29/19

* Into County Office with signed prelist by noon.

** Use these dates for payroll prelists.

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PAQ:vll

File Options



Report Selections Select Field Ranges

District: 97 KERN COUNTY SUPT OF SCHOOLS

Report Format: P - Prelist

Run Option: 1 - Extract and then print

Print W2ED17 changes made since: (Run option = 2 only)

SSN Mask (# digits set to '0')? (0=none, 1-9=mask, L/R=ExtRef)

Client field for ssn flag: 00 Use 01 - 30, or 00 for none

Set pension flag if Alt-Retire: N 84xx vol-deds only (Y/N/X)

Report layout: Leave blank for default layout,
use 01-99 for customer defined custom layouts.

October 22, 2018

TO: School District Administrators

FROM: Division of Administration, Finance & Accountability

SUBJECT: W2 Timeline 2018

January 31 is the filing deadline for BOTH electronic and paper form W2s

W2 Pre-list (W2SB17)	Preliminary Pre-list for 2018 Available NOW – Run W2 Prelist with Next Year Option Set Next Year – Run Option: 1 - Extract and then Print
W2 Pre-list (W2SB18)	W2Prelist (W2SB18) Report Format: P – Pre-list Current Year – Run Option: 1 - Extract and then Print Optional: Report Format – R - Reasonability Check (OASDI/ Medicare)
January 8	Final date to use pay history adjustments to make wage corrections
January 9 W2 Data Edit (W2ED18)	*Begin using W2 Data Edit (W2ED18) screen for adjustments W2Prelist (W2SB18) Current Year – Run Option: 2 – Use Existing Extract/W2 Edit File
January 11	*Last day to make adjustments/additions using W2 edit screen for printed W2s
January 16-18	KCSOS Print W2s
January 22	Districts pick up W2s for distribution to employees by the January 31 deadline – earlier if possible.
January 25 & 31	Edited W2s will be reprinted by KCSOS at 4pm
January 30	** Final date to make any corrections using W2 edit screen W2-C must be completed by district
February 1 Lookups/Uploads View W2 Image	Final version of W2 PDF images available from within QSS OASIS Districts can reprint lost, destroyed, etc. W2s

* Changes must also be made as pay history adjustments so that pay history will reconcile to the quarterly 941s.

**Any adjustments made after January 30 will necessitate the preparation of a Form W2-C. These forms must be completed by the district and mailed to the appropriate agencies. These forms may be obtained from the local IRS office, or by download at the IRS Web site at www.irs.gov.

Please email bass@kern.org or contact Vicki Lueck (661) 636-4706 or Bruce Storer (661) 636-4733 if you have any questions regarding this process.

PQ:cf

November 13, 2018

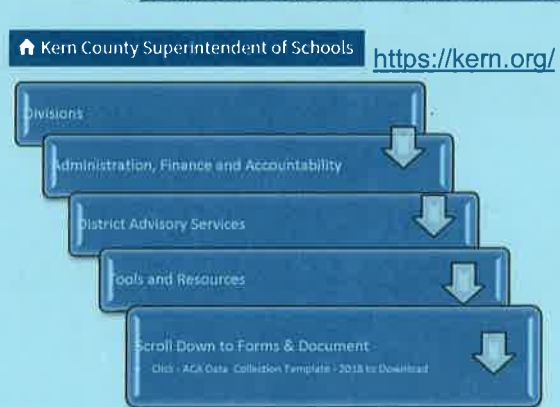
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FROM: Division of Administration, Finance & Accountability

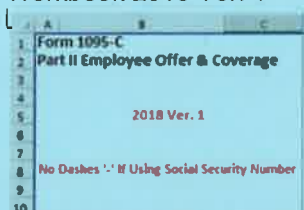
SUBJECT: 1095-C

Districts desiring the Kern County Superintendent of Schools Office to print 1095-Cs for 2018 should submit signed 1095-C prelists to External Business Services by **January 16**. Only those districts that have submitted signed prelists will have 1095-Cs processed and printed on January 18. Form 1095-C **must be furnished by January 31, 2019** to each full-time employee.

Download: [ACA Data Collection Workbook – 2018](#) Set Year/Mode Selection



Make Sure To Use ACA Data Collection Workbook 2018 Ver. 1

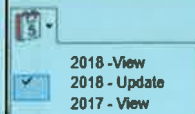


Note: Three Worksheets in the Workbook

Copy & Paste from Worksheet: 'Data to Import into QSS OASIS'



ACA Management (2018/Update)



1095-C Related QCC Modules



1095-C ACA Data Import Tool



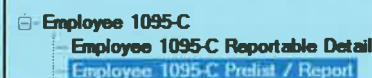
1095-C View/Update Employee Data



1095-C Form Error Check

Review and correct reported errors

1095-C Employee Prelist



Please email bass@kern.org or contact Bruce Storer at (661) 636-4733 if you have any questions regarding this process.

PQ:vr

Assembly Bill 1309
Government Code 21220
Retired Annuitant Reporting

Jennifer Rocco
Brad Hanson
Employer Account Management Division

Objectives

- Track the appointments, pay rate, and hours for retired annuitants.
- Ensure that retired annuitant appointments, pay rate, and hours are entered and reported timely.
- Provide for better tracking and monitoring of retired annuitant employment.

Assembly Bill 1309

- Effective January 1, 2018, Government Code section 21220 of the Public Employees' Retirement Law was amended.
- CalPERS started assessing fees on July 1, 2018.

Retired Annuitant Enrollment

- An employer must enroll a retired annuitant within 30 days of their effective date of hire.
- If an employer fails to enroll timely, a fee of two hundred dollars (\$200) per retired annuitant per month will be assessed.

Retired Annuitant Payroll Reporting

- An employer must report the pay rate and number of hours worked for a retired annuitant within 30 days following the last day of the effective earned period.
- If an employer fails to report timely, a fee of two hundred dollars (\$200) per retired annuitant per month will be assessed.

Fee Assessment

- Enrollment and Payroll Reporting fees are separate.
- CalPERS will not assess fees retroactively for late enrollment or payroll reporting prior to July 1, 2018.
- An employer shall not pass any of the fees on to the retired annuitant.

Resources

- Circular Letters: Enrolling and Reporting Retired Members
 - 200-010-18
 - 200-248-18
- A Guide to CalPERS Employment After Retirement (publication 33)
- [Membership Reporting@calpers.ca.gov](mailto:Membership.Reporting@calpers.ca.gov)
- [Working After Retirement@calpers.ca.gov](mailto:Working.After.Retirement@calpers.ca.gov)



California Public Employees' Retirement System
P.O. Box 942715 | Sacramento, CA 94229-2715
888 CalPERS (or 888-225-7377) | TTY: (877) 249-7442
www.calpers.ca.gov

Membership

Circular Letter

March 30, 2018

Circular Letter: 200-010-18

Distribution: IV, V, VI, X, XII, XVI

To: All CalPERS Employers
Subject: Enrolling and Reporting Retired Members

Purpose

The purpose of this Circular Letter is to inform you that effective January 1, 2018, the Legislature has amended Government (Gov.) Code section 21220 of the Public Employees' Retirement Law (PERL) regarding the required reporting of retired annuitants.

Consequences of Unlawful Employment

CalPERS wants to keep you informed of how this legislation may affect you as a CalPERS employer.

Gov. Code section 21220 has been amended to add the following subdivisions:

(d) If an employer fails to enroll, solely for the administrative recordkeeping purposes of the system, a retired member employed in any capacity, without reinstatement, within 30 days of the effective date of hire, the board may assess the employer a fee of two hundred dollars (\$200) per retired member per month until the retired member is enrolled in those administrative aspects of the system.

(e) If an employer fails to report the pay rate and number of hours worked of a retired member employed in any capacity, without reinstatement, within 30 days following the last day of the pay period in which the retired member worked, the board may assess the employer a fee of two hundred [dollars] (\$200) per retired member per month until the information is reported.

(f) An employer shall not pass on to an employee any fees assessed pursuant to subdivisions (d) and (e).

CalPERS will begin assessing these fees in July 2018. An additional Circular Letter will be published at that time with additional information.

Questions

If you have any questions, please call the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

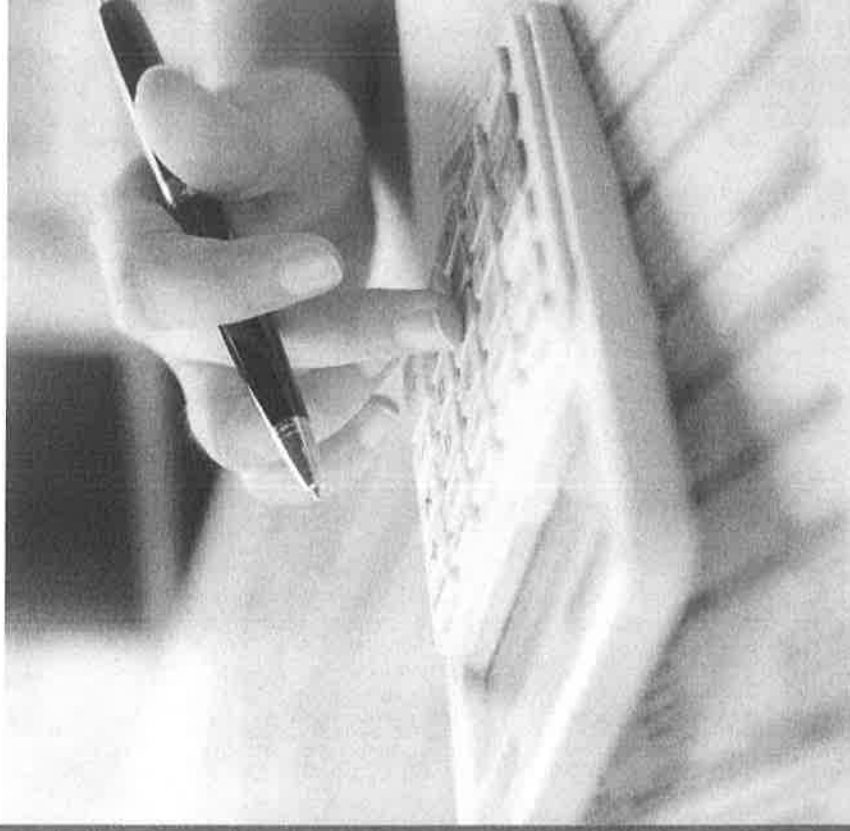
Renee Ostrander, Chief
Employer Account Management Division



Assembly Bill 1487 Government Code 20480

Out of Class Appointments

#CalPERSEOF





Objectives

- Track out-of-class hours, separate from payroll and reported compensation for both Classic and New Members.
- Ensure that out-of-class appointments are accurately maintained and tracked.
- Increase transparency when a member is assigned to an out-of-class appointment.



Out-Of-Class Appointment

- In an upgraded position or higher classification
- Appointed to a vacant position
 - Vacant while recruiting for a permanent appointment
- The appointment must be for a limited duration
- Cannot exceed 960 Hours



Reporting

- At the end of every fiscal year
 - Hours worked in an Out of Class Appointment
 - Even if hours do not exceed 960
- Due 30 days from the end of the fiscal year



Penalties

- Three times the amount of all contributions paid on the compensation directly attributable to the out-of-class appointment.
 - The penalty shall be for all hours worked in the out-of-class appointment in that fiscal year, not just the hours over the 960-hour threshold.
 - The difference in contributions that would have otherwise paid to the system
 - In accordance with the Publicly Available Pay Schedule



Future Tracking and Reporting

- System Reporting Initiative
 - Our intention is to have functionality in the my|CalPERS system to support easy electronic submission by the end of fiscal year 2018/19.
 - New Circular Letter Spring 2019



Resources

- Circular Letter 200-021-18 - Assembly Bill 1487 added Section 20480 to the Government Code: Out-of-Class Appointment Limitations and Penalties



California Public Employees' Retirement System
P.O. Box 942715 | Sacramento, CA 94229-2715
(888) CalPERS (or 888-225-7377) | TTY: (877) 249-7442
www.calpers.ca.gov

Legislation

Circular Letter

April 27, 2018

Circular Letter: 200-021-18

Distribution: VI, XII, XVI

To: All Contracting Public Agencies and School Employers
Subject: Assembly Bill 1487 added Section 20480 to the Government Code: Out-of-Class Appointment Limitations and Penalties

Purpose

The purpose of this Circular Letter is to inform California Public Employees' Retirement System (CalPERS) contracted employers of Assembly Bill (AB) 1487 that became effective January 1, 2018. AB 1487 adds Government (Gov.) Code section 20480 which prohibits an out-of-class appointment by a contracting agency or school employer with employees serving a limited term (LT) appointment in a vacant position from exceeding 960 hours worked within each fiscal year (FY). This pertains to Classic and New Members (Public Employees' Pension Reform Act).

Employer Responsibilities

Each employer is responsible for the following:

- Track out-of-class hours worked in each vacant position per FY.
- Report hours worked in vacant position(s) to CalPERS by July 30. Until we make system enhancements to allow online reporting, use the Out-of-Class Appointment Employer Certification form to submit the required information to the Employer Account Management Division.
- Make timely payments for penalties generated in accordance to Gov. Code section 20480.
- Ensure the out-of-class appointment during the LT duration is pursuant to a collective bargaining agreement or a publicly available pay schedule.

Letters to Employers

CalPERS will mail up to two (2) notification letters to each employer beginning June 2018.

Letter	When	What
Annual Notice	Within the month of June	The notice provides the employer with a reminder of the mandatory requirement to report the number of hours an out-of-class employee has worked in a vacant upgraded position which is due by July 30.
Second Notice	Within the month of September	The notice informs employers that CalPERS has not received their Out-of-Class Appointment Employer Certification form.

Notification letters will be mailed to the employer's preferred address on file. Employers must provide the required information by submitting Out-of-Class Appointment Employer Certification form to CalPERS.

Failure to do so may result in:

- Penalties as outlined in Gov. Code section 20480.
- Notification to the Office of Audit Services to initiate an audit of the employer's records.

Additional Information

Definition of Out-of-class Appointment

Gov. Code section 20480 of the Public Employees' Retirement Law (PERL) defines an "out-of-class appointment" to mean an appointment to an upgraded position or higher classification by an employer or governing board or body in a vacant position for a limited duration.

For purposes of this section, a "vacant position" refers to a position that is vacant during recruitment for a permanent appointment. A vacant position does not refer to a position that is temporarily available due to another employee's leave of absence.

Penalties

Employers who violate this provision must make payments to CalPERS equal to three times the amount of money for the difference between the compensation paid for the out-of-class

appointment and the compensation paid and reported to the system for the member's permanent position. The penalty shall be applied for the entire period(s) the member serves in an out-of-class appointment. In addition, the employer will be responsible for a fee of \$200 to cover administrative expenses.

These contributions are provided as reimbursement for administrative expenses only. Penalties paid to CalPERS are not normal contributions or additional contributions that would be credited to a member's individual account. The member shall bear no liability, obligation, or expense as a result of the unlawful actions of the employer with respect to Gov. Code section 20480.

Additional Resources

To view California Gov. Code section 20480 in its entirety, go to [leginfo.legislature.ca.gov](http://leginfo.ca.gov).

Questions

Any questions regarding this information should be directed to the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

Renee Ostrander, Chief
Employer Account Management Division

Attachments: Out-of-Class Appointment Employer Certification



P.O. Box 942709 Sacramento, CA 94229-2709
888 CalPERS (or 888-225-7377)
TTY: (877) 249-7442 | Fax: (800) 959-6545
www.calpers.ca.gov

[Reset Form](#)

Out-of-Class Appointment Employer Validation

For the current fiscal year 2017-18, the reporting period is from January 1, 2018 – June 30, 2018.

Employer Name	
Employer CalPERS ID	
Member Name	
Member CalPERS ID	
Permanent Position Title	
Out-of-Class Position Title	

Is the Out-of-Class Appointment a vacant position? Yes ☐ No ☐

Is the Out-of-Class Appointment in a recruitment? Yes ☐ No ☐

Total hours worked in Out-of-Class Appointment this fiscal year: _____ Hours

Begin Period Date	End Period Date	Pay rate in Permanent Position	Pay rate in out-of-class position	Pay rate Type (monthly, hourly)	Hours worked in out-of-class	Special Compensations (if none, list 0)	Total Earnings

For additional out-of-class appointments, please refer to supplemental form.

Fax or mail completed form by July 30, 2018:

California Public Employees' Retirement System
P.O. BOX 942709
Sacramento, CA 94229-2709
Fax: (800) 959-6545

Signature of authorized signer: _____

Printed name and title of authorized signer: _____

Telephone: _____

Date: _____

Email: _____

Fax Number: _____

For additional Out-of-Class Appointment, please fill out supplemental form(s).

Employer CalPERS ID	
Member Name	
CalPERS ID	
Previous Position Title	
Out-of-Class Position Title	

Is the Out-of-Class Appointment a vacant position? Yes ☐ No ☐

Is the Out-of-Class Appointment in a recruitment? Yes ☐ No ☐

Total hours worked in Out-of-Class Appointment this fiscal year: _____ Hours

Begin Period Date	End Period Date	Pay rate in Permanent Position	Pay rate in out- of-class position	Pay rate Type (monthly, hourly)	Hours worked in out- of-class	Special Compensations (if none, list 0)	Total Earnings

Working After Retirement Information Sheet

TOPICS COVERED:

- Postretirement Employment Overview
- What are Retired Member Activities?
- Third Party Exclusion
- Classified Employment

FREQUENT ASKED QUESTIONS (FAQ)

(Q) Are there any exemptions available for the annual earnings limit?

(A) No, there are currently no exemptions available from the annual earnings limit.

(Q) Is superintendent work considered reportable to CalSTRS in postretirement?

(A) Yes, Education Code 22119.5 for creditable service includes the work of a superintendent.

(Q) Is the work with a third party reportable to CalSTRS?

(A) If the CalSTRS retiree is working with the district under a third party and is performing a retired member activity, the earnings in that position is reportable to CalSTRS.

Postretirement Employment Overview

When a CalSTRS retiree decides to return to work and perform retired member activities within the California public school system as an employee, an independent contractor or an employee of a third party, the earnings in those positions will need to be reported to CalSTRS and will be subjected to the CalSTRS postretirement restrictions.

What are Retired Member Activities?

Retired member activities is defined by Education Code 22164.5 as being:

- One or more activities identified in subdivisions (b), (c), or (d) of Section 22119.5 or Section 26113
- Within the California public school system
- Performed by a retired member as one of the following:
 - (1) An employee of an employer
 - (2) An employee of a third party, except as specified in subdivision (b)
 - (3) An independent contractor

Third Party Exclusion

Some third party employment may be eligible for an exclusion from limitations if all of the following conditions apply:

- (1) The employee performs an assignment of 24 months or less
- (2) The third-party employer does not participate in a California public pension system
- (3) The activities performed by the individual are not normally performed by employees of an employer

Contact Postretirement@CalSTRS.com to determine eligibility for this exclusion.

Classified Employment

Education Code 45134 (c), limits CalSTRS retirees from returning to work in a classified position within the California public school system, unless as an aide in certain circumstances. The law states that a CalSTRS retiree cannot return to work under classified school employment while receiving a retirement allowance by reason of prior school employment, except as a teacher's aide in the following capacities:

- (1) In a class with high pupil-teacher ratio
- (2) Providing one-on-one instruction in remedial classes for underprivileged students

This law is outside CalSTRS purview, any questions regarding this law will need to be addressed by the California Department of Education.

08/2018



Working After Retirement Information Sheet

TOPICS COVERED:

- Postretirement Employment Overview
- What are Retired Member Activities?
- Third Party Exclusion
- Classified Employment

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08/2018



Person Search

Skip to: Content | Footer | Welcome county of | Customize | Help | Contact Us | CalPERS On-Line | Log out April 04, 2011

my CalPERS

Home Profile Reporting Person Information Loan Eligibility Search Education Other Organizations

Person Search

Please enter the social security number or CalPERS ID of the person for whom you are searching.

SSN / Federal or
Individual Tax ID: 432918612

CalPERS ID:

Search

Required Fields

Hire Date

Please enter the anticipated or actual hire date for the person you are searching for. By entering this information, you acknowledge that all Participant employee information accessible to you will be used only to assist you for employee enrollment purposes.

Anticipated or Actual Hire Date: 04/01/2011

Continue

Person Search Results

Home	Profile	Reporting	Person Information	Education	Other Organizations
Summary		Health Enrollment			
Common Tasks		▼ Summary			
Menu		▼ Profile			
Contributory Appointment History		Name: John Q Public			
Employee Rate Summary		CalPERS ID: 3954480536			
		Optional Member: No			
		Prior School Membership Date: Retired: No			
		Retirement Date: ARP Effective Date:			
		Membership Date: 01/01/2017			
		Member: Yes			
		ARP: No			
		5 Year Service Credit: No			
		Last Reporting Date:			