



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

TITLE: California State Teacher’s Retirement System (CalSTRS) Information

NUMBER: REF-045180.2

ISSUER: Linda Del Cueto
Chief Human Resources Officer
Human Resources Division

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PURPOSE: The purpose of this Reference Guide is to provide CalSTRS members with retirement related information and resources for assistance.

MAJOR CHANGES: This Reference Guide replaces Human Resources Reference Guide 045180.1 of the same subject issued February 20, 2018 which has been changed to update the name of the new Chief Human Resources Officer.

INSTRUCTIONS: **I. Background**

District employees considering retirement are urged to undertake, well in advance of their retirement date, certain steps that are necessary to understand and make informed decisions regarding future benefits related to retirement. Employees are responsible for completing and submitting all necessary forms within the specified time limits.

II. Pre-Retirement CalSTRS Benefits Planning Sessions

Retirement information is available for members of the California State Teacher’s Retirement System (CalSTRS) at District–hosted pre-retirement workshops and at individual or group benefits planning sessions with a CalSTRS retirement benefits planning specialist.

The District encourages employees anticipating retirement to attend at least one pre-retirement workshop which are held at various District locations during the school year. The pre-retirement workshop schedule is publicized each fall and posted on the Human Resources Retirement website at <http://achieve.lausd.net/Page/3441>. Employees are urged to schedule an individual or group benefits planning session close to age 55 and again during their anticipated final school year of service. CalSTRS benefits planning sessions are offered at the locations listed in Section B, on page 2.

ROUTING
All Employees
All Locations



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- A. Pre-retirement Workshops: Presentations by CalSTRS benefits planning specialists include an explanation of how the retirement benefit is calculated, beneficiary options, filing information, and legislation updates.
- B. Individual CalSTRS Benefits Planning Sessions: Individual and group benefits planning sessions (including printed estimates of monthly allowance) are strongly recommended and available by appointment at the locations listed below.

Appointments are particularly important for members who are: (a) nearing retirement, (b) considering the designation or change to a pre-retirement option starting at age 55 or older, (c) interested in the effects of new legislation, (d) contemplating a purchase of service credit or redeposit of previously withdrawn funds, or (e) diagnosed with a medical condition anticipated to last for at least 12 continuous months that may require an application for a CalSTRS disability benefit.

CalSTRS will send a confirmation letter with the date, time, and location of the appointment to the employee's home or e-mail address. Employees should take their latest pay stub from the current school year to their appointment. For all locations, appointments may be requested by calling CalSTRS at (800) 228-5453.

Member Service Centers

CalSTRS Glendale Member Service Center
505 N. Brand Blvd. Suite 200
Glendale, CA 91203

Irvine Member Service Center
2010 Main St, Suite 750
Irvine, CA 92614

CalSTRS Benefits planning services are also offered in Walnut, Antelope Valley, Culver City, Oxnard, Downey, Santa Fe Springs, Los Alamitos, and Brea. Please call (800) 228-5453 for information on these sites as well as other counties CalSTRS serves.



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- C. For additional retirement information, employees may write or call the California State Teachers' Retirement System, as provided below:

CalSTRS
P.O. Box 15275
Sacramento, CA 95851-0275

CalSTRS call center (800) 228-5453
Fax: (916) 229-3879

To contact CalSTRS via e-mail, go to www.calstrs.com and click on "Contact Us".

III. Application Packet and Filing of Forms

- A. Application Packet: To obtain an application visit the CalSTRS website at www.calstrs.com or contact them at (800) 228-5453. You may also pick up retirement forms at the CalSTRS Glendale or Irvine Member Service Centers.

B. Forms Required for Retirement

Certificated LAUSD employees need to complete and file the following documents to successfully complete the retirement process:

1. CalSTRS Service Retirement Application (Form SR-0059), obtained on the CalSTRS website at www.calstrs.com.
2. The "Express Benefit Report" (SR 0554E), obtained through CalSTRS, is used to convert your illness balance to CalSTRS service credit, and must be returned to Payroll Administration Branch, STRS Deductions Control, 27th Floor, P.O. Box 513307, Los Angeles CA 90051.
3. Certificated Resignation Form (8152) obtained through the Human Resources Division website at <http://achieve.lausd.net/page/1546>.
4. District Application for Continuation of Health Benefits Forms (HI-22). Obtained through Benefits Administration website at <https://achieve.lausd.net/benefits>.



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C. Filing Dates: Both the Certificated Resignation Form (8152) and the CalSTRS Retirement Application (SR 0059) are required for employees who wish to retire. Certificated employees must submit the Certificated Resignation Form (8152) to their immediate administrator at least one month in advance of their retirement date. The completed Certificated Resignation Form should be returned according to instructions on the form.

CalSTRS will accept applications up to the last day of the month in which you plan to retire. However, it is suggested that you submit your application 3 to 6 months in advance.

For your convenience, CalSTRS forms and retirement applications are now accepted at the Glendale and Irvine Member Service Centers. CalSTRS staff is available to review documents from 8:00 am-5:00 pm daily.

Applications will be date stamped and sent overnight to CalSTRS headquarters for processing. If you are mailing your application, CalSTRS recommends that the CalSTRS Retirement Application (SR-0059) be mailed by certified mail, with proof of delivery to: STRS, P.O. Box 15275, MS. 65 Sacramento, CA 95851-0275.

Members can also apply for retirement benefits online by registering for mycalstrs at www.calstrs.com.

IV. Effective Dates for Resignation and Retirement

The retirement date will be the first day the employee's retirement benefits begin with CalSTRS. The resignation date with the District will be the day immediately preceding the employee's retirement date. Typically, the resignation date is the end of the employee's last day of paid service or leave of absence.

V. Considerations for Designating Effective Dates

A. Resignation Prior to Completion of Contract Year: Certificated employees are paid on an "annualized" basis (i.e., the anticipated annual salary is "spread" over twelve pay periods). Thus, employees who resign prior to the completion of their annualized contract year may be in an overpaid or underpaid situation which would require a salary adjustment. Employees should contact their time reporter or their Human Resources personnel specialist with further questions regarding



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the issue.

In addition, resignations prior to the completion of the employee's contract year may have implications with respect to the employee's CalSTRS retirement benefits. You may make an appointment to speak with a CalSTRS benefits planning specialist at (800) 228-5453 to discuss possible considerations.

- B. CalSTRS Annual Benefit Adjustment: Each year, retired members will receive an increase equal to 2 percent of their initial benefit beginning on September 1 after the first anniversary of their retirement. The adjustment will appear on the October 1 payment. These adjustments are not compounded.
- C. Retirement Bonus: Employees who were paid during the 1992-93 school year and then retire from the District on or after July 1, 1994, may be eligible for a lump-sum cash bonus upon retirement. Eligible employees will be paid a cash bonus determined by multiplying the employee's regular daily rate for the year preceding the retirement date by 20.4. For additional details, refer to the District-UTLA Agreement, Article XIV, Section 1.2, or the District-AALA Agreement, XII, 11.0. There is no separate application for the retirement bonus. The resignation form will serve as the application. Additionally, eligible employees do not need to be time reported for the bonus.
- D. Additional Considerations: Various other issues should be considered when designating effective resignation and retirement dates. These include, but are not limited to, the employee's age, years of credited service, etc.

VI. Lump-Sum Payment for Accumulated Vacation

Upon separation from District service a lump-sum payment for accumulated vacation will be automatically processed by Payroll Administration. Payment will be at the employee's salary rate at the time of separation except for vacation hours remaining in the employee's vested vacation bank, which will be paid at the employee's June 30, 1995 salary rate.



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VII. Post-Retirement Employment

- A. It is possible to resign and retire and to be reemployed with the District as a retiree day-to-day substitute, interim administrator, or continue to be employed in the Division of Adult and Career Education. However, there is no guarantee of future reemployment in any capacity. Reemployment is contingent on current District needs and the candidate must meet District selection and reemployment standards in effect at the time of the application.
- B. Retirees who wish to be considered for reemployment should call Certificated Recruitment and Selection Section at (213) 241-5300 for information. For information regarding reemployment under the Division of Adult and Career Education, call (213) 241-3171. For information regarding reemployment as an interim administrator call (213) 241-6886.

Zero-dollar Earnings Limit for the First 180 Calendar Days:

All retired CalSTRS members are subject to a restriction if they return to CalSTRS-covered employment during the first 180 days after their most recent retirement. If the retired CalSTRS member returns to work during this period, CalSTRS will reduce his or her retirement benefit dollar-for-dollar by an amount equal to his or her earnings up to the benefit payable during that period. This restriction is in addition to the annual earnings limit. Any amount the retired CalSTRS member receives during the first 180 days of retirement will also count against the annual post-retirement earnings limit for the appropriate fiscal year.

Earnings Limit After Retirement: There is an annual dollar limit to the amount a retiree may earn within the California public school system. Refer to Personnel Policy Guide E15, Retired Certificated Persons, or www.calstrs.com for the updated annual earnings limitation. All post-retirement earnings limit exceptions ended June 30, 2012. No new legislation has been approved to extend these exemptions.

Effective July 1, 2002 retiree earnings from extra assignments such as summer school, intersession, and Professional Expert assignments that are certificated in nature (re-titled Temporary Certificated Assignments) will count toward the post-retirement earnings limit unless exempted by law.



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VIII. Health and Welfare Benefits

Employees retiring from the District may be eligible to continue certain health and welfare benefits during retirement. For retirement benefit coverage please refer to UTLA Agreement, Article XVI, section 4.0 or AALA Agreement Article XIV, section 4.0.

Applying for Retiree health benefits: Application for Continuation of Health Benefits (Form HI-22) and eligibility information are available online at <https://achieve.lausd.net/benefits> under publications (retiree Health Benefits Enrollment Form) or by calling (213) 241-4262. Employees are urged to review requirements for continued health benefits prior to their resignation and retirement dates.

IX. Additional Services and Information

- A. Retirement Deductions, Refunds, and Service Credit: Call the District Certificated Payroll Retirement Accounting Unit at (213) 241-2570.
- B. Disability Benefits: Call the Benefits Administration, Office of Risk Management and Insurance Services, at (213) 241-4262. Employee should make an appointment with a CalSTRS benefits planning specialist at (800) 228-5453 as soon as they have been diagnosed with a medical condition anticipated to last for at least 12 continuous months and could result in a CalSTRS disability benefit.
- C. Life Insurance: District-paid group life insurance coverage does not continue during retirement. However, conversion plans are available for both Basic (District-paid) and Optional (employee-paid) life insurance plan. Also, a continuation decreasing term insurance plan is available for optional life insurance members. Upon retirement, a conversion application will be mailed to you from VOYA. To obtain conversion plan information, you may contact customer service at (877) 236-6564.

**RELATED
RESOURCES:**

The California State Teachers' Retirement System website: www.calstrs.com.
The Human Resources Division Retirement website:
<http://achieve.lausd.net/Page/3441>.

ASSISTANCE:

For assistance or further information please contact Administrative Assignments Unit at (213) 241-6365.