

LOS ANGELES UNIFIED SCHOOL DISTRICT
Human Resources Division

RETIREMENT SYSTEM OPTION FOR EMPLOYEES WHO ARE CHANGING FROM ONE SERVICE TO ANOTHER, FOR EXAMPLE, FROM CLASSIFIED TO CERTIFICATED SERVICE

I. General Rule

Employees who are members of PERS (in general, classified employees) or STRS (in general, certificated employees) who change from one service to another will be **automatically enrolled** in the appropriate retirement system based on the status and hours of the **new job classification**. For example, a classified employee who changes to a certificated teaching position which qualifies for STRS membership will automatically be enrolled in STRS. However, pursuant to the Education Code, employees have up to **60 days** from the date of assignment in the new classification in which they can **irrevocably elect to remain** in their former retirement system.

II. Rule When The Assignment in The New Service Does Not Automatically Qualify For PERS/STRS Membership

A. PERS Members. Employees who are members of PERS who change to a certificated position which does not automatically qualify for membership in STRS (such as substitute teachers who work less than 100 days per school year, and part-time adult education teachers who work less than 60 hours per pay period, etc.) will be automatically enrolled in PARS. However, employees may irrevocably elect to enroll in STRS at any time during employment or, if they work sufficient hours to become eligible for STRS, they may then irrevocably elect to enroll in PERS within 60 days from the date of STRS eligibility. If the employee has worked sufficient hours to become eligible for STRS and no election is made to enroll in PERS, the employee will automatically be enrolled in STRS effective with the date of STRS eligibility.

B. STRS Members. Employees who are members of STRS who change to a classified position which does not automatically qualify for PERS membership (e.g., classified assignments requiring fewer than 20 hours per week) will be automatically enrolled in PARS until such time that they may qualify for PERS. If the employee has worked sufficient hours to become eligible for PERS, the employee will then automatically be enrolled in PERS unless the employee irrevocably elects to enroll in STRS within 60 days from the date of PERS eligibility.

III. Additional Information and Assistance

The effective date of membership is the first day of the pay period in which qualifying service is performed. Once an election is made, the employee must remain a member of the selected retirement system for all subsequent classified school service or STRS creditable service.

Election forms and written information describing STRS and PERS membership and benefits are available from the District offices listed below. Any completed election forms must be returned to the appropriate District office within 60 days from the date of assignment in the new classification.

- Certificated Substitute Unit, Human Resources, (213) 241-6151
- Credential Services, Human Resources, (213) 241-6520
- Personnel Unit, Adult and Career Education (213) 241-3174
- Human Resources Unit, Early Childhood Education (213) 241-2404
- Benefits Administration (213) 241-4262

For written information regarding PARS and for additional informational/assistance related to STRS and PERS, please contact the appropriate retirement system as follows:

- PERS (Public Employee's Retirement System) (888) 225-7377
- PARS (Public Agency Retirement System) (800) 540-6369 or (949) 250-6369
- STRS (State Teachers' Retirement System) (800) 228-5453

IV. Certification

My signature below certifies that I have been informed of my option to elect to continue membership in STRS/PERS. I understand that it is my responsibility to notify the District of my retirement system election, if any, within 60 days from the date of assignment in my classification. I also understand that if I choose to file an election to stay with STRS/PERS, the election is to be made on CalSTRS form [\(ES 372\)](#) and sent to the Payroll Services Branch--Retirement Section, (213) 241-6670, 27thFl., Beaudry site. Within 15 business days, the Retirement Section of the Payroll Services Branch will send a copy of the completed election form [\(ES 372\)](#) to me. I further understand that any election made will remain in force for all subsequent certificated or classified service.

Signature of Employee

Pers ID/Emp No.

Date

Employee Name (Print)

Social Security Number



Retirement System Election

ES0372 (rev 11/13)

CALSTRS[®]

California State Teachers' Retirement System
P.O. Box 15275, MS 17
Sacramento, CA 95851-0275
800-228-5453
CalSTRS.com

PLEASE READ THE ATTACHED INSTRUCTIONS BEFORE COMPLETING THIS FORM. PLEASE TYPE OR PRINT LEGIBLY IN DARK INK.

SECTION 1: MEMBER INFORMATION AND ELECTION (to be completed by employee)

NAME (LAST, FIRST, INITIAL)

FULL SOCIAL SECURITY NUMBER

HIRE DATE

EFFECTIVE DATE OF POSITION

POSITION TITLE

Credentialed

Classified

State Service

Employment in the California public school system is generally subject to coverage by either the California State Teachers' Retirement System (CalSTRS), or a different public retirement system including but not limited to the California Public Employees' Retirement System (CalPERS).

A member of CalSTRS who becomes employed by the same or a different school district, a community college district, a county superintendent of schools or limited state employment, as defined in Education Code Section 22508, to perform service that requires membership in a different public retirement system will have that service credited with that other public retirement system unless he/she files a written election (within 60 days from the date of hire in the new position) to have the service credited with CalSTRS.

A member of CalPERS who is employed by a school employer, Board of Governors of Community College Districts or State Department of Education or has at least five years of CalPERS credited service, as defined in Government Code Section 20309, and who subsequently becomes employed to perform creditable service that requires membership in CalSTRS, will have that service credited with CalSTRS unless he/she files a written election (within 60 days of the date of hire in the new position) to have the service credited with CalPERS.

I am a member of CalSTRS who has accepted employment to perform service that requires membership in a different public retirement system but am eligible to elect to continue retirement system coverage under CalSTRS.

I elect coverage in: (please choose one)

CA State Teachers' Retirement System (CalSTRS)

CA Public Employee's Retirement System (CalPERS) *

Other: _____

OR

I am a member of CalPERS who has accepted employment to perform service that requires membership in CalSTRS but am eligible to elect to continue coverage under CalPERS.

I elect coverage in: (please choose one)

CA State Teachers' Retirement System (CalSTRS)

CA Public Employee's Retirement System (CalPERS) *

I fully understand that this election is irrevocable for this employer. I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering a benefit administered by CalSTRS and it may result in up to one year in jail and a fine of up to \$5,000. (Education Code section 22010)

EMPLOYEE SIGNATURE

DATE

SECTION 2: EMPLOYER CERTIFICATION (to be completed by employer and County Office of Education)

I certify that the employee meets the qualifications to make a retirement system election.

CO/DIST/STATE DEPT NAME

CALSTRS REPORT UNIT CODE

SCHOOL/STATE OFFICIAL'S NAME

TITLE

PHONE NUMBER

SIGNATURE OF SCHOOL/STATE OFFICIAL

DATE

COUNTY OFFICIAL'S NAME

TITLE

PHONE NUMBER

SIGNATURE OF COUNTY OFFICIAL

*CalPERS Employer Code:



ES0372