

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

ES 0372 rev 01/19

CALSTRS

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

RETIREMENT SYSTEM ELECTION AND ACKNOWLEDGEMENT OF RECEIPT OF RETIREMENT SYSTEM INFORMATION

PLEASE READ THE ATTACHED INFORMATION AND 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, MIDDLE INITIAL)

FULL SOCIAL SECURITY NUMBER

A member of **CalSTRS** who becomes employed in a new position by the same or a different school district, a community college district, a county superintendent of schools, limited state employment or the Board of Governors of the California Community Colleges, as defined in Education Code sections 22508 and 22508.5, to perform service that *requires* membership in a different public retirement system will have that service credited with that other public retirement system unless the member files a written election (within 60 days after the date of hire) to have that service covered by CalSTRS, pursuant to Education Code section 22508(a) or 22508.5(a).

I am a member of **CalSTRS** who has accepted employment to perform service that *requires* membership in a different public retirement system and 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) *
 A Different Public Retirement System identified here: _____

OR

A member of **CalPERS** who was employed by a school employer, Board of Governors of the California Community Colleges or State Department of Education within 120 days before the member's date of hire, or who has at least five years of CalPERS credited service, as defined in Government Code section 20309, and who is subsequently employed to perform creditable service that *requires* membership in the Defined Benefit Program of CalSTRS, will have that service credited with CalSTRS unless the member files a written election (within 60 days after the date of hire) to have the service credited with CalPERS, pursuant to Government Code section 20309.

I am a member of **CalPERS** who has accepted employment to perform service that requires membership in the CalSTRS Defined Benefit Program, and 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) *

With my signature below, I certify that I have received information from my employer regarding my eligibility to elect membership for this position as described on this form. I fully understand that this election is irrevocable. 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 or receiving a benefit administered by CalSTRS and it may result in up to one year in jail and/or a fine of up to \$5,000 pursuant to Education Code section 22010.



EMPLOYEE SIGNATURE

DATE

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

With my signature below, I certify that I have provided information to the above employee regarding his/her eligibility to elect membership for this position, pursuant to Education Code section 22509. I certify the employee meets the qualifications to make a retirement system election, pursuant to Education Code sections 22508 or 22508.5, or Government Code section 20309.

EMPLOYEE POSITION INFORMATION:

POSITION HIRE DATE

POSITION EFFECTIVE DATE

POSITION TITLE

SELECT ONE:

Credentialed

Classified

State Service

EMPLOYER INFORMATION:

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

Retirement System Election – Information and Instructions

The following instructions are to assist you and your employer in completing the *Retirement System Election* form (ES372). Please read the instructions and information for retirement system coverage before completing the form. Please type or print legibly in dark ink.

INFORMATION

A member of the CalSTRS Defined Benefit Program who becomes employed by a school district, a community college district, a county superintendent of schools, limited state departments, or the California Community Colleges Board of Governors to perform service that requires membership in a different public retirement system, may elect to receive credit under the CalSTRS Defined Benefit Program for such service by completing a *Retirement System Election* form (ES372) within 60 days after the hire date *requiring* membership in the other system, and CalSTRS must receive the completed form within 60 days of the signature date. If the CalSTRS member does not elect to continue as a member of CalSTRS, all service subject to coverage by the other public retirement system will be reported to that retirement system. (Education Code sections 22508, 22508.5 and 22509)

A member of CalPERS who was employed by a school employer, Board of Governors of the California Community Colleges, or State Department of Education within 120 days before the member's date of hire, or who has at least five years of CalPERS credited service, and who accepts employment to perform creditable service that requires membership by the CalSTRS Defined Benefit Program, may elect to receive credit under CalPERS for such service by submitting a Retirement System Election form (ES372) to CalPERS, within 60 days after the hire date of employment requiring membership in CalSTRS. If the CalPERS member does not elect to continue as a member of CalPERS, all CalSTRS creditable service will be reported to CalSTRS. (Government Code section 20309).

Education Code section 22509 requires that within 10 working days of hire, an employer must provide all employees who have the right to make this election with the information regarding their election rights and must make available written information about the retirement systems to assist the employee in making an election.

SECTION 1: MEMBER INFORMATION AND ELECTION

Section 1 must be completed by the employee with assistance from the employer. Please complete all entries in Section 1.

EMPLOYEE NAME and SOCIAL SECURITY NUMBER – Enter employee's full name, and full Social Security Number.

RETIREMENT SYSTEM COVERAGE:

If you are a member of CalSTRS and have accepted employment to perform service that requires membership in a different public retirement system, mark the box next to the coverage you elect.

If you are a member of CalPERS and have accepted employment to perform service that requires membership in CalSTRS, mark the box next to the coverage you elect.

EMPLOYEE SIGNATURE – Sign and date the form. By signing this document, you certify that you have received information from your employer regarding your right to the Retirement System Election. You also certify that you understand this election is irrevocable, and that 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 which may result in up to one year in jail and a fine of up to \$5,000. (Education Code section 22010)

Submit the signed and dated *Retirement System Election* form (ES372) to your employer. Retain a copy for your records.

For general membership information, contact CalSTRS by calling 800-228-5453, or write to CalSTRS at P.O. Box 15275, MS 17, Sacramento, CA 95851-0275.

SECTION 2: EMPLOYER CERTIFICATION

Section 2 must be completed by the employer and the County Office of Education. Please complete the employer certification only after the employee has completed Section 1. Employees must qualify for membership before they can retirement system elect.

EMPLOYER:

POSITION HIRE DATE – Enter the date the employee was hired in the position.

POSITION EFFECTIVE DATE – Enter the first date that service was/will be performed by the employee in the new position.

POSITION TITLE – Enter employee's new position title and check the box next to the applicable position type.

CO/DIST CODE/STATE DEPARTMENT – Enter the appropriate county and district codes. Example: Kern County, Edison Elementary would be 15-012, and CA Department of Education would be 59-174.

EMPLOYER CERTIFICATION – Print school or state official's name, title and phone number, and sign and date the form.

Submit the completed form to the County Office of Education.

If you represent a state department, submit the form directly to CalSTRS and send a copy to the other public retirement system.

COUNTY OFFICE OF EDUCATION:

Print the County official's name, title and phone number, and sign and date the form.

Retain a copy for your and the employee's files.

SUBMIT THE FORM:

The *Retirement System Election* form (ES372) must be submitted to the retirement system elected by the employee and a copy submitted to the retirement system that would normally cover the service. For additional requirements, please see the Information section.

Mail completed forms to:

CalSTRS P.O. Box 15275, MS 17 Sacramento, CA 95851-0275	CalPERS P.O. Box 942709 Sacramento, CA 94229-2709
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CalSTRS also accepts the form via fax, at 916-414-5476, or by secure messaging via the Secure Employer Website.