

## PERS REMINDERS

- ❖ New or returning classified employee?
  - Look up in MyCalPERS and SEW to verify membership even if they don't appear to qualify. This includes retirees
  - Provide Enrollment form, Reciprocal form and snapshot of MyCalPERS screen
  - Retirees are required to be re-enrolled within 30 days of return. There is a \$200.00 fee assessed for late enrollment
  
- ❖ Retirement System Election
  - ES-372 form should be filled out and sent to county office for approval
  
- ❖ Please use updated CalPERS forms only
  - Forms can be found in Escape, SCOE Resources, Forms
  - Outdated forms do not include all required info.
  
- ❖ Retirement Appointment Reconciliation
  - Confirm unposted payroll on a monthly basis
  - New option to sort by "Past Due Payroll"
  
- ❖ View the snapshot in adjust payroll if you make an adjustment to an employees' pay
  - Confirm the following is reporting correctly:
    - Service Period, Pay rate, Earnings, Overtime, Contributions, Work Schedule Code, Retirement
    - If it is a negative adjustment confirm the pay rate matches what was previously reported
  
- ❖ Retirement Section – 3 (In Adjust Payroll)
  - Confirm and complete the following:
    - Retirement, Status, Plan Option, Member Type, Service Period Begin and End Date, Work Schedule, Contribution Code, Pay Code, Pay Rate

**Questions? - Call Maria Aguayo, 524-2655 or email [maguayo@scoe.org](mailto:maguayo@scoe.org)**

## STRS REMINDERS

- ❖ New or returning Certificated employee?
  - Look up in SEW to verify status and plan option
  - Provide Alli with an employee 99 report, snapshot of SEW screen, and the original Permissive Election (ES350) form [if applicable.]
  - ES350 is provided to all certificated new hires EXCEPT: Retirees of STRS, Current STRS members, and new employees hired to a 1.0 FTE
  
- ❖ New Process for Receivables
  - Email from Alli alerting to what kind of error, how much to be collected, and the employee ID
  - Attached Adjustment form that outlines all pertinent info and account code
  - District to collect from employee
  
- ❖ Retirement System Election
  - Only required if employee is going into MANDATORY membership with other system.
  - Send completed forms to Maria @ SCOE for approval
  
- ❖ Please use updated CalSTRS forms only
  - Forms can be found in Escape, SCOE Resources, Forms
  - Also available on the CalSTRS website, [www.CalSTRS.com](http://www.CalSTRS.com) and in SEW
  
- ❖ Gender nonbinary is an available gender choice in Escape
  - New employees will be processed by Alli for updating to STRS
  - Existing employees will need to contact STRS directly to use the gender nonbinary allocation in the retirement system
  
- ❖ Sign up online for CalSTRS Employer Directives

Questions? - Call Alli Britton, 524-2651 or email [abritton@scoe.org](mailto:abritton@scoe.org)

Dear \_\_\_\_\_,

SCOE established a receivable on the \_\_\_\_\_ payroll for Emp Id \_\_\_\_\_ . Please see check marked below the reason for the receivable. In each case the employer is required to make arrangements, in writing, with the employee to pay the funds owed the district. When collection is done through payroll, use the Repay Deduction to actually collect from the employee:

\_\_\_\_\_ Employee's Member Status was incorrectly set up in Escape as a Non-Member of STRS

*(see attached back-up for which earnings the employee owes on)*

- Prior to the employee being paid again, the district needs to do the following:
  1. Correct the set up in Employee Management, changing the employee's Member Status to STRS "Member"
  2. Change the Tax set up to "No OASDI"

\_\_\_\_\_ Employee's Plan Option was incorrectly set up in Escape as Plan Option "New" when the employee's Plan Option is actually "Pre 2013"

*(see attached back-up for which earnings the employee owes on)*

- Prior to the employee being paid again, the district needs to do the following:
  1. Correct the set up in Employee Management, changing the Plan Option to "Pre-2013"

TOTAL(S) OWED TO DISTRICT:



EMPLOYMENT STATUS	ASSNMT CODE	MANDATORY STRS MEMBERSHIP BEGINS	ES350
Full-Time	57	First day of employment	No
Part-Time Contracted 50% -99%	57	First day of following pay period	Yes
Part-Time Hourly	55	First day of following pay period after working 60 hours in one month	Yes
Part-Time Daily	55	First day of following pay period after working 10 days in one month	Yes
Substitute	54	First day of the following pay period after working 100 days in one FY	Yes