



RETIREMENT SYSTEM ELECTION

Read the attached instructions and information for retirement system coverage before completing the Retirement System Election. Keep a copy of the instructions and information sheet for your records. Please use a black ink pen or download and print the form.

TELEPHONE NUMBERS:

TOLL FREE 1-800-228-5453

MAILING ADDRESS:

CalSTRS
MAIL STATION #16
P.O. BOX 15275
SACRAMENTO, CA 95851-0275

(ES 372 05/09)

INSTRUCTIONS AND INFORMATION FOR RETIREMENT SYSTEM ELECTION

The following instructions are to assist you and your employer in completing the Retirement System Election (Form # ES 372). The first section of the form must be completed by you with assistance from your employer. Please complete all entries above the Employer Certification section. By signing this document, you 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. Ed. Code §22010

EMPLOYEE INSTRUCTIONS

- I. Press firmly and print clearly with **DARK INK**, or type all information requested. Do not use light colors of ink, pencil, felt pen, or erasable ink.
- II. If you should make a mistake on the Retirement System Election form, line through the error and initial.
- III. Enter your full name, last four digits of your Social Security Number, effective date of the change in employment status and position type.
- IV. **EFFECTIVE DATE** is the first date that service was or will be performed in the new position.
- V. **RETIREMENT SYSTEM COVERAGE** If you are a member of CalSTRS and have accepted employment to perform service that requires membership in CalPERS, enter an "X" in 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, enter an "X" in the box next to the coverage you elect.
- VI. **EMPLOYEE SIGNATURE** Sign and date the Retirement System Election form.
- VII. **SUBMIT** the Retirement System Election form to your employer. Retain a copy for your records.

For further information, you may contact our office toll Free **1-800-228-5453**, or by writing us at the address on the cover page.

Should you find it necessary to contact us, your correspondence should include the last four digits of your Social Security number, full name, address, and daytime telephone number.

EMPLOYER INSTRUCTIONS

Please complete the **EMPLOYER CERTIFICATION** only after the employee has completed the required employee information. Employees must qualify for membership before they can elect.

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

EMPLOYER CERTIFICATION – Print official's name, title and phone number, sign and date the Retirement System Election form.

SUBMIT the completed Retirement System Election form to the County Office of Education or if you represent a state department, send it directly to CalSTRS and send a copy to CalPERS.

COUNTY OFFICE OF EDUCATION

Review, sign and date the Retirement System Election form.

Mail the original Retirement System Election form to the retirement system elected by the employee and a copy to the retirement system that would normally cover the service. Provide copies for the employer, employee and employee's file.

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 or limited state departments to perform service that requires membership by the California Public Employees' Retirement System (CalPERS) [Education Code section 22508(a)] may elect to receive credit under the CalSTRS Defined Benefit Program for such service by submitting a Retirement System Election form to CalSTRS, within 60 days of the effective date of employment in the position requiring membership in the other system. If the CalSTRS member does not elect to continue as a member of CalSTRS, all service subject to coverage by CalPERS will be reported to that retirement system. (Education Code 22508)

A member of CalPERS who was employed by a school employer, Board of Governors of California Community Colleges, or State Department of Education or 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 [Government Code section 20309 (a)] may elect to receive credit under CalPERS for such service by submitting a Retirement System Election form to CalPERS, within 60 days of the effective date of employment in the position requiring membership in the other system. 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 20309)

RETIREMENT SYSTEM ELECTION
ES 372 (05/09)

PLEASE READ THE ATTACHED INSTRUCTIONS BEFORE COMPLETING THIS FORM PLEASE TYPE OR PRINT LEGIBLY IN DARK INK	CalSTRS USE ONLY
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TO BE COMPLETED BY EMPLOYEE			
Name: (Last)	(First)	(Initial)	Social Security Number: (last four digits)

EFFECTIVE DATE (Mo/Day/Yr)	POSITION TITLE
	<input type="checkbox"/> Credentialed <input type="checkbox"/> Classified <input type="checkbox"/> State Service

Employment in the California public school system is generally subject to coverage by either the California State Teachers' Retirement System (CalSTRS) or the California Public Employees' Retirement System (CalPERS). Employment in a position to perform "**creditable service**," as defined in Education Code Section 22119.5, is usually credited in CalSTRS, while **classified** (non-certificated) employment is usually credited in 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 CalPERS will have that service credited with CalPERS 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.

You are a member of CalSTRS who has accepted employment to perform service that requires membership in CalPERS but you may elect to continue retirement system coverage under CalSTRS. Please enter an "X" in the box next to the coverage you elect.

☐ CALIF STATE TEACHERS' RETIREMENT SYSTEM

☐ CALIF PUBLIC EMPLOYEES' RETIREMENT SYSTEM*

OR

You are a member of CalPERS who has accepted employment to perform service that requires membership in CalSTRS but you may elect to continue coverage under CalPERS. Please enter an "X" in the box next to the coverage you elect.

☐ CALIF PUBLIC EMPLOYEES' RETIREMENT SYSTEM*

☐ CALIF STATE TEACHERS' RETIREMENT SYSTEM

I fully understand that this election is irrevocable for this employer.

EMPLOYEE SIGNATURE	DATE
EMPLOYER CERTIFICATION	
I certify that the employee meets the qualifications to make a retirement system election.	
CO/DIST/STATE DEPT NAME	CO/DIST CODE OR STATE DEPT
SCHOOL/STATE OFFICIAL'S NAME and PHONE NUMBER	TITLE
SIGNATURE OF SCHOOL/STATE OFFICIAL	DATE
COUNTY OFFICIAL'S NAME and PHONE NUMBER	TITLE
SIGNATURE OF COUNTY OFFICIAL	DATE

*CalPERS Employer Code:



ES0372

e-Bulletin

Right of Retirement System Election When Changing Positions

This e-Bulletin will help clarify the questions that have come up regarding Employer Information Circular, Volume 29; Issue 3 (EIC13-3) Right of Retirement System Election When Changing Positions, dated November 25, 2013.

Members who are eligible for late submission of *Retirement System Election* form (ES372), must meet *all* of the following criteria:

1. The employee has continuously been a member of CalSTRS;
2. The member stopped working in a position performing creditable service, and started working in a position that requires membership in a different public retirement system;
3. The compensation for that position that requires membership in a different public retirement system has continuously been reported to CalSTRS.

NOTE: A *Retirement System Election* form, ES372 and justification letter does not need to be submitted for retired members at this time.

If the member meets all the criteria above and wishes to elect to have the service subject to the other public retirement system subject to coverage by the Defined Benefit program in CalSTRS a *Retirement System Election* form, ES372 and a justification letter must be submitted to CalSTRS.

The *Retirement System Election* form, ES372:

- Must be completed, signed and dated by the member's current employer.
- If the employer is not a CalSTRS independent report source, the form must be signed and dated by the County Office of Education.
- All signature dates should be the date that the form is signed. Do not back date signature dates.
- If a member has held several positions requiring membership in a different public retirement system, the "effective date" on the ES372 should be the date of the first position requiring membership in a different retirement system held by the member after the member's last position performing creditable service.

Please use the most current version of the *Retirement System Election* form, ES372 (revised 11/13). You can access current version of CalSTRS forms by going to the Forms & Publications link on the Secure Employer Website (SEW).

The required Justification Letter:

- Must be signed and dated by the member's current employer.
- Must include the following information:
 - 1) The member's name and CalSTRS Client ID number or Social Security number.

(Continued ...)

Right of Retirement System Election When Changing Positions (continued)

- 2) Work history including:
 - a) The member's last position where they performed creditable service: Title, position end date, employer name and report unit code.
 - b) The member's first position where they performed service requiring membership into another public retirement system: Title, position effective date, employer name and report unit code.
 - c) Any subsequent positions the member has worked: Title, position effective date, employer name and report unit code.

Work history example:

- a) Teacher for LAUSD from September 1, 2005 to June 30, 2008 (last position performing creditable service)
 - b) Director of Human Resources for LACOE from July 1, 2008 to June 30, 2010 (first position performing service requiring membership in a different public retirement system)
 - c) Director of Human Resources for Napa COE from July 1, 2010 to current (current position)
- 3) A written explanation that the member was not provided the *Retirement System Election* form, ES372, within 60 days from the date of hire in the position requiring membership in the other public retirement system ~~due to an oversight by the district~~.

If an employee has worked for more than one employer in positions that may not have been clearly for the performance of creditable service, one justification letter from the current employer, detailing the member's work history is sufficient.

Please submit the completed *Retirement System Election* form, ES372, and justification letter to CalSTRS via mail at the address below, by fax to (916) 414-5476, or by email through SEW.

CalSTRS
Member Account Services
P.O. Box 15275, MS 17
Sacramento, CA 95851-0275

CalSTRS will not send an acknowledgement response if these documents are submitted and completed correctly. If the *Retirement System Election* form, ES372, or the justification letter is received by CalSTRS without the required information and signatures, CalSTRS will reject the election and return the documents to the employer for correction.

As a reminder, pursuant to subdivision (b) of Education Code section 22508, a copy of the election shall be filed with the other public retirement system.

If you have any questions regarding this e-Bulletin or Employer Information Circular, EIC13-3, employers contact the Employer Services Helpline at 1-877-277-5778 or your Member Account Services Employer Services Representative.