

**2003 SUMMARY OF THE WORKSHOPS
PRESENTED AT THE CalSTRS/EMPLOYERS INSTITUTE**

State of CalSTRS

CalSTRS has been concentrating on internal changes designed to improve customer service. This will be an executive briefing on how we intend to fulfill our recently restated mission: “Securing the financial future and sustaining the trust of California’s educators”

Overview of CalSTRS

This will be a brief overview of the CalSTRS functional organization and communication network. The goal is to help employer staff better understand the interrelationships of the various CalSTRS units with which they conduct business.

Medicare Premium Payment Program

This presentation is designed to assist district staff who work with retired or soon-to- retire members with questions about health insurance. We will provide a brief history of Social Security and Medicare and outline the CalSTRS Medicare Premium Payment Program, including the Medicare Division Election Process.

Interactive Internet Presentation

The CalSTRS Web site, www.calstrs.ca.gov, is intended to provide information for members, employers, and CalSTRS business partners. This presentation will give an overview of the CalSTRS web site. After the presentation, there will be an opportunity to navigate through the site. Feedback on additions or changes to the CalSTRS Web site is encouraged.

The Right Stuff - Employer Responsibilities

This presentation is designed to give you a quick overview of member qualifications, reporting guidelines, and creditable compensation for the Defined Benefit and Defined Benefit Supplement Programs. We will have a question and answer session following our presentation and you are welcome to visit with our staff at the resource tables.

Service Retirement/ Employer’s Role In Retirement

This workshop is intended for those who may advise or work with members applying for or receiving service retirement benefits. General information describing the Service Retirement Program, Application Processes, and Post-Retirement Employment will be provided. Topics will include: Service Retirement Application Process, Calculation of Service Retirement Allowance, Pre-Retirement Election of an Option, Partial Lump Sum, Defined Benefit Supplement Program, One-Year Final Compensation, Golden Handshake, Reporting of Unused Sick Leave and Excess Sick Leave, and Post-Retirement Earnings Limitations and Exemptions. New and recent legislation affecting the program will also be discussed. The presenters will be available to answer questions.

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Survivor Benefits

Survivor Benefits is responsible for determining eligibility and processing benefits for family allowance, death payments/benefits, and refunds of the contributions and interest. This workshop is intended for those who may advise or work with members applying for CalSTRS survivor benefits. Participants in this workshop will receive specific information on Survivor Benefits Programs, which include death benefits, refunds, the importance of death beneficiary designations, and family allowances. New legislation affecting the Survivor Benefits Programs will also be discussed.

Disability Services

This interactive workshop is geared for Human Resource staff that might advise or work with members applying for CalSTRS disability benefits. Topics to be covered include a general overview of the program discussing who we are, what we do, and how long the process takes. In addition to the application process, the differences between Coverage A and Coverage B will be discussed. Topics completing the workshop will be criteria for eligibility, the approval process, benefit calculation, the continuing qualification process, and the member's appeal rights.

School District Audits

This workshop will cover the effects the new CalSTRS laws have on the school district audit process. We will discuss the types of audit issues that could occur because of the new laws. Detailed hypothetical examples will be included in the presentation.

Cash Balance - Technical

This workshop is designed for supervisory and technical level personnel and payroll staff at the county and/or district level. The workshop will benefit employers who are already implementing the Cash Balance Benefit Program, but may also be of interest to those who want to learn reporting requirements when implementing this cost-saving alternative retirement program. This workshop will not provide a general overview on benefits or eligibility issues, but will focus on the implementation/reporting/technical processes only. Topics covered will include program implementation, reporting and remittance methods, forms prescribed by the System, and on-going employer support.

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Accounting

The former Accounting I and Accounting II workshops have been combined to bring you an innovative and informative, new and improved Accounting Workshop – “Accounting's 3 R's”. Topics discussed will be Contribution Remittances including AB2700 creditable compensation change requirements, Variance Reports, Service Credit Purchases and Tax Deferred Payroll Deduction. County and District staff and their managers are encouraged to attend.

Cash Balance/Voluntary Investment Program - Overview

This workshop is designed to provide Business Service Representatives, Human Resources Coordinators, Staff Development and Benefit Managers and their representatives with the features and benefits of CalSTRS' Cash Balance Benefit Program and the Voluntary Investment Program, formerly the CalSTRS 403(b) Program. This workshop will cover program features, employer and employee benefits and eligibility guidelines for the Cash Balance Benefit Program. The workshop will also cover the basics of an often overlooked, but important component of a potential benefit package – the tax deferred Voluntary Investment Program. Included in this portion of the workshop will be a description of the low fee tax-sheltered savings program available to CalSTRS members and participants, hold harmless agreement procedures, the important role this program can play in an employee's overall retirement planning, and the changes made by the federal “Economic Growth and Tax Relief Reconciliation Act of 2001” (EGTRRA).

Manager/Supervisor Track

This workshop is intended for those who desire more emphasis on policy, law, and processing concepts and less on specific procedural details. The materials for the track have been developed with those guidelines. Topics will include Legislation, Auditing Overview, Accounting Overview, and Regional Counseling. New this year is the Health Security Accounts, a method through which districts can provide tax-free health care to active and retired members. Health insurance proposals that have been introduced in legislation and other health issues that could affect your district will be briefly discussed.