

CALSTRS

CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM

Newly Revised Forms Review & Updated Processing

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Employer Advisory Committee
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3 Forms Revised as of January 2019



CB 533



ES 372



ES 350

CB 533 – Cash Balance Benefit Program Election

- Used to make a coverage election for creditable service performed for a CB program employer and/or to acknowledge receipt of the information related to available coverage options.
- Election is applied PER EMPLOYER.

CB 533 – Cash Balance Benefit Program Election

Changes Made

- Updated design.
- Removed employee demographic information.
- Clarified employee's election options.
- Allows current CB/ARP employees to elect coverage in DB.
- Added election option for trustee service.
- Updated Required Signature/Certification language.
- Updated Instructions page.

ES 372 – Retirement System Election

- Used to make retirement system coverage election when a member of CalSTRS or CalPERS takes a position that *requires* membership in another retirement system.
- Election must be made within 60 days of hire into eligible position.
- Election is applied PER POSITION.

ES 372 – Retirement System Election

SB 1165 technical amendments to Ed Code Sec 22509

CalSTRS Received By Date

30 days after election
signature



60 calendar days after
election signature

ES 372 – Retirement System Election

Changes Made

- Updated CalPERS section to reference 120 day break-in-service requirement.
- Updated instructions page to reference the new 60 day requirement.

ES 372 – Retirement System Election

Reminders

- ✓ Only for those employees who are either (1) CalSTRS members taking a position that *requires* membership by another retirement system; or (2) CalPERS members taking a position that *requires* membership in CalSTRS DB.
- ✓ Election eligibility should be evaluated with each new position the employee takes.
- ✓ No need to submit forms for employees who are electing coverage in the retirement system to that which their service defaults.

ES 350 – Permissive Membership

- Used to make election to become a CalSTRS Defined Benefit Program member.
- Election can be made at any time while employed to perform creditable service.
- Employers must provide membership information to eligible employees within 30 days of hire.
- Election is applied for ALL SUBSEQUENT SERVICE.

ES 350 – Permissive Membership

SB 1165 technical amendments to Ed Code Sec 22515

CalSTRS Received By Date

Within 30 days of
election signature



Within 60 calendar days
of election signature

Membership Effective Date

1st day of the pay
period following
election



No earlier than the 1st
day of the pay period in
which election is made

ES 350 – Permissive Membership

Changes Made

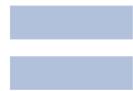
- Created an Instructions page.
- Removed employee demographic information.
- Clarified election information & allows employee to select membership date.
- Updated Required Signature/Certification language.

ES 350 – Permissive Membership

New Footnote:

“Membership Date may be no earlier than the first day of the pay period in which the election is made, or the first day of employment, whichever is later.”

Employment Date



Hire Date

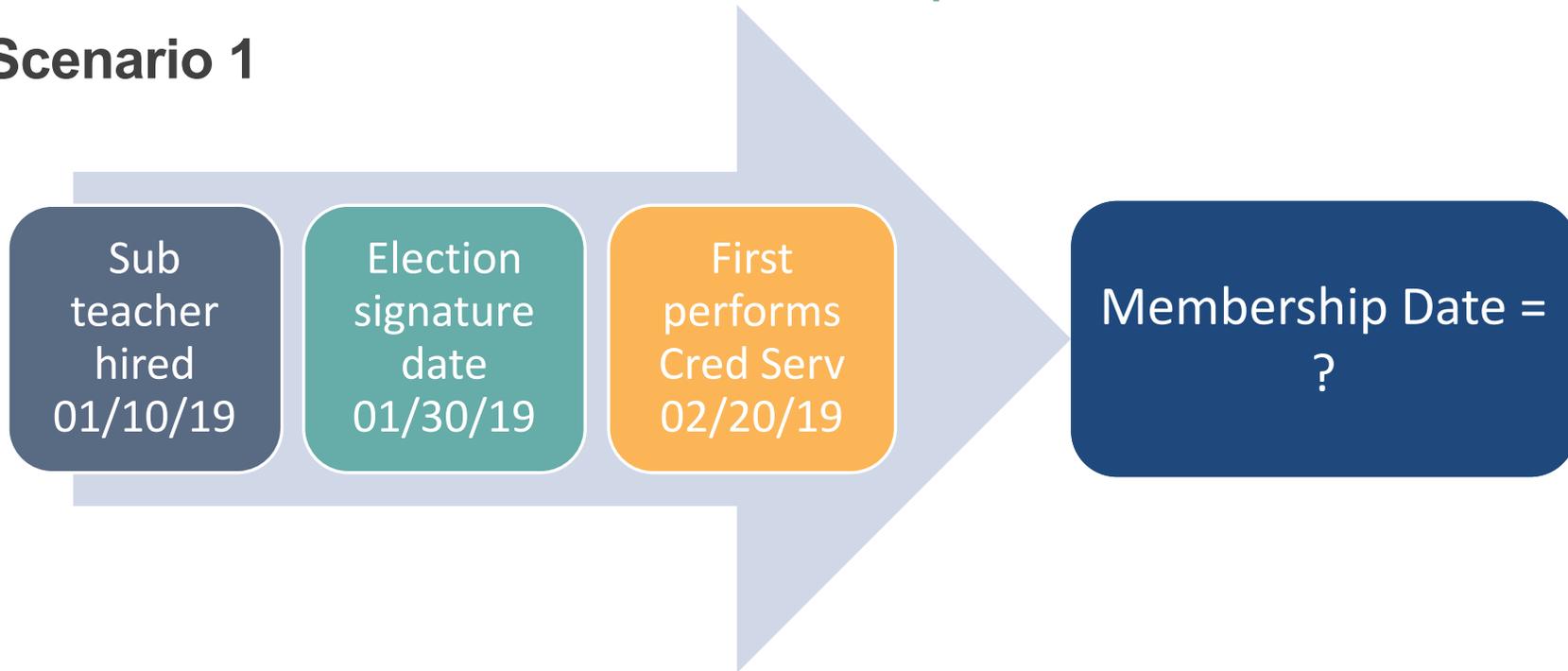
Membership Date



Hire Date

ES 350 – Permissive Membership

Scenario 1



ES 350 – Permissive Membership

Scenario 1

Sub
teacher
hired
01/10/19

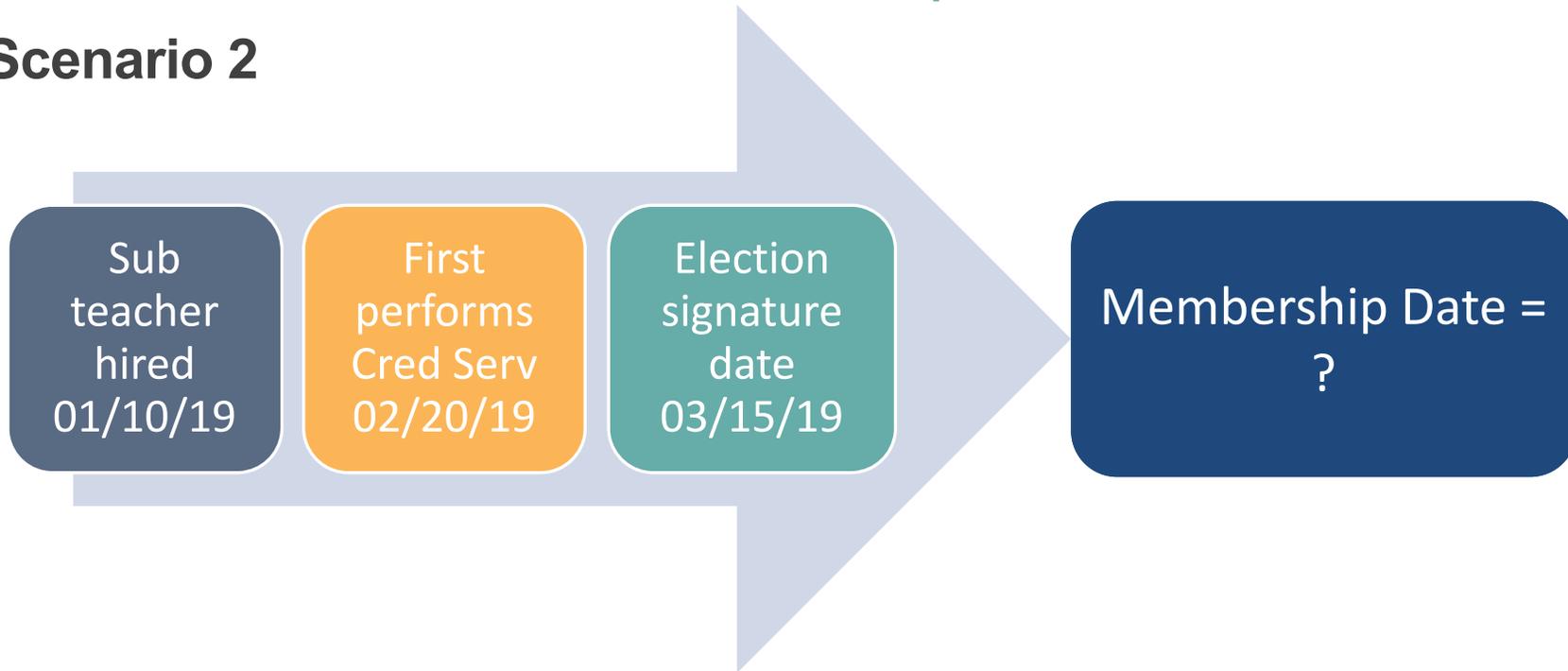
Election
signature
date
01/30/19

First
performs
Cred Serv
02/20/19

Membership Date =
No earlier than
01/10/19
1st day of
employment
(hired)

ES 350 – Permissive Membership

Scenario 2



ES 350 – Permissive Membership

Scenario 2

Sub
teacher
hired
01/10/19

First
performs
Cred Serv
02/20/19

Election
signature
date
03/15/19

Membership Date =
No earlier than
03/01/19
1st day of pay
period in which
election is made

ES 350 – Permissive Membership

Reminders

- ✓ Only for those employees who are (1) hired to perform creditable service, and who are (2) excluded from CalSTRS membership (i.e. substitutes and part-time employees).
- ✓ All subsequent creditable service performed for all employers is now subject to DB coverage.
- ✓ No need to submit forms for employees who are declining CalSTRS membership.

References

- Employer Directive 2018-04: Enrollment in CalSTRS Benefit Programs.
- Employer Connect Newsletter.
- CalSTRS Employer Help at EmployerHelp@CalSTRS.com.

CALSTRS

Questions?

