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
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 \textit{requires} membership by another retirement system; or (2) CalPERS members taking a position that \textit{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.
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 Prior To Hire Date
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 = ?
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

- Sub teacher hired: 01/10/19
- First performs Cred Serv: 02/20/19
- Election signature date: 03/15/19

Membership Date = ?
ES 350 – Permissive Membership

Scenario 2

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

- Sub teacher hired on 01/10/19
- First performs Cred Serv on 02/20/19
- Election signature date on 03/15/19
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 Connect Newsletter.
• CalSTRS Employer Help at EmployerHelp@CalSTRS.com.
Questions?