

## RETIREMENT SYSTEM QUESTIONNAIRE

2023 - 2024

Name: \_\_\_\_\_  
Last, First MI.

Position being hired for: \_\_\_\_\_ Site: \_\_\_\_\_

**New Hire:**

- **CERTIFICATED (STRS):** If you are being hired to work greater than .5 FTE in a certificated position, membership in STRS is mandatory. Membership is optional for employees working less than .5 FTE. Please complete the Permissive Membership Form to elect membership or decline at this time. Classic/PEPRA members contribute 10.25%/10.205% of pay to STRS (pre-tax) and do not contribute to Social Security.
- **CLASSIFIED (PERS):** If you are being hired to work at least 20 hours/week for one school year in a classified position, membership in PERS is mandatory. If you are being hired to work less than 20 hours/week you are not eligible at this time. Your hours will be tracked and if you exceed 1,000 hours in one school year in one District, membership will become mandatory and you will be automatically enrolled. Classic/PEPRA members contribute 7%/8% of pay to PERS (pre-tax) and also pay into Social Security (6.2%).

**Substitute:** Refer to "Information for Substitute Teachers and Supplemental Employees".

- **SUBSTITUTES:** Your retirement contribution depends on your membership, date of membership, and type of work. Membership in STRS is optional for employees working less than .5 FTE. If not a member of either, please complete the Permissive Membership Form (STRS) to elect membership or decline at this time.

Please complete these questions concerning your membership in the retirement systems available in this District:

- 1) Are you an **ACTIVE MEMBER** of either retirement system?  Yes  No

This means you were enrolled in a retirement system through a previous job AND have not separated, cashed out, or retired from the retirement system. If **YES**, please check the appropriate box:

STRS or  PERS or  Non-Member

- 2) Have you ever been a member but have SEPARATED from either retirement system?  Yes  No

This means you were enrolled AND separated or cashed out. If **YES**, please check the appropriate box:

STRS or  PERS or  Non-Member

- 3) Are you a **RETIRED** member of either retirement system?  Yes  No

If **YES**, please give the date of your retirement and indicate which system:

Retirement date: \_\_\_\_\_  STRS or  PERS

Retirees: Please refer to "Retirement Information for Substitute Teachers and Supplemental Employees" for special employment rules relating to retirees.

For more information, please visit the retirement sites listed here

CalSTRS = [www.calstrs.com](http://www.calstrs.com) California State Teachers Retirement System (for certificated employees)

CalPERS = [www.calpers.ca.gov](http://www.calpers.ca.gov) California Public Employees Retirement System (for classified employees)

I hereby certify that the above information is true and complete to the best of my knowledge.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_