



Retirement System Status Information

INSTRUCTIONS: Complete this form. This information is essential in determining your retirement system status. Your first pay warrant cannot be prepared until this form has been filed, and errors in information provided may delay your first pay warrant, or could result in a subsequent pay adjustment for recovery of retirement contributions owed.

Employee Name: _____ SSN: _____ DOB: _____

1. Are you Currently working or have you ever worked before, in any capacity, for:

A San Diego County school or District? ☐ Yes ☐ No
If yes, where: _____

Another California school or District? ☐ Yes ☐ No
If yes, where: _____

Public Agency in California (ex: San Diego County or City etc.) ☐ Yes ☐ No
If yes, where: _____

2. I contributed to the following systems:

- ☐ None
☐ CalSTRS (California State Teacher's Retirement System)
☐ CalPERS (California Public Employee's Retirement System)
☐ Other _____

3. Did you get a refund of your contributions? ☐ Yes ☐ No
If yes, when: _____

4. Are you currently retired and receiving a monthly benefit from: ☐ Yes ☐ No
☐ CalSTRS ☐ CalPERS ☐ other: _____

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

Signature _____ Date: _____

Be aware that employment in either an academic or non-academic capacity in any California school district may require that you become a member of CalSTRS or CalPERS, as appropriate.

CalSTRS – Academic employees who qualify for mandatory or permissive membership will have all CalSTRS covered employment subject to CalSTRS contributions. Please notify us immediately of any membership changes.

CalPERS – Part-time non-academic employees qualify for membership by working more than 1000 hours in a fiscal year, working an average of 20 hours a week for one year or longer, or working 40 hours a week for 6 months or more.