
RETIREMENT EARNINGS VERIFICATION PROCESS (PAY-W068)

Sacramento City Unified School District

1.0 SCOPE:

- 1.1 This work instruction is applied to assist the member when they have made the decision to retire.

2.0 RESPONSIBILITY:

- 2.1 Lead Payroll Technician
- 2.2 Fiscal Services Technician I

3.0 APPROVAL AUTHORITY:

- 3.1 Supervisor IV, Payroll Services

Signature

Date

4.0 DEFINITIONS:

- 4.1 Compile the employee's earnings for three (3) consecutive years.

5.0 WORK INSTRUCTION:

- 5.1 Access State Teachers Retirement System (STRS) to obtain reported earnings for member/employee.
- 5.2 Sign into ESCAPE, selecting the Personnel module.
- 5.3 Hit <F3> to bring up Access Method window and select Person Locator.
- 5.4 Enter employee's last name with first initial or SSN and hit <F3>.
- 5.5 Hit <Enter> to select employee. Hit <Enter> to go into employee's Personnel record.
- 5.6 Hit <Ctrl S> to retrieve employee's unused sick leave balance.
- 5.7 Hit <Esc> to exit out of sick leave balance information. This will bring you to the Personnel menu and the cursor should be on the employee.
- 5.8 Hit <Ctrl A> to go into employee's tracking record and select current record by hitting <Enter>.
- 5.9 Once tracking record open, hit <Ctrl C> to view employee's work calendar and obtain annual contract days.
- 5.10 Complete a letter with the members three (3) highest, consecutive years of salary; unused sick leave days; and annual contract days.
- 5.11 Letter is provided to employee for meeting with STRS counselor.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Printout of sick leave balance.
- 6.2 Printout of STRS CLQ (Contribution Line Query) of reported earnings by employer.

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7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Check and Backup	File cabinet in office	Two years, current and previous fiscal year. After two years, sent to warehouse.	None. Must keep all payroll records per Internal Audit Department.	Access with approval of Payroll Services Department.

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/14/04	A	Initial Release

***** End of procedure *****