

Request for Separation-From-Service Requirement Exemption—Information and Instructions

Read the instructions carefully before completing the form.

If all sections are not completed, or if the minimum requirements are not met, the retired member will be subject to the separation-from-service requirement.

Use this form to request an exemption from the separation-from-service requirement for a CalSTRS retired member who has reached normal retirement age (age 60 for CalSTRS 2% at 60 members or age 62 for CalSTRS 2% at 62 members) and is hired to fill a critically needed position during the first 180 calendar days following the member's most recent retirement date.

MINIMUM REQUIREMENTS

- CalSTRS must receive the exemption form prior to the retired member performing any activities for this requested exempted position.
- The retired member must be of normal retirement age when the compensation is earned.
- The retired member did not receive any financial inducement to retire from any public employer, including, but not limited to, receiving additional service credit through the CalSTRS Retirement Incentive Program.
- The appointment is necessary to fill a critically needed position before 180 calendar days have passed from the retired member's most recent retirement date.
- The retired member's termination of employment is not the basis for the critically needed position.
- That the employer did not have a reduction-in-force layoff pursuant to Section 45117, 44955, or 44955.5, or pursuant to any other similar state law authorizing the termination of its employees, within the prior 18 months.
- The employer shall provide a written copy of the completed documentation that substantiates the need for the exemption to the exclusive representative of employees prior to the member's performance of retired member activities.

EXEMPTION START AND END DATE

The exemption start date is the first day of employment in the position, no earlier than the date CalSTRS receives this form. The exemption end date is no later than 180 calendar days after the member's most recent retirement date.

COMPLETING THIS FORM

This form should be completed by the appointing authority unless otherwise stated. Print clearly in dark ink or type all information requested. Initial all corrections and sign on the last page.

SECTION 1 – MEMBER INFORMATION

Enter the member's full name and Client ID or Social Security number. Include the member's mailing address, telephone number and email address. Enter member's last position held.

SECTION 2 – POSITION INFORMATION

Provide the following information associated with the new position:

- Position title.
- Position salary (must be annualized salary).
- Requested exemption period start and end date (cannot be any earlier than the date CalSTRS receives the form).
- Nature of employment (duties of the position).
- Advise if exemption is for a newly created position.
 - If yes, provide duties that overlap from the previous position held by the member.
- Advise if this position requires the member to train or mentor the person filing the member's last position.

SECTION 3 – EMPLOYER INFORMATION

Enter the information related to the school district, county office of education or community college district employing the member. Include the mailing address, telephone number and email address so we may contact you if we have any questions. Enter the appropriate five-digit county and district codes. Contact your CalSTRS liaison if you are unsure of your code.

SECTION 4 – CERTIFICATION

Fully read each statement and enter your initials as the appointing authority next to each statement to certify that you met the minimum requirements for the exemption.

SECTION 5 – REQUIRED SIGNATURES

Have the retired member sign and date the Member's Signature line. Sign and date as the appointing authority on the form. The appointing authority's signature must be signed and dated by the superintendent, the county superintendent of schools or the chief executive officer of a community college. Electronic signatures will not be accepted on this form.

Submit completed form to Postretirement@CalSTRS.com. CalSTRS will review and send a formal letter to the employer and retiree within 30 days of receiving the exemption request to notify each party whether the activities performed will be subject to or exempt from the 180-calendar day separation-from-service requirement.

A separation-from-service requirement exemption is not an exemption from the fiscal year postretirement earnings limit. Visit CalSTRS.com for more information about working after retirement restrictions and limits.

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SR1897 REV 07/24



California State Teachers' Retirement System
 P.O. Box 15275, MS 60
 Sacramento, CA 95851-0275
 800-228-5453
CalSTRS.com

For CalSTRS Use Only CalSTRS Representative	<input type="checkbox"/> Approved	<input type="checkbox"/> Denied
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Section 1: Member Information – This section is to be completed by the retired member or the appointing authority.			
NAME (LAST, FIRST, INITIAL)		CLIENT ID OR SOCIAL SECURITY NUMBER	
MAILING ADDRESS			
CITY		STATE	ZIP CODE
EMAIL ADDRESS		TELEPHONE	
		LAST POSITION HELD	

Section 2: Position Information – This section is to be completed by the appointing authority.		
Position Title: <hr/>	Exemption Start Date No earlier than the date CalSTRS receives this form (MM/DD/YYYY): / /	Exemption End Date No later than 180 calendar days after the member's most recent retirement date (MM/DD/YYYY): / /
Position Salary (Annual):		
PROVIDE NATURE OF EMPLOYMENT (I.E. DUTIES OF THE POSITION): 		
IS THIS EXEMPTION REQUEST FOR A NEWLY CREATED POSITION? <div style="text-align: right;"> <input type="checkbox"/> YES <input type="checkbox"/> NO </div>		
IF YES TO THE QUESTION ABOVE, PLEASE LIST ANY DUTIES/TASKS THAT OVERLAP FROM THE PREVIOUS POSITION HELD: 		
DOES THIS POSITION REQUIRE THE MEMBER TO TRAIN OR MENTOR THE PERSON FILLING THE MEMBER'S LAST POSITION? <input type="checkbox"/> YES <input type="checkbox"/> NO		



Request for Separation-From-Service Requirement Exemption continued



Section 3: Employer Information – This section is to be completed by the appointing authority.

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COUNTY AND DISTRICT CODE (FIVE DIGITS)		EMPLOYING AGENCY'S NAME	
EMPLOYER ADDRESS	CITY	STATE	ZIP CODE
EMPLOYER CONTACT NAME		()	ext.
		EMPLOYER TELEPHONE	
EMPLOYER EMAIL ADDRESS		COUNTY WHERE EMPLOYER IS LOCATED	

Section 4: Certification – This section is to be completed by the appointing authority.

I have read and fully understand the instructions for the exemption certification for separation-from-service requirement of a retired member as outlined in Education Code section 24214.5. I fully certify that (please initial each):

- _____ The employer did not have a reduction-in-force layoff pursuant to Section 45117, 44955, or 44955.5, or pursuant to any other similar state law authorizing the termination of its employees, within the prior 18 months.
- _____ The retired member's termination of employment is not the basis to fill the critically needed position before 180 calendar days have passed from the retired member's most recent retirement date.
- _____ The retired member is of normal retirement age when the compensation is earned.
- _____ The retired member did not receive any financial inducement to retire from any public employer, including, but not limited to, receiving additional service credit through the CalSTRS Retirement Incentive Program.
- _____ The employer shall provide a written copy of the completed documentation that substantiates the need for the exemption to the exclusive representative of the employees prior to the member's performance of the retired member activities.

OR

_____ There is no exclusive representation for employees at this employer.

Section 5: Required Signatures – This section is to be completed by the member and the appointing authority.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct. I understand that perjury is punishable by imprisonment for up to four years (Penal Code section 126).

I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering a benefit administered by CalSTRS and it may result in penalties, including restitution, up to one year in jail and a fine of up to \$5,000 (Education Code section 22010).

I understand if CalSTRS does not approve this exemption that I, the member, shall be subject to the earnings limit outlined in Education Code section 24214.5.



MEMBER'S SIGNATURE

SIGNATURE DATE (MM/DD/YYYY)



APPOINTING AUTHORITY'S SIGNATURE

SIGNATURE DATE (MM/DD/YYYY)

(To be signed by the superintendent, the county superintendent of schools or the chief executive officer of a community college.)