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# CALSTRS REFUND OF CONTRIBUTIONS (PAY-W066)

Sacramento City Unified School District

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## 1.0 SCOPE:

- 1.1 This work instruction is applied to help guide employees in refunding contributions made into CALSTRS for service credit towards retirement.

## 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 A refund of all member contributions, tax-deferred contributions and interest credited on those contributions after a member has terminated employment with the California Public School System.
- 4.2 STRS – State Teachers' Retirement System

5.3 e Refund Application along with the district  
Resignation/Retirement form. This is for 5.3

## Log into ESCAPE

5.4 Enter Personnel module.

5.5 Enter Personnel.

5.6 Hit **F3**, Access Methods, Hit <Enter>, Person Locator and enter last name & first name and social security number, hit <F3>. Once name and SSN appear hit <Enter>

5.7 Enter the appropriate information in the application retain a copy for district files and return the original to employee. Personnel record, <Alt T> for termination date, if there is a date, enter that date in Section C - Last day of Employment and Section D - Termination Date of the Refund Application. The application cannot be completed until there is a termination date in the Personnel record for the employee.

- 5.8 Complete the appropriate information in the application retain a copy for district files and return the original to employee.

## 6.0 ASSOCIATED DOCUMENTS:

- 6.1 STRS Refund Application (RF1360).

