

LOS ANGELES COMMUNITY COLLEGES RETIREMENT PROCESSING CHECKLIST

THE 3 R'S TO RETIREMENT: RETIRE, RESIGN, AND RETIREE HEALTH BENEFITS

This checklist identifies the forms needed to transition from active to retired employee status.

- Group A forms are the “basic” forms your retirement system—CalSTRS or CalPERS requires for processing a retirement. Other forms may be required to address your unique situation. For assistance with identifying and/or completing specific retirement system forms applicable to their situation, employees must contact the appropriate retirement service counselor.
- Group B forms are the forms the District requires to terminate your assignment and continue your health benefits as a retiree.

Please note that processing a retirement and resigning from the District are legal processes subject to State statute and specific timelines. District and College staff can only answer general questions and provide you with guidance to the retirement / resignation / retiree health benefit application processes. It is your responsibility to complete the forms accurately, to provide any required documentation, and to submit the required documents within stated timelines.

✓	FORM TITLE	FORM NUMBER	OBTAIN FROM	SUBMIT TO	RECOMMENDED PROCESS / TIMELINE
GROUP A: RETIREMENT SYSTEM FORMS ¹					
▪ California State Teachers Retirement System (CalSTRS)					
	Express Benefit Report ²	SR0 554E	CalSTRS Phone: (800) 228-5453 Web: calstrs.com	• Retirement Unit, District Office	When submitting “retirement packet to CalSTRS.” ²
	Service Retirement Application	SR0059		• STRS Membership Services Center	Signed forms must be received by CalSTRS: <ul style="list-style-type: none"> • No earlier than six months prior to retirement date. • No later than the last business day of the month in which the employee retires
▪ California Public Employees' Retirement System (CalPERS)					
	Service Retirement Election Application ²	PERS-BSD-369-S	CalPERS Phone: (888) 225-7377 Web: calpers.ca.gov	• Retirement Services Unit, District Office • CalPERS Benefit Services Division	Submit a copy of Section 7 to Retirement Unit prior to submitting “retirement packet” to CalPERS ² No more than three months (90 days) before retirement date.
GROUP B: LACCD FORMS					
	Resignation	HR P-370	LACCD Website Web: laccd.edu	Supervisor / Department Chair	When submitting retirement application to CalSTRS or CalPERS.
	LACCD Application for Retiree Health Benefits (all retirees) PERS Health Benefits Plan Enrollment (Employees 65+and/ or dependents 65+)		LACCD Website Web: laccd.edu	LACCD Health Insurance Section District Office 6 th Floor	At least 30 days before resignation date to avoid lapse in coverage.
	Life Insurance Conversion				Will be contacted by MetLife within 30 days after resignation date.
GROUP C: APPLICATION FOR MEDICARE: SOCIAL SECURITY ADMINISTRATION (SSA)					
If you or your dependant is age 65 or over, complete the following two-step process:					
	1. Apply to SSA for Medicare Part A / B		Local Social Security Office		Apply to Social Security Administration at least 90 days prior to retirement.
	2. Request for Employment Information	CMS-L564	SSA mails to employee.	Complete employee section and forward form to Health Insurance Section, District Office	Important: Include form return instructions to Health Insurance Section: <ul style="list-style-type: none"> • Return form to employee <u>or</u> Social Security Administration. • If SSA, identify address of specific SSA office.
¹ In the LACCD, CalSTRS members usually hold Academic Service positions and CalPERS members usually hold Classified Service positions. Employees who have held regular assignments in both services “select” one retirement system. ² STRS members should submit the STRS Express Benefit form; PERS members submit Section 7 of the Service Retirement Election Application to Retirement Unit, District Office. The employee completes the employee portion of the form. The Retirement Unit completes the employer portion of the form, forwards the form to the applicable retirement system and sends a copy to the employee for his/her records. ³ Each campus has its own procedure for obtaining acknowledgment signatures. Resignation form must ultimately be submitted to location personnel office for processing.					