



Santa Clara County Office of Education

Mary Ann Dewan, Ph.D.  
Interim County Superintendent of Schools

**Informational Bulletin**

*For Santa Clara County Districts*

## District Business & Advisory Services

Judy Lee Kershaw, Director- DBAS: 408-453-6599

**Bulletin: 18-019**

Date: January 12, 2018

To: District Fiscal Directors  
Personnel and Payroll Directors  
Charter School Administrators

From: Nghia Do, Advisor

Re: Newly Revised Reduced Workload Program Eligibility Certification Form for California State Teachers' Retirement System (CalSTRS)

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The purpose of this bulletin is to inform Districts that CalSTRS has revised the Reduced Workload Program Eligibility Certification form (ES-1161) to conform to the technical legislative updated that have gone into effect as of January 1, 2018. The form (see attached) is now available on SEW Forms and Publication Ordering System at <https://forms.calstrs.com/CalSTRSONlineFormRequestWebUI/Root/Pages/Order.aspx>

Please discontinue use of any outdated forms. If forms have already been submitted for Fiscal Year 2018-19, new forms will not be required to be submitted again.

*Please distribute this memo within your District as deemed appropriate.*

# Reduced Workload Program Eligibility Certification

ES 1161 (REV 01/18)

# CALSTRS

California State Teachers' Retirement System  
P.O. Box 15275, MS 17  
Sacramento, CA 95851-0275  
800-228-5453  
CalSTRS.com

Please thoroughly read the attached instructions before completing this form. Please type or print legibly in dark ink. This form must be submitted to, and approved by, CalSTRS prior to the start of the school term of the first school year in which a member's workload is reduced.

SECTION 1: MEMBER INFORMATION	
MEMBER NAME (LAST, FIRST, INITIAL)	CLIENT ID OR SOCIAL SECURITY NUMBER
COUNTY CODE/NAME	DISTRICT CODE/NAME

SECTION 2: REDUCED WORKLOAD PROGRAM ELIGIBILITY REQUIREMENTS	YES	NO
1. The governing board of the employer or a county superintendent of schools has established regulations that allow employees who are members of the DB program to participate in the Reduced Workload Program.		
2. The member has met all of the following requirements: <ul style="list-style-type: none"> <li>Member is 55 or older prior to the start of the school term of the first school year in which the member's workload is reduced.</li> <li>Member has at least 10 years of service credit prior to the start of the school term of the first year in which the member's workload is reduced.</li> <li>Member has been employed in a full-time position to perform creditable service under the DB program each year of the five school years immediately preceding the first year in which the member's workload is reduced, without having a break in service.</li> <li>Member is employed by a school district or county office of education as a PreK-12 certificated employee who does not hold a position with a salary greater than that of school principal <i>OR</i> is employed by a community college district (community colleges have no salary limit).</li> </ul>		
3. A written agreement exists between the employer and the member that: <ul style="list-style-type: none"> <li>Is in effect prior to the beginning of the school term of the first year in which the member's workload is reduced.</li> <li>Requires member to work at least 50 percent of a full-time position.</li> <li>Includes member and employer contribution information.</li> </ul>		
4. Total amount of time in which member reduces his/her workload is not more than 10 school years.		
Note: If the response to any of the above items is "NO," the member may not be eligible to participate in the Reduced Workload Program. Please contact CalSTRS immediately for final determination.		

DATE OF AGREEMENT	SCHOOL TERM BEGIN DATE	FULL-TIME SALARY	PERCENTAGE OF FULL-TIME POSITION
		\$	%

SECTION 3: EMPLOYER CERTIFICATION AND SIGNATURE		
I understand it is unlawful to make a knowingly false material statement, to knowingly fail to disclose a material fact or to otherwise provide false information with the intent to use it, or allow it to be used, to obtain, receive, continue or increase a benefit administered by CalSTRS. I hereby certify by submitting the information on this form is true and correct and that the member is eligible to participate in the Reduced Workload Program as described in Education Code sections 22713.		
OFFICIAL'S NAME & TITLE	OFFICIAL'S SIGNATURE	DATE

CalSTRS USE ONLY	CalSTRS SIGNATURE	APPROVAL DATE



# Reduced Workload Program Eligibility Certification - Instructions

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**Read these instructions before completing this form. Print or type in dark ink. Initial all corrections.**

Use this *Reduced Workload Program Eligibility Certification* form to verify the member's eligibility for the Reduced Workload Program, per Education Code section 22713. This form must be submitted to, and approved by, CalSTRS prior to the start of the school term of the first school year in which the member's workload is reduced.

## SECTION 1—MEMBER INFORMATION

Enter member's full name, Client ID or Social Security Number, county code and name, and district code and name.

## SECTION 2—REDUCED WORKLOAD PROGRAM ELIGIBILITY REQUIREMENTS

Per Education Code section 22713 specific requirements must be met for any member to participate in the Reduced Workload Program. Review each part 1 through 4, and check the corresponding "YES" or "NO" box that is applicable to the member meeting each requirement. If the response to any of the requirements is "NO," the member may not be eligible to participate in the Reduced Workload Program. Please contact CalSTRS immediately for final determination.

**Date of Agreement** is the date in which the agreement between the employer and member is established for the member to participate in the Reduced Workload Program. The date of the agreement must be before the school term begin date.

**School Term** is defined as a minimum period of 35 weeks beginning the first day and ending the last day creditable service is required to be performed by a member employed on a full-time basis.

**Full-Time Salary** is the annualized pay rate the member participating in the Reduced Workload Program would have earned if he or she were to be employed full-time in the position.

**Percentage of Full-Time Position** means the percentage of time the member will be reducing his or her full-time position to. The member must work at least 50% of the time the employer requires for full-time employment in that position.

## SECTION 3—EMPLOYER CERTIFICATION AND SIGNATURE

Sign and date this form before submitting it to CalSTRS. This form will not be accepted without a signature and date.

## SUBMIT

**This form must be submitted to, and approved by, CalSTRS prior to the start of the school term of the first school year in which the member's workload is reduced.**

Mail form: CalSTRS  
P.O. Box 15275, MS 17  
Sacramento, CA 95851-0275

Fax form: (916) 414 - 5476

Email form: Submit form electronically via secure messaging on the Secure Employer Website (SEW)

## QUESTIONS

For information regarding the Reduced Workload Program or this form, please contact your CalSTRS Employer Services representative at [EmployerHelp@CalSTRS.com](mailto:EmployerHelp@CalSTRS.com)