

TRANSACTION OPTIONS ELIGIBILITY CHART FOR THE CALIFORNIA STATE UNIVERSITY TAX SHELTERED ANNUITY (TSA) PROGRAM

Employment Status		Contract Exchange to CSU Approved Fund Sponsors	Contract Exchange to non-CSU Fund Sponsors	Distribution Request (does not include hardship withdrawals)	Hardship Withdrawals	Loans	Rollover to IRA	CalPERS Service Credit Purchase
Active CSU employee, or an employee on leave, or FERP on active status	TSA → Transactions	Yes	No	Yes, if you are age 59 ½*	Yes, if Fund Sponsor has completed CSU requirements	Yes, if Fund Sponsor has completed CSU requirements	Yes, if you are age 59 ½*	Yes, no age requirement*
Separated from the CSU and actively employed elsewhere		Yes	Yes	Yes, no age requirement*	No	No	Yes*	No
Retired from the CSU (non-FERP) status		Yes*	No	Yes*	No	No	Yes*	No
Rehired Annuitant		Yes	No	Yes*	While in active status	While in active status	Yes*	No

Transactions highlighted with an asterisk cannot be processed through Retirement Manager, and requires employer authorization by the Chancellor's Office.