



The California State University  
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**Date:** October 2, 2003 **Code:** TECHNICAL LETTER  
HR/Benefits 2003-27

**To:** Associate Vice Presidents/Deans of Faculty  
Human Resources Directors  
Benefits Officers

**From:** Cathy Robinson  Cordelia Ontiveros   
Assistant Vice Chancellor Senior Director  
Human Resources Administration Academic Human Resources

**Subject:** Updated Eligibility Rules for Temporary Faculty Enrollment into CalPERS' Retirement Plan

The California Public Employees' Retirement System (CalPERS) has revised its retirement membership qualifications for CSU temporary faculty. Effective immediately, the following criteria are to be used to determine CalPERS membership.

**Full-Time Temporary Faculty**

Temporary faculty (Unit 3 employees) appointed full-time for an Academic Year (AY) should be enrolled into CalPERS membership at time of appointment. This change is effective immediately, for appointments from this time forward.

For newly hired employees who were appointed full-time for an AY appointment beginning Fall 2003 and whose payroll documents have already been processed, CalPERS will allow these employees to be brought into CalPERS membership the beginning of the next semester or quarter, as appropriate.

**Part-Time Temporary Faculty**

All part-time faculty appointed half-time or more (but less than full-time) will continue to be enrolled in CalPERS beginning the third consecutive semester at half-time or more,  
or at the beginning of the fourth quarter at half-time or more. This is called the "look back" method. The employee must work two consecutive semesters or three

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**Distribution:**

CSU Presidents  
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quarters at half-time or more and upon appointment to the next term at half-time or more, the employee is enrolled in CalPERS. Please note that for quarter campuses, the understanding is that a faculty employee normally works three consecutive quarters, takes one quarter off, then is brought into CalPERS membership if the appointment is half-time or more. If the employee works a fourth, consecutive quarter at half-time or more, the employee should be enrolled at the beginning of that fourth quarter.

Attached is a revised membership qualifications chart to be inserted between the charts on pages 18 and 19 of the CalPERS State Handbook.

**General Information**

Campuses are reminded that the criteria for enrollment into CalPERS retirement are different from eligibility criteria for health benefits. AB 211 health benefits eligibility is a separate process and is not to be confused with the eligibility criteria for retirement.

As a reminder, temporary faculty who are excluded from CalPERS membership are to be placed in the Department of Personnel Administration's Part-time, Seasonal, and Temporary (PST) Employee Retirement Program. Please refer to HR/Benefits 2003-26.

Employees who are enrolled in the PST retirement plan but subsequently become a member of CalPERS, have the option of purchasing service credit with CalPERS for the CSU covered employment prior to CalPERS membership. Interested employees should be referred to CalPERS for additional information.

If you have any questions, please contact Cordelia Ontiveros at (562) 951-4503 or Pamela Chapin at (562) 951-4414. This technical letter is also available on the Human Resources Administration's Web site at: <http://www.calstate.edu/HRAdm/memos.shtml>.

CR/CO/pc

Attachment

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Attachment**

STATUS	APPOINTMENT TYPE	MEMBERSHIP MANDATORY AT TIME OF APPOINTMENT	INITIALLY EXCLUDED BUT MONITOR TIME WORKED	EXCLUDED
NOT A CURRENT MEMBER (Was never a member or has had contributions refunded.)	Temporary Faculty (A-52 appointment) for one academic year at full time	YES		
	Temporary Faculty (A-52 appointment) for one academic year at part time		YES*	
	Temporary Faculty (A-52 appointment) for semester/quarter at full time		YES*	
	Temporary Faculty (A-52 appointment) for semester/quarter at part time		YES*	

\*You would bring employee into membership at the beginning of the third consecutive semester at half time or more, or at the beginning of the fourth quarter at half time or more.

09/19/2003