

# Creditable Service

The document provides information about what constitutes creditable service for the CalSTRS Defined Benefit Program and Cash Balance Benefit Program pursuant to Education Code sections 22119.5 and 26113, respectively. References to other Education Code (EDC) sections are provided where applicable. The board has the final authority to determine whether activities not specified in law are creditable service.

Questions? Contact [EmployerHelp@CalSTRS.com](mailto:EmployerHelp@CalSTRS.com) or send a secure message in the Secure Employer Website. Please include applicable supporting documentation for review.

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## What is creditable service?

Creditable service is the work employees perform for which they are eligible for CalSTRS benefits. For service to be creditable, it must meet all the following requirements:

- Be performed by an employee of a CalSTRS employer.
- Be performed in a position that meets the minimum requirements (unless exempt).
- Be a creditable service activity.

In some cases, creditable service may also include “outgrowth” activities, service covered by another California public retirement system, service as an elected officer of an employee organization, or service as a trustee.

## Is the employee employed by an employer? (EDC 22131 and 26122)

For service to be creditable under the Defined Benefit Program or Cash Balance Benefit Program, a person must be employed by an employer. To be employed by an employer, an employee must be employed by one of the following who offers the applicable program:

- Charter school (must be approved and eligible for State apportionment)
- Community college district
- County office of education
- School district (including joint powers authorities)

Those employed by a third-party administrator, private institution or as an independent contractor are not employed by an employer and therefore are not performing creditable service. However, if these employees are retired, they may be performing retired member or participant activities, respectively. For more information, see the [Working after Retirement](#) job aid available at [employersupport.CalSTRS.com](http://employersupport.CalSTRS.com).

### Does the employee meet the minimum requirements or are they exempt?

Minimum requirements vary by the type of employer. We cannot determine if a specific position is subject to or meets minimum requirements. Contact the California Commission on Teacher Credentialing or Board of Governors for help.

#### Charter Schools

The minimum requirements for charter schools changed effective July 1, 2020. You will have to consider when the service was performed to know which requirement to apply.

Service Period	Minimum Requirements
<b>On or after July 1, 2020</b>	<ul style="list-style-type: none"> <li>All teaching positions are subject to the certification qualifications adopted by the Commission on Teacher Credentialing pursuant to EDC 44001.</li> <li>All other positions are exempt from minimum requirements.</li> </ul>
<b>Prior to July 1, 2020</b>	<ul style="list-style-type: none"> <li>Core and college preparatory teachers are subject to certification qualifications adopted by the Commission on Teacher Credentialing pursuant to EDC 44001.</li> <li>All other positions are exempt from minimum requirements.</li> </ul>

#### Community College Districts

The position must be one of the following and subject to minimum standards adopted by the Board of Governors of the California Community Colleges pursuant to EDC 87356:

- Faculty member, as defined in EDC 87003.
- Academic position, as defined in EDC 87001(b).
- Educational administrator, as defined in EDC 87002(b).

The following are exempt from the minimum requirements for creditable service:

- Presidents and chancellors. This does not include assistant or vice presidents and vice chancellors. Report creditable compensation associated with presidents and chancellors using **Service Type Superintendent/President/Chancellor (SPCC)**.
- Employees providing vocational training pursuant to a contract between the community college district and the United States Department of Defense. These employees must meet the requirements provided in the contract. Report creditable compensation associated with this vocation training using **Service Type Teaching (TEAC)**. However, if the employee is subject to the Community College Comparison Calculation using **Service Type CCD/CCCC Lab Instructor (01), CCD/CCCC Lecturer / General Instructor (02), or CCD/CCCC Adult Education Instructor (03)**, as applicable. For

more information see the [Community College Comparison Calculation](#) job aid available at employersupport.calstrs.com.

### School Districts and County Offices of Education

The position requires certification qualifications as designated in regulations adopted by the Commission on Teacher Credentialing pursuant to EDC 44001.

The following are exempt from the minimum requirements for creditable service:

- Superintendents of California public schools. This does not include assistant or vice superintendents. Report creditable compensation associated with a superintendent using **Service Type Superintendent/President/Chancellor (SPCC)**.
- Consulting teachers participating in the California Peer Assistance and Review Program for Teachers (PAR) pursuant to Article 4.5 of Chapter 3 of Part 25 of Division 3 of Title 2 of the Education Code. Report creditable compensation associated with those employed in PAR using **Service Type PAR Consultant (PAR)**.
- Audiometrists. Report creditable compensation associated with audiometrists using **Service Type Health Services (HESE)**.

### Is the employee performing a creditable service activity?

The following table lists the creditable service activities found in EDC 22119.5 along with the Service Type used to report creditable compensation associated with the service when using the Contribution File format. Service Type is not reported when using the F496 File or Voluntary Deduction File formats.

Service Type	Creditable Service Activity
Teaching (TEAC)	<p>The work of teachers, instructors, district interns, and academic employees employed in the instructional program for pupils, including special programs such as adult education, regional occupation programs, childcare centers, and prekindergarten programs pursuant to Section 22161. Sojourn and exchange teachers are excluded from membership pursuant to Education Code section 22601.</p> <p>Exception: If the employee is subject to the Community College Comparison Calculation, you must use <b>Service Type CCD/CCCC Lab Instructor (01), CCD/CCCC Lecturer / General Instructor (02), or CCD/CCCC Adult Education Instructor (03)</b>, as applicable. For more information see the <a href="#">Community College Comparison Calculation</a> job aid available at employersupport.calstrs.com.</p>

Service Type	Creditable Service Activity
<b>Counseling (COUN)</b>	<p>Education or vocational counseling, guidance, and placement services.</p> <p>Exception: If the employee is subject to the Community College Comparison Calculation, you must use <b>Service Type CCD/CCCC Counselor (05)</b>. For more information see the <a href="#">Community College Comparison Calculation</a> job aid available at employersupport.calstrs.com.</p>
<b>Program Research/Evaluation (PRRE)</b>	<p>The work of employees who plan courses of study to be used in California public schools, or research connected with the evaluation or efficiency of the instructional program.</p>
<b>Curriculum/Material Development (CRMD)</b>	<p>The selection, collection, preparation, classification, demonstration, or evaluation of instructional materials of any course of study for use in the development of the instructional program in California public schools, or other services related to California public school curriculum.</p>
<b>Mentoring/Training (METR)</b>	<p>The examination, selection, in-service training, mentoring, or assignment of teachers, principals, or other similar personnel involved in the instructional program.</p>
<b>Health Services (HESE)</b>	<p>The work of nurses, physicians, speech therapists, psychologists, audiologists, and other California public school health professionals.</p>
<b>Librarian (LIBR)</b>	<p>Services as a California public school librarian.</p> <p>Exception: If the employee is subject to the Community College Comparison Calculation, you must use <b>Service Type CCD/CCCC Librarian (04)</b>. For more information see the <a href="#">Community College Comparison Calculation</a> job aid available at employersupport.calstrs.com.</p>
<b>Child Welfare Services (CWSR)</b>	<p>Activities connected with the enforcement of the laws relating to compulsory education, coordination of child welfare activities involving the school and the home, and the school adjustment of pupils.</p>
<b>Supervision/Administration (SVAD)</b>	<p>The work of employees who are responsible for the supervision of persons or administration of the duties described in this subdivision.</p>

## What about outgrowth?

Creditable service also includes the performance of California public school activities related to, and an outgrowth of, the instructional and guidance program of the California public school when performed for the same employer in the same fiscal year for which the member is performing another creditable service activity. We do not have a list of what is considered "outgrowth." Report creditable compensation paid for the performance of outgrowth using **Service Type Outgrowth (OUTG)**.

## What about other retirement system service?

Service covered by another California public retirement system is creditable service for the Defined Benefit Program if either:

- The employee elected coverage pursuant to EDC 22508 or 22508.5 (for more information see the [Defined Benefit Program Membership](#) job aid available at [employersupport.calstrs.com](http://employersupport.calstrs.com)); or
- The service was grandfathered as creditable service pursuant to EDC 22119.6.

Report creditable compensation associated with elected or grandfathered service as **Service Type Other Retirement System Service (ORSS)**.

### Grandfathering of Misreported Service (EDC 22119.6)

Activities that are not otherwise creditable service are creditable service for the Defined Benefit Program if the activities were:

- Performed for an employer on or before December 31, 2015; and
- Reported as creditable service to CalSTRS; and
- The employee did not elect to have the service excluded from CalSTRS coverage pursuant to EDC 22508.7.

This only applies to service in that specific position. If the employee becomes employed in another position, for the same or another employer, on or after January 1, 2016, the activities in that position must meet the definition of creditable service to remain creditable to CalSTRS. However, the employee may be able to elect the service be covered by the CalSTRS Defined Benefit Program via the *Retirement System Election* (ES 372) form.

## What about an elected officer on an employee organization? (EDC 22711)

Members may accrue up to 12 years of service credit under the Defined Benefit Program for time served as an elected officer of an employee organization while on a compensated leave of absence pursuant to EDC 44987 or 87768.5.

The member must have been employed and performed creditable service in the month prior to beginning their leave of absence (excluding periods not included in the school term). A school term is defined as a minimum period of 35 weeks that begins on the first day and ends on the last day creditable service is required to be performed by a member employed on a full-time basis (EDC 22168.5). Members do not have to be on a full-time leave of absence to perform service as an elected officer.

### Member Contributions

Members must contribute to CalSTRS at a rate adopted annually by the board. The contribution rate for the 2020-21 school year is **10.25% for CalSTRS 2% at 60** and **10.205% for CalSTRS 2% at 62** members.

### Employer Contributions

Employers must contribute to CalSTRS at a rate adopted annually by the board. The contribution rate for the 2020-21 school year is **16.15% for employers**.

### Contribution Reporting

If using the Contribution File format, report compensation paid for a leave of absence to serve as an elected officer of an employee organization using **Benefit Program Code Defined Benefit Member (DB1)**, **Assignment Code Elected Officer (37)** and **Service Type Elected Officer (ELOF)**. The system will calculate contributions at the applicable rate adopted by the board. You will receive an error message if you try to report creditable compensation and the member has already reached the 12-year limit.

If using the F496 File format, report compensation paid for a leave of absence to serve as an elected officer of an employee organization using **Member Code Member (1)** and **Assignment Code Elected Officer (37)**. The system will calculate contributions at the applicable rate adopted by the board.

## What about trustee service? (EDC 26403)

Creditable service for the Cash Balance Benefit Program also includes trustee service if the trustee elects to participate in the program for trustee service performed for that employer. For more information, see the [Cash Balance Benefit Program Participation](#) job aid available at [employersupport.calstrs.com](http://employersupport.calstrs.com). Report creditable compensation paid for service as a trustee using **Service Type Trustee Service (TRST)**.