INTRODUCTION

Conejo Unified School District, hereinafter referred to as CVUSD or District, has a strong commitment to providing a quality education for its students, including access to and experience with technology. CVUSD believes the integration of technology into classroom instruction greatly benefits both students and educators in maximizing student learning and preparing for the future in the information age. CVUSD recognizes that technology can enhance employee performance by improving access to and exchange of information, offering effective tools to assist in providing a quality instructional program, and facilitating operations. CVUSD provides a wide range of technological resources to its staff for the purpose of advancing the educational mission of the District.

CVUSD periodically updates technology standards according to Board Policies. Staff members who agree to abide by these defined standards will have access to District technology resources. Board Policy 4040 establishes ethical standards for the use of technology and technological resources in our schools. Board policies apply to all staff, whether or not they come into direct contact with students, and cover all technology used. The CVUSD Employee Technology Acceptable Use Policy provides direction regarding the appropriate and inappropriate use of technology. It does not attempt to articulate all required or prohibited behavior by users. The successful use of technology requires that all users conduct themselves in a responsible manner consistent with CVUSD’s Mission and Goals. Although CVUSD will make a concerted effort to protect staff from adverse consequences resulting from the use of technology resources, all users must exercise individual vigilance and responsibility to avoid inappropriate and/or illegal activities. Users are ultimately responsible for their actions in accessing and using District computers and/or mobile devices and the computer network.

CHILDREN'S INTERNET PROTECTION ACT (CIPA)

Pursuant to California legislation and Federal E-Rate regulations, CVUSD uses appropriate filtering technology to limit access to the Internet in an attempt to prevent online access to materials that are obscene, contain child pornography, or are harmful to minors. CVUSD policy and filtering technology allows employees to bypass certain filters to access job related information. Employees bypassing the filters must be diligent in preventing students from accessing inappropriate material. CVUSD curriculum and the Student Acceptable Use Policy provides for the education of students about internet safety, including appropriate online behavior, interacting with other individuals on social networking sites, cyber-bullying awareness and response, protecting online privacy and avoiding online predators.

USE OF CVUSD NETWORK AND HARDWARE

CVUSD employees must:

- Follow District protocols when using technological resources.
- Refrain from downloading software onto CVUSD computers without administrative privileges.
- Refrain from downloading electronic files without approved virus protection.
• Refrain from interfering with network operation through the propagation of viruses, downloading unusually large files without approval, or attaching non-District equipment to the network without approval.
• Refrain from examining, changing, or using another person’s username, password, files, or records without explicit authorization.
• CVUSD accepts no liability relative to information stored and/or retrieved on District-owned technology resources, or for employee-owned technology resources used on District property.

RESPECTING CONFIDENTIALITY AND PRIVACY
CVUSD is committed to meeting the provisions established in the Family Educational Rights and Privacy Act (FERPA), which protects the rights of students regarding education records, and the Health Insurance Portability and Accountability Act (HIPAA), which protects the rights of students and employees regarding protected health information. When technology resources are used to transmit confidential information about students, employees, and/or District business, all appropriate safeguards must be used.

RESPECTING COPYRIGHT AND FAIR USE LAWS
CVUSD employees must respect copyright and fair use laws and distinguish between the lawful and unlawful uses of material available on the Internet. This includes the following topics:
• The concept and purpose of both copyright and fair use.
• Distinguishing lawful from unlawful downloading and peer-to-peer file sharing.
• Avoiding plagiarism.

UNACCEPTABLE BEHAVIORS
Unacceptable behaviors include but are not limited to:
• The creation and transmission of offensive, obscene, or indecent material.
• The creation of defamatory material.
• Plagiarism.
• Infringement of copyright, including software, published texts, and student work.
• Using District technology resources for political and/or religious proselytizing.
• Using District technology resources for the transmission of commercial and/or advertising material.
• The creation and transmission of material which is disparaging, harassing, and/or abusive based on race, ethnicity, national origin, sex, gender, sexual orientation, age, disability, religion, and/or political beliefs.

SOCIAL NETWORKING SITES
In general, information that employees post on their personal social networking sites, i.e., Facebook, Twitter, blogs, webpages, etc. are considered constitutionally protected free speech. At the same time, this information may be seen by students, parents, CVUSD employees and members of the public. Employees are strongly urged to consider these potential audiences in evaluating the appropriateness of the information they post, especially when they make reference to their employment. Information that employees post on their personal sites that leads to disruption of the District work or educational environment may be subject to District scrutiny and employee disciplinary policies and procedures. Employees are strongly cautioned against communicating with students using social networking sites except those supported by the District for instructional purposes (Google, Moodle, Edmodo, etc.).

AUP – CVUSD STAFF
NO EXPECTATION OF PRIVACY
CVUSD employees have no expectation of privacy when using District provided hardware, software, networks, e-mail, voice mail or Internet access. To insure proper use, CVUSD may monitor District systems without advance notice or consent, and may copy, store, or delete any electronic communication or files and disclose them to others as it deems necessary. However, CVUSD does not routinely monitor electronic communications.

PERSONAL USE
CVUSD provides technology use and access for the purpose of educating students and conducting the business of the District. CVUSD recognizes, however, that some personal use is inevitable, and that occasional personal use is permitted so long as it does not interfere with the education of students or District business, and is not otherwise prohibited by CVUSD policy or procedures.

CVUSD employees are expected to review, understand, and abide by the policies described in this document and procedures provided by the Technology Services Department. District employees may obtain additional information and clarification on the topics contained in this document by accessing the CVUSD Website, Personnel Services page, and clicking on the link to Acceptable Use Policy – Conejo Valley Unified School District Employees. The employee’s signature indicates they have read the terms and conditions carefully and understand their significance. All employees must review and sign CVUSD’s Employee Technology Acceptable Use Policy as a condition of using District technology resources. Signed Employee Technology Acceptable Use Policies are kept on file at the District Personnel Office. Any employee who violates any provision of this Acceptable Use Policy may have their use of District technological resources restricted, and/or may be subject to disciplinary action, up to and including termination.

Employee Name: ________________________________________________

Employee Signature: ____________________________________________
(printed)

Date: ______________________________
2017-2018 Annual Plan Legal Notices

This packet contains annual plan legal notices regarding Conejo Valley Unified School District Health & Welfare Plans. The following mandated notices are included:

- Special Enrollment Notice
- Health Insurance Portability and Accountability Act (HIPPA)
- General Notice of Pre-Existing Conditions
- Newborns’ and Mothers’ Health Protection Act of 1996
- Women’s Health and Cancer Rights Act
- Patient Protection Disclosure
- California Maternity Coverage
- Premium assistance under Medicaid and CHIP
- Medicare Part D Notices Creditable/Non-Creditable/Important notice regarding prescription drug coverage
- New Health Insurance Marketplace Coverage Options
Special Enrollment Notice
If an eligible employee declines enrollment in this group health plan for the employee or the employee’s spouse or dependents because of other health insurance or group health plan coverage, the eligible employee may be able to enroll him/herself and eligible dependents in this plan if the employee or dependents lose eligibility for the other coverage (or because the employer stops contributing toward this other coverage). However, the eligible employee must request enrollment within 30 days after the other coverage ends (or after the employer ceases contributions for the coverage).

In addition, if an eligible employee acquires a new dependent as a result of marriage, birth, adoption or placement for adoption, the eligible employee may be able to enroll him/herself and any eligible dependents, provided that the eligible employee requests enrollment within 31 days after the marriage, birth, adoption, or placement for adoption. If the eligible employee otherwise declines to enroll, he/she may be required to wait until the group’s next open enrollment to do so.

To request special enrollment or obtain more information, contact Gerald Toumayan at (818)800-8835.

Loss of Other Health Coverage
For purposes outlined above, loss of other health coverage is defined as an employee, or a dependent of an employee, losing other health coverage, therefore triggering a special enrollment opportunity in the group health plan. This may be a result of:

- The employee or dependent must have had other health coverage when he or she previously declined coverage under our group health plan.
- If the other coverage was COBRA continuation coverage, special enrollment can be requested only after the COBRA continuation coverage is exhausted.
- If the other coverage was not COBRA continuation coverage, special enrollment can be requested when the individual loses eligibility for the other coverage.

Health Insurance Portability and Accountability Act (HIPAA)
Conejo Valley Unified School District recognizes the confidentiality of you and your enrolled dependents’ personal health information, and we are committed to keeping that information private. In addition to our company’s commitment, in April, 2003, the federal Health Insurance Portability and Accountability Act of 1996 (HIPAA) established privacy rules for individually identifiable health information.

The Standards for Privacy of Individually Identifiable Health Information (Privacy Rule) established a set of national standards for the protection of certain health information. The U.S. Department of Health and Human Services (“HHS”) issued the Privacy Rule to implement requirements under HIPAA.

The Privacy Rule standards address the use and disclosure of individuals’ health information—called “protected health information” by organizations subject to the Privacy Rule — called “covered entities,” as
well as standards for individuals’ privacy rights to understand and control how their health information is used.

A major goal of the Privacy Rule is to assure that individuals’ health information is properly protected while allowing the flow of health information needed to provide and promote high quality health care and to protect the public’s health and wellbeing. The Rule strikes a balance that permits important uses of information, while protecting the privacy of people who seek care and healing.

**General Notice of Pre-Existing Condition Exclusion**

*Effective for plan years beginning on, or after January 1, 2014, group health plans are not permitted to exclude individuals from coverage or limit or deny benefits on the basis of preexisting medical conditions. (The prohibition on exclusions of children under 19 years of age on the basis of pre-existing conditions began 6 months from the date the law was enacted.)*

**Newborns' and Mothers' Health Protection Act of 1996**

Group health plans and health insurance issuers generally may not, under Federal law, restrict benefits for any hospital length of stay in connection with childbirth for the mother or newborn child to less than 48 hours following a vaginal delivery, or less than 96 hours following a cesarean section. However, Federal law generally does not prohibit the mother’s or newborn’s attending provider, after consulting with the mother, from discharging the mother or her newborn earlier than 48 hours (or 96 hours as applicable). In any case, plans and issuers may not, under Federal law, require that a provider obtain authorization from the plan or the issuer for prescribing a length of stay not in excess of 48 hours (or 96 hours).

**Women’s Health and Cancer Rights Act**

If you have had or are going to have a mastectomy, you may be entitled to certain benefits under the Women’s Health and Cancer Rights Act of 1998 (WHCRA). For individuals receiving mastectomy-related benefits, coverage will be provided in a manner determined in consultation with the attending physician and the patient, for:

- all stages of reconstruction of the breast on which the mastectomy was performed;
- surgery and reconstruction of the other breast to produce a symmetrical appearance;
- prostheses; and
- treatment of physical complications of the mastectomy, including lymphedema.

These benefits will be provided subject to the same deductibles and coinsurance applicable to other medical and surgical benefits provided under this plan. Therefore, the following deductibles and coinsurance apply: Please refer to your benefit plan summary.

If you would like more information on WHCRA benefits, call your Plan Administrator or the health care plan whose number is located on the back of your ID card.

**Patient Protection Disclosure – Notice of Right to Designate a Primary Care Provider**

Your HMO plan (if applicable) generally require the designation of a primary care provider. You have the right to designate any primary care provider who participates in our network and who is available to accept you or your family members. Until you make this designation, the plan or carrier designates one for you. For
information on how to select a primary care provider, and for a list of the participating primary care providers, you may contact member services at the number listed on the back of your ID card.

You do not need prior authorization from your health plan or from any other person (including a primary care provider) in order to obtain access to obstetrical or gynecological care from a health care professional in our network that specializes in obstetrics or gynecology. The health care professional, however, may be required to comply with certain procedures, including obtaining prior authorization for certain services, following a pre-approved treatment plan, or procedures for making referrals. For a list of participating health care professionals who specialize in obstetrics or gynecology, contact member services at the number listed on the back of your ID card. For children, you may designate a pediatrician as the primary care provider.

**California Maternity Coverage**

Group health plans and health insurance issuers with policies or contracts issued in the State of California generally may not, under California law, restrict benefits for any hospital length of stay in connection with childbirth for the mother or newborn child to less than 48 hours following a vaginal delivery, or less than 96 hours following a cesarean section. However, the law generally does not prohibit the mother’s or newborn’s treating physician, after consulting with the mother, from discharging the mother or her newborn earlier than 48 hours (or 96 hours as applicable). In addition, California law requires the Plan to cover a post-discharge follow up visit for the mother and newborn within 48 hours of discharge when prescribed by the treating physician. The visit shall be provided by a licensed health care provider whose scope of practice includes postpartum care and newborn care. The visit shall include, at a minimum, parent education, assistance and training in breast or bottle feeding, and the performance of any necessary maternal or neonatal physical assessments. The treating physician shall disclose to the mother the availability of a post-discharge visit, including an in-home visit, physician office visit, or plan facility visit. The treating physician, in consultation with the mother, shall determine whether the post-discharge visit shall occur at home, the plan’s facility, or the treating physician’s office after assessment of certain factors.

These factors shall include, but not be limited to, the transportation needs of the family, and environmental and social risks.

Furthermore, the Plan may not:

- Reduce or limit the reimbursement of the attending provider for providing care to an individual enrollee in accordance with the coverage requirements.
- Provide monetary or other incentives to an attending provider to induce the provider to provide care to an individual enrollee in a manner inconsistent with the coverage requirements.
- Deny a mother or her newborn eligibility, or continued eligibility, to enroll or to renew coverage solely to avoid the coverage requirements.
- Provide monetary payments or rebates to a mother to encourage her to accept less than the minimum coverage requirements.
- Restrict inpatient benefits for the second day of hospital care in a manner that is less than favorable to the mother or her newborn than those provided during the preceding portion of the hospital stay.
- Require the treating physician to obtain authorization from the Plan prior to prescribing any services covered by this section.
Medicaid and the Children’s Health Insurance Program (CHIP) Offer Free Or Low-Cost Health Coverage to Children and Families

If you or your children are eligible for Medicaid or CHIP and you are eligible for health coverage from your employer, your State may have a premium assistance program that can help pay for coverage. These States use funds from their Medicaid or CHIP programs to help people who are eligible for these programs, but also have access to health insurance through their employer. If you or your children are not eligible for Medicaid or CHIP, you will not be eligible for these premium assistance programs.

If you or your dependents are already enrolled in Medicaid or CHIP and you live in a State listed below, you can contact your State Medicaid or CHIP office to find out if premium assistance is available.

If you or your dependents are NOT currently enrolled in Medicaid or CHIP, and you think you or any of your dependents might be eligible for either of these programs, you can contact your State Medicaid or CHIP office or dial 1-877-KIDS NOW or www.insurekidsnow.gov to find out how to apply. If you qualify, you can ask the State if it has a program that might help you pay the premiums for an employer-sponsored plan.

Once it is determined that you or your dependents are eligible for premium assistance under Medicaid or CHIP, as well as eligible under your employer plan, your employer must permit you to enroll in your employer plan if you are not already enrolled. This is called a “special enrollment” opportunity, and you must request coverage within 60 days of being determined eligible for premium assistance. If you have questions about enrolling in your employer plan, you can contact the Department of Labor electronically at www.askebsa.dol.gov or by calling toll-free 1-866-444-EBSA (3272).

If you live in one of the following States, you may be eligible for assistance paying your employer health plan premiums. The following list of States is current as of January 31, 2014. You should contact your State for further information on eligibility –

<table>
<thead>
<tr>
<th>State</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALABAMA</td>
<td>Website: <a href="http://www.medicaid.alabama.gov">http://www.medicaid.alabama.gov</a>&lt;br&gt;Phone: 855-692-5447</td>
</tr>
<tr>
<td>ALASKA</td>
<td>Website: <a href="http://health.hss.state.ak.us/dpa/programs/medicaid/">http://health.hss.state.ak.us/dpa/programs/medicaid/</a>&lt;br&gt;Phone (Outside of Anchorage): 1-888-318-8890&lt;br&gt;Phone (Anchorage): 907-269-6529</td>
</tr>
<tr>
<td>ARIZONA</td>
<td>Website: <a href="http://www.azahcccs.gov/applicants/default.aspx">http://www.azahcccs.gov/applicants/default.aspx</a>&lt;br&gt;Phone (Outside of Maricopa County): 1-877-764-5437&lt;br&gt;Phone (Maricopa County): 602-417-5437</td>
</tr>
<tr>
<td>COLORADO</td>
<td>Medicaid Website: <a href="http://www.colorado.gov/">http://www.colorado.gov/</a>&lt;br&gt;Medicaid Phone (In state): 1-800-866-3513&lt;br&gt;Medicaid Phone (Out of state): 1-800-221-3943</td>
</tr>
<tr>
<td>State</td>
<td>Medicaid Website</td>
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<tr>
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<tr>
<td>GEORGIA</td>
<td>Website: <a href="http://dch.georgia.gov/">http://dch.georgia.gov/</a></td>
</tr>
<tr>
<td>IDAHO</td>
<td>Medicaid Website: <a href="http://www.accesstohealthinsurance.idaho.gov">www.accesstohealthinsurance.idaho.gov</a></td>
</tr>
<tr>
<td>INDIANA</td>
<td>Website: <a href="http://www.in.gov/fssa">http://www.in.gov/fssa</a></td>
</tr>
<tr>
<td>IOWA</td>
<td>Website: <a href="http://www.dhs.state.ia.us/hipp/">www.dhs.state.ia.us/hipp/</a></td>
</tr>
<tr>
<td>KANSAS</td>
<td>Website: <a href="http://www.kdheks.gov/hcf/">http://www.kdheks.gov/hcf/</a></td>
</tr>
<tr>
<td>KENTUCKY</td>
<td>Website: <a href="http://chfs.ky.gov/dms/default.htm">http://chfs.ky.gov/dms/default.htm</a></td>
</tr>
<tr>
<td>LOUISIANA</td>
<td>Website: <a href="http://www.lahipp.dhh.louisiana.gov">http://www.lahipp.dhh.louisiana.gov</a></td>
</tr>
<tr>
<td>MASSACHUSETTS</td>
<td>Website: <a href="http://www.mass.gov/MassHealth">http://www.mass.gov/MassHealth</a></td>
</tr>
<tr>
<td>MINNESOTA</td>
<td>Website: <a href="http://www.dhs.state.mn.us/">http://www.dhs.state.mn.us/</a></td>
</tr>
<tr>
<td>MISSOURI</td>
<td>Website: <a href="http://www.dss.mo.gov/mhd/participants/pages/hipp.htm">http://www.dss.mo.gov/mhd/participants/pages/hipp.htm</a></td>
</tr>
<tr>
<td>State</td>
<td>Medicaid Website</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>Montana</td>
<td><a href="http://medicaidprovider.hhs.mt.gov/clientpages/clientindex.shtml">Website</a></td>
</tr>
<tr>
<td>Nebraska</td>
<td><a href="http://www.ACCESSNebraska.ne.gov">Website</a></td>
</tr>
<tr>
<td>New Hampshire</td>
<td><a href="http://www.dhhs.nh.gov/oi/documents/hippapp.pdf">Website</a></td>
</tr>
<tr>
<td>New Jersey</td>
<td>Medicaid Website: <a href="http://www.state.nj.us/humanservices/dmahs/clients/medicaid/">http://www.state.nj.us/humanservices/dmahs/clients/medicaid/</a></td>
</tr>
<tr>
<td>New York</td>
<td><a href="http://www.nyhealth.gov/health_care/medicaid/">Website</a></td>
</tr>
<tr>
<td>North Carolina</td>
<td><a href="http://www.ncdhhs.gov/dma">Website</a></td>
</tr>
<tr>
<td>North Dakota</td>
<td><a href="http://www.nd.gov/dhs/services/medicalserv/medicaid/">Website</a></td>
</tr>
<tr>
<td>Oklahoma</td>
<td><a href="http://www.insureoklahoma.org">Website</a></td>
</tr>
<tr>
<td>Pennsylvania</td>
<td><a href="http://www.dpw.state.pa.us/hipp">Website</a></td>
</tr>
<tr>
<td>Rhode Island</td>
<td><a href="http://www.ohhs.ri.gov">Website</a></td>
</tr>
<tr>
<td>South Carolina</td>
<td><a href="http://www.scdhhs.gov">Website</a></td>
</tr>
<tr>
<td>State</td>
<td>Medicaid and CHIP Details</td>
</tr>
<tr>
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</tbody>
</table>
| SOUTH DAKOTA | Website: http://dss.sd.gov  
                Phone: 1-888-828-0059 |
| TEXAS        | Website: https://www.gethipptexas.com/  
                Phone: 1-800-440-0493 |
| UTAH         | Website: http://health.utah.gov/upp  
                Phone: 1-866-435-7414 |
| VERMONT      | Website: http://www.greenmountaincare.org/  
                Phone: 1-800-250-8427 |
| VIRGINIA     | Medicaid Website: http://www.dmas.virginia.gov/rcp-HIPP.htm  
                Medicaid Phone: 1-800-432-5924  
                CHIP Website: http://www.famis.org/  
                CHIP Phone: 1-866-873-2647 |
| WASHINGTON   | Website: http://www.hca.wa.gov/medicaid/premiumpymt/pages/index.aspx  
                Phone: 1-800-562-3022 ext. 15473 |
| WEST VIRGINIA| Website: http://www.dhhr.wv.gov/bms  
                Phone: 877-598-5820, HMS Third Party Liability |
| WISCONSIN    | Website: http://www.badgercareplus.org/pubs/p-10095.htm  
                Phone: 1-800-362-3002 |
| WYOMING      | Website: http://health.wyo.gov/healthcarefin/equalitycare  
                Phone: 307-777-7531 |

To see if any more States have added a premium assistance program since January 31, 2014, or for more information on special enrollment rights, you can contact either:

<table>
<thead>
<tr>
<th>U.S. Department of Labor</th>
<th>U.S. Department of Health and Human Services</th>
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</thead>
<tbody>
<tr>
<td>Employee Benefits Security Administration</td>
<td>Centers for Medicare &amp; Medicaid Services</td>
</tr>
<tr>
<td>1-866-444-EBSA (3272)</td>
<td>1-877-267-2323, Menu Option 4, Ext. 61565</td>
</tr>
</tbody>
</table>

OMB Control Number 1210-0137 (expires 10/31/2016)
Important Notice from Conejo Valley Unified School District about your Prescription Drug Coverage and Medicare

This Notice Applies to You (or Dependent) ONLY if such person is (1) enrolled in a group medical plan offered by Conejo Valley Unified School District AND (2) eligible for Medicare

Please read this notice carefully and keep it where you can find it. This notice has information about your current prescription drug coverage with Conejo Valley Unified School District and about your options under Medicare’s prescription drug coverage. This information can help you decide whether or not you want to join a Medicare drug plan. If you are considering joining, you should compare your current coverage, including which drugs are covered at what cost, with the coverage and costs of the plans offering Medicare prescription drug coverage in your area. Information about where you can get help to make decisions about your prescription drug coverage is at the end of this notice.

There are two important things you need to know about your current coverage and Medicare’s prescription drug coverage:

1. Medicare prescription drug coverage became available in 2006 to everyone with Medicare. You can get this coverage if you join a Medicare Prescription Drug Plan or join a Medicare Advantage Plan (like an HMO or PPO) that offers prescription drug coverage. All Medicare drug plans provide at least a standard level of coverage set by Medicare. Some plans may also offer more coverage for a higher monthly premium.

2. Conejo Valley Unified School District has determined that the prescription drug coverage offered by Conejo Valley Unified School District group medical plans are, on average for all plan participants, expected to pay out as much as standard Medicare prescription drug coverage pays and is therefore considered Creditable Coverage. Because your existing coverage is Creditable Coverage, you can keep this coverage and not pay a higher premium (a penalty) if you later decide to join a Medicare drug plan.

When Can You Join a Medicare Drug Plan?
You can join a Medicare drug plan when you first become eligible for Medicare and each year from October 15th to December 7th. However, if you lose your current creditable prescription drug coverage, through no fault of your own, you will also be eligible for a two (2) month Special Enrollment Period (SEP) to join a Medicare drug plan.

What Happens to Your Current Coverage if You Decide to Join a Medicare Drug Plan?
If you decide to join a Medicare drug plan, your current Conejo Valley Unified School District coverage will not be affected. If you do decide to join a Medicare drug plan and drop your current Conejo Valley Unified School District coverage, be aware that you and your dependents will be able to get this coverage back if there is a qualified status change or during the annual open enrollment period.
When Will You Pay a Higher Premium (Penalty) to Join a Medicare Drug Plan?
You should also know that if you drop or lose your current coverage with Conejo Valley Unified School District and don’t join a Medicare drug plan within 63 continuous days after your current coverage ends, you may pay a higher premium (a penalty) to join a Medicare drug plan later. If you go 63 continuous days or longer without creditable prescription drug coverage, your monthly premium may go up by at least 1% of the Medicare base beneficiary premium per month for every month that you did not have that coverage. For example, if you go nineteen months without creditable coverage, your premium may consistently be at least 19% higher than the Medicare base beneficiary premium. You may have to pay this higher premium (a penalty) as long as you have Medicare prescription drug coverage. In addition, you may have to wait until the following October to join.

For More Information about This Notice or Your Current Prescription Drug Coverage
Contact the person listed below for further information or call Conejo Valley Unified School District at (818) 800-8835. NOTE: You’ll get this notice each year. You will also get it before the next period you can join a Medicare drug plan, and if this coverage through Conejo Valley Unified School District changes. You also may request a copy of this notice at any time.

For More Information About Your Options Under Medicare Prescription Drug Coverage...
More detailed information about Medicare plans that offer prescription drug coverage is in the “Medicare & You” handbook. You’ll get a copy of the handbook in the mail every year from Medicare. You may also be contacted directly by Medicare drug plans.
For more information about Medicare prescription drug coverage:
Visit www.medicare.gov
Call your State Health Insurance Assistance Program (see the inside back cover of your copy of the “Medicare & You” handbook for their telephone number) for personalized help
Call 1-800-MEDICARE (1-800-633-4227). TTY users should call 1-877-486-2048

If you have limited income and resources, extra help paying for Medicare prescription drug coverage is available. For information about this extra help, visit Social Security on the web at www.socialsecurity.gov, or call them at 1-800-772-1213 (TTY 1-800-325-0778). Remember: Keep this Creditable Coverage notice. If you decide to join one of the Medicare drug plans, you may be required to provide a copy of this notice when you join to show whether or not you have maintained creditable coverage and, therefore, whether or not you are required to pay a higher premium (a penalty).
PART A: General Information

When key parts of the health care law take effect in 2014, there will be a new way to buy health insurance: the Health Insurance Marketplace. To assist you as you evaluate options for you and your family, this notice provides some basic information about the new Marketplace and employment-based health coverage offered by your employer.

What is the Health Insurance Marketplace?

The Marketplace is designed to help you find health insurance that meets your needs and fits your budget. The Marketplace offers "one-stop shopping" to find and compare private health insurance options. You may also be eligible for a new kind of tax credit that lowers your monthly premium right away. Open enrollment for health insurance coverage through the Marketplace begins in October 2013 for coverage starting as early as January 1, 2014.

Can I Save Money on my Health Insurance Premiums in the Marketplace?

You may qualify to save money and lower your monthly premium, but only if your employer does not offer coverage, or offers coverage that doesn't meet certain standards. The savings on your premium that you're eligible for depends on your household income.

Does Employer Health Coverage Affect Eligibility for Premium Savings through the Marketplace?

Yes. If you have an offer of health coverage from your employer that meets certain standards, you will not be eligible for a tax credit through the Marketplace and may wish to enroll in your employer's health plan. However, you may be eligible for a tax credit that lowers your monthly premium, or a reduction in certain cost-sharing if your employer does not offer coverage to you at all or does not offer coverage that meets certain standards. If the cost of a plan from your employer that would cover you (and not any other members of your family) is more than 9.5% of your household income for the year, or if the coverage your employer provides does not meet the "minimum value" standard set by the Affordable Care Act, you may be eligible for a tax credit.1

Note: If you purchase a health plan through the Marketplace instead of accepting health coverage offered by your employer, then you may lose the employer contribution (if any) to the employer-offered coverage. Also, this employer contribution -as well as your employee contribution to employer-offered coverage- is often excluded from income for
Federal and State income tax purposes. Your payments for coverage through the Marketplace are made on an after-tax basis.

**How Can I Get More Information?**

For more information about your coverage offered by your employer, please check your summary plan description or contact.

The Marketplace can help you evaluate your coverage options, including your eligibility for coverage through the Marketplace and its cost. Please visit [HealthCare.gov](https://HealthCare.gov) for more information, including an online application for health insurance coverage and contact information for a Health Insurance Marketplace in your area.

---

An employer-sponsored health plan meets the "minimum value standard" if the plan’s share of the total allowed benefit costs covered by the plan is no less than 60 percent of such costs.

### PART B: Information About Health Coverage Offered by Your Employer

This section contains information about any health coverage offered by your employer. If you decide to complete an application for coverage in the Marketplace, you will be asked to provide this information. This information is numbered to correspond to the Marketplace application.

<table>
<thead>
<tr>
<th>3. Employer name</th>
<th>4. Employer Identification Number (EIN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conejo Valley Unified School District</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5. Employer address</th>
<th>6. Employer phone number</th>
</tr>
</thead>
<tbody>
<tr>
<td>1400 E Janss Rd.</td>
<td>805-497-9511</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>7. City</th>
<th>8. State</th>
<th>9. ZIP code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thousand Oaks</td>
<td>California</td>
<td>91362</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>10. Who can we contact about employee health coverage at this job?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liz Jacobs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>11. Phone number (if different from above)</th>
<th>12. Email address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><a href="mailto:ejacobs@conejousd.org">ejacobs@conejousd.org</a></td>
</tr>
</tbody>
</table>

Here is some basic information about health coverage offered by this employer:

- As your employer, we offer a health plan to:
  - All employees. Eligible employees are:
    - Employees that work 30+ hours or more per week
• With respect to dependents:

☐ We do offer coverage. Eligible dependents are:

Your spouse as recognized under state or federal law. This includes same sex spouses when legally married.

Your domestic partner if you are in a legally registered and valid domestic partnership.

Your, your spouse’s, or your domestic partner’s natural children, step children, legally adopted children, or children for whom you, your spouse or domestic partner have been appointed legal guardians by a court of law, who are:

Under 26 years old, or
26 years old or more if they are not capable of getting a self-sustaining job due to a physical or mental condition

☐ If checked, this coverage meets the minimum value standard, and the cost of this coverage to you is intended to be affordable, based on employee wages.

** Even if your employer intends your coverage to be affordable, you may still be eligible for a premium discount through the Marketplace. The Marketplace will use your household income, along with other factors, to determine whether you may be eligible for a premium discount. If, for example, your wages vary from week to week (perhaps you are an hourly employee or you work on a commission basis), if you are newly employed mid-year, or if you have other income losses, you may still qualify for a premium discount.

If you decide to shop for coverage in the Marketplace, HealthCare.gov will guide you through the process. Here’s the employer information you’ll enter when you visit HealthCare.gov to find out if you can get a tax credit to lower your monthly premiums.
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Injury and Illness Prevention Program (IIPP)

We have established this written Injury and Illness Prevention Program (IIPP) in accordance with Title 8, California Code of Regulations, Section 3203, of the General Industry Safety Orders. All employees are required to comply with our safety and health procedures and practices. This includes employees at every level and in all positions.

This IIPP includes the following elements:
- Responsibility and Authority
- Compliance
- Communication
- Hazard Assessment
- Accident Investigation
- Hazard Correction
- Training and Instruction
- Record Keeping

Responsibility and Authority

The Risk Manager is the designated IIPP Administrator and has the authority and responsibility for implementing and maintaining this IIPP.

Serving as the IIPP Coordinator for CVUSD, Risk Manager is responsible for implementing and maintaining the following aspects of the safety program:
- Coordinating all risk control activities.
- Maintaining, evaluating, and revising the IIPP and conducting investigation of disabling injuries.
- Providing advice and guidance to District Directors, Management, and Supervisors.
- Communicating safety objectives.
- Developing and/or assisting in the development of employee training programs.
- Participating in the District Safety Committee.
- Reviewing all accident reports and investigations.
- Ensuring the District is adhering to federal, state, and local safety codes.
- Serving as liaison between management and outside safety agencies.

Management Responsibilities

CVUSD establishes responsibility for the implementation of this IIPP. The Superintendent is responsible for ensuring that the operations of the District are conducted in accordance with these provisions of the IIPP. Risk Manager has the full authority and responsibility for implementing and maintaining this program.

District employees with management responsibilities include the Superintendent, Directors, Principals, and any other employee charged with a management role. Management is responsible, where appropriate, for specific elements of the IIPP as follows:
- Managing the injury prevention efforts in their area of responsibility.
- Providing the necessary means of ensuring a safe and healthy work environment for their staff.
- Providing supervisors and employees with safety training and job instruction.
• Managing safety discipline.
• Ensuring compliance with federal, state, and local safety codes. Cal/OSHA safety regulations can be found in CCR Title 8. These regulations can be accessed via the Internet at: https://www.dir.ca.gov/samples/search/query.htm
• Participating in the investigation of disabling injuries.

Supervisor Responsibilities

Supervisors have an integral role within the IIPP. Supervisors are in constant and direct contact with their employees and can greatly influence safety attitudes and practices. It is essential that Supervisors set the example for employees in regards to safety responsibilities. There are several specific responsibilities for Supervisors, as follows:

• Taking any reasonable action necessary to prevent injuries where an immediate danger exists.
• Taking responsibility for safety of all employees under their supervision and for any employee not under their supervision but in the supervisor’s work area.
• Taking responsibility for safety of all employees that may be in the work area.
• Providing and maintaining a clean and hazard-free work area.
• Providing safety orientation and job instruction of supervised employees.
• Planning, conducting, and documenting safety evaluations in assigned areas of responsibility.
• Conducting planned safety meetings with employees.
• Conducting safety observations of employee safe work practices.
• Developing and maintaining cooperative safety attitudes in employees through the application of approved methods or preventive and corrective discipline.

Employees Responsibilities

Employees are charged with adhering to the IIPP as directed by management. Employees are responsible for:

• Adhering to all safety rules and operating procedures established by the District.
• Wearing appropriate personal protective equipment (PPE) as required and provided by the District.
• Inspecting and maintaining equipment for proper and safe operation.
• Reporting all injuries immediately.
• Encouraging other workers to work in a safe manner.
• Reporting all observed unsafe acts and conditions to their Supervisor.
• Reporting to work in an acceptable condition and not under the influence of alcohol or drugs.

Employees Rights

Employees have several rights with respect to occupational safety. Employees have the right to:

• Safe and healthful working conditions.
• Receive training in general safe work practices and specific training with regard to hazards unique to any job assignment.
• Refuse work that would violate a health and safety standard or order where such violation would pose a real and apparent hazard to their safety or health.
Maintenance & Operations Responsibilities

The CVUSD Maintenance & Operations Department has a critical role in maintaining all sites and facilities in proper and safe condition. The IIPP-related responsibilities of the Maintenance & Operations Department are as follows:

- Responding immediately to maintenance work requests concerning safety related issues. These maintenance requests must be given the highest priority.
- Procedures in accordance with Cal/OSHA lockout/block out and tag out regulations will be strictly adhered to for locking, blocking, and tagging out unsafe equipment, electrical circuitry, and equipment with moving parts. Lockout/block out and tag out procedures will be used if equipment is in need of repair or is no longer in use.
- All equipment shall be used in a safe manner for which the equipment is intended and in accordance with manufacturers’ instructions and recommended rules for safe operation.
- Contracting with outside vendors as necessary to complete repairs that the Maintenance & Operations Department is not trained, equipped, or qualified to conduct.
- Posting required safety related signs as requested by District Management and Site Administrators.

Compliance

All employees, including managers and supervisors, are responsible for using safe work practices; following all directives, policies, and procedures; and assisting in maintaining a safe work environment.

The system to ensure all employees comply with these practices may include one or more of the following:

- Informing employees of the requirements within our IIPP in a readily understandable language
- Training employees on general safety policies, rules, and work practices
- Providing employees with the Safety Handbook at the time of hire
- Recognizing employees who perform safe and healthful work practices
- Providing additional training to employees whose safety performance is deficient
- Disciplining employees for failure to comply with safe and healthful work practices. Personnel whose safety record requires follow-up, additional training, or discipline, including discharge, may be identified through a variety of sources (i.e. the maintenance of records, loss run reports, injury investigations, verbal complaints/concerns, etc.).
- Disciplinary action – Employees found violating workplace safety practices or found jeopardizing the safety of any other employee or visitor will be subject to disciplinary action in accordance with District policies and MOUs.
- Supervisory observations – As appropriate, supervisors may conduct observations of work practices for employees under their direct supervision. These observations may be conducted to ensure employee compliance with safe and healthy work practices.

Communication

All managers and supervisors are responsible for communicating with employees about occupational safety and health in a form readily understandable by all employees. Our communication system encourages all employees to inform their managers and supervisors about workplace hazards without fear of reprisal. Employees can anonymously report workplace hazards by:
- Calling or providing a written notification to the Risk Manager and/or your immediate supervisor
- An anonymous reporting form which can be found in Appendix B of the IIPP

Our communication system includes:
- New employee orientation including a discussion of safety and health policies and procedures
- Review of our IIPP
- Safety training programs
- Regularly scheduled safety meetings
- Posted or distributed safety information
- A labor/management safety committee that:
  - Meets regularly, but not less than quarterly
  - Prepares written records of issues discussed at the meetings
  - May review periodic site inspections
  - May review work-related causes of occupational accidents/incidents
  - May review investigations of alleged hazardous conditions
  - May submit recommendations to assist with employee safety suggestions
  - May verify abatement of citations issued by Cal/OSHA

Hazard Assessment

Periodic inspections will be conducted to evaluate physical hazards, use of hazardous materials, and safe work practices. The periodic inspections are typically conducted by the Ventura County Schools Self-Funding Authority (VCSSFA) and commonly scheduled on a frequency of every 1-2 years.

In addition to the department periodic inspection schedule, inspections will be conducted as required in the following situations:

- When we initially established our IIPP;
- When new substances, processes, procedures, or equipment that present potential new hazards are introduced into our workplace;
- When new, previously unidentified hazards are recognized;
- When occupational injuries and illnesses occur; and
- Whenever workplace conditions warrant an inspection

Hazard Correction

When unsafe or unhealthy work conditions, practices, or procedures are observed or discovered, they will be corrected in a timely manner based on the severity of the hazard(s). When an imminent hazard exists that cannot be immediately corrected, the exposed employees will be removed from the immediate hazard except those needed to correct the condition and to address security issues. Employees who are required to correct the hazardous condition will be provided with the necessary protection.

Directors, Principals and Supervisors are to initiate the appropriate corrective action by way of a work order or communication with Maintenance and Operations or Risk Management.

Accident/Incident Investigations
Procedures for investigating workplace accidents and hazardous substance exposures may include:

- Interviewing injured employees and witnesses;
- Examining the workplace for factors associated with the accident/exposure;
- Determining the cause of the accident/exposure;
- Taking corrective action to prevent the accident/exposure from reoccurring; and
- Recording the findings and actions taken.

**Accident Investigation Procedures**

A work-related injury must be reported to your supervisor and the employee must document the injury by calling Company Nurse (Appendix C). However, this does not mean that you must see a doctor.

- If you see a doctor, please do not report back to work until you have provided your supervisor with a copy of your doctor’s note and completed the additional time sensitive paperwork given to you by your site or Risk Management.
- The supervisor will complete a Supervisor’s Report of Accident form, and provide to Risk Management.
- A predesignation form must be on file should you wish to see your own physician. For guidelines on how to predesignate, contact Personnel Services.
- The supervisor will contact Risk Management to report deaths or serious injuries or illnesses (see Eight Hour Reporting Requirement for the definition of a serious injury or illness).
- Risk Management will report any death or serious injury or illness to Cal/OSHA (notification to Cal/OSHA means as soon as practically possible but no longer than eight hours from the Agency’s receipt of knowledge of the serious injury or illness – see Eight Hour Reporting Requirement below).

**Eight (8) Hour Reporting Requirement**

Per Title 8, California Code of Regulations, Section 342, of the General Industry Safety Orders, “Every employer shall report immediately by telephone or telegraph to the nearest District Office of the Division of Occupational Safety and Health any serious injury or illness, or death, of an employee occurring in a place of employment or in connection with any employment. Immediately means as soon as practically possible but not longer than 8 hours after the employer knows or with diligent inquiry would have known of the death or serious injury or illness. If the employer can demonstrate that exigent circumstances exist, the time frame for the report may be made no longer than 24 hours after the incident.”

"Serious injury or illness" means any injury or illness occurring in a place of employment or in connection with any employment which requires inpatient hospitalization for a period in excess of 24 hours for other than medical observation or in which an employee suffers a loss of any member of the body or suffers any serious degree of permanent disfigurement, but does not include any injury or illness or death caused by the commission of a Penal Code violation, except the violation of Section 385 of the Penal Code, or an accident on a public street or highway.

**Training and Instruction**
All employees will participate in safety training on general and job-specific hazards and safe work practices. Each supervisor and manager will be trained on all health and safety hazards to which employees under their immediate direction and control are exposed.

In addition to hazard-specific safety training, training will be provided when:

- The IIPP is first established
- New employees are hired
- Employees are reassigned to a new area or task with no prior training
- New substances, operations, or equipment are introduced

Training Resources
- Risk Management can assist in providing health and safety training to employees on a variety of topics (Risk Management can also assist in obtaining outside assistance).
- Risk Management has access to online safety training, streaming videos, a collection of safety publications, and safety professionals to assist in implementing training programs.
- **Target Solutions Online Training Program**: Every employee has access to this online training resource.
- The [VCSSFA website](http://www.vcssfa.com) has a variety of resources available.

Record Keeping

All the following IIPP documentation is maintained for three years:

- Safety training for each employee, including the employee's name, training dates, type of training, and training providers
- Inspections, including the person(s) conducting the inspection; the unsafe conditions and work practices identified; corrective action, and follow up
- Injury and illness investigations
- Annual program reviews

**Note**: Per Title 8, CCR Section 3203 we are not required to keep records concerning the steps taken to implement the IIPP. Additionally, per the California Code of Regulations, Title 8 Sections 14300.2 we are not required to keep Cal/OSHA injury or illness records (Cal/OSHA Log 300), unless the government asks us to keep these records.
Appendix A – Hazardous/Unsafe Condition Report

Person conducting inspection: ____________________________ Date: __________________

Area(s) inspected:

Were any unsafe conditions or work practices identified? □ Yes □ No

If yes, please describe:

What action(s) have been taken to correct the unsafe conditions or work practices identified?
# Appendix B – Employee Safety Report

This form is to be completed when a hazard or dangerous situation has been noted by an employee. This form can be completed anonymously.

## Employee

**To:** Risk Management  

<table>
<thead>
<tr>
<th>Date:</th>
<th>Name (optional):</th>
<th>Dept:</th>
</tr>
</thead>
</table>

**Area of concern:**  
(Site, Office, Room, etc.)

**Please print the safety concern in detail:**

---

Has this concern been previously reported to the supervisor?  
- [ ] Yes  
- [ ] No

If No, give this original completed form to Risk Management & a copy to your site.

**Signature (optional):**

---

RETURN THIS COMPLETED FORM TO RISK MANAGEMENT

## Risk Management Use Only

**Date received:**

<table>
<thead>
<tr>
<th>Received by:</th>
</tr>
</thead>
</table>

**Concerned:**  
- [ ] Addressed  
- [ ] Work Order  

**Date:**
Appendix C – Reporting Workplace Injuries

IN CASE OF WORKPLACE INJURY:
ACCION a seguir en caso de un accidente en el trabajo

COMPANY NURSE®
Injury Hotline
1-855-602-5267

AVAILABLE 24 HOURS A DAY

1. Injured worker notifies supervisor.
   Empleado lesionado notifica a su supervisor.

2. Supervisor / Injured worker immediately calls injury hotline.
   Supervisor / Empleado lesionado llama inmediatamente a la línea de enfermeros/las.

3. Company Nurse gathers information over the phone and helps injured worker access appropriate medical treatment.
   Profesional Médico obtiene información por teléfono y asiste al empleado lesionado en localizar el tratamiento médico adecuado.

<table>
<thead>
<tr>
<th>EMPLOYER NAME</th>
<th>SEARCH CODE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conejo Valley Unified School District</td>
<td>VCS11</td>
</tr>
</tbody>
</table>

Notice to Employer/Supervisor:
Please post copies of this poster in multiple locations within your worksite. If the injury is non-life threatening, please call Company Nurse prior to seeking treatment. Minor injuries should be reported prior to leaving the job site when possible.

Visit us online: www.CompanyNurse.com
**CONEJO VALLEY UNIFIED SCHOOL DISTRICT**
**SUPERVISOR’S REPORT OF ACCIDENT**

**TO BE COMPLETED BY SUPERVISOR AFTER INVESTIGATING ACCIDENT**
**FOR INTERNAL USE ONLY**

*Supervisor’s Instructions: The information on this form is confidential, and must be completed by the employee’s supervisor or designee. Please complete this form after investigation of the incident. If more space is needed for any question, please continue on the reverse side of the form.*

---

### Employee Information

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Job Title</th>
<th>Work Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Date of Injury</th>
<th>Time of Injury</th>
<th>Date Supervisor Notified of Injury</th>
<th>Supervisor’s Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Did the employee seek medical attention?  

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Name and address of doctor</th>
<th>Supervisor Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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---

### Incident Information

Do you believe any unsafe building or working conditions may have contributed to the incident? (e.g. layout of operations, floors, platforms; defective tools, machines, materials; improper lighting, ventilation, sanitation/hygien; unsuitable or improper protective equipment or clothing, etc.)  

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

If you answered yes to the above, what steps have been taken to correct the unsafe condition? (work order, disposal of defective tools or materials, etc.)

---

Do you believe any housekeeping practices may have contributed to the incident?  

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
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<tbody>
<tr>
<td></td>
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</table>

If yes, please explain:

---

Do you believe the incident was due to the employee’s behavior? (e.g. unsafe work practice, inexperience, untrained in procedure, incorrect use of tools or equipment, improper lifting, etc.)  

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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If yes, please explain:

---

Additional Comments:

---

CVUSD 91-90003 pk 25 Rev. 5/2004
Appendix D – Sample Worker Training and Instruction Record

<table>
<thead>
<tr>
<th>Print Name</th>
<th>Signature</th>
<th>Initial Training Date</th>
<th>Refresher Training Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
Appendix E – Protective Clothing Reference Chart

**Note:** This is a general reference chart only. Always consult the tool/equipment manual or your supervisor for the required protective clothing before using any tool or equipment.

<table>
<thead>
<tr>
<th>TOOL/EQUIPMENT</th>
<th>Hard Hat</th>
<th>Goggles</th>
<th>Gloves</th>
<th>Hearing</th>
<th>Mask</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Trimmer</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Edger</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Hedge Trimmer</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Chain Saw</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Blower</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Pressure Washer</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Power Auger</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Trencher</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
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CODES OF SAFE PRACTICES - CUSTODIAN

Personal Safety Rules

Often custodians work alone at night. Special precautions must be taken against unwanted visitors.

A. **Pay attention to your surroundings.** Custodial work can become routine and your attention may waver. You must keep alert and aware of what is going on around you.

B. **Work in a well-lit area.** Make sure security lighting is functioning properly. Replace burnt bulbs and clean lenses when necessary; report inoperative outside security lights to your supervisor. Adjust cleaning schedules to include unlit areas during daylight hours when possible. Obtain a flashlight if it would be useful.

C. **Know where co-workers are working.** Know where to get help if you need it. To communicate with co-workers, custodians can use two-way radios. Just the sight of the radio may be a deterrent to unwanted visitors.

D. **Get help with heavy or awkward objects.** Don’t try to do a job by yourself if it requires two people to do it safely.

E. **When working inside, make sure entrances are secured.** Check doors to make sure they are locked from the inside when cleaning interiors. Make sure you can promptly exit the room in an emergency.

F. **Use good judgment.** You are not a police officer or security guard. Only approach unwanted visitors when you feel comfortable doing so. Don’t hesitate to call 911 for help.

Storeroom Safety Rules

An overcrowded, unorganized storeroom is an accident about to happen. A misplaced broom or mop may cause you to trip and injure yourself. Improperly stored cleaning supplies can cause serious injuries. A neat, clean storeroom can greatly reduce the potential for accidents.

A. **Store supplies safely.** All chemical containers must be properly labeled; store chemicals according to instructions on container labels. Be aware of where the Material Safety Data Sheets (MSDS) are kept for all the chemicals you use. Flammable cleaning supplies must be stored away from sources of ignition like hot water heaters.

B. **Weight can be a safety hazard.** Heavier items should be stored on the lower shelves at about chest height or lower. Be careful not to overload shelves.

C. **Electrical/water heater rooms are not storerooms.** Rooms with electrical panels are not designated as storerooms. However, if electrical rooms must be used for storage, make sure there is clear area at least 36" from electrical panels. Electrical rooms must be free of all liquids. A water heater is a source of ignition. Don’t store flammable materials in rooms with water heaters.

D. **Keep it neat.** Keep at least one aisle of your storage areas open at all times. Protruding nails and torn or sharp corners can cause serious cuts and bruises. Remove or pad them. Be alert to the careless actions of others.
Ladder Safety Rules:

A. **Use a straight ladder if you must lean the ladder against a support.** Avoid using an “A” frame ladder in this situation - it’s not the right equipment for the job. When using a straight ladder, be sure to secure the ladder before standing on it. Metal ladders must not be used near exposed electrical circuits or power lines. “A” frame ladders are safest if they are ten feet or less in length - never use one over 20 feet long.

B. **Inspect the ladder before you use it.** No ladder is safe if it is missing rungs, if the rungs or rails are defective, or if it is in a weakened condition. Wood ladders should be inspected for side rails that are cracked or split, and sharp edges or splinters on cleats, rungs or side rails. Make certain spreaders can be locked in place. Be sure straight ladders have safety feet. If a ladder cannot be repaired, dispose of it promptly.

C. **Set up your ladder safely.** If you must set up a ladder in a traffic area, use a barricade or guard to prevent unexpected collisions. Lock or block any nearby doors that open toward you. Keep the area around the ladder base uncluttered. Avoid side-to-side tilting by resting your ladder base on a solid level surface. When using a stepladder, make sure it’s fully open and its spreader is locked. Position a straight ladder at a four-to-one ratio - means every four feet of the ladder’s length to one foot away from the support point. Never lean a ladder against an unstable surface.

D. **Climb and descend ladders cautiously.** Face the ladder and hold on with both hands. If you need tools, carry them in a tool belt or raise and lower them with a hand line. Don’t take a chance on slipping - check ladder rungs and the bottoms of your shoes for slippery substances. Take one step at a time and don’t skip steps.

E. **Use common sense when working on ladders.** Never reach or lean too far to either side. To maintain your balance, keep your belt buckle between the ladder rails. Don’t climb higher than the second tread from the top on a stepladder or the third rung from the top on a straight ladder. Only one person may be on a ladder at a time. Don’t place tools on the rungs or top of the ladder.

Electrical Powered Tool Safety Rules

Tools can save time and make your job easier, but each power tool has potential risks that must not be ignored. Because you use you tools daily, you can begin to take them for granted. Always think “safety” when using your tools.

A. **Manufacturers supply manuals with tools and equipment.** Read the manuals before you use the equipment. Keep the manuals handy for future reference. Have an experienced operator provide instructions and a demonstration of the equipment before you use it. Practice using the equipment before you begin a large-scale job.

B. **Prepare the equipment and yourself for work.** Examine the tools for safety defects before you use them. Check electrical cords for frayed wires and defective plugs. If an extension cord is required, make sure the gauge of wire in the cord is compatible with the power supply and tool. Make sure the ground plug is in place. Examine the tool for cracks and safety defects. Check for loose or missing bolts and knobs. Keep safety guards in place at all times. Wear protective clothing provided by your supervisor and recommended by the equipment manufacturer (see Protective Clothing Reference Chart).

C. **Avoid hazards while operating equipment.** Clear the work area of trip, slip, and fall hazards and things that might get in your way while working. Designate the work areas with safety cones when possible. Keep a tight grip on the equipment and position the tool comfortable close to your
body. Be mindful of others around you. Always shut off the tool when you are not using it and disconnect it from the power supply.

D. **Charging batteries can be dangerous.** Take special precautions when charging batteries on electric carts. Read the manual before beginning. Charge the batteries only in a well-ventilated area away from any sources of ignition and where there is an eye wash station and deluge shower.

E. **Report any inoperative or unsafe equipment to your supervisor.** Take unsafe equipment out of service until it can be repaired or replaced.

**Fuel Powered Tool Safety Rules**

These tools have potential risks that must not be ignored. Oscillating blades on hedge trimmers can cut and maim. High velocity air from blowers can kick up dust and debris into the eyes and lungs. The cutting surfaces of chain saws are capable of gnawing chunks of skin and bones. Tools can save time and make your job easier, but each power tool has potential risks that must not be ignored. Because you use your tools daily, you can begin to take them for granted. Always think “safety” when using your tools.

A. **Manufacturers supply manuals with tools and equipment.** Read the manuals before you use the equipment. Keep the manuals handy for future reference. Have an experienced operator provide instructions and a demonstration of the equipment before you use it. Practice using the equipment before you begin a large-scale job.

B. **Take care when refueling and storing the equipment.** Using a safety can, refuel on a hard surface in a well ventilated area. Refuel when the tool or equipment is cool and let the pierce cool before transporting and storing it. If storing for long periods, drain the liquids. Fuel must be kept in and dispensed from an Underwriters Laboratory (UL) listed safety container and stored in a properly vented flammable liquids cabinet.

C. **Prepare the tool and yourself for work.** Examine the equipment for safety defects before you use them. Examine the tool for cracks and safety defects. Check for loose or missing bolts and knobs. Keep safety guards in place at all times. Wear protective clothing provided by your supervisor and recommended by the equipment manufacturer (See Protective Clothing Reference Chart).

D. **Avoid hazards while operating equipment.** Clear the work area of trip, slip, and fall hazards and things that might get in your way while working. Designate the work areas with safety cones when possible. Be mindful of pedestrians, wire fences and objects hidden in the grass and hedges. Shut off the tool when not using it. Remember, hot tools can cause severe burns.

**Lifting Rules - Proper Body Mechanics:**

It is just as important to keep your body in shape for the task as it is any other tool you use for other jobs. You can injure yourself just as easily lifting light objects as you can lifting heavier ones if you don’t lift properly and your “tool” is not in shape for the job. Lifting is a thinking person’s job.

A. **Before you lift something, prepare yourself and plan the move.** Make sure you are limber and physically fit enough to do the task safely. Daily exercises will keep your body ready for lifting and help you feel better. Size up the load to make sure you can handle it safely. If you think the load is too bulky or too heavy, ask someone to help you or try to break it up into smaller, more manageable loads. Use a hand truck or dolly if necessary. Plan your route and make sure the path is clear of trip, slip, and fall hazards.

B. **Use proper body mechanics when lifting.** Stand close to the object with your feet about shoulder width apart. Squat down, bending at the hips and knees. Keep your back straight. As
you grip the load, arch your lower back inward by pulling your shoulders back and sticking your chest out with chin tucked in. Be sure to keep the load close to your body. When you set the load down, squat down, bending at the hips and knees, keeping your lower back arched in.

C. **Turn, don’t twist.** Twisting is not the thing to do. Instead of twisting, turn your whole body in the direction that you want to go. Twisting when carrying a load puts a lot of undue stress on your back.

D. **Push, don’t pull.** Whenever you have to move something that’s on a cart, a dolly, or a hand truck, push the load. Pushing puts less strain on your back.

E. **Don’t store heavy objects higher than your waist.** If heavy objects aren’t stored higher than your waist then you won’t have to lift them higher than you waist. Lifting objects overhead puts a lot of undue stress on your back. It’s one of the surest ways to injure your back.

F. **Lift like a pro and avoid the pain.** Learning how to lift and carry safely is one of the most important things you can do for your back. It’s not hard to put these suggestions to use, and the payoffs will be well worth the time and effort you put into it.

### Riding Equipment Safety Rules

Not only the operator of riding equipment is at risk, but also other staff and students in the area. Awareness of safety must be high at all times when using this equipment.

A. **All riding equipment comes equipped with manuals.** Read the manuals and become completely familiar with the equipment before using it. Keep the manuals handy for future reference. Have an experienced operator provide instructions and a demonstration of the equipment before you use it. Practice on a small area before taking the equipment out on the job.

B. **Prepare the equipment and yourself for work.** Thoroughly inspect the equipment prior to using it (most equipment manuals have inspection checklists). Make sure all the factory installed safety devices are operating properly and don’t use the equipment if they are not. Immediately report all equipment faults to your supervisor. Wear protective clothing. (See Protective Clothing Reference Chart).

C. **Avoid hazards while operating the equipment.** Before you start to use the equipment clear the work area of potential hazards. Check the area for rocks and small objects that could be hurled by the blades. Remove other obstructions. Designate the work areas with safety cones or barrier tape when possible.

D. **Keep alert.** While using some riding equipment, it is possible to lost concentration. You must guard against becoming unaware of your surroundings. Keep staff and students at a safe distance from the equipment and work area. Never allow other riders on the equipment when you are operating it. Students are never allowed on any riding equipment.

E. **Do not leave the equipment unattended.** After turning off the equipment according to the manual instructions, remove the ignition key. The equipment must never be left unattended in an area where students have access - children may thing it is an interesting toy, not the potentially dangerous piece of equipment it is.

F. **Follow shutdown instructions in the manual.** Carefully follow the post-operating instructions contained in the manual. Always clean the equipment after use and store it in a secure area.
CODES OF SAFE PRACTICE - MAINTENANCE WORKERS

Electrical Repairs Safety Rules

A. Take charge of the source of power. Disconnect the fixture or equipment from its source of power and make sure it cannot be electrified without your knowledge and consent. Install your own padlock on the circuit breaker panel or lever to ensure that you have control over the electrical supply system. If it is not possible to lock the panel, post a sign stating “Person at Work”. Remove the padlock or sign when the task is complete.

B. Do not perform electrical repairs around water.
C. Never put your hands into an area that you cannot see. Live wires may be there.
D. Always replace a fuse with one that is of the same type and size.
E. All electrical installations should be made in compliance with the National Electric Code.

Plumbing Repairs Safety Rules

A. Be careful with P.V.C. cement. When using P.V.C. cement, make sure the work area is well ventilated and there are not sources of ignition nearby. Always wash your hands after using P.V.C. cements and solvents.

B. Inspect the immediate work area prior to performing brazing operations. Ensure that no flammable liquids or combustible materials are present.
C. Ensure that a fire extinguisher is available. If brazing is done in or near wall studs or other flammable material, a Class A portable fire extinguisher should be immediately available.

Ladder Safety Rules:

A. Use a straight ladder if you must lean the ladder against a support. Avoid using an “A” frame ladder in this situation - it’s not the right equipment for the job. When using a straight ladder, be sure to secure the ladder before standing on it. Metal ladders must not be used near exposed electrical circuits or power lines. “A” frame ladders are safest if they are ten feet or less in length - never use on over 20 feet long.

B. Inspect the ladder before you use it. No ladder is safe if it is missing rungs, if the rungs or rails are defective, or if it is in a weakened condition. Wood ladders should be inspected for side rails that are cracked or split, and sharp edges or splinters on cleats, rungs or side rails. Make certain spreaders can be locked in place. Be sure straight ladders have safety feet. If a ladder cannot be repaired, dispose of it promptly.

C. Set up your ladder safely. If you must set up a ladder in a traffic area, use a barricade or guard to prevent unexpected collisions. Lock or block any nearby doors that open toward you. Keep the area around the ladder base uncluttered. Avoid side-to-side tilting by resting your ladder base on a solid level surface. When using a stepladder, make sure it’s fully open and its spreader is locked. Position a straight ladder at a four-to-one ratio - means every four feet of the ladder’s length to one foot away from the support point. Never lean a ladder against an unstable surface.

D. Climb and descend ladders cautiously. Face the ladder and hold on with both hands. If you need tools, carry them in a tool belt or raise and lower them with a hand line. Don’t take a chance on slipping - check ladder rungs and the bottoms of your shoes for slippery substances. Take one step at a time and don’t skip steps.

E. Use common sense when working on ladders. Never reach or lean too far to either side. To maintain your balance, keep your belt buckle between the ladder rails. Don’t climb higher than the second tread from the top on a stepladder or the third rung from the top on a straight ladder.
Electrical Powered Tool Safety Rules
Tool can save time and make your job easier, but each power tool has potential risks that must not be ignored. Because you use you tools daily, you can begin to take them for granted. Always think “safety” when using your tools.

A. Manufacturers supply manuals with tools and equipment. Read the manuals before you use the equipment. Keep the manuals handy for future reference. Have an experienced operator provide instructions and a demonstration of the equipment before you use it. Practice using the equipment before you begin a large-scale job.

B. Prepare the equipment and yourself for work. Examine the tools for safety defects before you use them. Check electrical cords for frayed wires and defective plugs. If an extension cord is required, make sure the gauge of wire in the cord is compatible with the power supply and tool. Make sure the ground plug is in place. Examine the tool for cracks and safety defects. Check for loose or missing bolts and knobs. Keep safety guards in place at all times. Wear protective clothing provided by your supervisor and recommended by the equipment manufacturer (see Protective Clothing Reference Chart).

C. Avoid hazards while operating equipment. Clear the work area of trip, slip, and fall hazards and things that might get in your way while working. Designate the work areas with safety cones when possible. Keep a tight grip on the equipment and position the tool comfortable close to your body. Be mindful of others around you. Always shut off the tool when you are not using it and disconnect it from the power supply.

D. Report any inoperative or unsafe equipment to your supervisor. Take unsafe equipment out of service until it can be repaired or replaced.

Lifting Rules - Proper Body Mechanics:
It is just as important to keep your body in shape for the task as it is any other tool you use for other jobs. You can injure yourself just as easily lifting light objects as you can lifting heavier ones if you don’t lift properly and your “tool” is not in shape for the job. Lifting is a thinking person’s job.

A. Before you lift something, prepare yourself and plan the move. Make sure you are limber and physically fit enough to do the task safely. Daily exercises will keep your body ready for lifting and help you feel better. Size up the load to make sure you can handle it safely. If you think the load is too bulky or too heavy, ask someone to help you or try to break it up into smaller, more manageable loads. Use a hand truck or dolly if necessary. Plan your route and make sure the path is clear of trip, slip, and fall hazards.

B. Use proper body mechanics when lifting. Stand close to the object with your feet about shoulder width apart. Squat down, bending at the hips and knees. Keep your back straight. As you grip the load, arch your lower back inward by pulling your shoulders back and sticking your chest out with chin tucked in. Be sure to keep the load close to your body. When you set the load down, squat down, bending at the hips and knees, keeping your lower back arched in.

C. Turn, don’t twist. Twisting is not the thing to do. Instead of twisting, turn your whole body in the direction that you want to go. Twisting when carrying a load puts a lot of undue stress on your back.

D. Push, don’t pull. Whenever you have to move something that’s on a cart, a dolly, or a hand truck, push the load. Pushing puts less strain on your back.

E. Don’t store heavy objects higher than your waist. If heavy objects are not stored higher than
you waist then you won’t have to lift them higher than your waist. Lifting objects overhead puts a lot of undue stress on your back. It’s one of the surest ways to injure your back.

F. **Lift like a pro and avoid the pain.** Learning how to lift and carry safely is one of the most important things you can do for your back. It’s not hard to put these suggestions to use, and the payoffs will be well worth the time and effort you put into it.

**Machinery Safety Rules**

A. **Manufacturers supply manuals with machinery.** Read the manuals and become completely familiar with the equipment before using it, paying particular attention to the potential hazards of each piece of machinery. Keep the manuals handy for future reference. Have an experienced operator provide instructions and a demonstration of the equipment before you use it.

B. **Learn safeguarding techniques for each machine.** Become familiar with the purpose and nature of each required guard, and how to inspect and use the guards. Do not remove the guards without the approval of the maintenance supervisor.

C. **Prepare the equipment and yourself for work.** Thoroughly inspect the equipment prior to using it (most equipment manuals have inspection checklists). Make sure all the factory installed safety devices are operating properly and don’t use the equipment if they are not. Immediately report all equipment faults to your supervisor.

D. **Review the Personal Protective Equipment (PPE) required for safe use of each machine.** Become familiar with and wear the protective clothing provided by your supervisor and recommended by the equipment manufacturer (see Protective Clothing Reference Chart).

E. **Be aware of the non-mechanical hazards.** Recognize other potential hazards; they include noise (wear hearing protection if recommended), possible chemical splashing, sparking and excessive heat.

F. **Keep the area in and around the machine neat and well lit.** Poor housekeeping and lighting are factors in a number of machine injuries. Any limitations to vision or mobility are potentially dangerous.

G. **Do not wear loose fitting clothes or jewelry.** Long hair also needs to be confined.

H. **Follow lockout/tagout procedures when performing maintenance.** Review the procedures with your supervisor before disconnecting the machine from its source of power. Stay in control of that source of power - through either a lock or tag - while working on the machine.

**Storeroom Safety Rules**

An overcrowded, unorganized storeroom is an accident about to happen. A neat, clean storeroom can greatly reduce the potential for accidents.

A. **Store chemicals safely.** All chemical containers must be properly labeled; store chemicals according to instructions on container labels. Be aware of where the Material Safety Data Sheets (MSDS) are kept for all the chemicals you use. Store flammable materials in a properly vented flammable liquids cabinet away from sources of ignition like hot water heaters.

B. **Store your tools safely.** Each tool should have its place in the storeroom. The tools should only be stored after inspecting them for safety hazards and cleaning them. Check electrical tools for frayed wires and defective plugs. Make sure the ground plug is in place. Cords should be neatly wrapped and secured on the tool. Keep extension cords in good repair.

C. **Weight can be a safety hazard.** Heavier items should be stored on the lower shelves at about chest height or lower. Be careful not to overload shelves.

D. **Electrical/water heater rooms are not storerooms.** Rooms with electrical panels are not designed as storerooms. However, if electrical rooms must be used for storage, make sure there is clear area at least 36” from electrical panels. Electrical rooms must be free of all liquids. A
water heater is a source of ignition. Don’t store flammable materials in rooms with water heaters.

E. **Keep it neat.** Keep at least one aisle of your storage areas open at all times. Protruding nails and torn or sharp corners can cause serious cuts and bruises. Remove or pad them. Be alert to the careless actions of others.
General Kitchen Safety Rules
A. Be aware of where you are walking. Trip and slip hazards are common in the kitchen. Always put out “Caution, Wet Floor” signs before damp mopping a hard surface floor. Always mop up liquid spills immediately.

B. Be aware of the location of the nearest fire extinguisher. It may come in handy. Read the instruction on the fire extinguisher now, before you need to use it.

C. Watch out for other employees who may be daydreaming, in a hurry, or engaging in horseplay. All of those behaviors jeopardize both their own safety and yours.

D. Know the general layout of the kitchen and the location of the nearest exit in case you have to leave the area in a hurry.

E. Assume heat-producing equipment, such as stoves and steamers, are hot.

F. Don’t use wet potholders or mittens. The moisture will transmit heat to your hands.

G. Water and hot grease can be a burn hazard. Don’t put a wet basket into a hot deep fryer. This could cause splattering which results in a burn.

H. Be cautious of loose clothing when operating equipment. It could get caught in the equipment.

I. Be sure others are aware of what you are doing. This awareness could help prevent accidental or careless movements that could result in an injury.

J. Rolling carts should be pushed, not pulled. If carts don’t move easily, inspect the wheels for damage. Be aware of cracks and bumps when pushing carts on asphalt or cement. Don’t overload carts and don’t load them top heavy.

Storeroom Safety Rules
An overcrowded, unorganized storeroom is an accident about to happen. A misplaced broom or mop may cause you to trip and injure yourself. Improperly stored food and cleaning supplies can cause serious injuries. A neat, clean storeroom can greatly reduce the potential for accidents.

A. Store supplies safely. All chemical containers must be properly labeled; store chemicals according to instructions on container labels. Be aware of where the Material Safety Data Sheets (MSDS) are kept for all the chemicals you use. Flammable cleaning supplies must be stored away from sources of ignition like hot water heaters. Cleaning supplies and food must always be stored separately.

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C. **Set up your ladder safely.** If you must set up a ladder in a traffic area, use a barricade or guard to prevent unexpected collisions. Lock or block any nearby doors that open toward you. Keep the area around the ladder base uncluttered. Avoid side-to-side tilting by resting your ladder base on a solid level surface. When using a stepladder, make sure it’s fully open and its spreader is locked. Position a straight ladder at a four-to-one ratio - means every four feet of the ladder’s length to one foot away from the support point. Never lean a ladder against an unstable surface.

D. **Climb and descend ladders cautiously.** Face the ladder and hold on with both hands. If you need tools, carry them in a tool belt or raise and lower them with a hand line. Don't take a chance on slipping - check ladder rungs and the bottoms of your shoes for slippery substances. Take one step at a time and don’t skip steps.

E. **Use common sense when working on ladders.** Never reach or lean too far to either side. To maintain your balance, keep your belt buckle between the ladder rails. Don’t climb higher than the second tread from the top on a stepladder or the third rung from the top on a straight ladder. Only one person may be on a ladder at a time. Don't place tools on the rungs or top of the ladder.

**Tools/Equipment Safety Rules**

Because you use your tools and equipment daily, you can begin to take them for granted. This is a safety hazard to be avoided. Always think “safety” when using kitchen tools and equipment.

A. **Manufacturers supply manuals with tools and equipment.** Read the manuals before you use the equipment. Keep the manuals handy for future reference. Have an experienced operator provide instructions and a demonstration of the equipment before you use it. Practice using the equipment before you begin a large-scale job.

B. **Prepare both equipment and yourself for work.** Examine the tool/equipment for safety defects before you use it. Check electrical cords for frayed wires and defective plugs. Make sure the ground plug is in place. Keep safety guards in place at all times. Make sure the ground fault interrupter is working properly. Wear the protective clothing provided by your supervisor and recommended by the equipment manufacturer.

C. **Avoid hazards while operating equipment.** Clear the work area of trip, slip, and fall hazards and things that might get in your way while working. When working with electric equipment, make sure your hands are dry. Do not stand on a wet floor when inserting the plug into or pulling the plug from the electric receptacle. Be mindful of pedestrians and your surroundings. Students should not be allowed to operate tools or equipment.

D. **Keep tools and equipment clean.** Always unplug electric equipment before cleaning it. Store tools, like knives and other utensils, in a place designated for the tools.

E. **Report any inoperative or unsafe equipment to your supervisor.** Take any unsafe equipment out of service until it can be repaired or replaced.

**Lifting Rules - Proper Body Mechanics:**

It is just as important to keep your body in shape for the task as it is any other tool you use for other jobs. You can injure yourself just as easily lifting light objects as you can lifting heavier ones if you don’t lift properly and your “tool” is not in shape for the job. Lifting is a thinking person’s job.
A. **Before you lift something, prepare yourself and plan the move.** Make sure you are limber and physically fit enough to do the task safely. Daily exercises will keep your body ready for lifting and help you feel better. Size up the load to make sure you can handle it safely. If you think the load is too bulky or too heavy, ask someone to help you or try to break it up into smaller, more manageable loads. Use a hand truck or dolly if necessary. Plan your route and make sure the path is clear of trip, slip, and fall hazards.

B. **Use proper body mechanics when lifting.** Stand close to the object with your feet about shoulder width apart. Squat down, bending at the hips and knees. Keep your back straight. As you grip the load, arch your lower back inward by pulling your shoulders back and sticking your chest out with chin tucked in. Be sure to keep the load close to your body. When you set the load down, squat down, bending at the hips and knees, keeping your lower back arched in.

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D. **Push, don’t pull.** Whenever you have to move something that’s on a cart, a dolly, or a hand truck, push the load. Pushing puts less strain on your back.

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F. **Lift like a pro and avoid the pain.** Learning how to lift and carry safely is one of the most important things you can do for your back. It’s not hard to put these suggestions to use, and the payoffs will be well worth the time and effort you put into it.
General Safety Rules

A. Be aware of your surroundings. Be sure to check in at the office before going to your assigned location. In case of emergency, someone should be able to find you. Only enter areas where you have been authorized to visit.

B. Carry a source of immediate communication. Keep a walkie-talkie or cell phone on your person. Make sure it is charged and ready to use at all times.

C. Be aware of strangers. Report unauthorized visitors immediately.

D. Be aware of where you are walking. Walk on walkways, pathways and designated routes and avoid un-level or cracked pathways, if possible.
   1. When assisting in the playground, watch for gopher holes, clumps of grass and muddy areas. Wear good shoes with rubber soles and good traction.
   2. Trip and slip hazards are common in the kitchen. Always put out “Caution, Wet Floor” signs before damp mopping a hard surface floor. Always mop up liquid spills immediately.
   3. Walkways both outdoors and indoors should be kept free of standing water or sand to avoid slipping hazards. Notify maintenance for corrections.

E. Keep latex gloves on hand. Gloves are required whenever contact with bodily fluids is possible.
   1. Wear latex gloves and other appropriate personal protective equipment.
   2. Remove visible soil with a detergent solution. Rinse in water.
   3. Wash area with or dip toys in a sanitizing solution, e.g., bleach water or EPA approved solution. Bleach water is 1/4 cup bleach to 1 gallon of water. The solution must be mixed fresh daily to ensure the solution is not weakened by the evaporation of chlorine. Air dry.
   4. Remove gloves and wash hands immediately.

F. Noon aides are required to renew first aid certifications and CPR certifications on a regular basis. These certifications must be current.
   1. First aid assistance should be done using latex gloves and other appropriate personal protective equipment.
   2. After removing the gloves properly to ensure not to contaminate yourself or the surrounding areas, wash your hands. If clothes are contaminated, then remove clothing immediately and wash skin area with soap and water.
   3. Always report first aid assistance.

G. Aides are encouraged to wear comfortable clothing and shoes with rubber soles.

H. Report faulty equipment. If Aides become aware of a faulty piece of equipment, indoors or outdoors, it should be taken out of service immediately and reported to appropriate individuals.

I. Familiarize yourself with the emergency exit procedures. An emergency plan should be posted near the evacuation emergency exit. Ask what your role will be in assisting in assembly or evacuation. Learn your role in of how to exit the room, the evacuation route and where they are to assemble after.
   1. Watch out for other employees who may be daydreaming, in a hurry, or engaging in horseplay. All of those behaviors jeopardize both their own safety and yours.
   2. Know the general layout of the area you have volunteered for and know the location of the nearest exit in case you have to leave the area in a hurry.

J. Be aware of the location of the nearest fire extinguisher. Know your responsibilities in case of emergency and only use if authorized. Fire extinguishers should be located near the exit door used for evacuation.
   1. Assist in keeping this area clear from obstructions and should always be readily available.
   2. Don’t post notices and decorative paper that may obscure its location.
   3. Report discharged or expired fire extinguishers.
Lifting Rules - Proper Body Mechanics:

It is just as important to keep your body in shape for the task as it is any other tool you use for other jobs. You can injure yourself just as easily lifting light objects as you can lifting heavier ones if you don’t lift properly and your “tool” is not in shape for the job. Lifting is a thinking person’s job.

A. **Before you lift something, prepare yourself and plan the move.** Make sure you are limber and physically fit enough to do the task safely. Daily exercises will keep your body ready for lifting and help you feel better. Size up the load to make sure you can handle it safely. If you think the load is too bulky or too heavy, ask someone to help you or try to break it up into smaller, more manageable loads. Use a hand truck or dolly if necessary. Plan your route and make sure the path is clear of trip, slip, and fall hazards.

B. **Use proper body mechanics when lifting.** Stand close to the object with your feet about shoulder width apart. Squat down, bending at the hips and knees. Keep your back straight. As you grip the load, arch your lower back inward by pulling your shoulders back and sticking your chest out with chin tucked in. Be sure to keep the load close to your body. When you set the load down, squat down, bending at the hips and knees, keeping your lower back arched in.

C. **Turn, don’t twist.** Twisting is not the thing to do. Instead of twisting, turn your whole body in the direction that you want to go. Twisting when carrying a load puts a lot of undue stress on your back.

D. **Push, don’t pull.** Whenever you have to move something that’s on a cart, a dolly, or a hand truck, push the load. Pushing puts less strain on your back.

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CODES OF SAFE PRACTICE - TEACHERS/AIDES

General Classroom Safety Rules

A. **Be aware of where you are walking.** Trip and slip hazards - stacks of paper or boxes, for example, or recently polished and slick floors, or extension cords - are common in the classroom.

B. **Be aware of the location of the nearest fire extinguisher.** It may come in handy. Read the instruction on the extinguisher now, before you need to use it.

C. **Familiarize yourself with the emergency exit procedures.** An emergency plan must be posted near the classroom exit to notify all employees and students of how to exit the room, the evacuation route and where they are to assemble after.

D. **Chairs are not step stools.** Don’t use them for that purpose. Use a step stool or ladder when reaching for elevated supplies and materials.

E. **Electric extension cords are to be used only as a temporary source of power.** Extension cords should be unplugged, rolled up and stored immediately after use. Improper use of electricity is the second most common cause of fires in schools.

F. **Flammable and combustible liquids may not be stored in classrooms.** These liquids are the third most common cause of school fires.

G. **Be cautious with flammable materials.** They may not be attached to windows and doors and no more than 50% of all the wall space may be covered with flammable materials. Window coverings, drapes and curtains may not be installed unless they meet the Fire Marshall’s fireproofing requirements. Keep decorations for holidays only.

Office Ergonomic Safety Rules

Teachers and Aides don’t spend the majority of time at their desks using the computer, but they still need to be aware of Repetitive Motion Injuries (RMI) and should take the following steps to reduce the chance of such an injury.

A. **Complete a workstation ergonomic evaluation.** If available, utilize an in-house resource to complete the evaluation or complete a self-evaluation (checklist attached).

B. **Make the necessary adjustments to your chair.** Most chairs will have at least two to three adjustment levers to use to change the height and tilts of the seat and backrest. Adjust the chair so you can achieve the most comfortable typing position.

C. **Take the weight on your feet.** Ensure that your feet test on the ground so that not all the weight is on your lower back. If your feet do not reach the ground, utilize a footrest.

D. **Type with your wrist at a neutral position.** Adjust the height of chair and keyboard to ensure that, while typing, the shoulders are relaxed, there is a 90-degree angle at the elbow, and the wrist is in a flat position (i.e. no raising or lowering of the wrist from the forearm in order to reach the keys).

E. **Avoid neck and eye strain.** Position the monitor directly in front of you at a distance with its top at eye level. Keep the monitor between 18” and 24” from the
eye, and place it at a right angle to the window. If you are entering data from a
document, prop the document up or, better still, place it at eye level with the use of
a document holder.

F. **Keep the mouse close.** Avoid having to reach either up or out to use the mouse. If
possible it should be kept next to and at the same height as the keyboard. Hold the
mouse gently and move it with the arm rather than the wrist.

G. **Take your breaks.** Take micro-breaks from typing for 2-3 minutes every half-hour
and stop typing for ten minutes after typing uninterrupted for 2 hours. If possible, get
outside during breaks for some valuable fresh air and, during the day, regularly
stretch the hands, arms and back.

**Office Equipment Safety Rules**

A. **Electric Powered Equipment can be a shock hazard.** Periodically, check the
equipment for frayed cords and defective plugs. Never clean or service electric
powered equipment with the power on; always disconnect the equipment from the
power source. Don’t use the equipment with wet hands or while on a damp floor.

B. **Shut off electrical equipment.** Before leaving the classroom, be sure electrical
equipment, like audiovisual equipment, is shut off and unplugged.

C. **Be careful with paper cutters.** Cutters should only be used on a level,
unobstructed and clear surface. The finger guard must be in place before using the
cutter. The lever should be put down and in the locked position when it is not being
used.

D. **Photocopy machines could be harmful to the eyes.** These machines emit an
extremely bright light. Always make sure the machine cover is down when operating
it.

E. **Close file cabinet and desk drawers when not in use.** File cabinets are unstable
with the drawers open and a co-worker or student could walk into an open drawer.

F. **Do not change a burnt out projection bulb when the projector is still hot.**
Disconnect the projector and wait for it to cool before changing the bulb.

**Materials Storage Safety Rules**

A. **Store materials in an organized way.** Do not overload shelves and drawers. Do
not store materials on top of cabinets. Materials may not be stored within 36” of the
ceiling.

B. **Weight can be a safety hazard.** Heavier items should be stored on the lower
shelves at about chest height or lower.

C. **Place cabinets and shelves away from room exits.** They could fall over and block
the exit.

D. **Keep aisles and passageways free of materials.** As well a being a trip and fall
hazard, they could also impede a quick exit in an emergency.

E. **Keep the storeroom neat.** Everything should have its place in the storeroom. Avoid
placing old boxes and files in there on a permanent basis and keep clutter to
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**Revision Record**

<table>
<thead>
<tr>
<th>Revision</th>
<th>Changes</th>
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<tbody>
<tr>
<td>1.0</td>
<td>Older format</td>
<td>July 2012</td>
</tr>
<tr>
<td>2.0</td>
<td>New format, revised content</td>
<td>August 2014</td>
</tr>
<tr>
<td>2.1</td>
<td>Revised to include Company Nurse information</td>
<td>August 2016</td>
</tr>
<tr>
<td>3.0</td>
<td>Revised to include Table of Contents, Employee, Manager, Supervisor and M&amp;O responsibilities, EE rights, Added PPE information and code of safe practices and protective clothing chart, corrected web links.</td>
<td>January 2018</td>
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**Periodic Review**

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<thead>
<tr>
<th>Date</th>
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<tr>
<td>8-2014</td>
<td>New format</td>
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<tr>
<td>8-2014</td>
<td>Removed safety policy information</td>
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<tr>
<td>8-2015</td>
<td>Revised and added language to all sections</td>
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<tr>
<td>8-2015</td>
<td>Added/Revised attachments and forms</td>
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<tr>
<td>8-2016</td>
<td>Added information on Company Nurse &amp; to Appendix C; Revised Supervisor’s Report of Accident form to include new District logo.</td>
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</table>
WORKERS’ COMPENSATION IS PROVIDED BY:

MPN ID #2376 – LWP Claims Solutions Platinum MPN Notice

Your employer has a Medical Provider Network (MPN) to treat work-related injuries. Unless you have properly pre-designated a physician or medical group prior to an injury, any new work-related injuries will be treated by providers in the Medical Provider Network. **If you have properly pre-designated a primary treating physician, you cannot be transferred into the MPN.**

If you have an existing injury, you may be required to change treatment to a provider in the new MPN. Please discuss this with your claims professional.

You may obtain more information about your rights and obligations within the MPN from the workers’ compensation poster at your worksite or from your employer. You can access the MPN listing at [www.lwpclaimsplatinummpn.com](http://www.lwpclaimsplatinummpn.com).

Medical Access Assistant (MAA)

MPN ID #2376 – LWP Claims Solutions Platinum MPN Notice

The Medical Access Assistant has the primary duty to assist with finding available Medical Provider Network physicians and with scheduling provider appointments. The MAA shall be available Monday through Saturday from 7AM to 8PM (PST). The MAA will contact the physician during normal business hours to schedule your appointment. The MAA does not have authority to authorize treatment and has different duties than the claims adjuster.

LWP Medical Access Assistant
Toll free number (855) 622-6474
E-mail: [LWPMAA@snp-plus.com](mailto:LWPMAA@snp-plus.com)
Fax #: (714) 892-4825

To check the website you may go to [www.lwpclaimsplatinummpn.com](http://www.lwpclaimsplatinummpn.com)
Under the California Family Rights Act of 1993 (CFRA), if you have more than 12 months of service with us and have worked at least 1,250 hours in the 12-month period before the date you want to begin your leave, and if we employ 50 or more employees at your worksite or within 75 miles of your worksite, you may have a right to a family care or medical leave (CFRA leave). This leave may be up to 12 workweeks in a 12-month period for the birth, adoption, or foster care placement of your child or for your own serious health condition or that of your child, parent or spouse. If we employ less than 50 employees at your worksite or within 75 miles of your worksite, but at least 20 employees at your worksite or within 75 miles of your worksite, you may have a right to a family care leave for the birth, adoption, or foster care placement of your child under the New Parent Leave Act (NPLA). Similar to CFRA leave, the NPLA leave may be up to 12 workweeks in a 12-month period. While the law provides only unpaid leave, employees may choose or employers may require use of accrued paid leave while taking CFRA leave under certain circumstances and employees may choose to use accrued paid leave while taking NPLA leave.

Even if you are not eligible for CFRA or NPLA leave, if you are disabled by pregnancy, childbirth or a related medical condition, you are entitled to take a pregnancy disability leave of up to four months, depending on your period(s) of actual disability. If you are CFRA or NPLA-eligible, you have certain rights to take both a pregnancy disability leave and a CFRA or NPLA leave for reason of the birth of your child. Both leaves contain a guarantee of reinstatement-for pregnancy disability it is to the same position and for CFRA or NPLA it is to the same or a comparable position at the end of the leave, subject to any defense allowed under the law.

If possible, you must provide at least 30 days’ advance notice for foreseeable events (such as the expected birth of a child or a planned medical treatment for yourself or of a family member). For events that are unforeseeable, we need you to notify us, at least verbally, as soon as you learn of the need for the leave. Failure to comply with these notice rules is grounds for, and may result in, deferral of the requested leave until you comply with this notice policy.

We may require certification from your health care provider before allowing you a leave for pregnancy disability or for your own serious health condition. We also may require certification from the health care provider of your child, parent or spouse, who has a serious health condition, before allowing you a leave to take care of that family member. When medically necessary, leave may be taken on an intermittent or reduced work schedule.

If you are taking a leave for the birth, adoption, or foster care placement of a child, the basic minimum duration of the leave is two weeks, and you must conclude the leave within one year of the birth or placement for adoption or foster care.

Taking a family care or pregnancy disability leave may impact certain of your benefits and your seniority date. If you want more information regarding your eligibility for a leave and/or the impact of the leave on your seniority and benefits, please contact DFEH.

To schedule an appointment, contact the Communication Center below.

If you have a disability that requires a reasonable accommodation, the DFEH can assist you by scribing your intake by phone or, for individuals who are Deaf or Hard of Hearing or have speech disabilities, through the California Relay Service (711), or you can contact us below.

**CONTACT US**

Toll Free: (800) 884-1684  
TTY: (800) 700-2320  
contact.center@dfeh.ca.gov  
www.dfeh.ca.gov
YOUR EMPLOYER HAS AN OBLIGATION TO:

• Reasonably accommodate your medical needs related to pregnancy, childbirth or related conditions (such as temporarily modifying your work duties, providing you with a stool or chair, or allowing more frequent breaks);

• Transfer you to a less strenuous or hazardous position (where one is available) or duties if medically needed because of your pregnancy; and

• Provide you with pregnancy disability leave (PDL) of up to four months (the working days you normally would work in one-third of a year or 17 1/3 weeks) and return you to your same job when you are no longer disabled by your pregnancy or, in certain instances, to a comparable job. Taking PDL, however, does not protect you from non-leave related employment actions, such as a layoff.

• Provide a reasonable amount of break time and use of a room or other location in close proximity to the employee’s work area to express breast milk in private as set forth in the Labor Code.

FOR PREGNANCY DISABILITY LEAVE:

• PDL is not for an automatic period of time, but for the period of time that you are disabled by pregnancy. Your health care provider determines how much time you will need.

• Once your employer has been informed that you need to take PDL, your employer must guarantee in writing that you can return to work in your same position if you request a written guarantee. Your employer may require you to submit written medical certification from your health care provider substantiating the need for your leave.

• PDL may include, but is not limited to, additional or more frequent breaks, time for prenatal or postnatal medical appointments, doctor-ordered bed rest, severe morning sickness, gestational diabetes, pregnancy-induced hypertension, preeclampsia, recovery from childbirth or loss or end of pregnancy, and/or post-partum depression.

• PDL does not need to be taken all at once but can be taken on an as-needed basis as required by your health care provider, including intermittent leave or a reduced work schedule, all of which counts against your four month entitlement to leave.

• Your leave will be paid or unpaid depending on your employer’s policy for other medical leaves. You may also be eligible for state disability insurance or Paid Family Leave (PFL), administered by the California Employment Development Department.

• At your discretion, you can use any vacation or other paid time off during your PDL.

• Your employer may require or you may choose to use any available sick leave during your PDL.

• Your employer is required to continue your group health coverage during your PDL at the same level and under the same conditions that coverage would have been provided if you had continued in employment continuously for the duration of your leave.

• Taking PDL may impact certain of your benefits and your seniority date; please contact your employer for details.

• If possible, you must provide at least 30 days’ advance notice for foreseeable events (such as the expected birth of a child or a planned medical treatment for yourself). For events that are unforeseeable, we need you to notify your employer, at least verbally, as soon as you learn of the need for the leave. Failure to comply with these notice rules is grounds for, and may result in, deferral of the requested leave until you comply with this notice policy.

NOTICE OBLIGATIONS AS AN EMPLOYEE:

• Give your employer reasonable notice. To receive reasonable accommodation, obtain a transfer, or take PDL, you must give your employer sufficient notice for your employer to make appropriate plans. Sufficient notice means 30 days advance notice if the need for the reasonable accommodation, transfer, or PDL is foreseeable, otherwise as soon as practicable if the need is an emergency or unforeseeable.

• Provide a Written Medical Certification from Your Health Care Provider. Except in a medical emergency where there is no time to obtain it, your employer may require you to supply a written medical certification from your health care provider of the medical need for your reasonable accommodation, transfer or PDL. If the need is an emergency or unforeseeable, you must provide this certification within the time frame your employer requests, unless it is not practicable for you to do so under the circumstances despite your diligent, good faith efforts.

• Your employer must provide at least 15 calendar days for you to submit the certification. See your employer for a copy of a medical certification form to give to your health care provider to complete.

• Please note that if you fail to give your employer reasonable advance notice or, if your employer requires it, written medical certification of your medical need, your employer may be justified in delaying your reasonable accommodation, transfer, or PDL.

ADDITIONAL RIGHTS UNDER CALIFORNIA FAMILY RIGHTS ACT (CFRA) LEAVE AND NEW PARENT LEAVE ACT (NPLA):

Under the California Family Rights Act of 1993 (CFRA), if you have more than 12 months of service with us and have worked at least 1,250 hours in the 12-month period before the date you want to begin your leave, and if we employ 50 or more employees at your worksite or within 75 miles of your worksite, you may have a right to a family care or medical leave (CFRA leave). This leave may be up to 12 workweeks in a 12-month period for the birth, adoption, or foster care placement of your child or for your serious health condition or that of your child, parent or spouse. If we employ less than 50 employees at your worksite or within 75 miles of your worksite, but at least 20 employees at your worksite or within 75 miles of your worksite, you may have a right to a family care leave for the birth, adoption, or foster care placement of your child under the New Parent Leave Act (NPLA). Similar to CFRA leave, the NPLA leave may be up to 12 workweeks in a 12-month period. While the law provides only unpaid leave, employees may choose or employers may require use of accrued paid leave while taking CFRA leave under certain circumstances and employees may choose to use accrued paid leave while taking NPLA leave.*

*CFRA and NPLA applies to all employees of the state of California and any other political or civil subdivision of the state and cities, regardless of the number of employees.

This notice is a summary of your rights and obligations under the Fair Employment and Housing Act (FEHA). For more information about your rights and obligations as a pregnant employee, contact your employer, visit the Department of Fair Employment and Housing’s website at www.dfeh.ca.gov, or contact DFEH at (800) 884-1684 (voice or via relay operator 711), TTY (800) 700-2320, or contact.center@dfeh.ca.gov. The text of the FEHA and the regulations interpreting it are available on the Department of Fair Employment and Housing’s website at www.dfeh.ca.gov.

CONTACT US
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WHAT DOES “TRANSGENDER” MEAN?
Transgender is a term used to describe people whose gender identity differs from the sex they were assigned at birth. Gender expression is defined by the law to mean a “person’s gender-related appearance and behavior whether or not stereotypically associated with the person’s assigned sex at birth.” Gender identity and gender expression are protected characteristics under the Fair Employment and Housing Act. That means that employers may not discriminate against someone because they identify as transgender or gender non-conforming. This includes the perception that someone is transgender or gender non-conforming.

WHAT IS A GENDER TRANSITION?
1. “Social transition” involves a process of socially aligning one’s gender with the internal sense of self (e.g., changes in name and pronoun, bathroom facility usage, participation in activities like sports teams).
2. “Physical transition” refers to medical treatments an individual may undergo to physically align their body with internal sense of self (e.g., hormone therapies or surgical procedures).

A person does not need to complete any particular step in a gender transition in order to be protected by the law. An employer may not condition its treatment or accommodation of a transitioning employee upon completion of a particular step in a gender transition.

WHAT ARE THE OBLIGATIONS OF EMPLOYERS WHEN IT COMES TO BATHROOMS, SHOWERS, AND LOCKER ROOMS?
All employees have a right to safe and appropriate restroom and locker room facilities. This includes the right to use a restroom or locker room that corresponds to the employee’s gender identity, regardless of the employee’s assigned sex at birth. In addition, where possible, an employer should provide an easily accessible unisex single stall bathroom for use by any employee who desires increased privacy, regardless of the underlying reason. Use of a unisex single stall restroom should always be a matter of choice. No employee should be forced to use one either as a matter of policy or due to harassment in a gender-appropriate facility. Unless exempted by other provisions of state law, all single-user toilet facilities in any business establishment, place of public accommodation, or state or local government agency must be identified as all-gender toilet facilities.

FILING A COMPLAINT
If you believe you are a victim of discrimination you may, within three years* of the discrimination, file a complaint of discrimination by contacting DFEH.

To schedule an appointment, contact the Communication Center below.

If you have a disability that requires a reasonable accommodation, the DFEH can assist you by scribing your intake by phone or, for individuals who are Deaf or Hard of Hearing or have speech disabilities, through the California Relay Service (711), or you can contact us below.

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* Effective 1/1/2020.
CALIFORNIA LAW PROHIBITS WORKPLACE DISCRIMINATION & HARASSMENT

The California Department of Fair Employment and Housing (DFEH) enforces laws that protect you from illegal discrimination and harassment in employment based on your actual or perceived:

- ANCESTRY
- AGE (40 and above)
- COLOR
- DISABILITY (physical, mental, HIV and AIDS)
- GENETIC INFORMATION
- GENDER IDENTITY, GENDER EXPRESSION
- MARITAL STATUS
- MEDICAL CONDITION (genetic characteristics, cancer or a record or history of cancer)
- MILITARY OR VETERAN STATUS
- NATIONAL ORIGIN (includes language use and possession of a driver’s license issued to persons unable to prove their presence in the United States is authorized under federal law)
- RACE (including, but not limited to, hair texture and protective hairstyles. Protective hairstyles includes, but is not limited to, such hairstyles as braids, locks, and twists)
- RELIGION (includes religious dress and grooming practices)
- SEX/GENDER (includes pregnancy, childbirth, breastfeeding and/or related medical conditions)
- SEXUAL ORIENTATION
THE CALIFORNIA FAIR EMPLOYMENT AND HOUSING ACT (GOVERNMENT CODE SECTIONS 12900 THROUGH 12996) AND ITS IMPLEMENTING REGULATIONS (CALIFORNIA CODE OF REGULATIONS, TITLE 2, SECTIONS 11000 THROUGH 11141):

1. Prohibit harassment of employees, applicants, unpaid interns, volunteers, and independent contractors by any persons and require employers to take all reasonable steps to prevent harassment. This includes a prohibition against sexual harassment, gender harassment, harassment based on pregnancy, childbirth, breastfeeding and/or related medical conditions, as well as harassment based on all other characteristics listed above.

2. Require that all employers provide information to each of their employees on the nature, illegality, and legal remedies that apply to sexual harassment. Employers may either develop their own publications, which must meet standards set forth in California Government Code section 12950, or use material from DFEH.

3. Require employers with 5 or more employees and all public entities to provide training for all employees regarding the prevention of sexual harassment, including harassment based on gender identity, gender expression, and sexual orientation.

4. Prohibit employers from limiting or prohibiting the use of any language in any workplace unless justified by business necessity. The employer must notify employees of the language restriction and consequences for violation. Also prohibits employers from discriminating against an applicant or employee because they possess a driver’s license issued to a person who is unable to prove that their presence in the United States is authorized under federal law.

5. Require employers to reasonably accommodate an employee, unpaid intern, or job applicant’s religious beliefs and practices, including the wearing or carrying of religious clothing, jewelry or artifacts, and hair styles, facial hair, or body hair, which are part of an individual’s observance of their religious beliefs.

6. Require employers to reasonably accommodate employees or job applicants with disabilities to enable them to perform the essential functions of a job.

7. Permit job applicants, unpaid interns, volunteers, and employees to file complaints with DFEH against an employer, employment agency, or labor union that fails to grant equal employment as required by law.

8. Prohibit discrimination against any job applicant, unpaid intern, or employee in hiring, promotions, assignments, termination, or any term, condition, or privilege of employment.

9. Require employers, employment agencies, and unions to preserve applications, personnel records, and employment referral records for a minimum of two years.

10. Require employers to provide leaves of up to four months to employees disabled because of pregnancy, childbirth, or a related medical condition.

11. Require an employer to provide reasonable accommodations requested by an employee, on the advice of their health care provider, related to their pregnancy, childbirth, or a related medical condition.

12. Require employers of 20 or more persons to allow eligible employees to take up to 12 weeks leave in a 12-month period for the birth of a child or the placement of a child for adoption or foster care; also require employers of 50 or more persons to allow eligible employees to take up to 12 weeks leave in a 12-month period for an employee’s own serious health condition or to care for a parent, spouse, or child with a serious health condition.

13. Require employment agencies to serve all applicants equally, refuse discriminatory job orders, and prohibit employers and employment agencies from making discriminatory pre-hiring inquiries or publishing help-wanted advertisements that express a discriminatory hiring preference.

14. Prohibit unions from discriminating in member admissions or dispatching members to jobs.

15. Prohibit retaliation against a person who opposes, reports, or assists another person to oppose unlawful discrimination.

FILING A COMPLAINT

The law provides for remedies for individuals who experience prohibited discrimination or harassment in the workplace. These remedies include hiring, front pay, back pay, promotion, reinstatement, cease-and-desist orders, expert witness fees, reasonable attorney’s fees and costs, punitive damages, and emotional distress damages.

Job applicants, unpaid interns, and employees: If you believe you have experienced discrimination or harassment you may file a complaint with DFEH. Independent contractors and volunteers: If you believe you have been harassed, you may file a complaint with DFEH. Complaints must be filed within three years of the last act of discrimination/harassment. For victims who are under the age of eighteen, not later than three years after the last act of discrimination/harassment or one year after the victim’s eighteenth birthday, whichever is later.

To schedule an appointment, contact the Communication Center below.

If you have a disability that requires a reasonable accommodation, the DFEH can assist you by scribing your intake by phone or, for individuals who are Deaf or Hard of Hearing or have speech disabilities, through the California Relay Service (711), or you can contact us below.

DFEH is committed to providing access to our materials in an alternative format as a reasonable accommodation for people with disabilities when requested.

Government Code section 12950 and California Code of Regulations, title 2, section 11013, require all employers to post this document. It must be conspicuously posted in hiring offices, on employee bulletin boards, in employment agency waiting rooms, union halls, and other places employees gather. Any employer whose workforce at any facility or establishment consists of more than 10% of non-English speaking persons must also post this notice in the appropriate language or languages.

CONTACT US

Toll Free: (800) 884-1684
TTY: (800) 700-2320
contact.center@dfeh.ca.gov
www.dfeh.ca.gov

* Effective 1/1/2020.
SEXUAL HARASSMENT

THE FACTS

Sexual harassment is a form of discrimination based on sex/gender (including pregnancy, childbirth, or related medical conditions), gender identity, gender expression, or sexual orientation. Individuals of any gender can be the target of sexual harassment. Unlawful sexual harassment does not have to be motivated by sexual desire. Sexual harassment may involve harassment of a person of the same gender as the harasser, regardless of either person's sexual orientation or gender identity.

There are two types of sexual harassment

1. "Quid pro quo" (Latin for "this for that") sexual harassment is when someone conditions a job, promotion, or other work benefit on your submission to sexual advances or other conduct based on sex.

2. "Hostile work environment" sexual harassment occurs when unwelcome comments or conduct based on sex unreasonably interferes with your work performance or creates an intimidating, hostile, or offensive work environment. You may experience sexual harassment even if the offensive conduct was not aimed directly at you.

Behaviors that may be sexual harassment

1. Unwanted sexual advances
2. Offering employment benefits in exchange for sexual favors
3. Leering, gestures; or displaying sexually suggestive objects, pictures, cartoons, or posters
4. Derogatory comments, epithets, slurs, or jokes
5. Graphic comments, sexually degrading words, or suggestive or obscene messages or invitations
6. Physical touching or assault, as well as impeding or blocking movements

The harassment must be severe or pervasive to be unlawful. A single act of harassment may be sufficiently severe to be unlawful.
Actual or threatened retaliation for rejecting advances or complaining about harassment is also unlawful. Employees or job applicants who believe that they have been sexually harassed or retaliated against may file a complaint of discrimination with DFEH within three years* of the last act of harassment or retaliation. DFEH serves as a neutral fact-finder and attempts to help the parties voluntarily resolve disputes. If DFEH finds sufficient evidence to establish that discrimination occurred and settlement efforts fail, the Department may file a civil complaint in state or federal court to address the causes of the discrimination and on behalf of the complaining party. DFEH may seek court orders changing the employer’s policies and practices, punitive damages, and attorney’s fees and costs if it prevails in litigation. Employees can also pursue the matter through a private lawsuit in civil court after a complaint has been filed with DFEH and a Right-to-Sue Notice has been issued.

EMPLOYER RESPONSIBILITY & LIABILITY

All employers, regardless of the number of employees, are covered by the harassment provisions of California law. Employers are liable for harassment by their supervisor or agents. All harassers, including both supervisory and non-supervisory personnel, may be held personally liable for harassment or for aiding and abetting harassment. The law requires employers to take reasonable steps to prevent harassment. If an employer fails to take such steps, that employer can be held liable for the harassment. In addition, an employer may be liable for the harassment by a non-employee (for example, a client or customer) of an employee, applicant, or person providing services for the employer. An employer will only be liable for this form of harassment if it knew or should have known of the harassment, and failed to take immediate and appropriate corrective action.

Employers have an affirmative duty to take reasonable steps to prevent and promptly correct discriminatory and harassing conduct, and to create a workplace free of harassment. A program to eliminate sexual harassment from the workplace is not only required by law, but it is the most practical way for an employer to avoid or limit liability if harassment occurs.

ALL EMPLOYERS MUST TAKE THE FOLLOWING ACTIONS TO PREVENT HARASSMENT AND CORRECT IT WHEN IT OCCURS:

1. Distribute copies of this document or an alternative writing that complies with Government Code 12950. This document may be duplicated in any quantity.
2. Post a copy of the DFEH employment poster “California Law Prohibits Workplace Discrimination and Harassment.”
3. Develop a harassment, discrimination, and retaliation prevention policy in accordance with 2 CCR 11023. The policy must:
   • Be in writing.
   • List all protected groups under the FEHA.
   • Indicate that the law prohibits coworkers and third parties, as well as supervisors and managers with whom the employee comes into contact, from engaging in prohibited harassment.
   • Create a complaint process that ensures confidentiality to the extent possible; a timely response; an impartial and timely investigation by qualified personnel; documentation and tracking for reasonable progress; appropriate options for remedial actions and resolutions; and timely closures.
   • Provide a complaint mechanism that does not require an employee to complain directly to their immediate supervisor. That complaint mechanism must include, but is not limited to including: provisions for direct communication, either orally or in writing, with a designated company representative; and/or a complaint hotline; and/or access to an ombudsperson; and/or identification of DFEH and the United States Equal Employment Opportunity Commission as additional avenues for employees to lodge complaints.
   • Instruct supervisors to report any complaints of misconduct to a designated company representative, such as a human resources manager, so that the company can try to resolve the claim internally. Employers with 50 or more employees are required to include this as a topic in mandated sexual harassment prevention training (see 2 CCR 11024).
   • Indicate that when the employer receives allegations of misconduct, it will conduct a fair, timely, and thorough investigation that provides all parties appropriate due process and reaches reasonable conclusions based on the evidence collected.
   • Make clear that employees shall not be retaliated against as a result of making a complaint or participating in an investigation.
4. Distribute its harassment, discrimination, and retaliation prevention policy by doing one or more of the following:
   • Printing the policy and providing a copy to employees with an acknowledgment form for employees to sign and return.
   • Sending the policy via email with an acknowledgment form.
   • Posting the current version of the policy on a company intranet with a tracking system to ensure all employees have read and acknowledged receipt of the policy.
   • Discussing policies upon hire and/or during a new hire orientation.
   • Using any other method that ensures employees received and understand the policy.
5. If the employer’s workforce at any facility or establishment contains ten percent or more of persons who speak a language other than English as their spoken language, that employer shall translate the harassment, discrimination, and retaliation policy into every language spoken by at least ten percent of the workforce.
6. In addition, employers who do business in California and employ 5 or more part-time or full-time employees must provide at least one hour of training regarding the prevention of sexual harassment, including harassment based on gender identity, gender expression, and sexual orientation, to each non-supervisory employee; and two hours of such training to each supervisory employee. All employees must be trained by January 1, 2021. Beginning January 1, 2021, new supervisory employees must be trained within six months of assuming their supervisory position, and new non-supervisory employees must be trained within six months of hire. Employees must be retrained once every two years. Please see Gov. Code 12950.1 and 2 CCR 11024 for further information.

CIVIL REMEDIES

1. Damages for emotional distress from each employer or person in violation of the law
2. Hiring or reinstatement
3. Back pay or promotion
4. Changes in the policies or practices of the employer

To schedule an appointment, contact the Communication Center below. If you have a disability that requires a reasonable accommodation, the DFEH can assist you by scribing your intake by phone or, for individuals who are Deaf or Hard of Hearing or have speech disabilities, through the California Relay Service (711), or you can contact us below.

CONTACT US

Toll Free: (800) 884-1684
TTY: (800) 700-2320
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* Effective 1/1/2020.
Your CalPERS Benefits

Planning Your Service Retirement
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INTRODUCTION

Retirement from your working career is one of the most important decisions of your life.

This publication will help you plan your service retirement and provide information you need to consider before retiring.

You should consider your desired retirement lifestyle and project how much that lifestyle will cost. Then compare the lifestyle or the cost with your projected retirement income. Sources of income may include:

• Your CalPERS pension
• Deferred compensation, such as a 401(k) or 457 plan
• Social Security
• Other savings and investments

Other factors such as taxes, inflation, health care costs, and estate planning may need your consideration, as well.
WHAT IS THE CALPERS RETIREMENT PLAN?

CalPERS is a defined benefit plan funded by employee contributions, employer contributions, and earnings made on CalPERS investments. Most employees contribute a percentage of their salary, which accrues interest under their individual CalPERS account. As a member, you may choose to withdraw your contributions and interest if you no longer work for a CalPERS-covered employer, or you may apply for a lifetime monthly retirement allowance once you become eligible.

Eligibility requirements to collect your CalPERS pension differ from the Social Security Administration’s requirements. It’s important you understand CalPERS and the Social Security Administration are independent of each other. You do not need to be Social Security age to collect your CalPERS pension.

If you’re eligible to receive Social Security benefits and worked for an employer that did not withhold Social Security taxes, the Windfall Elimination Provision and Government Pension Offset can reduce your Social Security benefits. Before you stop working and collect your CalPERS pension, call the Social Security Administration at (800) 772-1213 or visit their website at www.ssa.gov for more information about these Social Security benefit reductions.

Your retirement benefit is based on a retirement formula using your total service credit, your age at retirement, and your highest average annual compensation during any consecutive 12- or 36-month period throughout your CalPERS career.

You may have more than one retirement formula based on your membership date, your membership category, and your employer’s contract with CalPERS.
If your membership date with us is December 31, 2012, or before, you are considered a classic member with a classic retirement formula.

You are a PEPRA member with a PEPRA formula if:
• You were brought into CalPERS membership for the first time on or after January 1, 2013, and you had no prior membership with any other California public retirement system.
• You were brought into CalPERS membership for the first time on or after January 1, 2013, and you were not eligible for reciprocity with another California public retirement system.
• You became a member on or before December 31, 2012, left CalPERS employment for six months or more, and then returned to membership on or after January 1, 2013, with a CalPERS employer you did not previously work for.

Note: All State of California departments are considered the “same employer.” All school county offices and districts are considered the same school employer. Each public agency is considered a separate employer.

Membership categories include:
• Local miscellaneous
• Local safety
• School
• State miscellaneous and industrial
• State safety

You can find your membership category and retirement formula on your Annual Member Statement and by logging in to your personal myCalPERS account at my.calpers.ca.gov.
CalPERS Retirement Planning Resources

We have many resources available to help you in your retirement planning:
- CalPERS website at www.calpers.ca.gov
- Your personal myCalPERS account at my.calpers.ca.gov
- Online and instructor-led retirement classes
- Webinars and YouTube videos
- Member publications
- One-on-one retirement counseling

You can access your personal account information by logging in to your myCalPERS account. If you have not created your myCalPERS account, you must go to my.calpers.ca.gov and follow the easy steps to complete the registration process.

From your myCalPERS account, you can do the following:
- View and print your Annual Member Statements
- Create and save retirement estimates
- Change your beneficiary designation
- Take online CalPERS retirement classes
- Sign up for instructor-led retirement classes
- Register for retirement counseling appointments and CalPERS Benefits Education Events
- Apply for service retirement

We offer a variety of retirement classes designed for members at different career stages. These classes can help you understand the retirement process and various aspects of financial planning. A few of them are listed below:
- Your CalPERS and You
- Planning Your Retirement
- Your Retirement Application and Beyond

For a complete list of available classes, please visit our website at www.calpers.ca.gov.
ELIGIBILITY REQUIREMENTS FOR RETIREMENT

To retire you must meet two requirements: age and service credit.

1. Your minimum retirement age depends on your retirement formula:
   50, 52, or 55. Note: If you have a combination of classic and PEPRA service, you may be eligible to retire at age 50.

2. The minimum service requirement is five years, or 10 years if you are a State of California Second Tier member. There are exceptions to the minimum service requirement:
   • You’ve worked at least five calendar years as a permanent part-time employee (Government Code section 20970).
   • You’ve established reciprocity with another California public retirement system. Refer to the publication A Guide to CalPERS When You Change Retirement Systems (PUB 16).

We mail most members a postcard once these two requirements are met. Your personal myCalPERS account and Annual Member Statement also tell you when you’re eligible to retire.
WAYS TO INCREASE YOUR RETIREMENT BENEFIT

The key to increasing your retirement benefit is to understand how service credit, age, and final compensation are used in the basic retirement calculation. Increase any one of these factors and you’ll increase your overall benefit. The basic retirement calculation is shown below:

If you have more than one retirement formula, we calculate an Unmodified Allowance for each formula and then add them to get your total Unmodified Allowance.

Service Credit

Service credit is earned on a fiscal year basis, which is July 1 through June 30. If you are paid on a monthly basis, 10 months of full-time employment will equal one year. You cannot earn more than one year of service credit in one fiscal year. If you work less than eight hours per day, it will take you longer to earn a year of service credit.

You may be able to increase your total service credit through sick leave or educational leave, golden handshake, and service credit purchase, as explained below.

Sick Leave or Educational Leave

Your employer’s contract may allow you to convert any unused sick leave and/or educational leave hours to service credit when you retire. You must retire within 120 days from your last day of employment for this to apply.

Eight hours of sick leave or educational leave = 1 day of service credit, or 0.004 years of service credit. The conversion formula is shown below:

Example:

250 hours ÷ 8 = 31.25 days × 0.004 = 0.125 years of service credit
Golden Handshake
Your employer may offer additional service credit as an incentive to retire. This is known as a golden handshake. You must retire within a specific “window period” to be eligible. Ask your employer if they offer this type of retirement incentive.

Purchasing Service Credit
You may be eligible to purchase other types of service credit to increase your retirement benefit. You must request a cost packet and elect to purchase the service credit before your planned retirement date. To learn more, refer to *A Guide to Your CalPERS Service Credit Purchase Options* (PUB 12) and *A Guide to Your CalPERS Military Service Credit Options* (PUB 15).

Benefit Factor

Your benefit factor, also known as “age factor,” is the percentage of pay you’ll receive for each year of service credit earned. It is determined by your retirement formula and age at retirement.

Starting at your minimum retirement age, your benefit factor increases every quarter year up to a maximum age. For example, if your retirement formula is 2% at 55 and you retire at age 55, you will get 2 percent for each year of service credit. The percentage increases every quarter after age 55 up to the maximum age of 63.

A common misconception is that your benefit will increase indefinitely with age. Once you reach the maximum benefit factor, your benefit will not increase unless you are working and earning service credit.

Benefit factor charts are located in your CalPERS member publication.

Final Compensation

Your final compensation is your highest average annual compensation during any consecutive 12- or 36-month period of employment. We use your full-time pay rate, not your earnings. If you work part time or are paid hourly, we will convert your pay rate to a monthly equivalent.
If you have a combination of classic and PEPRA service, we will use one final compensation amount for the service earned under your classic service and a second final compensation amount under your PEPRA service (California Code of Regulations section 579.24(b)).

Note: We cannot apply your PEPRA salary toward your classic service and vice versa.
We consider the following when determining your final compensation:

**Special Compensation**
This is additional income reported separately from your regular pay rate, such as holiday pay, uniform allowance, or longevity pay. By law, not all special compensation can be included in your final compensation calculation.

**Social Security Offset**
If your employer(s) withheld Social Security taxes, you may be subject to a one-time Social Security offset. This means we will reduce your final compensation by $133.33 before your retirement benefit is calculated. For example, if your final compensation were $3,133.33, we would use $3,000.00 in your retirement calculation. Read more about the Social Security offset in your member publication.

**Compensation Limits**
The final compensation amount we can use to calculate your retirement benefit may be limited by Retirement Law, Internal Revenue Code (IRC) section 401(a)(17), or both. If your service is subject to PEPRA, the annual compensation limit amounts are lower than the IRC compensation limits (Government Code section 7522.10). These limits do not limit the salary your employer can pay, but rather limit the amount of compensation we can take into account under your retirement plan. Beginning each year, the compensation limit amounts are updated. Read more about the limits in your member publication or visit our website. If you are unsure whether they apply to you, ask your human resources department or contact us.

**Pay Increases**
You should take advantage of pay raises to increase your final compensation. The more months you work at the higher pay rate, the higher your final compensation will be. The charts on the next page demonstrate this concept.

**Reciprocity**
If you are a member of another California public retirement system, we will use the highest average annual compensation during any 12- or 36-month period of employment as long as you retire from each system on the same date. The final compensation we use to calculate your retirement benefit must comply with CalPERS laws and regulations, and may be subject to review.
### Final Compensation – Pay Increase Examples

<table>
<thead>
<tr>
<th>Months</th>
<th>6 Months of Pay Increase</th>
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<tbody>
<tr>
<td>January</td>
<td>$5,000.00</td>
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<td>February</td>
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<td>March</td>
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<tr>
<td><strong>July</strong></td>
<td><strong>$5,200.00</strong></td>
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<td>October</td>
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<tr>
<td>November</td>
<td>$5,200.00</td>
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<tr>
<td>December</td>
<td>$5,200.00</td>
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<tr>
<td><strong>Final Compensation</strong></td>
<td><strong>$5,100.00</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Months</th>
<th>12 Months of Pay Increase</th>
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<tbody>
<tr>
<td>July</td>
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<td>August</td>
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<td>September</td>
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<tr>
<td><strong>Final Compensation</strong></td>
<td><strong>$5,200.00</strong></td>
</tr>
</tbody>
</table>
**BENEFITS PAID UPON YOUR DEATH**

**Before You Retire**

Should you pass away before retiring, the benefits your loved ones are entitled to receive are based on your membership classification, your employer’s contract with us, and whether you were eligible to retire. Refer to your member publication or ask your human resources department about your pre-retirement death benefits.

Be sure to keep your beneficiary designation up to date. You can update your beneficiary designation online using your personal myCalPERS account. If your beneficiary designation is revoked and there is no designation in effect when you die, benefits will be paid to your **statutory beneficiary**. The list of revocable events and statutory beneficiary order can be found in your member publication.

**After You Retire**

Benefits may be payable to your named **beneficiary** (or beneficiaries) and eligible **survivor**, should you pass away after you retire. Three types of benefits may be paid to your beneficiaries or survivor. The first two depend on your employer’s contract with us, and the last one is chosen by you on your retirement application:

- **Lump-sum death benefit**
- **Survivor continuance**
- **Retirement payment option**

**Lump-Sum Death Benefit**

The amount paid ranges from $500 to $5,000 and can be paid to one or more beneficiaries. Refer to your Annual Member Statement or ask your human resources department how much your lump-sum death benefit is. If you last worked with another California retirement system that provides a similar benefit, then the CalPERS retired death benefit is not paid.

**Survivor Continuance**

If your employer contracts for this monthly benefit, the amount paid to your survivor is either 25 percent or 50 percent of your Unmodified Allowance. You must have an eligible survivor when you retire and that survivor must remain eligible until you die. Ask your current or past employer if this benefit applies to you.

You cannot choose your survivor. A survivor is defined by law as:

- A spouse or registered domestic partner who was married or registered to you for at least one year before your service retirement date and continuously until your death. For disability or industrial disability retirement, you only need to be married as of your retirement date and remain married until your death.
• If no eligible spouse or domestic partner, your natural or adopted unmarried children under age 18. The benefit would be paid until they marry or turn 18.
• Your unmarried child who was disabled prior to age 18 and whose disability continues without interruption until the disability ends or until marriage.
• Qualifying financially dependent parents, if none of the above.

If you have more than one employer that contracts for this benefit, we calculate the survivor continuance for each employer and add them to get the total survivor continuance amount.

Retirement Payment Option
You choose the benefit paid upon your death when you apply for retirement. You can choose the Unmodified Allowance for your lifetime only or take a reduction in order to provide a benefit to a beneficiary.

Depending on the option you choose, an actuarial factor based on your age, your beneficiary’s age, life expectancies, or amount of contributions is used to determine how much each payment option will cost.

If survivor continuance is payable, we first subtract that amount from your Unmodified Allowance and then apply the reduction for your beneficiary. For example, if your survivor continuance benefit is 25 percent, only the remaining 75 percent is subject to reduction. Once the reduction is applied, this amount is called the “option portion.”

\[
\text{Unmodified Allowance} - \text{Survivor Continuance} = \text{Amount Subject to Reduction}
\]

\[
\text{Amount Subject to Reduction} \times \text{Actuarial Factor} = \text{Option Portion}
\]

As we discuss the different payment options, keep in mind that you choose a beneficiary to receive the option portion of your monthly benefit, aside from any survivor continuance portion. And remember, your survivor and beneficiary can be the same person, but they don’t have to be.
RETIEMENT PAYMENT OPTIONS

As a result of California Assembly Bill 2404 (Cooley), also known as Retirement Option Simplification, for members retiring on or after January 1, 2018, the retirement payment options have been consolidated and renamed to make the choices easier to understand.

Unmodified Allowance

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides the highest monthly allowance paid for life.</td>
<td>There is no continuing monthly benefit to a beneficiary and no return of unused member contributions upon your death.</td>
<td>25% or 50% if payable</td>
</tr>
</tbody>
</table>

Return of Remaining Contributions Option 1

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
</table>
| • Only available if you paid contributions to CalPERS.  
• Can name one or more beneficiaries. | • Does not provide ongoing monthly benefit.  
• Upon your death, provides a lump-sum payout of any remaining member contributions in your account to one or more named beneficiaries.  
• If no remaining member contributions, no benefit is paid. | 25% or 50% if payable |

It takes about 10 years of retirement to totally deplete your contributions, but your monthly benefit continues.
### 100 Percent Beneficiary Option 2

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
</table>
| • Can name only one beneficiary for an ongoing monthly benefit.  
• Can name one or more beneficiaries for the lump-sum portion. | • Provides 100 percent of the option portion of your ongoing monthly benefit to your named beneficiary upon your death.  
• Upon both your deaths, a lump-sum payout of any remaining member contributions in your account will be paid to one or more named secondary beneficiaries. | 25% or 50% if payable |

It takes about 10 years of retirement to totally deplete your contributions, but your monthly benefit continues.

### 100 Percent Beneficiary Option 2 with Benefit Allowance Increase

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
</table>
| • Can name only one beneficiary.  
• If your beneficiary dies before you, or you have another qualifying event, your benefit will increase to the Unmodified Allowance. | Provides 100 percent of the option portion of your ongoing monthly benefit to your named beneficiary upon your death. | 25% or 50% if payable |
50 Percent Beneficiary Option 3

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Can name only one beneficiary for an ongoing monthly benefit.</td>
<td>• Provides 50 percent of the option portion of your ongoing monthly benefit to your named beneficiary upon your death.</td>
<td>25% or 50% if payable</td>
</tr>
<tr>
<td>• Can name one or more beneficiaries for the lump-sum portion.</td>
<td>• Upon both your deaths, a lump-sum payout of any remaining member contributions in your account will be paid to one or more named secondary beneficiaries.</td>
<td></td>
</tr>
</tbody>
</table>

It takes about 10 years of retirement to totally deplete your contributions, but your monthly benefit continues.

50 Percent Beneficiary Option 3 with Benefit Allowance Increase

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Can name only one beneficiary.</td>
<td>Provides 50 percent of the option portion of your ongoing monthly benefit to your named beneficiary upon your death.</td>
<td>25% or 50% if payable</td>
</tr>
<tr>
<td>• If your beneficiary dies before you, or you have another qualifying event, your benefit will increase to the Unmodified Allowance.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

It takes about 10 years of retirement to totally deplete your contributions, but your monthly benefit continues.
### Flexible Beneficiary Option 4

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Can name one or more beneficiaries.</td>
<td>Provides an ongoing monthly benefit of a specific percentage or specific dollar amount of your Unmodified Allowance to one or more named beneficiaries upon your death.</td>
<td>25% or 50% if payable</td>
</tr>
<tr>
<td>- Can specify a specific dollar or percentage be paid to each beneficiary.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you are required by a court order to designate your nonmember spouse or domestic partner for an ongoing monthly benefit, you can choose one of the following Court-Ordered Community Property Option 4 options for your share of the benefit.

### Court-Ordered Community Property Option 4 / Unmodified Allowance

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
<tbody>
<tr>
<td>For your remaining share, provides you the highest monthly allowance paid for your lifetime.</td>
<td>- Provides an ongoing monthly benefit to your nonmember spouse or domestic partner equal to his or her community property interest.</td>
<td>25% or 50% if payable</td>
</tr>
<tr>
<td></td>
<td>- There is no return of unused member contributions upon your death.</td>
<td></td>
</tr>
</tbody>
</table>
Court-Ordered Community Property Option 4 / Return of Remaining Contributions Option 1

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
</table>
| • Only available if you paid contributions to CalPERS.  
• Can name one or more beneficiaries for the lump-sum portion of your remaining share. | • Provides an ongoing monthly benefit to your nonmember spouse or domestic partner equal to his or her community property interest.  
• For your remaining share, provides a lump-sum payout of any remaining member contributions in your account to one or more named beneficiaries. | 25% or 50% if payable |

It takes about 10 years of retirement to totally deplete your contributions, but your monthly benefit continues.

Court-Ordered Community Property Option 4 / Specific Percentage or Specific Dollar Amount

<table>
<thead>
<tr>
<th>For You</th>
<th>For Your Beneficiary</th>
<th>For Your Survivor</th>
</tr>
</thead>
</table>
| • Can name one or more beneficiaries for your remaining share.  
• Can specify a specific dollar or percentage be paid to each beneficiary. | • Provides an ongoing monthly benefit to your nonmember spouse or domestic partner equal to his or her community property interest.  
• For your remaining share, provides an ongoing monthly benefit of a specific percentage or specific dollar amount of your Unmodified Allowance to one or more named beneficiaries upon your death. | 25% or 50% if payable |
SAMPLE RETIREMENT CALCULATION

Fred chooses the 100 Percent Beneficiary Option 2 and names his spouse, Maria, as the beneficiary. Because Fred and Maria were married at least one year prior to Fred’s retirement date, she is also the eligible survivor for the survivor continuance benefit. How much will Fred and Maria get?*

Fred’s Information
Birthday: 9/15/1964
Spouse: Maria – married 2/14/1992
Retirement date: 12/31/2020
Age at retirement: 56.25

<table>
<thead>
<tr>
<th>Employer 1</th>
<th>Employer 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local miscellaneous, 2.5% at 55</td>
<td>State miscellaneous &amp; industrial, 2% at 55</td>
</tr>
<tr>
<td>3-year final compensation period 1/1/2017–12/30/2020 $6,000.00</td>
<td>1-year final compensation period 1/1/2019–12/30/2020 $6,200.00</td>
</tr>
<tr>
<td>Not subject to Social Security offset</td>
<td>Subject to Social Security offset</td>
</tr>
<tr>
<td>Not contracted for survivor continuance</td>
<td>Survivor continuance 25%</td>
</tr>
<tr>
<td>Earned 20 years of service credit</td>
<td>Earned 2 years of service credit</td>
</tr>
</tbody>
</table>

Calculate the Unmodified Allowance:

Employer 1

<table>
<thead>
<tr>
<th>Service Credit</th>
<th>Benefit Factor</th>
<th>% of Final Compensation</th>
<th>Final Compensation</th>
<th>Unmodified Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>× 2.500%</td>
<td>50.000</td>
<td>$6,000</td>
<td>$3,000</td>
</tr>
</tbody>
</table>

Employer 2

<table>
<thead>
<tr>
<th>Service Credit</th>
<th>Benefit Factor</th>
<th>% of Final Compensation</th>
<th>Final Compensation</th>
<th>Unmodified Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>× 2.080%</td>
<td>4.160</td>
<td>$6,066.67 ($6,200 – $133.33)</td>
<td>$252.37</td>
</tr>
</tbody>
</table>

$3,252.37

* The data used in this example is hypothetical and is not based on any real-life persons. It’s intended to illustrate how multiple employers with different contract provisions affect the overall retirement calculation.
Then calculate survivor continuance:

\[
\begin{align*}
Employer 2 \times \% &= \text{Survivor Continuance Amount} \\
$252.37 \times 25\% &= $63.09
\end{align*}
\]

Then calculate the option portion:

\[
\begin{align*}
\text{Unmodified Allowance} - \text{Survivor Continuance} &= \text{Amount Subject to Reduction} \\
$3,252.37 - $63.09 &= $3,189.28 \\
\times \text{Actuarial Factor} &= \text{Option Portion} \\
$3,189.28 \times 0.91988 &= $2,933.75
\end{align*}
\]

Fred’s 100 Percent Beneficiary Option 2 monthly benefit:

\[
\begin{align*}
\text{Survivor Continuance} + \text{Option Portion} &= \text{100 Percent Beneficiary Option 2 Monthly Benefit} \\
$63.09 + $2,933.75 &= $2,996.84
\end{align*}
\]

Upon Fred’s death, Maria will get the same monthly benefit because she is his eligible survivor and his beneficiary for the 100 Percent Beneficiary Option 2.
CHOOSING A RETIREMENT DATE

When choosing your retirement date, keep the following in mind:

- Your retirement date can be any day of the week, even a Saturday or Sunday.

- If you leave CalPERS-covered employment and do not submit your retirement application within nine months, the law states that your retirement date can be no earlier than the first of the month we receive your retirement application.

- Your retirement date cannot be earlier than your last day on payroll for all CalPERS-covered positions. This includes any full-time, part-time, or intermittent positions.

- **Cost-of-Living Adjustment (COLA):** Your retirement date affects how soon you can receive a COLA increase. You are eligible to receive your first COLA on May 1 of the second calendar year after your retirement year. For example:

<table>
<thead>
<tr>
<th>If your retirement date is…</th>
<th>Then you become eligible for COLA on…</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 31, 2020</td>
<td>May 1, 2022</td>
</tr>
<tr>
<td>January 1, 2021</td>
<td>May 1, 2023</td>
</tr>
</tbody>
</table>

- **Reciprocity:** If you have established reciprocity with another California public retirement system, your CalPERS retirement benefit could be based on your highest compensation earned under all systems if you retire from each system on the same day. The final compensation we use to calculate your benefit must comply with CalPERS laws and regulations, and may be subject to review. Refer to the publication *A Guide to CalPERS When You Change Retirement Systems* (PUB 16).

  If you last worked for the other retirement system and you submit your CalPERS retirement application more than nine months from separation of employment with the other system, the law states that your retirement date cannot be earlier than the first of the month we receive your application.

- **Health, Dental, and Vision Benefits:** Your retirement date must be within 120 days of your last day of employment (see “Health Benefits in Retirement” on page 24).
• **Unused Sick Leave or Educational Leave:** Your retirement date must be within 120 days of your last day of employment for us to include it in your retirement calculation (see “Service Credit” on page 8).

• **Service Credit Purchases:** If you plan to purchase service credit, you must request a cost packet and elect to purchase the service credit before your planned retirement date.

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**ESTIMATE YOUR FUTURE BENEFIT**

**Retirement Is More Than a Year Away**

You have two options for generating retirement estimates when you are more than one year from your expected retirement date.

The first option is to log in to myCalPERS at my.calpers.ca.gov, which requires a username and password, to obtain an estimate that uses data your employer already reported to CalPERS. You can generate a variety of scenarios and save them in myCalPERS for future reference.

The second option is to use the CalPERS Retirement Estimate Calculator on our website at www.calpers.ca.gov. This online calculator allows you to generate multiple estimates, customizing them to include projections based on:

• Career plans
• Expected promotions or pay increases
• Special compensation
• Possible changes to your time base
• Any expected formula changes
• Alternative retirement dates
• Potential service credit purchases

The estimate will provide only the Unmodified Allowance. You can print but not save estimates produced using this calculator.

**You’re Within a Year of Retirement**

When you’re within one year of your expected retirement date, you can request up to two official CalPERS-generated retirement estimates in a 12-month period. An official estimate uses your current account information to project your benefit as of your estimated retirement date. For retirement estimates, we do not project salary increases, special compensation, or anticipated service credit purchases.
It’s important you know what your estimated retirement allowance will be before you retire and choose a retirement payment option. You only have 30 days from the date your first retirement check is issued to make any changes to your retirement payment option.

To request an official CalPERS-generated estimate, you must mail us a completed Retirement Allowance Estimate Request form. You can find this form in the Forms & Publications area on our website at www.calpers.ca.gov or you can ask us to mail you one. Please allow 30 days for processing once we receive your completed form.

Community Property Estimates

If you have a community property hold on your retirement account, we must have an acceptable filed Qualified Domestic Relations Order (QDRO) for a time-rule division (Model Order B) on file to request an estimate of your potential retirement benefit amounts. You can request two time-rule retirement estimates per year if your projected retirement date is within three years.
HEALTH BENEFITS IN RETIREMENT

Eligibility Requirements

You will be eligible for a CalPERS-administered health plan as a retiree if you meet all the following criteria:

- You are eligible for health coverage upon separation of employment.
- You retire from an employer (and bargaining group, if applicable) that contracts for health benefits through CalPERS.
- You receive a monthly CalPERS retirement allowance.
- You retire within 120 days of the date of your separation from employment.

Your spouse or registered domestic partner will be eligible for a continuing health benefit after your death as long as they receive an ongoing monthly benefit, as either a survivor or beneficiary.

State of California and California State University (CSU) employees who receive a monthly CalPERS retirement allowance and who retire within 120 days of separation from employment are eligible for dental and vision benefits. If you are a State of California or CSU employee, please refer to your member publication for vesting requirements.

Transitioning From Active to Retired Health Coverage

If you are enrolled in a CalPERS health plan, your health coverage generally continues automatically into retirement if your permanent separation date and retirement date are within 30 days of each other. If you don’t want your health coverage to continue, you may decline automatic enrollment by either:

- Submitting a Health Benefits Plan Enrollment form to your employer before you retire, or
- Declining health coverage on your retirement application.

If your permanent separation date and retirement date are between 31 and 120 days apart, your health coverage does not automatically continue. To re-enroll, you must either:

- Submit a written request to CalPERS within 60 days of your retirement date, or
- Enroll during Open Enrollment.
Coordinating CalPERS Health Coverage With Medicare

If you and your dependents are enrolled in a CalPERS Basic health plan when you retire and you qualify for Medicare, you must enroll in Medicare Parts A and B. You must provide your Medicare information to CalPERS and then transfer to a CalPERS Medicare health plan to continue CalPERS coverage. Please contact the Social Security Administration to find out if you qualify for Medicare Parts A and B.

Be sure to read our CalPERS Medicare Enrollment Guide for more detailed information. If you have questions about Medicare, Medicare premiums, enrollment or eligibility, contact the Social Security Administration at (800) 772-1213 or TTY (800) 325-0778 or visit their website at www.ssa.gov.

OTHER CONSIDERATIONS

If You Become Disabled

If you become disabled and can no longer perform the duties of your job, you may qualify for disability retirement or industrial disability retirement. Learn about the eligibility requirements in our publication A Guide to Completing Your CalPERS Disability Retirement Election Application (PUB 35).

Power of Attorney

A CalPERS special power of attorney allows you to designate a representative or agent, known as your attorney-in-fact, to conduct your retirement affairs. Should you become unable to act on your own behalf, your designated attorney-in-fact will be able to perform important duties concerning your CalPERS business, such as address changes, federal or state tax withholding elections, and retirement benefit elections.

The CalPERS special power of attorney is specifically designed for use by active and retired CalPERS members and beneficiaries. You may already have a power of attorney set up through another resource; however, it may not address your CalPERS retirement benefits. For more information, review the publication A Guide to the CalPERS Special Power of Attorney (PUB 30).

Emergency Retirement

If you are terminally ill, facing imminent death, or are about to have surgery, please call us toll free at 888 CalPERS (or 888-225-7377) to discuss what options are available to you.
Divorce, Legal Separation, or Termination of Domestic Partnership

If you have a community property claim on your retirement account, a hold is placed on your account and benefits are held until the claim is resolved. We recommend that you resolve the claim before you retire to avoid possible delays in processing your retirement benefits. However, you should not wait to submit your retirement application. Waiting to apply for retirement may affect the retirement date and other benefits you are entitled to receive.

For more information, review the publication *A Guide to CalPERS Community Property* (PUB 38A). If you are unsure whether your claim has been resolved or have questions about your court order or your benefits, please call us toll free at 888 CalPERS (or 888-225-7377).

Temporary Annuity

Temporary annuity is additional monthly income you may choose to enhance your CalPERS pension. A temporary annuity benefit is funded through a lifetime reduction of your monthly retirement allowance. The type of temporary annuity you are eligible for depends on your CalPERS membership date. For more information, review the publication *A Guide to Your CalPERS Temporary Annuity* (PUB 13).

Internal Revenue Code (IRC) Section 415(b) Retirement Benefit Limit

IRC section 415(b) places a dollar limit on the annual retirement benefit you can receive from CalPERS, a tax-qualified pension plan. This dollar limit is set and adjusted each year by the Internal Revenue Service. We determine if your benefit is subject to this limit when you retire.

If your retirement benefit must be limited under section 415(b), you may be enrolled in the IRC section 415(b) Replacement Benefit Plan, an employer-funded plan, if eligible. If your membership date is prior to January 1, 2013, the CalPERS Replacement Benefit Plan provides a replacement benefit that will, to the extent possible, make up the amount your CalPERS benefit is limited.

For more information, see the IRC section 415(b) Replacement Benefit Plan Fact Sheet on our website at [www.calpers.ca.gov](http://www.calpers.ca.gov).
How We Report Your Pension Income

Service and disability retirement are fully taxable. Only industrial disability retirement is free from taxation under certain criteria.

If you have after-tax contributions on your account when you retire, a portion of your annual income will be tax-free. CalPERS uses the Simplified Method tables in Internal Revenue Service Publication 575 to determine and report the tax-free portion of your retirement allowance.

Benefit Forfeiture for Felony Convictions

Under the California Public Employees' Pension Reform Act of 2013, if you are convicted of a felony by a state or federal trial court in connection with your official job duties, you will forfeit all of your accrued rights and benefits after the commission of the felony and you will no longer be eligible to accrue further benefits with CalPERS, effective on the date of conviction (Government Code sections 7522.72 and 7522.74). For more information, refer to your member publication.

Working After You Retire

If you retire and then want to return to work for a CalPERS-covered employer, you may do one of the following:

• Work as a retired annuitant, or
• Come out of retirement and return to active service.

There are rules and restrictions related to both options. Before accepting any position, read the publications A Guide to CalPERS Employment After Retirement (PUB 33) and/or A Guide to CalPERS Reinstatement From Retirement (PUB 37) regarding the requirements and limitations.
RETIREMENT PLANNING CHECKLIST

As you plan for your retirement and get ready to submit your retirement application, use the following checklist as a reminder of what you need to consider.

Retirement Planning Checklist

☐ Create my personal myCalPERS account.

☐ Request CalPERS-generated estimates 12 months prior to retirement.

☐ Review my recent Annual Member Statement for accuracy.

☐ Do I have an unresolved community property claim?
  ☐ I have resolved my community property claim.

☐ Do I qualify for reciprocity with another retirement system?
  ☐ I have established reciprocity.

☐ Watch retirement education webinars and CalPERS YouTube videos.

☐ Attend retirement classes.
  ☐ Attending a class is required if you would like a half-hour or one-hour retirement counseling appointment.

☐ Read my member publication(s).

☐ Contact my credit union, employee organization, or insurance plan and ask if payroll deductions can continue into retirement.

☐ Call CalPERS Long-Term Care at (800) 982-1775 and ask how premium deductions continue into retirement.

☐ Fill out dental and vision enrollment forms so my employer can process my enrollment (State of California/CSU only) 30 to 60 days prior to retirement.
WHEN YOU’RE READY TO RETIRE

Submit Your Retirement Application

You can apply for retirement up to 120 days before your retirement date. We recommend you submit your application early to ensure timely payment. You can apply online, by mail, or in person:

• Log in to your personal myCalPERS account and apply online at my.calpers.ca.gov.
• Send in your completed and notarized retirement application along with any other applicable forms. Refer to A Guide to Completing Your CalPERS Service Retirement Election Application (PUB 43) for the application form and instructions.
• Visit your nearest Regional Office. One of our representatives can review your online or paper application and witness your and your spouse’s or domestic partner’s signatures in lieu of a notary.

Be sure to keep a copy of all forms and supporting documents for your records and future reference.

You must submit your application within nine months of your permanent separation date to receive the retirement date of your choice. If your application is received more than nine months after your permanent separation date, the law states that your retirement date cannot be earlier than the first of the month we receive your application.

If you are also a member of another public retirement system in California, you must apply for retirement with each system separately. Contact the other public retirement system to determine their requirements and timeframes to apply for retirement. If you last worked for the other retirement system and you submit your CalPERS retirement application more than nine months from separation of employment with the other system, the law states that your retirement date cannot be earlier than the first of the month we receive your application. For full reciprocal benefits to apply, your retirement date must be the same with both systems. Review the publication A Guide to CalPERS When You Change Retirement Systems (PUB 16) for more information.
**Important!** Separation from employment alone is not considered retirement—you must submit a retirement election application to complete the retirement process. You must stop working from all CalPERS-covered employment, including all full-time and part-time positions and any elected or appointed positions with a CalPERS employer before your retirement date.

It’s your responsibility to inform every CalPERS employer of your planned retirement date so each employer can submit permanent separation information on your behalf. If your employer does not submit separation information to us and you continue working, you may be considered unlawfully employed. This unlawful employment can result in termination of your retirement allowance and require you to repay overpaid retirement benefits.

**WHAT NEW RETIREES NEED TO KNOW**

**Retirement Payment Schedule**

We pay in arrears and your first retirement check is typically paid within 45 days of your retirement date, or within 45 days of when you submit your application.

**Retirement Payment Method**

You can have your retirement check mailed to you, or you can have it deposited directly to your bank account. If you submit direct deposit information with your retirement application, your direct deposit is typically effective with your first retirement payment. We send funds for direct deposit on the first of each month. Your financial institution determines when your direct deposit funds are available.

Once you’re retired, you can manage your payment method through your myCalPERS account.
Canceling or Changing Your Retirement Application

By law, you have 30 days from the date your first retirement benefit check is issued to:
• Change your retirement payment option
• Change your lifetime beneficiary
• Change your retirement date
• Cancel or make changes to your retirement application

When you choose a retirement payment option, your choice becomes irrevocable after 30 days from the date your first retirement check is issued, unless you have a qualifying event. Before you make your decision, it’s important you understand the limits to changing your retirement payment option or beneficiaries.

For more information about qualifying events, please refer to the publication Changing Your Beneficiary or Monthly Benefit After Retirement (PUB 98).

Adjustments to Your Retirement Benefit

Your retirement benefit is calculated using the payroll and service on your account as of your retirement date. It’s normal for additional payroll, including sick leave, to come in after we’ve processed your initial benefit. This means your First Payment Acknowledgment letter, Account Detail sheet, and monthly benefit may be lower than what you were expecting until final payroll shows on your account. Adjustments to your retirement benefit take up to four months to process and are retroactive to your retirement date.
BECOME A MORE INFORMED MEMBER

CalPERS Website

Visit www.calpers.ca.gov for information on all our benefits and services. You can also sign up to receive email newsletters and alerts.

my|CalPERS

Log in at my.calpers.ca.gov to access real-time details and balances of your CalPERS accounts. With my|CalPERS you can:
• View, print, and save current and past statements.
• Select mailing preferences for your statements, newsletters, and retirement checks.
• Search for medical premium rates and health plans available in your area and confirm which dependents are covered on your health plan.
• Estimate your future retirement benefit and save estimates to view later.
• Send and receive secure messages.
• Order and download publications.
• Send account information to third parties, such as banks.
• Apply for service retirement.
• Change your beneficiary designation.
• Retirees can update contact information, set up direct deposit, change tax withholdings, and view annual tax statements.

CalPERS Education Center

Whether you’re in the early stages of your career or getting ready to retire, visit the CalPERS Education Center in my|CalPERS to:
• Take online classes that help you have a better understanding of your CalPERS benefits.
• Register for instructor-led classes and download class materials.
• Register to attend a CalPERS Benefits Education Event at a location near you.
• Schedule a one-on-one appointment with a representative at your nearest CalPERS Regional Office.

Experience CalPERS Through Social Media

Facebook: www.facebook.com/myCalPERS
Twitter: www.twitter.com/CalPERS
Instagram: www.instagram.com/CalPERS
YouTube: www.youtube.com/CalPERS
LinkedIn: www.linkedin.com/company/CalPERS

Reach Us by Phone

Call us toll free at 888 CalPERS (or 888-225-7377). Monday through Friday, 8:00 a.m. to 5:00 p.m. TTY: (877) 249-7442
Visit Your Nearest CalPERS Regional Office

Fresno Regional Office
10 River Park Place East, Suite 230
Fresno, CA 93720

Glendale Regional Office
Glendale Plaza
655 North Central Avenue, Suite 1400
Glendale, CA 91203

Orange Regional Office
500 North State College Boulevard, Suite 750
Orange, CA 92868

Sacramento Regional Office
Lincoln Plaza East
400 Q Street, Room 1820
Sacramento, CA 95811

San Bernardino Regional Office
650 East Hospitality Lane, Suite 330
San Bernardino, CA 92408

San Diego Regional Office
7676 Hazard Center Drive, Suite 350
San Diego, CA 92108

San Jose Regional Office
181 Metro Drive, Suite 520
San Jose, CA 95110

Walnut Creek Regional Office
Pacific Plaza
1340 Treat Boulevard, Suite 200
Walnut Creek, CA 94597

Visit the CalPERS website for directions to your local office.
Regional Office hours are Monday through Friday, 8:00 a.m. to 5:00 p.m.
PRIVACY NOTICE

The privacy of personal information is of the utmost importance to CalPERS. The following information is provided to you in compliance with the Information Practices Act of 1977 and the Federal Privacy Act of 1974.

Information Purpose
The information requested is collected pursuant to the Government Code (sections 20000 et seq.) and will be used for administration of Board duties under the Retirement Law, the Social Security Act, and the Public Employees’ Medical and Hospital Care Act, as the case may be. Submission of the requested information is mandatory. Failure to comply may result in CalPERS being unable to perform its functions regarding your status. Please do not include information that is not requested.

Social Security Numbers
Social Security numbers are collected on a mandatory and voluntary basis. If this is CalPERS’ first request for disclosure of your Social Security number, then disclosure is mandatory. If your Social Security number has already been provided, disclosure is voluntary. Due to the use of Social Security numbers by other agencies for identification purposes, we may be unable to verify eligibility for benefits without the number.

Social Security numbers are used for the following purposes:
1. Enrollee identification
2. Payroll deduction/state contributions
3. Billing of contracting agencies for employee/employer contributions
4. Reports to CalPERS and other state agencies
5. Coordination of benefits among carriers
6. Resolving member appeals, complaints, or grievances with health plan carriers

Information Disclosure
Portions of this information may be transferred to other state agencies (such as your employer), physicians, and insurance carriers, but only in strict accordance with current statutes regarding confidentiality.

Your Rights
You have the right to review your membership files maintained by the System. For questions about this notice, our Privacy Policy, or your rights, please write to the CalPERS Privacy Officer at 400 Q Street, Sacramento, CA 95811 or call us at 888 CalPERS (or 888-225-7377).

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