



STANISLAUS COUNTY  
EMPLOYEES' RETIREMENT ASSOCIATION  
832 12<sup>th</sup> Street, Suite 600  
Modesto, CA 95354  
MAIL: PO Box 3150 Modesto 95353-3150

Phone (209) 525-6393  
Fax (209) 558-4976  
www.stancera.org  
e-mail: retirement@stancera.org

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March 22, 2012

## **NOTICE OF PUBLIC MEETING**

To: *Internal Governance Committee:*  
Maria De Anda, Chair  
Ron Martin, Trustee  
Donna Riley, Trustee

From: Rick Santos, Executive Director

**SUBJECT: StanCERA INTERNAL GOVERNANCE AUDIT COMMITTEE**

The Internal Governance Audit Committee will meet at 1:00 p.m., Tuesday, March 27, 2012.

The Committee will meet in the Conference Room at StanCERA's Office, located at 832 12<sup>th</sup> Street, Suite 600, 6<sup>th</sup> Floor, Modesto.

### **AGENDA**

1. Discussion and Action on the Operational Audit's I.T. Security Assessment Recommendations of Auditors' Macias, Gini & O'Connell (MGO), and Varinek, Trine, Day & Co. (VTD)
2. Discussion and Action on the Dissolution of Marriage or Registered Domestic Partnership Policy [View](#)
3. Discussion and Action on Amendments to the Operational Audit's Recommended Policies and Procedures Adopted June 28, 2011 [View](#)

cc: K. Herman  
J. Parker  
D. Lea



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**March 27, 2012**  
**Internal Governance Committee Meeting**

TO: Internal Governance Committee

FROM: Dawn Lea, Benefits Manager

**SUBJECT: Dissolution of Marriage or Registered Domestic Partnership Policy**

- I. RECOMMENDATION: We recommend that the Committee approve the Dis solution of Marriage or Registered Domestic Partnership Policy (Attachment 1).
- II. ANALYSIS: Retirement benefits earned during marriage are considered community property assets. These benefits must be considered in the property settlement agreement and are subject to disposition by the court.

This policy will establish a formal process to insure that all members are treated equally and that domestic relation orders will be written in a manner that conforms to the requirements of the 1937 Act and StanCERA Bylaws.

- III. RISK: None
- IV. STRATEGIC PLAN: Goal 3, Board and Staff Development, Strategy C Systems and Policies
- V. BUDGET IMPACT: None

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Dawn Lea  
Benefits Manager

Attachment

**DISSOLUTION OF MARRIAGE OR REGISTERED DOMESTIC  
PARTNERSHIP POLICY**

Stanislaus County Employees' Retirement Association (StanCERA) retirement benefits are generally payable only to members or their beneficiaries and cannot be paid to others. California state law recognizes an exception to this rule in the case of dissolution of marriage or registered domestic partnership. Because retirement benefits earned during marriage or registered domestic partnership are considered community property assets, they must be considered in the property settlement agreement and are subject to disposition by the court.

For consistency, the parties referenced in all documents, including court documents, **shall** be referred to as "Member" or "Non-Member."

- **"Member"** represents the member of StanCERA, and
- **"Non-Member"** represents the party with a community property interest in the Member's StanCERA account.

The Non-Member has an interest in the Member's retirement account if he/she was married or registered to a StanCERA Member while the Member worked for a StanCERA employer. To protect the Member and Non-Member's interest in the plan, StanCERA ***must be notified in writing*** that the Non-Member is asserting a claim for a community property interest in the Member's benefit.

StanCERA requires that it be joined as a party to the dissolution proceeding pursuant to California Family Code Sections 2060-2065.

**I. Active/Deferred Members**

When StanCERA is served with a Joinder, and the Member has ***not*** retired, the pending dissolution is noted in the Member's account. StanCERA will not distribute any payments from the Member's account until the dissolution is resolved and the Member has retired or withdraws his/her monies.

Prior to filing the Domestic Relations Order ("DRO") with the court, the parties shall submit their draft DRO to StanCERA's Counsel to obtain preapproval ***before*** obtaining the signatures of the Member and Non-Member. StanCERA's staff and StanCERA's Counsel will review the draft DRO for consistency with StanCERA's policies. Once the DRO is preapproved, the DRO will be returned for signing by the Member and Non-Member and their attorneys, if any. After the parties and their attorneys have signed the DRO, it must be returned to StanCERA's Counsel for final approval and the signatures of StanCERA and StanCERA's Counsel. To be clear, this process involves both preapproval and final approval by StanCERA and StanCERA's Counsel. The fully executed DRO will then be returned to the appropriate party for filing with the court. Once the court approves and signs the DRO Order, StanCERA requires that it be provided with a conformed, file-marked copy.

StanCERA will not recognize any court orders addressing a Member's account unless StanCERA and StanCERA's Counsel have approved the DRO pursuant to the foregoing process.

## **II. Retired Members**

For retired Members who are receiving a benefit, the retirement option a Member previously elected cannot be changed. If the Member's marriage or registered domestic partnership is dissolved after retiring, the Member's retirement benefit is reduced to provide retirement income to the Non-Member based on the retirement option selected at retirement and the percentage formula provided in the DRO.

After StanCERA is served with a Joinder, StanCERA will pay the retired member only fifty percent (50%) of the retirement benefit and will withhold the remaining 50% of the retirement benefit until StanCERA receives the DRO which has been executed by all parties and signed by the Court. StanCERA will disburse the 50% of the retirement benefit that was withheld pursuant to the terms of the DRO.

If, at the time of retirement, the unmodified option was chosen, the marriage or registered domestic partnership is dissolved and the retired Member dies first, the Non-Member is no longer eligible to receive a retirement benefit. A Non-Member is not considered a surviving spouse or registered domestic partner for any purpose under the County Employees Retirement Law of 1937; therefore, the Non-Member's community interest terminates upon the death of the retired Member.

If the Non-Member dies first, the portion of the retired Member's benefit payable to the Non-Member will continue to be paid to the Non-Member's estate or designated beneficiary during the Member's lifetime, unless otherwise stated in the Domestic Relations Order.

Prior to filing the DRO with the court, the parties shall submit their draft DRO to StanCERA's Counsel to obtain preapproval before obtaining the signatures of the Member and Non-Member. StanCERA's staff and StanCERA's Counsel will review the draft DRO for consistency with StanCERA's policies. Once the DRO is preapproved, the DRO will be returned for signing by the Member and Non-Member and their attorneys, if any. After the parties and their attorneys have signed the DRO, it must be returned to StanCERA's Counsel for final approval and the signatures of StanCERA and StanCERA's Counsel. To be clear, this process involves both preapproval and final approval by StanCERA and StanCERA's Counsel. The fully executed DRO will then be returned to the appropriate party for filing with the court. Once the court approves and signs the DRO Order, StanCERA requires that it be provided with a conformed, file-marked copy.

StanCERA will not recognize any court orders addressing a Member's account unless StanCERA and StanCERA's Counsel have approved the DRO pursuant to the foregoing process.

### **III. Revocation of California Government Code Section 31764**

Upon the StanCERA Retirement Board's approval of this policy, California Government Code Section 31764<sup>1</sup> (Option Settlement 4) will no longer be an option for StanCERA members. California Government Code Section 31764 is repealed from policy adoption forward.

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<sup>1</sup> Cal. Gov't Code § 31764 states, "[o]ptional settlement 4 consists of the right to elect in writing to have a retirement allowance paid him or her until his or her death and thereafter to have other benefits as are approved by the board, upon the advice of the actuary, continued throughout the life of and paid to the persons, having an insurable interest in his or her life, as he or she nominates by written designation duly executed and filed with the board at the time of his or her retirement. The designation shall not, in the opinion of the board and the actuary, place any additional burden upon the retirement system."



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**March 27, 2012 Internal Governance Committee**

TO: Internal Governance Committee  
FROM: Kathy Herman, Operations Manager

**SUBJECT: Updating Policies and Procedures**

- I. RECOMMENDATION: Approve the amended policies.
- II. ANALYSIS: In response to Operational Audit recommendations, on June 28, 2011 the Board of Retirement adopted several policies. Three are being brought back to this Committee for revision.
  - Purchasing Policy – Vavrinek, Trine, Day & Co. LLP (VTD) recommended that a person be named as the purchasing agent for StanCERA. The policy has been revised to list the Executive Director or his designee to act in this capacity.
  - Electronic Data Security Policy - Language was added to include response to Public Record Requests.
  - Desk and Process Manual Policy - Language was revised to more accurately reflect current and efficient practices. StanCERA has approximately 387 documented processes and procedures. These are kept electronically and updated as new information is identified and/or something changes. Annually, all 387 are reloaded to both Tyler and the Continuity of Operations Program (COOP). Both are backed-up to off site servers. (List attached)

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Kathy Herman, Operations Officer

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Rick Santos, Executive Director

Stanislaus County Employees' Retirement Association's  
**Purchasing Policy**  
(Board Approved June 28, 2011)

Stanislaus County purchasing policies and procedures are meant to manage all aspects of the County procurement process (they are located @ <http://intranet/departments/GSA/gsa-files/divisions/policies-procedures.pdf> . StanCERA views these policies and procedures as fair and adequate. StanCERA will adopt and will abide by the Stanislaus County purchasing policies and procedures with the following exceptions:

“StanCERA **Executive Director or his designee**” should be substituted for “purchasing or purchasing department” through out the policy except for the sale of surplus property section. StanCERA will coordinate monitor, and record all phases of StanCERA’s procurement of supplies equipment, materials, and services. StanCERA will also be responsible for the leasing of any StanCERA property. StanCERA will administer and manage all of its own contracts. StanCERA will use County purchasing agent to sell any StanCERA surplus personal property. StanCERA will consult with County purchasing agent as necessary for any assistance.

References in the policy to the County Board of Supervisors and County affiliations are not applicable to StanCERA procurements.

As a separate legal entity, StanCERA reserves the right to modify and/or reject any of the County purchasing policies and procedures as it deems appropriate. Any such modifications and/or rejections will be documented and approved by the Retirement Board.

Revised 3/22/2012

Stanislaus County Employees' Retirement Association's  
**Electronic Data Security Policy**  
Effective June 28, 2011

In addition to complying with the County's Computer Security – end user policy, found in Tab 16 pages 26-30 of the County personnel manual, StanCERA augment that policy with the following policy:

StanCERA member data is considered the Property of StanCERA and subject to all implied property rights. It may not be shared, distributed, published, disposed of, or otherwise released without explicit direction of the StanCERA ~~Administrator.~~ **Executive Director**

### **1. Electronic member data**

All electronic member data will reside in the Tyler database  
Access to member data is limited to authorized StanCERA staff  
Modification of member data may only be done by authorized StanCERA staff  
Any data extracted will be limited, secure and temporary

At times member data must be extracted and shared. Some examples are; actuarial valuations, yearly audits, death audits, and state and federal reporting **and authorized Public Records Act requests.** Secure procedures are in place for all these processes that include password security, data encryption and/or secure file transfer protocol (SFTP). Excluding these required functions, identifiable member data will not be transported off StanCERA premises. Identifiable member data is considered to be any data that includes SSN, birth date, name or address.

Electronic identifiable member data will not be:

- attached to emails for sharing or distribution outside of StanCERA
- saved to any transportable media including flash drives and CDs or other external storage device.
- saved to any Laptop or portable computer

Extracted member data will only be stored on the StanCERA network drives. Temporary storage on desktop PCs should be cleared daily or at the end of the project/assignment.

### **2. PERA Application Security**

Access authorizations will be reviewed and verified quarterly

### **3. Consequences**

An employee who violates this policy will be subject to the appropriate disciplinary action, which may include suspension, demotion or termination from County employment. Additionally an employee may be subject to civil, and/or criminal prosecution.



A vendor who violates this policy may be subject to termination of relations with StanCERA. Additionally vendors may be subject to civil, and/or criminal prosecution.

## **Historical Notes**

Adopted by the Board of Retirement on June 28, 2011.

Revised 4/22/2012

Stanislaus County Employees' Retirement Association's  
Desk and Process Manual Policy  
(Board Approved June 28, 2011)

The desk and process manuals for StanCERA staff functions (located @ V/Desk and Process Manuals) are adopted by the Board of Retirement. Manuals will be stored electronically. Manuals will be updated as procedures and processes change by staff and reloaded to the Tyler Help Menu and Continuity of Operations application annually by January 1. ~~Revisions to the desk and process manuals shall be identified by staff, and approved by the administrator as needed. The Internal Governance committee will review all changes at least annually. These revisions will be brought before the Retirement Board on or before December 31 of each year.~~

Revised 3/22/2012

## StanCERA Documented Process and Procedures

	Classification
1 Deposits	
2 Posting Buybacks Dollars & Service	Active
3 Pulling Bi-Weekly County Payroll Data	Active
4 Pulling Bi-Weekly City of Ceres & Courts Payroll Data	Active
5 Importing and Posting Contributions	Active
6 Web Transmittal	Active
7 Refund of Overpayment to Active Member	Active
8 Refund for Deceased or Terminated Members	Active
9 Printing Blank Numbered Checks	Admin
10 Stale-Dated Checks	
11 Processing Accounts Payable	
12 Reconciling Cash Between QuickBooks & Oracle	
13 Reconciling Investment Managers' Reports	
14 Retiree Payroll Entries	
15 Purchase Card Reconciliation	
16 County Prepayment	
17 Change in Contribution Rates	
18 Year End Accruals	Fiscal Year End
19 Depreciation	
20 Posting Interest to Member Accounts	Active
21 Transfer Active Reserves to Retiree Reserves	
22 Before Closing QuickBooks	Fiscal Year End
23 Closing QuickBooks	Fiscal Year End
24 Interim Fieldwork	Fiscal Year End
25 Work Completed Before the Auditors Return	Fiscal Year End
26 Allocating Earnings to Reserve Accounts	Fiscal Year End
27 CAFR Production Overview	Fiscal Year End
28 CAFR Introductory Section	Fiscal Year End
29 CAFR Financial Section	Fiscal Year End
30 CAFR Investment Section	Fiscal Year End
31 CAFR Actuarial Section	Fiscal Year End
32 CAFR Statistical Information Section	Fiscal Year End
33 CAFR Producing the CAFR Draft	Fiscal Year End
34 CAFR Distributing the CAFR	Fiscal Year End
35 CAFR Producing the PAFR	Fiscal Year End
36 CAFR Public Retirement Systems Financial Transactions Report	Fiscal Year End
37 Completing the Annual Census	Fiscal Year End
38 Reconciliation Between QuickBooks & Tyler	
39	
40 Processing New Hires	Active
41 Processing a Rehire	Active
42 Terminations	Active
43 Part-Time Terminations	Active
44 Processing Deferrals	Active
45 Processing Refunds	Active
46 Refund of Overpayment of Contributions	Active
47	

## StanCERA Documented Process and Procedures

	Classification
48 Preparing & Posting the Quarterly Investment Holdings Report (web)	Communciations
49 Compiling Financial Reports for Web Publication	Communciations
50 Calculating the Simplified General Rule	Retirees
51 Monitoring 960-Hour Limits for Retirees	Retirees
52 Administering the 415 Income Limit	Retirees
53 Semi-Annual Interest Posting	Active
54 Semi-Annual Member Statements	Active
55	
56 Death Notification via Obituary	Retirees
57 Retiree Death Processing/Overpayments	Retirees
58 Preparing the Condolence Letter/Refund of Overpayments	Retirees
59 Deferred Death Processing	Active
60 Active Death Processing	Active
61 Violent Death Benefit	Active
62 Proof of Attendance	Active
63 Berwyn Group Report	Retirees
64 Over- and Underpaid Contributions	Active
65 Stale Dated Checks	Retirees
66 Withholding for Child Support	Retirees
67 Return of ACH Process	Retirees
68 Adjusting Member Contributions Reciprocity	Active
69 Adjusting Member Contributions - 30 Year's Service	Active
70 Deferred Members Aged Over 65	Active
71 Processing a Returned Advice Notice/Lost Warrant Affidavit	Retirees
72 Retired Members Age 62 - Section 31810	Active
73 Pre-Retirement Seminar	Active
74 Elected Officials Acceptance/Waiver of Membership	Active
75 Retiree United Way	Retirees
76	

## StanCERA Documented Process and Procedures

	Classification
77 Accessing Personnel History Cards	Active
78 Researching Time in People Soft	Active
79 Researching Time on Legacy Check History	Active
80 Researching Time on Microfiche	Active
81 Investigating Records in Position Control	Active
82 Researching Lost Time via Tier 3 Query	Active
83 Investigating Monthly Part-Time Records	Active
84 Monthly Part-Time Prior Service	Active
85 Biweekly Part-Time Prior Service	Active
86 Combination Buybacks	Active
87 Annual Prior Service Buyback Calculation	Active
88 Redeposit Prior Full Time Service	Active
89 Calculating Rotating/Variable Shift Time	Active
90 Calculating Percent Time	Active
91 Medical Leave of Absence	Active
92 Old Military Time	Active
93 Recalculations	Active
94 Payroll Deduction	Active
95 Personal Check	Active
96 Rollover/Transfer	Active
97 Combination of Payment Types	Active
98 Maintaining Buyback Contracts	Active
99 Enhancing Tier 1 Service to Tier 4 Service	Active
100 Tier 3 Enhancement	Active
101	
102 Disability Counseling Meetings	Disability
103 Processing the Disability File	Disability
104 Using Tyler Case Management	Disability
105 Summarizing the Medical Records	Disability
106 Scheduling an Independent Medical Examination (IME)	Disability
107 Following up on an IME Exam	Disability
108 Recommendations to Grant or Deny Applications	Disability
109 Calculations for Non-Service Connected Disability Benefits	Disability
110 When a Case Goes to the Hearing Officer	Disability
111 Supplemental Disability Allowance MS	Disability
112 Writ of Mandate	Disability
113	
114 When StanCERA is not Joined	Active
115 Processing a Joinder and a DRO	Active
116 When a Member Submits the Draft DRO Only	Active
117 When Revised MSA Retains 100% of Retirement	Active
118 When the Member Does Not Act on the Joinder	Active
119	

## StanCERA Documented Process and Procedures

	Classification
120 Collecting the Data for your Estimate	Active
121 Hand Calculate the Estimate	Active
122 Interpolation	
123 Generating Retirement Estimate in PERA	Active
124 Processing Completed Estimate Paperwork	Active
125 DRO Estimates	Active
126 Estimate Counseling	Active
127 30 - Year Pay	Active
128 Outgoing Reciprocity	Active
129 Processing Returned Advice Notice	Active
130 Incoming Reciprocity	Active
131 Processing the Returned Incoming Advice Notice	Retiree
132 Re-Calculation of Retirement Allowance	Retiree
133 Retirement Award Letter Process	Retiree
134 Maintaining Buyback Contracts	Active
135 Maximum Retirement Benefit Audit	Active
136 Employee Presentations	Active
137 Back-up the Reception Counter	Admin
138 Phone Etiquette	Admin
139	
140 Create Master Board Calendar	Board Support
141 Generate the Education Calendar	Board Support
142 Generate the Board Agenda Item Master Calendar	Board Support
143 Preparing the Agenda	Board Support
144 Coordinating Investment Manager Presentations	Board Support
145 Disseminating Board Packets	Board Support
146 Linking Board Agenda & Attachments	Board Support
147 Board Meeting Logistics	Board Support
148 Preparing the Minutes	Board Support
149 Processing Blue Claim Meeting Stipends	Board Support
150 Board of Supervisor Agenda Items	Board Support
151 Strategic Planning Sessions	Board Support
152 Making Travel Arrangements	Board Support
153 Arrangements for SACRS Conferences	Board Support
154 Due Diligence	
155 FPPC Forms	
156 Tracking Trustee Education Requirement	Board Support
157 LI Electing Board of Retirement Members	Board Support
158 New Board Member Orientation Packet	Board Support
159 LI Sorting Board Members' Mail	Board Support
160 Reviewing the Mail	Admin
161 Coordinate BOR Subscriptions	Board Support
162 Minutes and Agenda Retention	Board Support
163 Employee Payroll	Board Support
164 Monitoring Contracts	Admin
165 Pay-for-Performance Reviews	Admin
166 Annual Employee Performance Reviews	Admin
167 Generating Personnel Action Forms	Admin
168	

## StanCERA Documented Process and Procedures

	Classification
169 File Audit Overview/Gather Your Materials	Active
170 Researching & Verifying Service Prior to 1999 Conversion	Active
171 Complete the Table Worksheet	Active
172 I. T. Coordinator - Service Adjustments	Active
173 Accountant - Buybacks and Service Batches	Active
174 References & Samples	Active
175 Viewing Position Control Records	Active
176 Locate the Personnel History Card	Active
177 Review the Member's Job Summary in PeopleSoft	Active
178	
179 Retirement Application Forms	Retiree
180 Reviewing the Application	Retiree
181 Calculations at a Glance	Retiree
182 Getting Started & Age Factor	Retiree
183 Years of Service	Retiree
184 Calculate Final Average Salary (FAS)	Retiree
185 Calculate the Monthly Unmodified Benefit	Retiree
186 FAS Interpolation Style 2	Retiree
187 Checking your Interpolation Work (Style 2)	Retiree
188 Converting Excess Sick Leave to Service Credit	Retiree
189 Preparing Retirement Paperwork	Retiree
190 Tier 3 Retirement	Retiree
191 Blended Retirement Calculations	Retiree
192 Retire the Member in Tyler	Retiree
193 Re-Calculation of Retirement Allowance	Retiree
194 Tier Mover Utility	Utilities
195 Retiring Members out of Active & into Retirement Payroll	Retiree
196	
197 401 a 17 monitoring	Active
198 Annual Budget	Admin
199 Cash flow projects	Admin
200 Continuity of Operations	Admin
201 Investment Reconciliation	Admin
202 District Employer and Employee Contribution updates	Admin
203 Trade order placement	Admin
204 Wire instructions Stanislaus County	Admin
205	
206 <b>StanCERA - Tyler Help Documentation</b>	
207 <b>000 Basics</b>	
208 PERA Bar (Menu Bar Icons)	
209 Initial Setup and Login	
210 Name and Address Standards	
211 <b>001 Active Members</b>	
212 Activity History Codes	Active
213 Employment History	Active
214 New Member Setup	Active
215 Pre-Retirement Death	Active
216 Pre-Retirement Seminar Attendance	Active
217 Service	Active
218 Reciprocity In and Out	Active
219 Rehire- Conflict of Information	Active
220 Tier and Plan History	Active



## StanCERA Documented Process and Procedures

	Classification
221 Member Documents / File Association	Active
222 About Dates:	
223 Dates - Activity History	General
224 Dates Map	General
225 Utilities:	
226 Tier/Plan Mover Utility	Active
227 Interest Calculation and Posting to Member Accounts	Active
228 Rehire Tier 1 or 2 Auto Upgrade of Service	Active
229 Manual Batch for Service	Active
230 Re-Activate Members	Active
231 Prior Service Auto Upgrade	Active
232 Contribution Allocation - pre 1999	Active
233	
234 <b>003 Contribution Posting</b>	
235 Web Transmittal	Active
236 Contribution Pay Code Look Up	Active
237 Contribution Posting	Active
238	
239 <b>004 Buybacks - Purchasing Service Credit</b>	Active
240 Buybacks - The Basics	Active
241 Dispatcher notes	Active
242 Instructions	Active
243 LOA	Active
244 Enhancements and Tier 3	Active
245 Redeposits	Active
246 Other Public Service	Active
247 Part Time	Active
248 Pay Code Detail / Lookup	Active
249 Posting	Active
250 Prior Service Annual	Active
251 Taxable Flag	Active
252 Setting Interest Rates For Payment Schedule	Active
253 PT Upload from PeopleSoft	Active
254	
255 <b>005 Refunds</b>	
256 Refund Upon Termination	Active
257 Burial and Lump Sum Refund Process-Post Retirement Death	Active
258	
259 <b>007 Estimate and Retirement Calculations</b>	
260 Estimates	Active
261 'What if' Estimates	Active
262 Retiree From Active	Active
263 Retiree Creation	Active
264 Re-calc of Retirement Allowance	Active
265 Work Around for Ventura Reserve Calculation	Active
266	
267 <b>008 Disabiltiy Management</b>	
268 Disability Case Management	Disability
269 Supplemental Disability Member Setup - Active side	Disability
270	
271 <b>011 Beneficiary</b>	
272 Beneficiary Maintenance	

## StanCERA Documented Process and Procedures

	Classification
273 Trust Beneficiary Sample	
274	
275 <b>012 DRO</b>	
276 Domestic Relations Orders (DRO) - Joinder Flag	Active
277	
278 <b>020 Retirees</b>	
279 Retirees Overview	Retiree
280 Retiree Setup	Retiree
281 Retiree Alternate Address	Retiree
282 Post Retirement Death Benefit Set Up	Retiree
283 Cost Of Living (COLA) Increase Update Process	Retiree
284 Retiree Mass Deduction Update	Retiree
285 1099R SGR Explanation	Retiree
286	
287 <b>023 Payroll</b>	
288 Payroll Processing - step by step	Retiree
289 Payroll-Munis Version	Retiree
290 HID Import	Retiree
291 Final Proof Report Errors	Retiree
292 NACHA Bank Of The West Instructions	Retiree
293 Creating a Check/Advice Message	Retiree
294 Available Munis Reports	Retiree
295 Tax Table Updates (California and Federal)	Retiree
296 FICA Withholding Updates (MUNIS Quick Tip)	Retiree
297 Insurance Rate Maintenance	Retiree
298 Limited Payroll - Payee Selection Process	Retiree
299 Various Retiree Pay Setup (post retirement death, beneficiary death, DRO, S	Retiree
300 Munis Admin Tasks	Retiree
301 Munis Admin Tips And Tricks	Retiree
302 Void Payroll Process	Retiree
303 Payroll Transaction Import	Retiree
304	
305 <b>050 Reports</b>	
306 Member Reports - Tips and Tricks	General
307 1099R Processing	Retiree
308 1099R Print forms and reports	Retiree
309 1099R Creation	Retiree
310 SGR Synopsis	Retiree
311 SGR Worksheet sample	Retiree
312 Contribution Activity and Balance Report	Active
313 EDD Quarterly Extract - State Withholding	Retiree
314 Actuary Extract	Admin
315 Death Audit Extract and Pick Up	Admin
316 Address Listing (mail merge) instructions.	
317 StanCERA Created Reports	
318 Member Statements	Active
319 <b>070 Event Tracking</b>	
320 Event Tracking	Board Support
321	
322 <b>080 Web Functions</b>	
323 Web Application - Admin Functions	Communciations
324 Web Calculator (StanCERA Website)	Communciations

## StanCERA Documented Process and Procedures

	Classification
325 Web Calculator- Access to Individual Member Records	Communciations
326 Alfresco Electronic Document Access (EDM)	General
327 StanCERA Website editing (Blue CMS)	Communciations
328 Transfer (FTP) documents to Fire2Wire Server	Communciations
329 StanCERA Website editing (In House)	Communciations
330 StanCERA Website Code Section Binder Update	Communciations
331	
<b>332 090 MCP (Master Control Program)</b>	
333 MCP Instructions	General
334 Courts ER COL Profile Screen	Active
335 Interest Rates	Active
336 Creating a New Activity Code	General
337 Member Status Codes Interest Rates	General
<b>338 900 Release Notes</b>	
339 StanReleaseNotes 2008-04-28	General
<b>340 910 Desk and Procedure Manuals</b>	
341 Accounting Procedure Manual	
342 Administrative Assistant Procedure Manual	
343 Administrative & Web Procedure Manual	
344 Benefits Manager Desk & Procedure Manual	
345 Buy Backs Procedure Manual	Active
346 Disability Procedure Manual	Disability
347 DRO Procedure Manual	Active
348 Executive Assistant to the Board Manual	Board Support
349 Interest Posting and Member Statements Procedure Manual	Active
350 Service Retirement Procedure Manual	Retiree
351 Retirement Specialist Desk & Procedure Manual	
<b>352 920 Other</b>	
353 401-a17 Limits Verification Query	Active
354 415 Earnings Limit Extract	Retiree
355 Alfresco Batch Load	General
356 Alfresco Electronic Document Access (EDM)	General
357 Tyler System Security and Access	Admin
358 Board Audio Recording Process	Board Support
359 End Of Year Tasks and Deadlines	Admin
360 SFTP Instructions	Active
361 StanCERA Disaster Recovery Plan (COOP) <a href="http://www.StanislausCoop.com">www.StanislausCoop.com</a>	Admin
362 Updating the Tyler Help Menu	Admin
363 Ryans In and Out board documentation	IT
364 How to Scan and OCR documents	General
<b>365 930 PERA.Net (documentation provided by vendor)</b>	
366 Buybacks	Active
367 Contribution Posting	Active
368 Domestic Relation Orders (DROs)	Active
369 Estimates	Active
370 Interest Posting	Active
371 Payroll-Munis	Retiree
372 Refunds	Active
373	
<b>374 2-001 Links:</b>	
375 Link to StanCERA Disaster Recovery Plan (COOP) <a href="http://www.StanislausCoop.co">www.StanislausCoop.co</a>	Admin
376 Link to Alfresco login	General

## StanCERA Documented Process and Procedures

	Classification
377 Tyler Tech web site	Admin
378 County Intranet	Admin
379 StanCERA web site	Admin
380 PeopleSoft login	Admin
381 <b>2-002 Standards:</b>	
382 File Naming Best Practices	General
383 Help Standards	General
384 How to Scan and OCR documents	General
385 <b>2-003 Installation documentation:</b>	
386 TACS Installation - new PC	IT
387 MUNIS Client Desktop Install Instructions	IT