Type II Charter Schools
Retirement Reporting and Processing (RR&P)
Required Documentation

LACOE offers:
  • CalSTRS and/or CalPERS retirement reporting
  • Funding disbursement, after sufficient funds have been reserved for CalSTRS and/or CalPERS

All documents and forms should be submitted electronically to sfs_bcsu@lacoe.edu

Documents

- Charter Petition
- Copy of Articles of Incorporation bearing the seal of the Secretary of State, if your Charter is affiliated with a Non-Profit Public Benefit Corporation
- Board Minutes Approving charter school
- Federal Tax ID letter

Forms

- General Application for Charter Schools (digital/e-signature)
- Certification of Signatures (wet signature)
- Charter School Funds Distribution (digital/e-signature)
- Charter School Intentions (digital/e-signature)
- Bulletin Distribution Form (digital/e-signature)
- Introduction & Authorized Signatures (wet signature)
- Resolution to Issue Funds (digital/e-signature)
- Electronic Funds Transfer (EFT) Payment Enrollment (Instructions) (wet signature)
- Voided Check

CalSTRS Forms (if elected)

- CalSTRS Activation Packet (wet signature)
- Pre-Tax Receivable Resolution - CalSTRS (wet signature)

CalPERS Forms (if elected)

- EPMC Resolution - CalPERS (wet signature)
- Pre-Tax Receivable Resolution - CalPERS (wet signature)
- CalPERS Applicant Questionnaire (wet signature)
- CalPERS Certification Form (digital/e-signature)
- School’s By-Laws