Type III Charter Schools
PeopleSoft and Retirement Reporting and Processing
Required Documentation

LACOE offers:
- CalSTRS and/or CalPERS retirement reporting
- PSFS for accounts payable processing and accounting services

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 Intentions (digital/e-signature)
- Charter School Mail Delivery (digital/e-signature)
- Commercial Warrant Approval Resolution (digital/e-signature)
- District Security Administrator and Alternate Letter format (wet signature)
- PeopleSoft Operator Security Request — (one for each PeopleSoft user) (wet signature)
- RAD User Security Form — (one for each RAD user) (wet signature)
- Charter School Funds Distribution (digital/e-signature)
- Resolution to Issue Funds (digital/e-signature)
- Bulletin Distribution Form (digital/e-signature)
- Introduction & Authorized Signatures (wet signature)

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