



# Monterey County Office of Education

*Leadership, Support, and Service to Prepare All Students for Success*

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*Dr. Nancy Kotowski  
County Superintendent of Schools*


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Finance and Business Services

Bulletin No. 13-031

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TO: Chief Business Officials and Payroll Clerks

FROM:  Suzette Burns, Administrator of Business Services

DATE: February 19, 2013

RE: **This Memorandum Serves as Guidance Regarding CalPERS Employer Certification for Retirement Applications**

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CalPERS retirement applications were revised to remove the employer certification section for reporting last day on payroll, separation date, unused sick leave, and unused educational leave hours. However, the Monterey County Office of Education (MCOE) is still required to report this information online using myCalPERS.

In order to comply with the new reporting method, the attached AESD-1 must be submitted to Bei Kong at MCOE at [bkong@monterey.k12.ca.us](mailto:bkong@monterey.k12.ca.us) or by fax to (831) 753-1616. Unused sick leave or educational leave hours should be noted in box 8 of the AESD-1 form.

If you have any questions, please feel free to contact Bei Kong at 755-0318.

cc: Garry Bousum  
Colleen Stanley



P.O. Box 942709  
 Sacramento, CA 94229-2709  
 Telephone (888) 225-7377  
 FAX (916) 795-3287  
 TDD (916) 795-3240

(Please PRINT or TYPE clearly)

INCOMPLETE OR IMPROPERLY COMPLETED FORMS MAY BE RETURNED TO YOU

# Member Action Request

<b>1</b> SOCIAL SECURITY NUMBER - -		<b>2</b> Current Name (First, Middle, Last)		<b>3</b> Daytime Phone Number (	
<b>4</b> Date of Birth MM   DD   YYYY		<b>5</b> Gender <input type="checkbox"/> Female <input type="checkbox"/> Male <input type="checkbox"/> Unknown		<b>6</b> Former Name - For name changes only (First, Middle, Last)	
<b>7</b> Mailing Address:  In Care of (if applicable):  Street/P.O. Box:  Additional Address Line:  City:  State:    ZIP Code:    -			<b>8</b> Remarks (pertaining to CalPERS)		
			<b>9</b> Employer Name		
<b>10</b> Effective Date of Action MM   DD   YYYY		<b>11</b> Subject to Section 20306 <input type="checkbox"/> Yes <input type="checkbox"/> No		<b>12</b> Employer Code 0203	<b>13</b> District Code (Schools only)
			<b>14</b> Hire Date MM   DD   YYYY		

**15** Type of Action (check all boxes that apply for this Effective Date; if none apply, indicate action needed in "Remarks" [#8] above):

A. <input type="checkbox"/> Appointment/Membership	E. <input type="checkbox"/> Military Leave	I. <input type="checkbox"/> Alternate Retirement Plan (G.C. 20306)
B. <input type="checkbox"/> Return from Leave	F. <input type="checkbox"/> Worker's Comp Leave	J. <input type="checkbox"/> Name Change
C. <input type="checkbox"/> Separation, Permanent	G. <input type="checkbox"/> Sabbatical Leave	K. <input type="checkbox"/> Address Change
D. <input type="checkbox"/> Separation, Temp (≥ 2 months)	H. <input type="checkbox"/> Maternity/Paternity Leave	L. <input type="checkbox"/> Coverage Group Change

<b>16</b> Coverage Group 60004	<b>17</b> Job/Position Title	<b>18</b> ½ @ 55 Formula  Cont. Rate:            %
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**19**  - This person is an Optional Member (e.g., "Elective Officer," "Legislative Employee") who is electing membership.  
 (Please attach appropriate election form AESD-3, AESD-59, or AESD-229)

**20 BASIS FOR MEMBERSHIP QUALIFICATION:** (Optional informational field. Check appropriate box.)

<input type="checkbox"/>	Full-Time for > 6 months
<input type="checkbox"/>	Part-Time for ≥ 20 hours for 1 year or more
<input type="checkbox"/>	Indeterminate; at least 20 hours a week for 1 year or more
<input type="checkbox"/>	Has completed 1,000 hours or 125 days in fiscal year
<input type="checkbox"/>	Person is already a PERS member

**21** Form Completed By:

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(Name & Title)

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(Telephone Number)            (Fax Number)            (Date)

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(Signature of Certifying Officer)            (Date)



California Public Employees' Retirement System  
P.O. Box 942709  
Sacramento, CA 94229-2709  
(888) CalPERS (or 888-225-7377)  
TTY: (877) 249-7442  
[www.calpers.ca.gov](http://www.calpers.ca.gov)

Reference No.:  
Circular Letter No.: 200-049-12  
Distribution: IV, V, VI, X, XII, XVI  
Special:

## Circular Letter

October 29, 2012

TO: **ALL CALPERS EMPLOYERS**

SUBJECT: **CHANGE IN EMPLOYER CERTIFICATION FOR RETIREMENT APPLICATIONS**

The purpose of this Circular Letter is to inform you of important information regarding a change in the employer certification section on Service and Disability Retirement applications.

### **Employer Certification on Retirement Applications**

Service and Disability Retirement applications are being revised to remove the employer certification section. Employers no longer need to indicate last day on payroll, separation date, unused sick leave, and unused educational leave hours on the retirement application. Employers must, however, report this information online using myCalPERS. The newly revised retirement applications will be available on the CalPERS website and will be available for ordering December 20, 2012.

### **Requested Employer Certification or Amended Employer Certification**

Effective immediately, CalPERS will no longer process the Requested Employer Certification (BSD-200) or Amended Employer Certification (BSD-200A) forms. Unused sick leave and educational leave, when applicable, must be reported online.

### **Proper Reporting**

It is imperative that an employer report a permanent separation when an employee retires or otherwise ends employment with your agency, regardless of the reason. All transactions within myCalPERS, including health and retirement, rely on the permanent separation date to be reported to determine proper benefit eligibility and cost for both the employer and the member.

### **Employer Resources**

For information about how Public Agency, School, State, and Non-Central employers should submit this information using myCalPERS, please visit the CalPERS Education Center on CalPERS On-Line at [www.calpers.ca.gov](http://www.calpers.ca.gov). The student guide for myCalPERS Training Course 103: Retirement Enrollment Basics, provides instruction on reporting a permanent separation, the last day on payroll, unused sick leave, and unused educational leave in Unit 3, Scenario 5.

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Please note that State Agencies and the California State University (CSU) system should continue to report permanent separations as well as sick leave and educational leave via the Personnel Information Management System (PIMS). However, if any corrections need to be made after the permanent separation and sick or educational leave have been reported via PIMS, State Agencies and the CSU system should make changes via my|CalPERS, and not through PIMS.

Additional information regarding the reporting of unused sick or educational leave is available in the CalPERS Public Agency & Schools Reference Guide and the CalPERS State Reference Guide.

If you have any questions, please contact the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

ANTHONY SUINE, Chief  
Benefit Services Division