



Monterey County Office of Education


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

*Dr. Nancy Kotowski
County Superintendent of Schools*

Finance and Business Services

Bulletin No. 13-032

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 Member Reciprocal Self-Certification**

CalPERS requires the Member Reciprocal Self-Certification (CASD-801) form be provided to all new employees upon hire in order to be compliant with the Public Employees' Pension Reform Act of 2013 (PEPRA). The form will assist your district in determining the applicable PEPRA retirement benefit formula for the new employee.

Please review attached CASD-801 form and instructions. Submit a copy of the completed form to Bei Kong at MCOE at bkong@monterey.k12.ca.us or by fax to (831) 753-1616. The original form must be retained by the district and placed in the employee's Personnel file for CalPERS auditing purposes.

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

cc: Garry Bousum
Colleen Stanley



California Public Employees' Retirement System
 Customer Account Services Division
 Retirement Account Services Section
 P.O. Box 942709
 Sacramento, CA 94229-2709
 TTY: (877) 249-7442
 888 CalPERS (or 888-225-7377) phone • (916) 795-4166 fax
 www.calpers.ca.gov

MEMBER RECIPROCAL SELF-CERTIFICATION FORM

Complete the following information and return this form to your Personnel Office **within 10 business days**:

EMPLOYEE NAME: _____
(Last) (First) (Middle)

SOCIAL SECURITY NUMBER OR CalPERS ID NUMBER: _____

NAME OF MOST RECENT RECIPROCAL RETIREMENT SYSTEM: _____

PERMANENT SEPARATION DATE FROM MOST RECENT RECIPROCAL RETIREMENT SYSTEM: _____

FIRST MEMBERSHIP DATE IN ANY PRIOR CALIFORNIA PUBLIC RETIREMENT SYSTEM THAT IS SUBJECT TO RECIPROCALITY: _____

(Check the applicable statement)

_____ I have not been a member of another California Public Retirement System within the last six months.

_____ I was a member and am retired from the _____ Retirement System and subsequently became employed by a CalPERS-covered employer.

_____ I was a member of the _____ Retirement System and became employed by a CalPERS-covered employer within six months after separating from employment with the previous reciprocal retirement system.

I understand that by accepting employment in a specific retirement system, I am subject to the applicable laws and regulations of that system. I also understand that completing this form does not constitute a request to establish reciprocity. I must complete and return the "Election to Coordinate Retirement When Changing Retirement Systems," (PERS-MSD-255) Form to CalPERS.

I hereby certify that the foregoing information is true and correct and any information found to be incorrect may require corrections to my account in the California Public Employees' Retirement System including, but not limited to, my date of membership. CalPERS may make any necessary corrections to my account to ensure I am properly enrolled and eligible to receive the correct retirement benefits.

 SIGNATURE OF EMPLOYEE DATE

TO BE COMPLETED BY EMPLOYER ONLY:

NAME OF CalPERS AGENCY: _____ CalPERS BUSINESS PARTNER ID: _____

CaPERS MEMBERSHIP ELIGIBILITY DATE WITH YOUR AGENCY: _____ ORIGINAL HIRE DATE WITH YOUR AGENCY: _____

DATE MEMBER RECIPROCAL SELF-CERTIFICATION FORM GIVEN TO EMPLOYEE: _____
 DATE MEMBER RECIPROCAL SELF-CERTIFICATION FORM RECEIVED FROM EMPLOYEE: _____

(Please Print) DESIGNEE OF EMPLOYER _____ TITLE _____ DATE _____

DESIGNEE'S SIGNATURE _____

MEMBER RECIPROCAL SELF-CERTIFICATION FORM

Instructions

Reciprocity is an agreement among public retirement systems to allow members to separate from one public employer and enter into employment with another public employer within a specific time limit without losing some valuable retirement and related benefit rights.

The Public Employees' Pension Reform Act of 2013 (PEPRA), effective January 1, 2013, requires a CalPERS covered employer to determine the applicable PEPRA retirement benefit formula for new employees. CalPERS refers to all members that do not fit within the PEPRA definition of a "new member"¹ as "classic members" who are subject to the Public Employees' Retirement Law (PERL). PEPRA allows a member after January 1, 2013, to retain his/her classic member retirement benefit status if the member continues his/her membership in all previous California Public Retirement System(s) by leaving his/her service credit and contributions (if any) on deposit, and the member enters into employment that results in CalPERS membership within six months of separating from the most recent California Public Retirement System. Classic member status also requires the membership date to be on or before December 31, 2012, in a California Public Retirement System in which reciprocity is established.

EMPLOYER INSTRUCTIONS

1. Employers must provide the Member Reciprocal Self-Certification Form to all new employees upon eligibility for membership.
2. Employers must sign and date the Member Reciprocal Self-Certification Form on the date the form is given to the employee.
3. Upon receipt of the completed Member Reciprocal Self-Certification Form, the employer will enter the date the employee returns the form.
4. The employer will enroll the new employee into CalPERS membership through my|CalPERS based on the information provided on the Member Reciprocal Self-Certification Form. my|CalPERS will determine the proper retirement benefit formula. If an employer believes the retirement benefit formula is incorrect, employers may contact CalPERS at 1-888-225-7377.
5. It is the responsibility of the employer to retain the completed Member Reciprocal Self-Certification Form in the employee's employment records for auditing purposes.

¹ A new member is defined in PEPRA as any of the following:

- A new hire who is brought into CalPERS membership for the first time on or after January 1, 2013, who has no prior membership in any California Public Retirement System.
- A new hire who is brought into CalPERS membership for the first time on or after January 1, 2013, who has a break in service of greater than six months with another **California Public Retirement System that is subject to Reciprocity.**
- A member who first established CalPERS membership prior to January 1, 2013, who is rehired by a different CalPERS employer after a break in service of greater than six months.

EMPLOYEE INSTRUCTIONS

1. The Member Reciprocal Self-Certification Form will assist your employer in determining whether you are considered a new member or a classic member under PEPRA.
2. As the new employee, you must complete, sign and date the Member Reciprocal Self-Certification Form to self-certify your most recent service in a reciprocal California Public Retirement System, your first membership date in any previous California Public Retirement System and your permanent separation date from the most recent California Public Retirement System; or indicate that you are not a member of any California Public Retirement System that is subject to Reciprocity.
3. As the new employee, you must return the Member Reciprocal Self-Certification Form to your Personnel Office **within 10 business days** of employment.
4. The completion of the Member Reciprocal Self-Certification Form does not establish reciprocity and is not a request to establish reciprocity. In order to request that reciprocity be established, visit the CalPERS web-site at: www.calpers.ca.gov and download the publication: "When You Change Retirement Systems", PUB-16. **It is the responsibility of the employee to complete and send the "Election to Coordinate Retirement When Changing Retirement Systems," PERS-MSD-255 Form to CalPERS.**

Reciprocal 1937 Act Counties

Alameda	Sacramento
Contra Costa	San Bernardino
Fresno	San Diego
Imperial	San Joaquin
Kern	San Mateo
Los Angeles	Santa Barbara
Marin	Sonoma
Mendocino	Stanislaus
Merced	Tulare
Orange	Ventura

Non-Reciprocal & UCRS Retirement Systems

Non-reciprocal systems are not covered by reciprocity retirement laws, but participate in retirement agreements with other systems.

State Teachers' Retirement System
Legislators' Retirement System
Judges' Retirement System
Judges' Retirement System II
University of California Retirement System

Reciprocal Public Agencies

*City of Concord
*City of Costa Mesa (Safety employees only)
City of Fresno (Miscellaneous and Safety Retirement Systems)
City of Los Angeles (non-Safety only)
City of Oakland (non-Safety employees only)
City of Pasadena (Fire and Police Retirement System)
*City of Sacramento
*City of San Clemente (non-Safety employees only)
City of San Diego
*City and County of San Francisco
City of San Jose
Contra Costa Water District
County of San Luis Obispo
East Bay Municipal Utility District
East Bay Regional Park District (Safety employees only)
Los Angeles County Metropolitan Transportation Authority
(Non-Contract Employees' Retirement Income Plan, formerly Southern California Rapid Transit District)

*Also CalPERS-covered agency