



# Contra Costa County Office of Education

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Karen Sakata, Superintendent of Schools

## Business and Administrative Services

July 31, 2018

TO: District Business Officials  
District Payroll  
Contra Costa County School Districts

FROM: Jade Moore  
District Payroll Services

SUBJECT: CalPERS Circulars - **July 2018**

The following is a summary of CalPERS Circulars, relevant to payroll, distributed during the month of July 2018.

**1) CalPERS Circular No. 200-050-18 – Revised Reciprocal Self-Certification Form**

- Revisions have been made to the Reciprocal Self-Certification Form (PERS-EAMD-801), as well as the employer reference guides.
- The revised form provides members with added direction on how to fill out the form, as well as emphasizing the importance of accurate information and dates.
- The State Reference Guide and Public Agency & Schools Reference Guide have been updated to include information regarding the importance of proper utilization and processing of the form.
- Copy of the revised form is attached with this summary, and can also be downloaded here: <https://www.calpers.ca.gov/docs/circular-letters/2018/200-050-18-attach-1.pdf>



California Public Employees' Retirement System  
P.O. Box 942715 | Sacramento, CA 94229-2715  
888 CalPERS (or 888-225-7377) | TTY: (877) 249-7442  
[www.calpers.ca.gov](http://www.calpers.ca.gov)

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## Membership

# Circular Letter

July 27, 2018

Circular Letter: 200-050-18

Distribution: IV, V, VI, X, XII, XVI

**To:** All CalPERS Employers  
**Subject:** Revised Reciprocal Self-Certification Form

### Purpose

The purpose of this Circular Letter is to inform you of revisions made to the **Reciprocal Self-Certification Form** (PERS-EAMD-801) and updates made to the employer reference guides providing processing instructions for the form.

### Revised Form

The revised **Reciprocal Self-Certification Form** provides the member with added direction regarding how to complete the form. The revision also includes an explanation of the importance of providing accurate information and dates so the retirement enrollment level can be properly determined by my|CalPERS to help avoid adjustments to retirement accounts. It is the responsibility of the employer to ensure they are using the revised version of the form, processing the form properly, and retaining the completed **Reciprocal Self-Certification Form** in the member's employment records for auditing purposes.

### Reference Guides and Website Updates

Updates to the employer **State Reference Guide** and **Public Agency & Schools Reference Guide** provide employers with information regarding the importance of properly utilizing the form, as well as instructions for processing the form. The instructions have been updated to reflect the proper processing procedures based on employer type under the Reciprocal Self-Certification section. Our website, [www.calpers.ca.gov](http://www.calpers.ca.gov), has been updated to easily navigate information

regarding the Public Employees' Pension Reform Act of 2013 (PEPRA) and its impacts to members and employers.

### **Questions**

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

Renee Ostrander, Chief  
Employer Account Management Division

**Attachment:** Reciprocal Self-Certification Form



California Public Employees' Retirement System  
P.O. Box 942709 Sacramento, CA 94229-2709  
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Employer Account Management Division

Dear Member,

The California Public Employees' Retirement System (CalPERS) requires all members hired after January 1, 2013 complete the **Reciprocal Self-Certification Form (PERS-EAMD-801)** to provide essential information that will be used by your employer to enroll you in CalPERS membership.

This form obtains information regarding your membership in other qualifying public retirement systems and *must be returned to your employer within 10 business days of receipt*. Use the instructions provided on the back of the form and reference the List of Qualifying Public Retirement Systems for assistance. Information regarding your membership in a defined benefit plan for any of the listed qualifying public retirement system must be provided. **However, information related to CalPERS membership should not be included when completing this form, as this data is already stored in the CalPERS system.**

It is your responsibility to ensure the accuracy and completeness of the information you provide. Inaccurate information may result in adjustments to your account which could lead to adverse impacts such as incurring financial obligations that you and your employer will be responsible to fulfill.

For more information regarding the **Reciprocal Self-Certification Form**, please visit our website at [www.calpers.ca.gov](http://www.calpers.ca.gov).

Please note: The completion of the **Reciprocal Self-Certification Form** does not establish [reciprocity](#), nor is it a request to establish reciprocity. To request that reciprocity be established, download the **When You Change Retirement Systems (PUB 16)** publication to obtain the **Confirmation of Intent to Establish Reciprocity When Changing Retirement Systems (PERS-CASD-255)** form. This publication is available at [www.calpers.ca.gov](http://www.calpers.ca.gov).

Sincerely,

Membership Services

Enclosures: List of Qualifying Public Retirement Systems in California, **Reciprocal Self-Certification Form**, and Directions for Completing Reciprocal Self-Certification Form

## List of Qualifying Public Retirement Systems in California

Name of Public Retirement System	Qualifications:
Alameda County Employees' Retirement Association <sup>^</sup>	
City and County of San Francisco Employees' Retirement System*	
City of Concord Retirement System*	
City of Costa Mesa Public Retirement System*	Safety only
City of Fresno Retirement System	
City of Pasadena Fire and Police Retirement System	Fire and police only
City of San Clemente*	Non-safety (miscellaneous) only
Contra Costa County Employees' Retirement Association <sup>^</sup>	
Contra Costa Water District	
East Bay Municipal Utility District	
East Bay Regional Park District	Safety only
Fresno County Employees' Retirement Association <sup>^</sup>	
Imperial County Employees' Retirement Association <sup>^</sup>	
Judges Retirement System II	
Kern County Employees' Retirement System <sup>^</sup>	
Legislators' Retirement System	
Los Angeles City Employees' Retirement System	Non-safety (miscellaneous) only; L.A. Fire and Police Pension System and L.A. Water and Power Employees' Retirement System not eligible
Los Angeles County Employees' Retirement Association <sup>^</sup>	
Los Angeles County Metropolitan Transportation Authority	Non-contract Employees' Retirement Income Plan, formerly Southern California Rapid Transit District
Marin County Employees' Retirement Association <sup>^</sup>	
Mendocino County Employees' Retirement Association <sup>^</sup>	
Merced County Employees' Retirement Association <sup>^</sup>	
Oakland Municipal Employees' Retirement System (City of Oakland)	Non-safety (miscellaneous) only
Orange County Employees' Retirement System <sup>^</sup>	
Sacramento City Employees' Retirement System*	
Sacramento County Employees' Retirement System <sup>^</sup>	Defined benefit plan only; cash balance plans not eligible
San Bernardino County Retirement Association <sup>^</sup>	
San Diego City Employees' Retirement System	Defined benefit plan only; cash balance plans not eligible
San Diego County Employees' Retirement Association <sup>^</sup>	
San Joaquin County Employees' Retirement Association <sup>^</sup>	
San Jose Federated City Employees' Retirement System	
San Luis Obispo County Pension Trust	
San Mateo County Employees' Retirement Association <sup>^</sup>	
Santa Barbara County Employees' Retirement System <sup>^</sup>	
Sonoma County Employees' Retirement Association <sup>^</sup>	
Stanislaus County Employees' Retirement Association <sup>^</sup>	
State Teachers' Retirement System	Defined benefit plan only; cash balance plans not eligible
Tulare County Employees' Retirement Association <sup>^</sup>	
University of California Retirement Program	Defined benefit plan only; cash balance plans not eligible
Ventura County Employees' Retirement Association <sup>^</sup>	
*= <sup>Also CalPERS-covered agency</sup>	<sup>^</sup> =1937 Act Counties



## Reciprocal Self-Certification Form

*Complete the following information and return this form to your personnel office **within 10 business days**. To ensure this form is completed correctly, please reference the enclosed List of Qualifying Public Retirement Systems and instructions.*

<b>Section 1. Member Information</b>	
Member Name:	(Last) (First) (Middle)
Date of Birth:	CalPERS ID:
<b>Membership Status in Qualifying Public Retirement Systems:</b> <input type="checkbox"/> I have not been a member of a qualifying public retirement system in California. (skip to section 3) <input type="checkbox"/> I have membership in a defined benefit plan under a qualifying public retirement system in California other than CalPERS. (complete section 2 with membership information for each qualifying public retirement system)	

<b>Section 2. Qualifying Reciprocal Membership Information</b>			
Name of Most Recent Public Retirement System:	Membership Date: / /	Separation Date*: / /	<input type="checkbox"/> Retired* or <input type="checkbox"/> Refunded* Date: / /
Name of Prior Public Retirement System:	Membership Date: / /	Separation Date*: / /	<input type="checkbox"/> Retired* or <input type="checkbox"/> Refunded* Date: / /
Name of Prior Public Retirement System:	Membership Date: / /	Separation Date*: / /	<input type="checkbox"/> Retired* or <input type="checkbox"/> Refunded* Date: / /

*\*Please provide dates, if applicable. Not all sections may be applicable for each Public Retirement System.*

<b>Section 3. Sign and Certify</b>	
I understand that by accepting employment in a qualified public retirement system, I am subject to the applicable laws and regulations of that system. <b>I also understand that completing this form is not a request to establish reciprocity.</b>	
I hereby certify that the foregoing information has been verified with the qualifying public retirement system as true and correct and any information found to be incorrect may require corrections to my CalPERS account including, but not limited to, my retirement enrollment level and adjustments to my member contributions. CalPERS may make any necessary corrections to my account to ensure I am properly enrolled and eligible to receive the correct retirement benefits.	
<i>Member Signature:</i>	<i>Date:</i>

<b>Section 4. To Be Completed by Employer Only</b>	
Name of CalPERS Agency:	
CalPERS Business Partner ID:	Member's Enrollment Eligibility Date:
Designee of Employer: (print name)	Designees' Title:
<i>Designee Signature:</i>	<i>Date:</i>
<b>The employer must retain this form in the member's file for auditing purposes.</b>	
<i>For more direction regarding how to process the Reciprocal Self-Certification Form, please refer to our employer reference guides.</i>	

## Instructions for Completing the Reciprocal Self-Certification Form

<p><b>Section 1. Member Information</b></p>	<ul style="list-style-type: none"> <li>• Complete the required fields with your name, date of birth, and CalPERS ID.</li> <li>• Check <b>one</b> of the appropriate boxes to indicate if you have had membership in a defined benefit plan in one of the qualifying public retirement systems named on the enclosed list. <ul style="list-style-type: none"> <li>– If you <b>have not</b> been a member of any of the qualifying public retirement systems, mark the first box and skip to section 3.</li> <li>– If you <b>have</b> membership in a defined benefit plan of any of the qualifying public retirement systems on the enclosed list, mark the second box and continue to section 2.</li> <li>– This form is to obtain information regarding your membership in <u>other</u> qualifying public retirement systems; <b>do not include CalPERS membership on this form.</b></li> </ul> </li> </ul>
<p><b>Section 2. Qualifying Reciprocal Membership Information</b></p>	<ul style="list-style-type: none"> <li>• In the first column, titled “Name of Public Retirement System,” list the name of any qualifying public retirement systems you are a member of a defined benefit plan. <ul style="list-style-type: none"> <li>– If you are a member of multiple qualifying public retirement systems, please provide the name of each system beginning with the most recent in descending order.</li> <li>– <b>Please reference the enclosed List of Qualifying Public Retirement Systems in California. Only systems named on this list should be provided on the Reciprocal Self-Certification Form.</b></li> </ul> </li> <li>• In the second column, titled “Membership Date,” list your membership date in the qualifying public retirement system. <ul style="list-style-type: none"> <li>– You must provide a full date, including month, date, and year, which corresponds to each qualifying public retirement system listed.</li> <li>– If you are unsure of your membership date, please contact the qualifying public retirement system to confirm information prior to completing the form.</li> </ul> </li> <li>• In the third column, titled “Separation Date,” list your separation date from the qualifying public retirement system. <ul style="list-style-type: none"> <li>– This section may not be applicable for all qualifying public retirement systems. If you have not separated from the qualifying public retirement system, leave this field blank.</li> <li>– If you have separated from the qualifying public retirement system, you must provide a full date including month, date, and year.</li> <li>– If you are unsure of your separation date, please contact the qualifying public retirement system to confirm information prior to completing the form.</li> </ul> </li> <li>• In the fourth column, titled “Retired or Refunded,” indicate if you have retired or refunded from the qualifying public retirement system. <ul style="list-style-type: none"> <li>– This section may not be applicable for all qualifying public retirement systems. If you have not retired or refunded from the qualifying public retirement system, leave this field blank.</li> <li>– If you have retired or refunded from the qualifying public retirement system, mark the appropriate box and provide a full date including month, date, and year.</li> <li>– Retired: You have separated from the qualifying public retirement system and receive a monthly retirement allowance.</li> <li>– Refunded: You have terminated your membership in the qualifying public retirement system by withdrawing your contributions.</li> </ul> </li> </ul>
<p><b>Section 3. Sign and Certify</b></p>	<ul style="list-style-type: none"> <li>• Please read the statement. Then, sign your name and date the document before returning it to your personnel office.</li> </ul>

# Privacy Notice

The privacy of personal information is of the utmost importance to CalPERS. The following information is provided to you in compliance with the Information Practices Act of 1977 and the Federal Privacy Act of 1974.

## Information Purpose

The information requested is collected pursuant to the Government Code (sections 20000 et seq.) and will be used for administration of Board duties under the Retirement Law, the Social Security Act, and the Public Employees' Medical and Hospital Care Act, as the case may be. Submission of the requested information is mandatory. Failure to comply may result in CalPERS being unable to perform its functions regarding your status.

Please do not include information that is not requested.

## Social Security Numbers

Social Security numbers are collected on a mandatory and voluntary basis. If this is CalPERS' first request for disclosure of your Social Security number, then disclosure is mandatory. If your Social Security number has already been provided, disclosure is voluntary. Due to the use of Social Security numbers by other agencies for identification purposes, we may be unable to verify eligibility for benefits without the number.

Social Security numbers are used for the following purposes:

1. Enrollee identification
2. Payroll deduction/state contributions
3. Billing of contracting agencies for employee/ employer contributions
4. Reports to CalPERS and other state agencies
5. Coordination of benefits among carriers
6. Resolving member appeals, complaints, or grievances with health plan carriers

## Information Disclosure

Portions of this information may be transferred to other state agencies (such as your employer), physicians, and insurance carriers, but only in strict accordance with current statutes regarding confidentiality.

## Your Rights

You have the right to review your membership files maintained by the System. For questions about this notice, our Privacy Policy, or your rights, please write to the CalPERS Privacy Officer at 400 Q Street, Sacramento, CA 95811 or call us at **888 CalPERS** (or **888-225-7377**).