



California Public Employees' Retirement System
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TO: STATE AGENCIES, AGRICULTURAL DISTRICTS, PUBLIC AGENCIES, STATE COLLEGES & UNIVERSITIES, COUNTY SUPERINTENDENT OF SCHOOLS

SUBJECT: NEW RETIREMENT APPLICATION AND ELECTION PROCESS

In May of 2000, all agencies were notified of the changes to the California Public Employees' Retirement System's Retirement Application and Election process and provided with procedures for the new process. These changes were made to simplify the process and improve the service level for members who apply for retirement. The major area of change centered on the following items:

- Create a single step application election process for members vs. the old two-step process that required a member to apply for retirement first then elect retirement options later
- Employer to certify unused sick leave and/or educational leave (if contracted for) and separation date information on member's retirement application vs. reporting after member retires and having to perform a post-retirement adjustment to member's allowance

The intent of this Circular Letter is to clarify and emphasize a few items concerning the new Retirement Application and Election process. Those items are listed below.

Retirement Applications

CalPERS will only process retirement applications submitted on the "new" retirement application election forms which are contained in the following publications: Stepping Into Retirement A Guide to Completing CalPERS Service Retirement Election Application (PERS-Pub-43) or A Guide to Completing Your CalPERS Disability Retirement Election Application (PERS-Pub-35). These are the only applications that should be distributed to an employee applying for retirement. Please destroy all previous Service Retirement and Disability Retirement application forms.

You may order these publications by faxing a request to: CalPERS, Central Receiving (916) 795-1523.

Certification of Sick Leave and Educational Leave Credits

Agencies are required to certify unused sick leave days and/or educational leave days (if applicable) and separation date information on the retirement application form prior to a member submitting to CalPERS. The employer certification section is *included* on the service, disability, and industrial disability retirement applications. **Important Note: Provide the sick leave and/or educational leave information in days only. If hours are reported they will be entered into the system as days thus resulting in an overpayment to the employee.**

Employees are responsible for taking the application to their employer to have the certification completed. The employer can establish whatever in-house procedures they desire to ensure appropriate sick leave and/or educational leave days are reported. For instance, the employee's sick leave can be taken off the books the day the certification is completed.

CalPERS does not contact the employers to verify the information on the certification form. CalPERS is providing the Notice of Retirement Letter (BSD 62) to employers as a means of verifying this information. The BSD 62 is mailed after the employee is placed on retirement roll and will provide the employer with the number of sick leave **days** (includes educational leave **days** if applicable) that were included in the employee's retirement calculation. Employers that wish to submit corrected certification information may do so on the Amended Certification Form (BSD 200A). An adjustment will be completed upon receipt of the form. Supplies of this form can be ordered from CalPERS.

Public Agency and School employees that submit the retirement application to CalPERS without the certification section completed must request CalPERS to send a Post Certification Form (BSD 200) directly to the employer. An adjustment will be completed upon receipt of the form.

State employees that submit their retirement application to CalPERS without the certification section completed will have this information updated via T-Log through the State Controller's Office. **Note:** T-Log will **only** be used to update the sick leave and/or educational leave days if **zero** is posted at the time of retirement.

Your assistance and compliance with the above stated information will continue to provide your employees with a smooth and efficient retirement process. If you would like more information on the items presented in this letter, did not receive the complete procedures on the new process, or have any questions, please contact us at the address and telephone number above.

Kenneth W. Marzion, Chief
Actuarial & Employer Services