

Student Procedures for Reciprocal Agencies

1. Review estimate request form
2. If member lists name of Reciprocal System and Estimated Final Compensation Amount, begin checking for accuracy.
 - A. Check to see that Reciprocal Agency listed is on your reciprocal agency list, if so then continue with procedures. If not, then run estimate without reciprocal information and note in CTP notes.
3. Go to "Expanded Customer Profile Tool", check for member "Status"
4. If member is "active" then request estimate and expedite.
 - A. If letter prints, review final compensation on request with final compensation on estimate. If estimate letter final comp is higher than reciprocal final comp, mail letter.
 - B. Use reciprocal final comp if it is higher, print customized cover letter, expedite new estimate, attach cover letter with estimate, use unofficial stamp and mail out. Remove estimate with PERS final comp from system and certified destruct the PERS/Final Comp estimate
 - C. If estimate fails, sort estimate with attached estimate request form into appropriate area, based on error message. If error message is consistent with 5 day batch error messages place in 5 day batch drawer. If estimate is DR/IDR or has an error message consistent with manual estimates place in manual drawer. Full time staff will calculate and complete
5. If member is "inactive" or "inactive reciprocity" then search "member payroll detail" for highest 12 or 36 month payroll period (depending on contract).
 - A. If reciprocal payroll is determined to be higher then run estimate using reciprocal payroll. Expedite, print customized cover letter, expedite, attach cover letter with estimate, use unofficial stamp and mail out.
 - B. If CalPERS final comp is higher than reciprocal final comp run estimate through normal batch.

NOTES:

CTP notes must be input regardless of how you run estimate. Examples:

If member is active with PERS and PERS final comp is higher-
"Member listed reciprocal final comp of \$5000 with STRS- used PERS final comp as it is higher"

If you used the reciprocal final comp:
"Used unverified reciprocal final compensation of \$5000 with STRS as given by member"