



Calculation Exception Handling

Active and Inactive Reciprocity Procedures

The case will fall as a calculation error when the Member has established membership with a Reciprocal or Non-Reciprocal Retirement System and COMET is updated or Member has entered information in the "Other California Public Retirement System" section on the retirement application.

Below are the Roster Messages which identify the type of Reciprocity established by the CalPERS Member. Refer to: [Changing Retirement Systems Booklet](#) for more details

Reciprocity Type Code	Definitions
'A'	<ul style="list-style-type: none"> Reciprocity System Membership Vesting Only (Empl #)
'B'	<ul style="list-style-type: none"> Reciprocal System Membership Full Reciprocity (Empl #)
'C'	<ul style="list-style-type: none"> Non Reciprocal System (Empl #)
'D'	<ul style="list-style-type: none"> Reciprocal System Membership Final Compensation Only (Empl #)

Note: For common Reciprocity Inquiries and other facts, Refer to: [Step 16](#)

Step	Action		
1	Determine if Reciprocity has been established: <ul style="list-style-type: none"> Roster Messages <ul style="list-style-type: none"> Indicates type of Reciprocity established COMET <ul style="list-style-type: none"> Look for multiple types (incoming or outgoing, vesting only or full, etc.), multiple periods, and/or multiple reciprocal systems SmartDesk Customer Touch Point (CTP) notes <ul style="list-style-type: none"> Look for notes from MBSD regarding reciprocal system approval or denial Look for notes from the Estimate Unit regarding type of final compensation (F/C) used in the estimate 		
	<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">If...</td> <td style="width: 50%;">Then...</td> </tr> </table>	If...	Then...
If...	Then...		

Reciprocity has not been established	<ul style="list-style-type: none"> • <u>Continue to Step 2</u>
Reciprocity has been established	<ul style="list-style-type: none"> • <u>Continue to Step 5</u>
<p>CASA or LBSBMA</p> <ul style="list-style-type: none"> • Sac City Unified School District • Yolo County Office of Education • Long Beach Unified School District <p>Note: A COMET Administrative Hold (RIBS hold 08) has been set on all Members who have been identified as a CASA (California Association of School Administrators) employee (approx 300 members.) Members of the employers above may indicate Reciprocity on the application; however, there is <u>no</u> Reciprocity between CalPERS and CASA or LBSBMA.</p>	<ul style="list-style-type: none"> • Always use CalPERS salaries <ul style="list-style-type: none"> ◦ Do not use "CASA" or "LBSBMA" reciprocal salaries ◦ Do not request reciprocal salaries from CASA <ul style="list-style-type: none"> ▪ Active Members have received letters advising them that we will use only CalPERS salaries for their retirement benefits • <u>Continue to Step 12</u>

2 Reciprocity has not been established on COMET:

- Member indicated "Yes" on application "Other California Public Retirement System" and there is no Roster Message on PCP

If...	Then...
Last with CalPERS and Vested	<ul style="list-style-type: none"> • Generate a Request For Action (RFA) to MBSD Unit 841 to establish reciprocity or non-reciprocal system <ul style="list-style-type: none"> ◦ Enter on the Return to Requester? NO • <u>Continue to Step 5</u>
Last with CalPERS and NOT Vested or Last with reciprocal or non-reciprocal system	<ul style="list-style-type: none"> • Generate a Request For Action (RFA) to MBSD Unit 841 to establish reciprocity or non-reciprocal system • Enter "Complete By" date: <ul style="list-style-type: none"> ◦ If retirement date (R/D) is in the future: <ul style="list-style-type: none"> ▪ Enter the "effective R/D" ◦ If R/D is current or in the past: <ul style="list-style-type: none"> ▪ Enter 10 working days from date of request • Place a note on the work item "RFA to Unit 841 to establish Reciprocity" • Enter on the Return to Requester? YES • Suspend the work item for the number of days to "complete by" date

- **Set external code 09 on FTS with notes**
- **Place in "outgoing" MBSD basket**
- **Continue to bullet below**

Note: If last with reciprocal or non reciprocal system:

- **Generate salary request to reciprocal system prior to response from MBSD**
 - Refer to: Step 6 for instructions
 - Refer to: Step 9 for JRS
 - Refer to: Step 10 for LRS

- **Note:** Under the service level agreement with MBSD they will respond to the RFA by the complete by date

If...	Then...
Reciprocity established	• <u>Continue to Step 5</u>
Reciprocity not established or no response from MBSD unit 841	• <u>Continue to Step 3</u>

3 Follow up on RFA to establish Reciprocity

If...	Then...
MBSD Unit 841 did not respond by complete by date	Follow up with 2nd request <ul style="list-style-type: none"> • Advise Unit Supervisor that the Service Level Agreement with MBSD was not met • Provide copies of case and timeline to Supervisor <ul style="list-style-type: none"> ◦ Supervisor to determine next action to be taken • <u>Continue to Step 4</u>
Reciprocity was not established and/or membership with reciprocal system is confirmed	• <u>Continue to Step 4</u>

4 Reciprocity was not established and/or membership with reciprocal system is confirmed (For example: Reciprocal salary information is received):

- **Member is entitled to retire from CalPERS without meeting minimum service credit requirement (Vesting Only)**
- **Use CalPERS salaries**

- **Generate Reciprocity letter to the Member**
 - **Copy to DMS**
 - **Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Recipr Not Estab-PERS Salary Used"**
- **Continue to Step 12 to place Member on roll with CalPERS highest salaries**

5 Determine if Member last worked for a CalPERS agency or a reciprocal system:

Note: This is to determine what agency salaries to use in the retirement calculation.

If...	Then...
Service (01) and last with CalPERS or With reciprocal system last and Member requested CalPERS salaries to be used	<ul style="list-style-type: none"> • <u>Continue to Step 12</u>
Service (01) and last with reciprocal system or With CalPERS last and Member requested other system's salaries to be used or Member marked "NO" on "Other Retirement system" on application, but in review found Member is with "Other System" or Last with other system and vested	<ul style="list-style-type: none"> • <u>Continue to Step 6</u>
Reciprocal System Membership "Vesting Only"	<ul style="list-style-type: none"> • <u>Continue to Step 12</u>
Approved Disability (02) and last with CalPERS	<ul style="list-style-type: none"> • <u>Continue to Step 12</u>
Approved Disability (02) and last with reciprocal system or With CalPERS last and Member requested other system's salaries to be used	<ul style="list-style-type: none"> • <u>Continue to Step 7</u>
Approved Industrial Disability (03) and last with CalPERS	<ul style="list-style-type: none"> • <u>Continue to Step 12</u>

Approved Industrial Disability (03) and last with CalPERS but Member requested other system's salaries to be used	• <u>Continue to Step 7</u>
Approved Industrial Disability (03) and last with reciprocal system	• <u>Continue to Step 8</u>
Judges Retirement System (JRS)	• <u>Continue to Step 9</u>
Legislative Retirement System (LRS)	• <u>Continue to Step 10</u>
2nd Request for Salaries or information provided is not correct	• <u>Continue to Step 11</u>

6 Service (01) and last with reciprocal system, last with reciprocal system and vested, or last w/ CalPERS and Member requests other system's salaries to be used:

- Send via the US Postal mail the "Request for Salaries" (BSD-68-W) letter and "Terms & Glossary" to the reciprocal system
 - Do not send request via E-mail or FAX, must be sent via US Postal mail
 - Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Request For Salaries"
- On File Tracking System (FTS):
 - Set external Code 01 "Salary"
 - In status remarks, enter "Misc holds, date and PA#"
- On work item:
 - Update "Attention" field as "Salaries Requested", if appropriate
 - Update any necessary comments and Save
 - Select "Suspend" button
 - Suspend case window populates
 - Select "30" days to suspend case
 - Select "Suspend"
 - Application calculates suspense date and closes
 - If "Close" is selected, work item returns to the detail window and will not be suspended

Note: The work item will un-suspend if:

- Additional documents are received and attach to the work item
- Staff complete a find and open work item
- When the number of days suspended lapse
- Continue to Step 12

If...	Then...
2nd Request for Salaries is needed or	• <u>Continue to Step 11</u>

information provided is not correct

7

Approved Disability (02) and last with reciprocal system or Approved DR/IDR last w/CalPERS and requesting reciprocal system salaries:

Note: At eligibility review, a "Retirement Salary Request Form - Disability Retirement" BSD-923 was sent to the reciprocal system through Workflow.

If...	Then...
BSD-923 returned and complete	<ul style="list-style-type: none"> • <u>Continue to Step 12</u>
BSD-923 was incomplete at eligibility review or not returned	<ul style="list-style-type: none"> • <u>Continue to bullet below</u>

- Send via the US Postal mail the "Retirement Salary Request Form - Disability Retirement" (BSD-923-W)
 - Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Request for Salaries-DR/IDR"
- On File Tracking System (FTS):
 - **Set external Code 01 "Salary"**
 - In status remarks, enter "Misc holds, date and PA#"
- On work item:
 - Update "Attention" field as "Salaries Requested", if appropriate
 - Update any necessary comments
 - Select "Save" button
 - Select "Suspend" button
 - Suspend case window populates
 - Select "30" days to suspend case
 - Select "Suspend"
 - Application calculates suspense date and closes
 - If "Close" is selected, work item returns to the detail window and will not be suspended

Note: The work item will un-suspend if:

- Additional documents are received and attach to the work item
- Staff complete a find and open work item
- When the number of days suspended lapse
- Continue to Step 12

If....	Then...
2nd Request for Salaries is needed or information provided is not correct	<ul style="list-style-type: none"> • <u>Continue to Step 11</u>

8

Approved Industrial Disability (03) and last with reciprocal system:

**Note: General Calculation Warning/Error message will generate on PCP:
 *Reciprocity - Annuity Only If Not Last With PERS**

- CalPERS will calculate and pay:
 - The annuity that is the actuarial equivalent of Member's CalPERS contributions and interest.
- Continue to Step 12

9

Judges Retirement System (JRS):

Note: JRS considered "Retired" as of 5:00 p.m. of the judges last day worked.

If....	Then...
Member's effective R/D for CalPERS is one day different for JRS	<ul style="list-style-type: none"> • Change our effective R/D to JRS date to be concurrent

- Send via interoffice mail the "Request for Salaries" (BSD-68-W) letter and "Terms & Glossary" to the non-reciprocal system
 - Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Request For Salaries"
- On File Tracking System (FTS):
 - **Set external Code 01 "Salary"**
 - In status remarks, enter "Misc holds, date and PA#"
- On work item:
 - Update "Attention" field as "Salaries Requested", if appropriate
 - Update any necessary comments
 - Select "Save" button
 - Select "Suspend" button
 - Suspend case window populates
 - Select "30" days to suspend case
 - Select "Suspend"
 - Application calculates suspense date and closes
 - If "Close" is selected, work item returns to the detail window and will not suspended

Note: The work item will un-suspend if:

- Additional documents are received and attach to the work item
- Staff open work item
- The number of days case was suspended lapse
- Continue to Step 12

If....	Then...
2nd Request for Salaries is needed or information provided is not correct	<ul style="list-style-type: none"> • <u>Continue to Step 11</u>

10

Legislative Retirement System (LRS):

- Send via interoffice mail the "Request for Salaries" (BSD-68-W) letter and "Terms & Glossary" to LRS to confirm concurrent R/D.
 - Do not request salary information.
 - Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Request For Salaries"
- Set external code 09 on FTS
 - In status remarks "Misc Holds to confirm effective R/D. Date and PA#".
- On work item:
 - Update "Attention" field as "Request to confirm concurrent R/D", if appropriate
- Update any necessary comments
 - Select "Save" button
- Select "Suspend" button
 - Suspend case window populates
- Select "30" days to suspend case
 - Select "Suspend"
 - Application calculates suspense date and closes
 - If "Close" is selected, work item returns to the detail window and will not be suspended

Note: The work item will un-suspend if:

- Additional documents are received and attach to the work item
- Staff open work item
- When the number of days case was suspended lapse

After R/D is confirmed as concurrent with LRS non-reciprocal system:

- Continue to Step 12 to correct messages and errors

11

2nd Request for reciprocal system salaries:

- Generate and send a 2nd "Request for Salaries" (BSD- 68-W) or "Retirement Salary Request Form - Disability Retirement" (BSD-923) letter to reciprocal system
 - Do not send request via E-mail or FAX. Must be sent via US Postal mail.
 - Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Request For Salaries" or "Request for Salaries-DR/IDR"
- Unit Supervisor may ask that you call reciprocal system to expedite receiving the salary information

- **Only calculate case with CalPERS salaries after discussing case with Unit Supervisor**
 - On the online 131 program, enter **Reciprocal Code "1"**
 - **Note:** If IDR and annuity only is payable, Continue to Step 12
 - Document in SmartDesk CTP notes or work item comments: "Case calculated with CalPERS salaries, reciprocal salaries not received."
 - Generate and send to Member, "Reciprocity Letter last with CalPERS Salary Used"
 - Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Recipr last.CalPERS Salary"
- **Continue to Step 12**

If...	Then...
Salaries are received from reciprocal system	<ul style="list-style-type: none"> • Process salary/final comp update as an adjustment or a "change calc", if R/D is in the future (no roll date on file tracking system)

12

CalPERS salaries are used or salary request is received from a reciprocal or non-reciprocal system, review 1st calculation output for all calculation messages and errors.

- **Correct messages and errors based on Calculation Exception Handling - BNSD Calculation Review**
- **Double check COMET for concurrent employment or multiple reciprocal agencies/periods**
- **Note** required changes on the calculation sheet or PCP when sending to DMS post imaging

Refer to:

- **Calculation Exception Handling - BNSD Calculation Review Procedures**
- **Calculation Warning/Error Messages - General and Calculation Warning/Error Messages**
- **Calculation Warning/Error Messages - Roster Messages**
- **Calculation Warning/Error Messages - Projection Messages**
- **Calculation Warning/Error Messages - Membership Status**

If...	Then...
Salaries are received from STRS prior to STRS membership validated by MBSD 841	<ul style="list-style-type: none"> • Make a copy of the returned Salary Request form completed by STRS and a copy of the original RFA to establish reciprocity • Route both copies above to MBSD 841 to update reciprocity membership status in

	<p>COMET</p> <ul style="list-style-type: none"> Place Member on roll with STRS salaries
<p>Member has Second Tier "All" and does not have 5 years service prior to 1/1/85 with either system</p>	<p>Member is vested for service credit</p> <p>Minimum retirement age from CalPERS at age 55.</p> <ul style="list-style-type: none"> If eligible: Delete mod code 30 from all employer/coverage group codes (CGC) with Second Tier service <p>Note: Reference Government Code section (GCs) 21074.</p>
<p>Member has Second Tier "All" and has 5 years service prior to 1/1/85 with either system</p>	<p>Member is vested for service credit</p> <p>Minimum retirement age from CalPERS at age 50.</p> <ul style="list-style-type: none"> If eligible: Delete mod code 30 from all employer/CGC's with Second Tier service <p>Note: Reference GCs 21074.</p>
<p>Mixed Tier</p> <p>Member is considered vested at age 50</p>	<p>All service is payable:</p> <ul style="list-style-type: none"> Delete mod code 30 from all employer/CGCs with Second Tier service
<p>1 or 3 year final comp (salaries) received from reciprocal system does not match CalPERS required 1 or 3 year requested final comp</p>	<ul style="list-style-type: none"> Send 2nd Request for the appropriate F/C period <ul style="list-style-type: none"> Place Member on roll with CalPERS salaries <u>Continue to Step 11</u>
<p>F/C period received from reciprocal system is less than the contracted CalPERS final comp requirement</p> <p>Example: 3 year final comp required but Member only worked at reciprocal system for 18 months</p>	<ul style="list-style-type: none"> Complete a manual final comp calculation <ul style="list-style-type: none"> Template located in Excel / Smiley Face icon / BASD / "FINACOMP" Create a leave of absence and use CalPERS salaries to complete the required 12 or 36 month final comp <ul style="list-style-type: none"> Reference GCs 20037 Stamp manual final comp calculation "Approved to Retain" and send to DMS with final calculation <p>If not enough total months for 12 or 36 final comp available:</p> <ul style="list-style-type: none"> Check for another reciprocal system eligible for salary exchange or CalPERS Service Prior to Membership.

	<p>If none of the above applies:</p> <ul style="list-style-type: none"> • Project "first" pay rate posted "backwards" to obtain full 1 or 3 year final comp
<p>Multiple Reciprocal Agencies (movement)</p>	<p>Verify if qualifies for salary exchange:</p> <ul style="list-style-type: none"> • Check for multiple types of reciprocity (such as full, vesting only, etc.) <ul style="list-style-type: none"> ◦ Are there multiple types of reciprocity? <ul style="list-style-type: none"> ▪ If yes, was the reciprocal agreement broken due to concurrent employment? <ul style="list-style-type: none"> ▪ If yes, Member is not entitled to use the reciprocal salary ▪ If no, verify what periods qualify <ul style="list-style-type: none"> ▪ For example: employment dates, movement from one agency to another, etc. ▪ If no, continue below • Based on qualified periods, determine what salaries will be used <ul style="list-style-type: none"> ◦ Note: Manual calc may be required ◦ <u>See attached sample timeline</u> <p>Note: See Unit 450 or Unit SME for assistance.</p>
<p>Concurrent Employment</p>	<p>Time worked concurrently - CalPERS salaries will be used for the concurrent time.</p> <ul style="list-style-type: none"> • Based on when reciprocity was established, will determine what salaries will be used. <ul style="list-style-type: none"> ◦ <u>See attached sample timeline</u> <p>Note: See Unit 450 or Unit SME for assistance.</p>

• Continue to Step 13

- 13** Make appropriate changes to the on-line 131 calculation program
- Auto Release "NO" or add "HC 25" to ensure calculation warning/error messages are reviewed and checked before releasing
 - If processing an Adjustment, see If/Then section below
 - **Ensure the LDP/SEP dates are based on the last CalPERS employer the Member worked**
- For on line processing:
- Refer to: "Calculation Change Transactions" Booklet or "Applications and Systems" Binder

Note: Appendix "A" is not a current list of reciprocal & non-reciprocal systems in the booklet. Refer to: COMET for validation of eligible agencies or CalPERS on-line/Member Information/ Service Credit Purchase Options/ Redeposit of Withdrawn Contributions/ Reciprocal Retirement Systems.

If...	Then...
<p>CalPERS Salaries are used and Reciprocity established</p>	<ul style="list-style-type: none"> • Project and calculate the case following: <u>Calculation Exception Handling - BNSD Calculation Review</u> • Enter 2 in the "Reciprocity Code" field before releasing to roll <ul style="list-style-type: none"> ◦ Note: Even if calculation is "within guidelines", update to on-line 131 system is required • Validate the F/C that is contracted under CalPERS is on the on-line 131 F/C table is correct
<p>CalPERS Salaries are used and Reciprocity not established or not eligible for final comp exchange</p> <p>Example: RD's are not concurrent</p>	<ul style="list-style-type: none"> • Project and calculate the case following: <u>Calculation Exception Handling - BNSD Calculation Review</u> • Do not enter a code in the "Reciprocity Code" field • Validate that the correct CalPERS F/C is on the on-line 131 F/C table
<p>Disability or Industrial Disability</p>	<ul style="list-style-type: none"> • Refer to: Step 14 for additional information before updating the on-line 131 calculation program
<p>Other System's salaries are used</p>	<ul style="list-style-type: none"> • R/D must be concurrent • Enter 1 in the "Reciprocity Code" field on the 131 screen • On-line F/C information on the 131 calculation change screen. <ul style="list-style-type: none"> ◦ Do not populate the F/C table with reciprocal system's salary information • Update the last month field with CalPERS salary on the 131 screen • Update FTS with the received date for the external code
<p>Legislative Retirement System</p>	<ul style="list-style-type: none"> • R/D must be concurrent • Enter 1 in the "Reciprocity Code" field on the 131 screen • Determine the F/C period for 12 or 36 months <ul style="list-style-type: none"> ◦ Check the application to ensure the Member did not indicate a different F/C period

- Obtain salaries to be used for the F/C period from CRS or Smart Desk
 - LRS is located under Employer code 9900 and coverage group code 40001
 - Compensation reported under LRS is not subject to ERSD-115 Compensation Review procedures
- Manually calculate final comp (F/C)
- Online F/C information on the 131 calculation change screen
 - Do not populate the F/C table with reciprocal system's salary information
- Update the last month field with CalPERS salary on the 131 screen
- Update FTS with the received date for the external code

Note: If salary information received from LRS on the (BAS 68W):

- Then... Do not use the salary information;
Reason: LRS uses the last month to calculate their retirement benefit

Processing an Adjustment and Reciprocity Code "2" is used

- Ensure the appropriate adjustment reasons are selected. The reasons will appear on the adjustment letter and the automated BSD-160 when any of the following reasons are selected:
 - Final Compensation
 - Service Credit
 - Retirement Date
 - Membership Date
- Enter "Caseinfo" on the direct command line or Enter:
 - D - Database Maintenance
 - D - Misc PERS Acct Info (Caseinfo)
- Enter SSN, press Enter
- "Adjustment Reason" is on the bottom left of the screen
- On a blank line, enter "?", press enter
 - The table of adjustment reasons will appear
- Add or Delete reason codes as appropriate
- PF12 to update

Note: If none of the above 4 reasons are selected, no BSD-160 will be produced. This is appropriate as there is no reason to notify reciprocal system of the adjustment.

• Continue to Step 15

Note: Reciprocal or Non-Reciprocal salaries are not reviewed by ERSD 115 Compensation Review. Refer to: Calculation Exception Handling - Compensation Audit Review ERSD 115 Procedures, Step 19

14 Disability and Industrial Disability Retirement:

If...	Then...
<p>Roll 02 - Disability Retirement - "Inactive Member" who has established Reciprocity and approved to receive a disability from a County System, Public Agency, or University of California Retirement Plan (UCRP). Refer to: GC Section 21162</p>	<ul style="list-style-type: none"> • CalPERS will calculate and pay: <ul style="list-style-type: none"> ◦ Disability retirement benefit based on CalPERS service credit & subject to CalPERS law and limited to amount that does not exceed the difference between allowance paid by the County System, Public Agency, or UCRP and the allowance they would pay if CalPERS service were credited with the other system <ul style="list-style-type: none"> ▪ OR ◦ No less than annuity that is the actuarial equivalent of the Member's CalPERS contributions and interest <ul style="list-style-type: none"> ◦ On the 131 screen enter Annuity Unmodified Allowance for all employer/cgcs and add a Mod Code 03 • <u>Continue to Step 15</u> <ul style="list-style-type: none"> ◦ Ensure the checker is trained in DR calculations. <p>Note: This action is called a "Full Case Add". <u>Changing Retirement Systems Booklet Appendix F</u> will provide samples of different scenarios (14F-17F and 23F-25F).</p>
<p>Roll 03 - Industrial Disability Retirement - "Inactive Member" who has established Reciprocity and approved to receive a service connected disability from a County System, Public Agency, or University of California Retirement Plan (UCRP).</p> <p>Refer to: GC Section 21162</p> <p>Calculation</p>	<p>CalPERS will calculate and pay:</p> <p>The annuity that is the actuarial equivalent of Member's CalPERS contributions and interest.</p> <ul style="list-style-type: none"> • Annuity Unmodified = Total contributions and interest divided by IDR annuity factor • On the on-line 131 program, enter the Annuity Unmodified allowance for all employer and coverage group codes. • Add Mod Code '03' • Add Reciprocal Code '1' <ul style="list-style-type: none"> ◦ This triggers the IDR benefit to be fully taxable. The reciprocal system pays the tax

Warning/Error message will generate on PCP:
"Reciprocity - Annuity Only If Not Last With PERS"

- free benefit.
- Auto Release 'N' for calculations or Hold Code '25' for adjustments.
- Continue to Step 15
 - Ensure the checker is trained in IDR calculations.

Note: This action is called a "Full Case Add".
Changing Retirement Systems Booklet Appendix F will provide samples of different scenarios (18F-19F)

Roll 03 - Industrial Disability Retirement - "Active Member" who requested to use other System's salaries

- R/D must be concurrent
- Leave the "Reciprocity Code" field on the 131 screen blank
 - **Note:** This is to ensure the system updates the correct tax information
- On-line F/C information on the 131 calculation change screen
 - **Do Not populate the F/C table with their salary information**
- Update the last month field with CalPERS salary on the 131 screen
- Update FTS
 - Add remarks on Application Status screen, "Reciprocal Salaries Used"
 - Enter received date for the external code

15

Always have the case checked by another technician once there is a good calculation.

- Sign and date calculation output and circle option elected by Member
- Stamp retainable documents "Approved to Retain"

If case...	Then Checker to...
Has no errors	<ul style="list-style-type: none"> • If first calc, release case using the "V" Application Release screen • If adjustment, release case on "Adjustment Administration", "Adj Quick Release" screen <ul style="list-style-type: none"> ◦ Select "R", then "C" on RIBS • Send retainable documents to DMS • Complete work item on Workflow or RAD • When Reciprocity code "2" is used, the system will generate reciprocal salary information letter (BSD-160) <ul style="list-style-type: none"> ◦ Calculation: Letter is generated with each

	<p>131 calc change update. Output is sent to processing units based on SSN last 4 digits, units 412, 414, 417 & 419.</p> <ul style="list-style-type: none"> ▪ Mail only the letter associated with the last calculation updated. ◦ Adjustment: Letter is generated only at adjustment release based on unit number that released the adjustment (not by SSN). ◦ If no letter is generated, Refer to: <u>Calculation Exception Handling - Reciprocity Error Report</u> <p>Note: Reciprocal system will contact PERS if our salaries are needed. Refer to: <u>Step 16</u></p> <ul style="list-style-type: none"> • <u>Continue to Step 17</u>
Needs corrections	<ul style="list-style-type: none"> • Return case to technician for correction • Repeat steps to resolve calculation errors

16 Reciprocity Inquiries and other facts:

If...	Then...
<p>Reciprocal system information has changed.</p> <p>i.e. Contact name, address, phone number, etc</p>	<ul style="list-style-type: none"> • Send new information via E-mail or send correspondence to: <ul style="list-style-type: none"> ◦ ERSD - Unit 126 - Attn: Tracy Donohue and Debra Laperle <ul style="list-style-type: none"> ▪ ERSD will, as appropriate: <ul style="list-style-type: none"> ▪ Validate information with the agency ▪ Update COMET ▪ Notify Health Benefits Branch and the Mail Room
<p>Other Systems notifies CalPERS a Member has not filed an application for retirement with their system</p>	<ul style="list-style-type: none"> • Send to Member, BSD-918S <ul style="list-style-type: none"> ◦ Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "BAS-918S.dot" • Add SmartDesk CTP note, "Member sent BAS-918S"
<p>A request for salary information is received from a reciprocal system and no CalPERS application on file</p>	<ul style="list-style-type: none"> • Send to Member, BSD-365-W and Retirement Application <ul style="list-style-type: none"> ◦ Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "BAS-365-W.dot" • Add SmartDesk CTP note, "Member sent BAS 365W"

<p>A request for salary information is received from a reciprocal system and Member was last with CalPERS and the DR/IDR application is "Pending"</p>	<ul style="list-style-type: none"> • Send acknowledgement of salary request to reciprocal system <ul style="list-style-type: none"> ◦ Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Recip Salary Req Pend DR-IDR" • Route Reciprocal salary request and copy of letter to DMS • Enter SmartDesk CTP note, "Acknowledgement letter sent to reciprocal system for pending DR/IDR. See DMS for DR Reciprocal Salary request and complete when DR approved" • Add File Tracking remarks, "See DMS for DR Reciprocal Salary request and complete when DR approved"
<p>Correspondence is received from a reciprocal system requesting CalPERS salary information</p>	<ul style="list-style-type: none"> • Using the reciprocal systems salary request form, provide the 1 or 3 year F/C that was used in the paying retirement calculation • Note: If IRC 401(a)(17) limit applies, provide the limited F/C. <ul style="list-style-type: none"> ◦ Do not provide the salaries listed on CRS and/or the salaries approved by ERSD Comp Review 115. <p>If reciprocal system's form does not provide sufficient space:</p> <ul style="list-style-type: none"> • Send to reciprocal system a BSD-160-W • Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Send_Pyrate_Recip_Sys" • Note: For "Total Years of Vested Service Credit": <ul style="list-style-type: none"> ◦ Use total of normal, sick leave and prior service credit only. Do not include ARSC, golden handshake or military service credit. • Add SmartDesk CTP note, "Reciprocal system sent BSD-160-W" <p>Note: If less than 1 year with PERS, for F/C calculation, Refer to: <u>Reciprocity - Computing Compensation When Less than 1 year in the System</u></p>
<p>Reciprocal system is requesting a F/C other than what is used in the current paying retirement calculation</p>	<ul style="list-style-type: none"> • Ensure the F/C table is correct for the requested F/C period • If case was previously reviewed by ERSD 115, ensure additional payroll is also reviewed prior to sending salaries to the

For example: CalPERS is contracted for a 1 year F/C but reciprocal system is requesting a 3 year F/C

reciprocal system

- Refer to: Calculation Exception Handling - Compensation Audit Review (ERSD 115) for compensation that is outside the audit parameter
- On RFA: Enter complete by date as 10 business days
- On RFA and CAT Sheet to ERSD 115: Add note "Please expedite, information is needed to process Reciprocal salary request"
- Suspend salary request (inquiry) until payroll is reviewed
- Send acknowledgement of salary request to reciprocal system and possible delay
 - Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Recip Salary Req Pend ERSD"

Case is an adjustment "Streamline Procedure" and last with CalPERS salaries used and F/C increases or decreases

- Ensure the F/C table is correct
- If case was previously reviewed by ERSD 115, ensure additional payroll is also reviewed prior to sending salaries to the reciprocal system
 - Refer to: Calculation exception Handling - Compensation Audit Review (ERSD 115) for compensation that is outside the audit parameter
 - On RFA, enter complete by date as 10 business days
 - On RFA and CAT Sheet to ERSD 115, add note "Please expedite, information is needed to process reciprocal salary request"
 - Suspend salary request (inquiry) until payroll is reviewed
 - Send acknowledgement of salary request to reciprocal system and possible delay
 - Letter under construction. See Unit 450 if situation occurs.
- Send a corrected BSD-160-W to the reciprocal or non-reciprocal system
 - Template located in Word / CalPERS / BNSD / Service Calc/Eligibility / "Send_Pyrate_Recip_Sys"
- Add SmartDesk CTP note, "Reciprocal system sent BSD-160-W"

Reciprocity Procedures when applying Reciprocity Salaries

When a member has requested that we use their Reciprocal Salaries in their retirement estimate the following steps must be taken:

- First you must research to find if Full Reciprocity, other system, or final compensation exchange does apply to the member. In order for a member to have full reciprocity or a final compensation exchange or reciprocal salaries used when calculating their retirement benefit they must have transferred employment between agencies within required timeframes*. Other situations when final compensation can apply with out a transfer within 6 months are other system (STRS, JRS, and LRS).

*On 10-1-57, the break in membership from one retirement system to the other was limited to 60 days.

Effective 10-1-59, it was changed to 90 days.

On 1-1-76, discontinuance of membership in the first system and employment that lead to membership in the other system must be within six months.

- Research of COMET can determine if you may apply the reciprocal salaries to the members estimate. Under Activity in the Account Tab you will be able to find information on the member regarding reciprocity.

Here is a list of TYPES of Reciprocity you may find in COMET and what the mean:

Full: Member has full reciprocity with CalPERS and the reciprocal retirement system as they met the movement criteria to establish reciprocity, use highest salaries if member retires on same day with both systems.

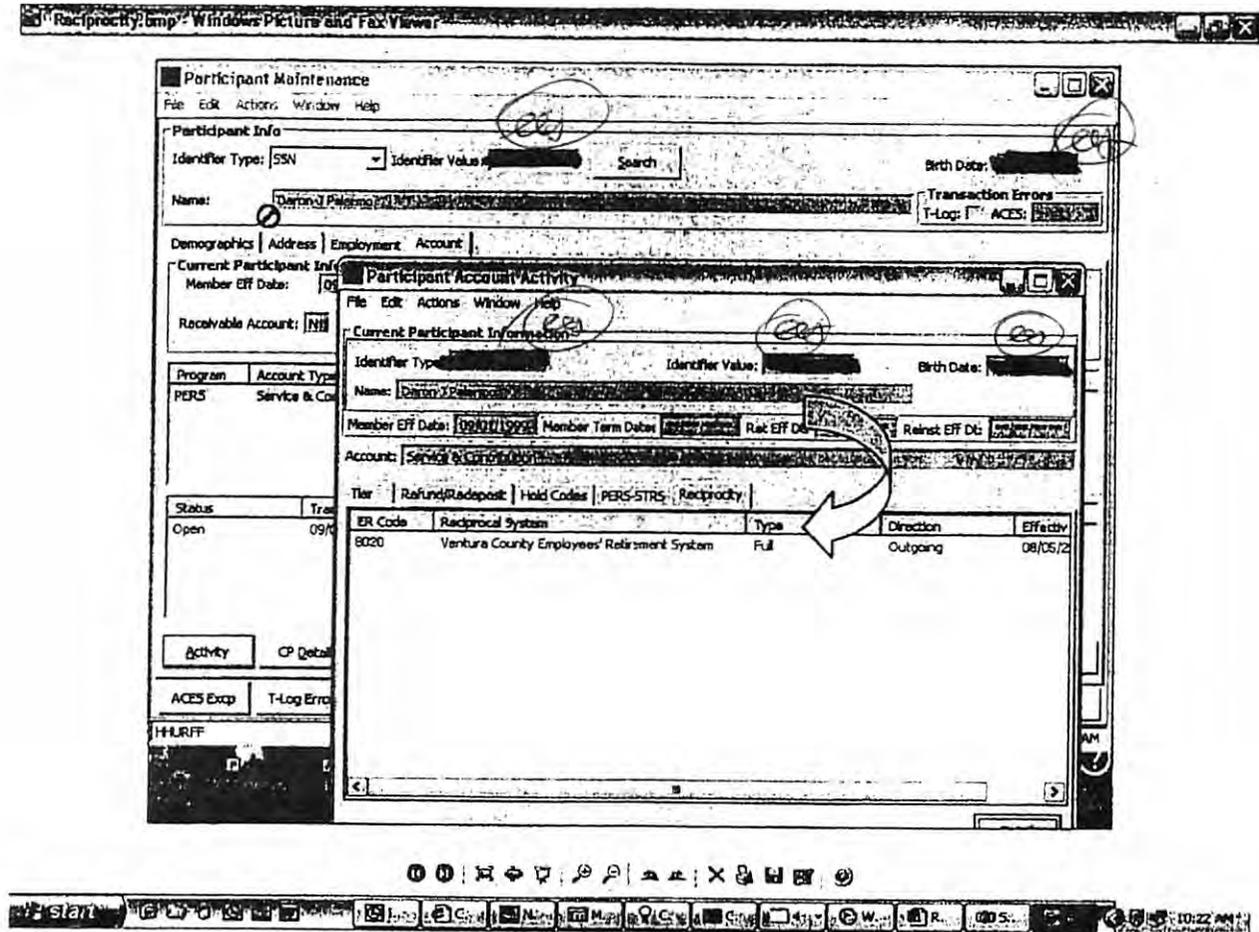
Final Comp: The member has final compensation exchange; they have made the move within the required guidelines prior to the reciprocal contract agreement date, use highest salaries if member retires on same day with both systems.

Also, if they are a member of UCRP and did not meet the movement criteria, they will be afforded final compensation exchange recognized in CalPERS. Member will need to discuss with UCRP their eligibility for reciprocity and final compensation exchange.

Vesting Only: The member qualifies to retire; however, CalPERS salaries are used. CalPERS considers you vested with or without establishing reciprocity as long as you are a member of a reciprocal retirement system because normally a member will have 5.000 years accumulated under all retirement systems. Member may also be retired from the other retirement system; however, final compensation exchange will not apply.

Other System: Member of CalSTRS, LRS, JRS, and JRS II (gentleman's handshake agreement, no formal reciprocal agreement/contract established) Statutes provide for the exchange of final compensation.

Not Appl: Not a member of the reciprocal retirement system so there is no reciprocity to establish.



- Look for what TYPE of Reciprocity has been established.

If the member advises of reciprocal salaries/reciprocity, and/or status reads Inactive Reciprocity, a determination needs to be made that the use of final compensation and/or reciprocity is valid. The status of Inactive Reciprocity does not constitute a member qualifying for reciprocity.

- If there is no reciprocity information on COMET for a member who has noted Reciprocal salaries on their estimate, reciprocity has not been determined **only** use CALPERS salaries when completing the estimate. Send Not-Reciprocal template with estimate located under the MBSD templates for estimates.
- If member has established FULL reciprocity and has not given other system payrates on estimate request send Reciprocity template located under the MBSD templates for estimates.

Please refer all questions or concerns to the estimate unit supervisor to be addressed or assigned to an analyst.

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"

CalPERS SmartDesk Plus

File Edit Reports Help

Process Information

- CalPERS Services
 - Retirement
 - Benefit
 - Community Priority
 - Death Case Management System
 - Double
 - Member Calc Program
 - Pension Audit System
 - Retirement Application Process
 - Retirement Estimate
 - Health

Active Processes

- Member Builder 05/27/2008
- Customer Output
- Customer Touch Point
- Member Calc Program
- Retirement Application Process

Active Processes

- Enhanced Customer Profile Tool

Retirement Estimates

Member: SSN: 057-72-0056 Name: Guio, Fred State: Inactive Deferred Retirement

Estimate Request:

Retirement Date	Received	Processed	Completed	Ref Code	Status
03/02/2008	03/27/2007	10/23/2007	10/23/2007	Service Retirement	Complete
01/28/2008	03/04/2007	10/02/2007	10/02/2007	Service Retirement	Complete
05/01/2008	10/22/2007	10/28/2007	10/28/2007	Service Retirement	Complete
08/14/2008	10/01/2007	10/08/2007	10/08/2007	Service Retirement	Manual Complete

Recent Data:

Add View Remove

Customer

CalPERS ServiceDesk Plus

File Edit Reports Help

Process Calculator

CalPERS Services

- Retirement
 - Benefit
 - Community Priority
 - Death Case Management System
 - Disability
 - Member Calc Program
 - Personnel Audit System
 - Retirement Application Process
 - Retirement Estimates
- Health

Member Information

Member: SDN 65712026 Name: Juan, Fred Status: Prorated Deferred Retirement

Request | Additional Information | Employees

Member Information

Supplemental: [] Sex: M

Address: 220 CASADORA LANE ES

City: SAN CLEMENTE State: California Zip: 95067

Country: [] District: 03741948

Estimate Data

Estimate Type: Continued Request Reference Date: 03/01/2008

CalPERS Link: 720 [] Income: Ancho M Separation Date: []

Request Received: 07/20/2003 Last Day on Payroll: []

Roll Code: Service Retirement Sick Leave Days: []

Option 4: [] Temp Annuity Code: []

Partial Retirement to: [] Temp Annuity Amount: []

Additional Services: []

Beneficiary and Service Information

Beneficiary: [] Eligible Survivor: Yes

Beneficiary Est Date: 03/20/1948

Router Message [] Cancel

Customer

CalPERS SmartDesk Plus

File Edit Reports Help

Process Integration

- CalPERS Services
 - Retirement
 - Benefit
 - Community Property
 - Death Care Management System
 - Disability
 - Member Calc Program
 - Pension Audit System
 - Retirement Application Process
 - Retirement Estimates
 - Health
- Customer Processes
 - Find Guide: 557-72-0256
 - Customer Output
 - Customer Touch Point
 - Member Calc Program
 - Retirement Application Process
- Active Processes
 - Expanded Customer Profile Tool
 - Customer Profile Tool

Retirement Estimates

Member

SSN: 557-72-0256 Name: GARCIA, Fred Status: Inactive Deferred Retirement

Request | Additional Information | Employee

Member Information

Supplemental: [] Sex: M

Address: 233 COLUMBIAN LANE #5

City: SAN CLEMENTE State: California Zip: 92672

County: [] Birthdate: 08/14/1948

Estimate Data

Estimate Type: Customized Request Retirement Date: 03/03/2025

CalPERS Unit: 753 (San Mateo, Kewa) Separation Date: []

Request Reason: 0070-0000 Last Day on Payroll: []

Ret Code: Service Retirement Sick Leave Days: []

Option 4: [] Temp Annuity Code: []

Partial Retirement %: []

Additional Services: []

Beneficiary and Service Information

Beneficiary Birth Date: 10/24/1948 Eligible Survivor: Yes

Route Message Cancel

Customer

CapERS SmartDesk Plus

File Edit Reports Help

Business Integration

CapERS Services

- Retirement
 - Community Property
 - Death Case Management System
 - Disability
 - Member Calc Program
 - Pension ActB System
 - Retirement Application Process
 - Retirement Estimates
- Health

Customer Processes

Final Guide: 55/720236

- Customer Output
- Customer Touch Point
- Member Calc Program
- Retirement Application Process

Active Processes

- Extended Customer Profile Tool

Management Console

Member: [Name] [Fred, Fred] State: [Inactive Deferred Retirement]

SSN: 55-720236

Request: Additional Information | Employees

Supplemental Input:

1 Year Final Corp	1/1/2000	3 Year Final Corp	
1 Year Extended Final Corp		3 Year Extended Final Corp	
Basic Employer Membership Date		CapERS Membership Date	
		IDR Final Corp It	

Print Message Cancel

CalPERS SmartDesk Plus

File Edit Reports Help

Personal Information

CalPERS Services

- Retirement
 - Benefit
 - Community Priority
 - Death Case Management System
 - Disability
 - Member Care Program
 - Pension Audit System
 - Retirement Application Process
 - Retirement Estimates
- Health

Customer Processes

Fixed Benefit 50/72/4256

- Customer Output
- Customer Touch Point
- Member Care Program
- Retirement Application Process

Active Processes

- Expanded Customer Profile Tool
- Transfer of Assets

Retirement Estimates

Member: SSN: 50-72-4256 Name: Garcia, Fred Date: Inactive Deferred Retirement

Request: Additional Information Employees

Type	Code	CDC	SVC Type	SVC	Cost & Int	Ben Fct	% of FIC	Unmod Allow	AER	Delete
------	------	-----	----------	-----	------------	---------	----------	-------------	-----	--------

Details

Employee Code: 0000 Day of Disability: _____

Employee Type: Active Deleted

Employee Group: P4257

Service Type: _____

Calculation Modifications: _____

Service Credit: _____

Accumulated Contributions & Interest: _____

Benefit Factor: _____

Percent of Final Comp: _____

Unmodified Allowance: _____

AER Reduction: _____

Terminated Employee Final Comp: _____

Reset Messages Cancel

Customer Information Plus

File Edit Reports Help

Customer Information Plus

Customer Services

- Retirement
- Benefit
 - Community Property
 - Death Case Management System
 - Disability
 - Member Calc Program
 - Pension ActB System
 - Retirement Application Process
 - Retirement Estimate
- Health

Customer Processes

- Print Data: 05/24/2008
- Customer Output
- Customer Touch Point
- Member Calc Program
- Retirement Application Process

Active Processes

- Expanded Customer Profile Tool

Retirement Overview

Member: SSN: 557-724228 Name: (Last, First) State: (Active) Deferred Retirement

Request | Additional Information | Employees

Member Information

Supplemental: Ser: W

Address: 333 CAZADOR LANE US
City: SAN CLEMENTE, State: California Zip: 92672
County: Birthdate: 05/14/1948

Enrollment Data

Enrollment Type: Continued Request
Enrollment Date: 07/28/2008
Enrollment Reason: 720 - (S)Normal, Normal
Last Day on Panel: 08/29/2007
Ref Code: Service Retirement
Option A:
Paid Retirement \$:
Additional Service:
Temp Annuity Code:
Temp Annuity Account:

Retirement Date: 07/28/2008
Separation Date:
Last Day on Panel:
Sick Leave Days:
Temp Annuity Code:
Temp Annuity Account:

Verifiability and Survival Information

Verifiability Birth Date: 07/28/1948
Eligible Survival: [No]

Radio Manager Cancel

CalPERS SmartDesk Plus

File Edit Reports Help

Process Integration

CalPERS Services

- Retirement
- Benefit
 - Community Property
 - Death Case Management System
 - Disability
 - Member Care Program
 - Personnel Audit System
 - Retirement Application Process
 - Retirement Estimates
- Health

Customer Processes

Final Status: 05/17/2016

- Customer Output
- Customer Touch Point
- Member Care Program
- Retirement Application Process

Active Processes

- Extended Customer Profile Tool

Member: [Name] [Last, First]

SSN: 051720156

Status: [Inactive/Onlined Retirement]

Request: Additional Information | Employee |

Supplemental Input

1 Year Final Comp [T/75.00]	3 Year Final Comp [_____]
1 Year Extended Final Comp [_____]	3 Year Extended Final Comp [_____]
Ratio Employee Membership Date [_____]	CalPERS Membership Date [_____]
IDR Final Comp R [_____]	

Router Messages [_____] Cancel

CalPERS SmartDesk Plus

File Edit Reports Help

Process Integration

- CalPERS Services
 - Retirement
 - Benefits
 - Community Property
 - Death Case Management System
 - Disability
 - Member Case Program
 - Plan Audit System
 - Retirement Application Process
 - Retirement Estimates
- Health

Customer Processes

- Find Guide: 501-72-0236
- Customer Detail
- Customer Touch Point
- Member Case Program
- Retirement Application Process

Active Processes

- Expanded Customer Profile Tool
- Customer Estimate

Retirement Estimates

Member: ID# 15972026 Name (Last, First) Status: Pre-Retiree Deferred Retirement

Request: Additional Information Employees

Type	Code	CDC	SVC Type	SVC	Cost & Int	Ben Plan	% of FIC	Unmodified Allowance	AER	Details
------	------	-----	----------	-----	------------	----------	----------	----------------------	-----	---------

Details

Employee Code: 0420 City of custody

Employee Type: Active Deceased

Accumulated Balance: 17400

Employee Error: [Dropdown]

Calculation Modifications: [Dropdown]

Service Credit: [Text]

Accumulated Contributions & Interest: [Text]

Benefit Factor: [Text]

Percent of Final Comp: [Text]

Unmodified Allowance: [Text]

AER Reduction: [Text]

Terminated Employee Final Comp: [Text]

Router Messages Cancel

Customer

CalPERS SmartDeck Plus

File Edit Reports Help

Process Integration

CalPERS Services

- Retirement
 - Benefit
 - Community Property
 - Death Cost Management System
 - Disability
 - Member Calc Program
 - Pension Audit System
 - Retirement Application Process
 - Retirement Estimates
- Health

Retirement C: Gouvar

Member: SSN: 557-72-0336 Name: Gouvar, Fred Status: Inactive Deferred Retirement

Request | Additional Information | Employee

Member Information

Supplemental: [] Sex: M

Address: 550 CHOCOMA LANE #3
City: SAN CLEMENTE State: California Zip: 95072
Country: [] Estimated: 05/14/1968

Estimate Data

Estimate Type: Customized Request Retirement Date: 05/01/2008
CalPERS Unit: 729 Notes, Details Separation Date:
Retirement Scenario: 10/25/2003 Last Day on Payroll:
Est Code: Service Retirement Sick Leave Days:
Option 4: [] Temp Annuity Code:
Partial Retirement %:
Additional Services:

Beneficiary and Service Information

Beneficiary Birth Date: 01/24/1968 Eligible Survivor: Yes

Router Message Cancel

Customer

CalPERS SmartDesk Plus

File Edit Reports Help

Process Integration

CalPERS Services

- Retirement
 - Benefit
 - Community Property
 - Death Case Management System
 - Disability
 - Member Calc Program
 - Pension Audit System
 - Retirement Application Process
 - Retirement Estimates
- Health

Customer Inquiries

Print Guide: 537-72-0326

- Customer Output
- Customer Touch Point
- Member Calc Program
- Retirement Application Process
- Unemployment

Active Processes

- Expanded Customer Profile Tool
- Unemployment

Retirement Estimator

Member

SSN: 537-72-0326 Name: Jack, Fred State: [Inactive Deferred Retirement]

Request | Additional Information | Employees

Employee

Type	Code	DOB	SVC Type	SVC	Cont & Int	Ben Fch	% of FAC	Unmod Allow	AER	Delay

Details

Employee Code: [P620] City of Delivery

Employee Type: [None] Delete

Contract Code: [P0001]

Service Type: []

Calculation Modification: []

Service Credit: []

Accumulated Contributions & Interest: []

Benefit Factor: []

Percent of Final Comp: []

Unmodified Allowance: []

AER Reduction: []

Terminated Employer Final Comp: []

Route Message Cancel

CalPERS SmartDev Plus

File Edit Reports Help

Process Integration

- CalPERS Services
- Retirement
 - Benefit
 - Community Property
 - Death Case Management System
 - Disability
 - Member Call Program
 - Plan Audit System
 - Retirement Application Process
 - Retirement Estimates
 - Health
- Customer Processes
 - Fred Gracie: 957-72-0336
 - Customer Output
 - Customer Touch Point
 - Member Call Program
 - Retirement Application Process
 - Retirement Estimates
 - Active Processes
 - Expanded Customer Profile Tool
 - Customer Estimates

Retirement Estimate

Member: SSN: 957-72-0336 Name: Fred Gracie Status: Inactive/Deceased/Retiree

Request: Additional Information | Employees

Supplemental Input

1 Year Final Comp	3 Year Final Comp
1 Year Extended Final Comp	3 Year Extended Final Comp
Basic Employer Membership Date	CalPERS Membership Date
	ID# Final Comp %

Router Messages Cancel

CalPERS SmartView Plus

File Edit Reports Help

Process Information

- CalPERS Services
 - Retirement
 - Benefit
 - Community Property
 - Death Case Management System
 - Disability
 - Member Calc Program
 - Pension Act System
 - Retirement Application Process
 - Retirement Estimates
 - Health

Customer Processes

Find Guide: 557-72-0336

- Customer Output
- Customer Touch Point
- Member Calc Program
- Retirement Application Process

Active Processes

- Expanded Customer Profile Tool

Information Estimates

Member: SSN: 557-72-0336 Name: (Last, First) Steve (Inactive Deferred Retirement)

Request | Additional Information | Employees

Employees

Type	Code	GGC	SVC Type	SVC	Core Srv	Ben Foc	% of FIC	Unmod Allow	AER	Details

Details

Employee Code: (GGC) City of Outlook

Employee Type: (Basic) Delete

Employee Group: (GGC)

Service Credit: _____

Accumulated Contributions & Interest: _____

Benefit Factor: _____

Percent of Final Comp: _____

Unmodified Allowance: _____

AER Reduction: _____

Terminated Employee Final Comp: _____

Service Credit: _____

Benefit Factor: _____

Percent of Final Comp: _____

Unmodified Allowance: _____

AER Reduction: _____

Terminated Employee Final Comp: _____

Router Messages | Cancel

CalPERS SmartDesk Plus

File Edit Reports Help

Process Integration

- CalPERS Services
 - Retirement
 - Benefit
 - Community Property
 - Death Case Management System
 - Disability
 - Member Calc Program
 - Pension Audit System
 - Retirement Application Process
 - Retirement Estimator
 - Health

- Customer Processes
- Fixed Gender: M/F: 12/02/06
 - Customer Output
 - Customer Touch Point
 - Member Calc Program
 - Retirement Application Process
- Active Processes
- Expanded Customer Profile Tool

Retirement Estimator

Member: [Name] [Last, First] Status: [Inactive] [Unfunded] [Retiree]

SSN: 00-72-0236 Name: [Last, First]

Request: [Additional Information] [Employers]

Employee:

Type	Code	ESC	SVC Type	SVC	Cont & Int	Ben Fct	% of FAC	Unfnd Allow	AER	Delete

Details

Employee Code: [SSN] City of Origin:

Employee Type: [Male] Delete

Current Status: [POOH]

Service Type: []

Calculation Modifications: []

Service Date: []

Accumulated Contributions & Interest: []

Benefit Factor: []

Percent of Final Comp: []

Unmodified Allowance: []

AER Reduction: []

Terminated Employer Final Comp: []

Reset Messages Cancel

The screenshot displays the CAPERS SmartDesk Plus interface. At the top, the title bar reads "CAPERS SmartDesk Plus" with menu options for "File", "Edit", "Reports", and "Help". Below the title bar is a toolbar with various icons. The main interface is divided into several sections:

- Process Navigator (Left Panel):** A tree view containing categories like "CAPERS Services", "Retirement", "Health", "Future Processes", and "Active Processes". Under "Retirement", there are sub-items: "Benefit", "Community Property", "Death Cost Management System", "Disability", "Member Calc Program", "Personnel Audit System", "Retirement Application Process", and "Retirement Estimates".
- Member Information (Top Right):** Fields for "Member", "SSN" (057-720268), "Name" (Dustin Ford), and "Status" (Inactive/Deferred Retirement).
- Request Tab (Middle):** A tabbed interface with "Request", "Additional Information", and "Employers" tabs. Below the tabs is a table with columns: "Type", "Code", "CDC", "SVC Type", "SVC", "Date & Int", "Ben Pct", "% of FIC", "Unmod Allow", "AER", and "Date".
- Details Section (Bottom Right):** A form with fields for "Exclusion Code" (0200), "City of Duty", "Employer Type" (Base), "Contract Status" (Full), "Service Code", "Accumulated Contributions & Interest", "Benefit Factor", "Percent of Final Cost", "Unmodified Allowance", "AER Production", and "Terminated Employee Final Cost".

At the bottom of the window, there is a "Post Message" button and a "Cancel" button. The system tray at the very bottom shows a "Customer" label and several icons.