



Employer Account Management Division

Dear Member,

You are being provided with the background, explanation, and instructions for the Reciprocal Self-Certification Form (PERS-CASD 801).

With the implementation of The Public Employees' Pension Reform Act of 2013 (PEPRA) on January 1, 2013, CalPERS requires that employers determine the applicable retirement benefit formula for new employees. The Reciprocal Self-Certification form allows you to provide essential information to your employer and will be used by your employer to enroll you into CalPERS membership. This information will assist in identifying your retirement benefit level¹.

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

Within 10 business days of employment you must complete, sign, date, and submit to your employer the Reciprocal Self-Certification form. When completing the form, reference the attached list of qualifying Public Retirement Systems in California. If applicable, list your previous membership date(s) in the qualifying Public Retirement System and your permanent separation date(s); **OR** indicate that you are not a current or past member of a qualifying Public Retirement System.

The completion of the 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 website, www.calpers.ca.gov and download the publication ***When You Change Retirement Systems***. It is the responsibility of the employee to complete and send the form, ***Confirmation of Intent to Establish Reciprocity When Changing Retirement Systems*** to CalPERS.

Sincerely,

Membership Management Section

Enclosures: List of Qualifying Public Retirement Systems in California, Reciprocal Self-Certification form

¹ A new member is defined in the Public Employees' Retirement Law (PERL) under Government Code section 7522, the Public Employees' Pension Reform Act of 2013 (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.

List of Qualifying Public Retirement Systems in California

Name of County/Agency/System:	Qualification(s):
Alameda County^	
City and County of San Francisco*	
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 only
City of Pasadena	Fire and Police Only
City of Sacramento*	
City of San Clemente*	Non-Safety only
City of San Diego	
City of San Jose	
Contra Costa County^	
Contra Costa Water District	
County of San Luis Obispo	
East Bay Municipal Utility District	
East Bay Regional Park District	Safety Employees only
Fresno County^	
Imperial County^	
Judges' Retirement System	
Kern County^	
Legislators' Retirement System	
Los Angeles County Metropolitan Transportation Authority	Non-Contract Employees' Retirement Income Plan, formerly Southern California Rapid Transit District
Los Angeles County^	
Marin County^	
Mendocino County^	
Merced County^	
Orange County^	
Sacramento County^	
San Bernardino County^	
San Diego County^	
San Joaquin County^	
San Mateo County^	
Santa Barbara County^	
Sonoma County^	
Stanislaus County^	
State Teachers' Retirement System	
Tulare County^	
University of California Retirement System	
Ventura County^	

*=Also CalPERS-covered agency

^=1937 Act Counties



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:			

Check the applicable statement:

- I have not been a member of CalPERS or of a qualifying Public Retirement System in California.
- I was a member of CalPERS or a qualifying Public Retirement System in California and terminated my membership by withdrawing my funds.
- I am retired from CalPERS.
- I am retired from another Public Retirement System in California.
- I am an active member of CalPERS. I have funds on deposit with CalPERS.
- I am an active member of another Public Retirement System in California. *(Complete the box below).*

Name of Most Recent Reciprocal System:	Membership Date:	Separation Date:
Name of Prior Reciprocal System:	Membership Date:	Separation Date:
Name of Prior Reciprocal System:	Membership Date:	Separation Date:

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 form **Confirmation of Intent to Establish Reciprocity When Changing Retirement Systems** 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.

Employee Signature

Date

TO BE COMPLETED BY EMPLOYER ONLY:

Name of CalPERS Agency:	CalPERS Business Partner ID:	Employees' CalPERS Original Hire Date:
Designee of Employer: (Print Name)	(Title)	Employees' CalPERS Membership Eligibility Date:
Designee's Signature:		(Date)

The employer must retain this form in the employee's file for auditing purposes.

RECIPROCAL SELF-CERTIFICATION FORM INSTRUCTIONS (EMPLOYER)

1. Employers must provide the Reciprocal Self-Certification Form to all employees upon hire.
2. Employers must sign and date the Reciprocal Self-Certification Form.
3. The employer will enroll the employee into my|CalPERS utilizing the information provided on the Reciprocal Self-Certification Form. If the employee indicates they are an active member of a qualifying Public Retirement System in California, be sure to complete the data fields in the Reciprocity panel in my|CalPERS.

Reciprocity

Reciprocal Member Indicator: Yes No

Reciprocal Agency:

Reciprocal Membership Date: **Enter membership date with first qualifying reciprocal system.**

Retired Reciprocal Member Indicator: Yes No

Reciprocal Permanent Separation Date:

Save Clear

4. The proper retirement benefit formula will be automatically determined by my|CalPERS. If you believe the retirement benefit formula is incorrect, you may contact CalPERS at 1-888-225-7377.
5. It is the responsibility of the employer to retain the completed Reciprocal Self-Certification Form in the employee's employment records for auditing purposes. You do not need to send a copy of the form to CalPERS.

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**).