
Judges' Retirement System II

Dear Judge,

You are being provided with the background, explanation, and instructions for the **JRS II Reciprocal Self-Certification Form (PERS-JLRS- 801)**. Reciprocity among qualified Public Retirement Systems is to allow members to separate from one qualified Public Retirement System and enter into employment with another within a specific time period without losing valuable retirement and related benefit rights.

With the implementation of the Public Employees' Pension Reform Act of 2013 (PEPRA), Government Code section 7522, on January 1, 2013, the Judges' Retirement System (JRS) II requires that you complete the JRS II Reciprocal Self-Certification form and return it to your employer within 10 business days of taking the bench. The Reciprocal Self-Certification form allows you to provide essential information to your employer and will be used by your employer to enroll you in JRS II membership and determine your retirement enrollment level.

It is important to ensure that you are providing accurate information so your retirement enrollment level can be properly determined. It is your responsibility to ensure the accuracy of the data provided on the Reciprocal Self Certification Form. Inaccurate information may cause your account to reflect an incorrect retirement enrollment level which may lead to future retroactive adjustments to your member and employer contributions, and you and your employer will be responsible for any debts that may occur.

Determination of JRS II Enrollment Level:

Government Code section 7522.04 (f) created a new membership (enrollment) level, referred to as a new "PEPRA" member. For JRS II, a new member is either of the following:

1. A judge who is brought into JRS II membership for the first time on or after January 1, 2013, who has no prior membership in any California public retirement system; or
2. A judge who is brought into JRS II membership for the first time on or after January 1, 2013, and who has membership in another California public retirement, but who was not subject to reciprocity.

All new judges, who do not qualify as a new member under PEPRA, are enrolled into JRS II as classic members. PEPRA allows a judge who was a member of another qualified Public Retirement System prior to January 1, 2013, to retain classic membership if the judge was subject to reciprocity. For a judge to be subject to reciprocity for PEPRA purposes, all of the following must exist:

1. Was a member of another Public Retirement System on or before December 31, 2012, where reciprocity exists by statute or agreement between that system and JRS II; and

2. There was not a break in service of more than six (6) months between the date the judge separated from the previous system and the judge’s date of membership in JRS II; and
3. The judge left his/her service credit and contributions (if any) on deposit, and has not retired, **or applied for retirement**, from the reciprocal system to be effective on or before his or her membership date in JRS II.

Instructions for completing the JRS II Reciprocal Self-Certification form:

1. Within 10 business days of taking the bench, you must complete, sign, date, and submit the JRS II Reciprocal Self-Certification form to your employer
2. When completing the form, reference the list below of qualifying Public Retirement Systems in California. Only include information related to a Defined Benefit Plan of a qualifying Public Retirement System. Defined contributions plans are not eligible for reciprocity. Following are the qualifying Public Retirement Systems :
 - CalPERS; and
 - San Francisco Employees’ Retirement System; and
 - All County Retirement Systems subject to the 1937 County Employees’ Retirement Law (CERL). Below is a list of the Counties that have a retirement system subject to the 1937 County Employees’ Retirement Law.

Counties with Retirement Systems subject to the 1937 County Employees’ Retirement Law		
Alameda Contra Costa Fresno Imperial Kern Los Angeles Marin	Mendocino Merced Orange Sacramento San Bernardino San Diego San Joaquin	San Mateo Santa Barbara Sonoma Stanislaus Tulare Ventura

3. Complete the form by indicating that you are not a current or past member of a qualifying Public Retirement System; OR indicate that you have prior membership in one of the qualify Public Retirement Systems.
4. For each prior Reciprocal System reported, you must provide the name of the qualifying Public Retirement System and membership date. If you have separated, retired, or refunded from that Reciprocal System, please indicate that by providing dates in the appropriate sections. If you have not separated, retired, or refunded from that Reciprocal System, you may leave these sections blank or indicate that by entering N/A (not applicable).
5. Please ensure you are providing complete and accurate dates. You must provide a month, date, and year. If you are unsure of the dates, please contact the qualifying Public Retirement System to verify prior to completing the form.

The completion of the JRS II Member Reciprocal Self-Certification Form does not establish reciprocity and is not a request to establish reciprocity with your previous retirement system.

Sincerely,

Judges’ Retirement System II



Judges' Retirement System II

JRS II RECIPROCAL SELF-CERTIFICATION FORM

Complete the following information and return to your Personnel Office **within 10 business days:**

Judge's Name	(Last)	(First)	(Middle)
Date of Birth:	CalPERS ID:		

Check the applicable statement:

- _____ I have never been a member of any qualifying Public Retirement System in California.
- _____ I have prior membership under another qualifying Public Retirement System in California.
 (Complete the box below with verified dates including month, date, and year. **If you are unsure of the dates, please contact your previous Public Retirement System to confirm the information prior to completing the form.**)

Name of Most Recent Reciprocal System:	Membership Date:	Separation Date*:	<input type="checkbox"/> Retired * <input type="checkbox"/> Refunded* Date: / /
Name of Prior Reciprocal System:	Membership Date:	Separation Date*:	<input type="checkbox"/> Retired * <input type="checkbox"/> Refunded* Date: / /
Name of Prior Reciprocal System:	Membership Date:	Separation Date*:	<input type="checkbox"/> Retired * <input type="checkbox"/> Refunded* Date: / /

**Please provide dates, if applicable. Not all sections may be applicable for reach Reciprocal System.*

I understand that I am subject to the applicable laws and regulations of JRS II and the Public Employees' Pension Reform Act of 2013 (PEPRA). I also understand that completing this form does not constitute a request to establish reciprocity with my previous retirement system.

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 Judges' Retirement System II including, but not limited to, a change in my membership enrollment. JRS II may make any necessary corrections to my account to ensure I am properly enrolled and eligible to receive the correct retirement benefits.

 Judges' Signature Date

TO BE COMPLETED BY EMPLOYER ONLY:

Name of Employer (Court):	CalPERS Business Partner ID:	Judge's Membership Date (First Day on Payroll):
Designee of Employer: (Print Name)	(Title)	
Designee's Signature:	(Date)	

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

INSTRUCTIONS (EMPLOYER)

1. Employers must provide the JRS II Member Reciprocal Self-Certification Form to all new judges .
2. Employers must sign and date the JRS II Member Reciprocal Self-Certification Form.
3. The employer will enroll the judge into my|CalPERS utilizing the information provided on the JRS II Reciprocal Self-Certification Form. If the judge indicates they are a prior member of a qualifying Public Retirement System in California, be sure to complete the data fields in the Reciprocity panel in my|CalPERS. Please enter the permanent separation date, retirement date, or refund date, if applicable, as provided by the judge.
4. The proper retirement enrollment level will be automatically determined by my|CalPERS. If you believe the enrollment level is incorrect, you may contact JRS II at (916) 795-3688.
5. It is the responsibility of the employer to retain the completed JRS II Member Reciprocal Self-Certification Form in the judge's employment records for auditing purposes. You do not need to send a copy of the form to JRS II unless we request it.

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**).