



# San Joaquin County Employees' Retirement Association

## MEMBER RECIPROCAL SELF-CERTIFICATION FORM

Complete and return this form to your Personnel Office within 5 business days

EMPLOYEE NAME \_\_\_\_\_  
(Last) (First) (Middle)

EMPLOYEE ID: \_\_\_\_\_

SOCIAL SECURITY NUMBER: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_

Name of Most Recent Reciprocal Retirement System: \_\_\_\_\_

Last Date of Employment under most recent reciprocal retirement system: \_\_\_\_\_ First Membership Date in any previous reciprocal retirement system: \_\_\_\_\_

Name(s) of any other previous reciprocal retirement system(s) in which you are still a member:

\_\_\_\_\_

(Check the applicable statement)

I have not been an active member of another reciprocal retirement system within the last six months. (SJCERA Tier II)

I was a member and am retired from the \_\_\_\_\_ Retirement System and subsequently began full-time employment with an SJCERA-participating employer. (SJCERA Tier II)

I was a member of the \_\_\_\_\_ Retirement System and began full-time employment with an SJCERA-participating employer within six months after separating from employment covered by this previous reciprocal retirement system and (check one):

I have left my member contributions on deposit with that system. (SJCERA Tier I)

I have withdrawn my member contributions from that system. (SJCERA Tier II)

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 San Joaquin County Employees' Retirement Association (SJCERA) including, but not limited to, my date of membership and the member contributions I am required to pay. SJCERA 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:

EMPLOYING AGENCY / DEPT.: \_\_\_\_\_

Employee Hire Date: \_\_\_\_\_ Date This Form Was Given to Employee: \_\_\_\_\_

Employer Designee: \_\_\_\_\_ (Signature) Rec'd from Employee: \_\_\_\_\_

Designee Title: \_\_\_\_\_ Date: \_\_\_\_\_

## **MEMBER RECIPROCAL SELF-CERTIFICATION FORM**

### Instructions and Information

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

The Public Employees' Pension Reform Act of 2013 (PEPRA), effective January 1, 2013, requires an SJCERA-participating employer to determine for which SJCERA benefit tier a newly hired or rehired full-time employee is eligible.

### **MEMBERS ELIGIBLE FOR SJCERA TIER I**

An employee is not considered a “new member” of SJCERA as defined by PEPRA and is eligible for membership in SJCERA Tier I if **all** of the following apply:

- You were a member of a reciprocal public retirement system in California on or before December 31, 2012;
- You began your SJCERA-covered employment within six months of terminating your previous public employment covered by the prior reciprocal system; and
- You left your service credit and contributions (if any) on deposit with the prior reciprocal system.

### **MEMBERS ELIGIBLE FOR SJCERA TIER II**

An employee is considered a “new member” of SJCERA as defined by PEPRA and is subject to SJCERA Tier II if any of the following apply:

- You became a member of SJCERA for the first time on or after January 1, 2013, and you have no prior membership in any public retirement system in California.
- You became a member of SJCERA for the first time on or after January 1, 2013, and your last date of employment covered by a reciprocal public retirement system in California was more than six months prior to the date you became a member of SJCERA.
- You became a member of SJCERA for the first time prior to January 1, 2013, you later terminated full-time employment subject to SJCERA, and more than six months later returned to full-time employment for a different SJCERA-participating employer.

### **EMPLOYEE INSTRUCTIONS**

1. The Member Reciprocal Self-Certification Form will assist your employer in determining whether you are a member of SJCERA Tier I or SJCERA Tier II for your current employment.
2. As the new employee, you must complete, sign, and date the Member Reciprocal Self-Certification Form to self-certify your most recent service and first membership date in a reciprocal public retirement system in California, or indicate that you are not a member of any reciprocal system.
3. You must return the Member Reciprocal Self-Certification Form to your Personnel Office within 5 business days of beginning employment, as your SJCERA benefit tier and required member contributions are determined based on your date of hire and continuity of membership in one or more reciprocal public retirement systems in California.

## **EMPLOYER INSTRUCTIONS**

1. Employers must provide the Member Reciprocal Self-Certification Form to all new employees eligible for membership in SJCERA.
2. Employers must sign and date the Member Reciprocal Self-Certification Form on the date the form is given to the employee.
3. Upon receipt of the completed Member Reciprocal Self-Certification Form, the employer will enter the date the employee returns the completed and signed form.
4. The employer will ensure the employee is enrolled in the appropriate retirement benefit tier in the payroll system, and that the corresponding member contributions to retirement are deducted from the employee's biweekly compensation.
5. The employer must forward the original completed and signed Member Reciprocal Self-Certification Form returned by the employee to SJCERA, and retain a copy for the employer's employment records for the employee.

## **RECIPROCAL CALIFORNIA PUBLIC RETIREMENT SYSTEMS**

### **County Employees Retirement Systems**

Counties and participating special districts that maintain retirement systems under the County Employees Retirement Law of 1937.

Alameda	Los Angeles	Sacramento	Santa Barbara
Contra Costa	Marin	San Bernardino	Sonoma
Fresno	Mendocino	San Diego	Stanislaus
Imperial	Merced	San Joaquin	Tulare
Kern	Orange	San Mateo	Ventura

### **California Public Employees' Retirement System (CalPERS)**

All agencies whose employees are members of CalPERS including state agencies, county schools, various counties, cities, and special districts.

### **Independent Public Agency Retirement Systems**

Public agencies maintaining their own retirement systems that have contracted with CalPERS to provide the benefits of reciprocity (\* are also CalPERS-covered agencies)

California Administrative Services Authority	City of San Jose
*City of Concord	Contra Costa Water District
*City of Costa Mesa (Safety only)	County of San Luis Obispo
City of Fresno	East Bay Municipal Utility District
City of Oakland (non-Safety only)	East Bay Regional Park District (Safety only)
City of Pasadena (Fire and Police)	Los Angeles City Employees' Retirement System
*City of Sacramento	Los Angeles County Metropolitan
*City of San Clemente (non-Safety only)	Transportation Authority (Non-Contract
City of San Diego	Employees' Retirement Income Plan.
*City and County of San Francisco	Formerly Southern Calif. Rapid Transit
	District)

### **Other Retirement Systems**

Membership in the following retirement systems may be reciprocal for SJCERA members pursuant to reciprocity agreements with CalPERS:

State Teachers' Retirement System (CalSTRS)    Legislator's Retirement System (LRS)  
Judges' Retirement System (JRS & JRS II)