



## Board Administration Policy

# Age Verification

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### I. Purpose

- A. This policy governs the management and operation of the retirement system with respect to the establishment of guidelines for age verification of its membership, including its retired members and their survivors, dependents, and beneficiaries.

### II. Birth Certificate Requirement

- A. Upon appointment to a permanent full-time position or opt-in confirmation of elected officers, every employee who is eligible for membership in SJCERA shall submit a legible copy of the employee's birth certificate or, if unobtainable, other proof of age. This requirement shall be in addition to the Membership requirements set forth in the bylaws.
- B. Upon applying for a retirement benefit (including service, disability, or survivor), a legible copy of the birth certificate or, if unobtainable, other acceptable age verification documentation shall be submitted for the following individuals, if the documentation is not already on file with SJCERA: the member, any survivors/beneficiaries named to receive a continuance, and any dependents named for health insurance coverage.
1. Benefit payments and health plan enrollment shall not be processed without proof of age.

### III. Alternative Acceptable Age Verification Documents

- A. The following alternative documents will be acceptable:
1. Any one of the following:
    - a) A valid U.S. Passport issued within the last 10 years
    - b) Valid Real ID compliant driver's license or identification card
    - c) Infant baptismal certificate;
    - d) Elementary school age record
    - e) Hospital birth record;
    - f) Authenticated family record; or
  2. Any two of the following:
    - a) Valid state-issued driver's license or identification card,
    - b) Marriage record, if age is shown;
    - c) Military record;
    - d) Child's birth certificate showing age of parent;
    - e) Naturalization certificates issued by the U.S. Citizenship and Immigration Services (USCIS).
    - f) Expired U.S. Passport
    - g) Valid non-U.S. Passport
- B. If the member is unable to provide satisfactory Age Verification documentation, as outlined in Sections II and III of this policy, the CEO is authorized to approve

alternate documentation based on individual circumstances. In that instance, the CEO shall maintain a record describing the Age Verification procedure for the member and the reason for approval of alternate documentation.

#### IV. Corrections

- A. In the event acceptable age verification documentation is not available, the birth date provided by the employer will be accepted for actuarial valuation and contribution purposes.
- B. Upon receipt of acceptable age verification documentation, any discrepancy between the documentation received and the birth date reported by the employer, will be corrected by SJCERA.
  - 1. Any re-calculation and correction of over- or underpaid contributions will be processed pursuant to SJCERA's *Correction of Errors and Omissions Policy*.

#### V. Law Prevails

- A. In the event a conflict between this policy and the County Employees Retirement Law, the Public Employees' Pension Reform Act, or other applicable statute arises, the law shall prevail.

#### VI. Policy Review

- A. Staff shall review this Policy at least once every three years to ensure that it remains relevant, appropriate, and in compliance. Any revisions or amendments to this policy must be approved by the Board of Retirement in accordance with the bylaws.

#### VII. History

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| 03/01/2017 | Bylaws Amended and Approved by the Board of Supervisors  |
| 12/08/2017 | Bylaw Section 5.2.B.1. & 2, C & D Converted to Board Policy  |
| 06/29/2018 | Reviewed, no content changes required; Staff updated format  |
| 04/12/2019 | Policy Review section amended to at least once every three years   |
| 07/12/2019 | Amended to allow copies of birth certificates, expand the types of acceptable documentation, grant the CEO discretion to allow exceptions, clarify procedures when no age documentation is on file or there are conflicting birth dates. |

#### Certification of Board Adoption

  
Clerk of the Board

07/12/2019

Date

#### Related Statutes:

California Government Code Sections 31531 and 31526