



Santa Clara County Office of Education

Charles Weis, Ph.D.
County Superintendent of Schools

Informational Bulletin

For Santa Clara County Districts

District Business & Advisory Services

Nimrat Johal: Director- DBAS: 408-453-6599

Cathy McKim, Manager-DBAS: 408-453-6588

Bulletin: 12-065

Date: November 3, 2011

To: District Fiscal Directors
District Payroll and Human Resources Directors

From: Cathy McKim

Re: 2011 CalPERS Annual Member Statements
Permanent Separation Dated in my|CalPERS

The purpose of this e-mail is to communicate the following circular letters from CalPERS.

Circular Letter No. 200-068-11 dated November 1, 2011

Re: 2011 CalPERS Annual Member Statements. The Purpose of this circular is to inform you that the Annual Member Statements (AMS) will be mailed to member's home addresses beginning November 7, 2011. Members who have opted to "go green" or who have an invalid address will not receive a printed statement. Beginning November 7, 2011, all members may view and print their AMS online at <http://www.calpers.ca.gov>

Circular Letter No.200-070-11 dated October 28th, 2011

Re: Permanent Separation Dates in my|CalPERS. The purpose of this circular is to inform you of important information regarding the appropriate use of permanent separation dates in my|CalPERS. With the implementation of my|CalPERS and the integration of the membership, health, payroll and benefit systems, an employee's permanent separation date must be reported consistently and uniformly by all Business Partners.

I have attached the documents for your convenience; however, the information can also be found at the CalPERS website at <http://www.calpers.ca.gov/index.jsp?bc=employer/cir-ltrs/2011-cir-ltrs.xml>

Please share this information as deemed appropriate.

County Board of Education: Leon F. Beauchman, Michael Chang, Joseph Di Salvo, Julia Hover-Smoot, Grace H. Mah, Craig Mann, Anna Song
1290 Ridder Park Drive. San Jose, CA 95131-2304 (408) 453-6500 www.sccoe.org

A Champion for Children, Schools and Community



California Public Employees' Retirement System
P.O. Box 942709
Sacramento, CA 94229-2709
(888) CalPERS (or **888-225-7377**)
TTY: (877) 249-7442
www.calpers.ca.gov

Reference No.:
Circular Letter No.: 200-068-11
Distribution: IV, V, VI, X, XII, XVI
Special:

Circular Letter

November 1, 2011

TO: **ALL CALPERS EMPLOYERS**

SUBJECT: **2011 CALPERS ANNUAL MEMBER STATEMENTS**

The purpose of this Circular Letter is to inform you that the Annual Member Statements (AMS) will be mailed to members' home addresses beginning November 7, 2011. Members who have opted to "go green" or who have an invalid address will not receive a printed statement. Beginning November 7, 2011, all members may view and print their AMS online at my.calpers.ca.gov.

The AMS includes the member's total amount of CalPERS service credit, the breakdown of contributions and interest, their employer(s), and retirement benefit formula(s) as of June 30, 2011. This information is derived from payroll reports received by CalPERS through July 31, 2011. Member contributions and service credit data for fiscal year 2010/2011 that are received after July 31, 2011, will be reflected on the next year's AMS.

The AMS Employer Reports that were previously available online through the Automated Communications Exchange System (ACES) will be made available in the new my|CalPERS system after the first of the year. This report will continue to be provided yearly to inform CalPERS employers of the employees in their agency who receive an AMS. It will also continue to provide the year-end account data for each member, including the mailing address used and account balances. Only members with an "active" status will be shown on the AMS Employer Report.

Please visit our website at www.calpers.ca.gov for more information about the AMS. If you are unable to find the information you need online, contact the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

KAREN DEFRANK, Chief
Customer Account Services Division



California Public Employees' Retirement System
P.O. Box 942709
Sacramento, CA 94229-2709
(888) CalPERS (or 888-225-7377)
TTY: (877) 249-7442
www.calpers.ca.gov

Reference No.:
Circular Letter No.: 200-070-11
Distribution: V, VI, XII, XVI, & Special
Special:

Circular Letter

October 28, 2011

TO: **PUBLIC AGENCIES, SCHOOL EMPLOYERS, NON-CENTRAL STATE AGENCIES, AGRICULTURAL DISTRICTS, SENATE RULES COMMITTEE, AND ASSEMBLY RULES COMMITTEE**

SUBJECT: **PERMANENT SEPARATION DATES IN my|CalPERS**

The purpose of this Circular Letter is to inform you of important information regarding the appropriate use of permanent separation dates in my|CalPERS. With the implementation of my|CalPERS and the integration of our membership, health, payroll, and benefit systems, an employee's permanent separation date must be reported consistently and uniformly by all Business Partners.

Prior to my|CalPERS, the permanent separation date reported was used differently by the many unique systems throughout the organization and did not impact downstream processing. In the past, many Business Partners understood the permanent separation date to be the last day an employee worked for your agency or equal to the last day on payroll and the day before an employee's retirement date.

Proper Reporting

In the integrated my|CalPERS system, the permanent separation date is now part of a series of system validations. **Therefore, the permanent separation date must be reported as the day after the last day an employee works for your agency, which is often the day after the last day on payroll.** The permanent separation date will frequently be the same day as a member's retirement date or start date of a new appointment. It is imperative that all Business Partners follow this important business rule to avoid transaction errors due to automatic system validations.

A permanent separation date must also be reported for all employees who end employment with your agency, regardless of the reason. This is required in my|CalPERS to ensure benefits are administered timely and accurately, especially for those employees nearing retirement. All transactions within my|CalPERS, including health and retirement, rely on the permanent separation date to be reported in this manner.