



Reciprocity Process FAQ

Q. How do I process the Reciprocal Self-Certification form now?

A. The [Member Reciprocal Self-Certification Form](#) must be provided to all members enrolled in CalPERS on or after 1/1/2013. You must obtain the form from the member, completed, and kept for your records. Your agency will be required to enter the information self-certified on the form will in the appointment in [myCalPERS](#).

Q. Are there training guides I can review or give to my team for processing the Reciprocal Self-Certification form?

A. You can view the [State Reference Guide](#). You can also review the presentation notes given at the Transaction Specialist Educational Forum [here](#) from December 2023. You can also review training information about this process via CalPERS online courses as well by accessing the Education tab in [myCalPERS](#).

Q. Do I need to submit information to SCO directly?

A. No, you will be submitting the reciprocal information in myCalPERS.

Q. How do I submit information to CalPERS and do I need to send them a copy of the form?

A. You will take the information from the form that was filled out and enter it in myCalPERS. The form should not be sent to CalPERS unless a member indicates multiple reciprocal systems or multiple membership periods. If you have a form where this is the case, send the form to memberelectionteam@calpers.ca.gov for processing.

Q. Now that the reciprocal retirement form has been updated, will the previous version of the form be allowable for a short time? If so, how long?

A. You may process any version of the form that was revised after 2018, since these versions have the required information available to be completed by the member. However, it is strongly recommended you provide members the most recent version of the form as they have been updated for clarity and accuracy of completion.

Q. Who can I contact for questions about how to complete the reciprocity form?

A. You can contact the CalPERS contact center at 888 CalPERS or the [Member Election Team@calpers.ca.gov](mailto:MemberElectionTeam@calpers.ca.gov) for questions on the submission process. However, there

are many resources at your disposal like the online course which can be located by accessing the Education tab in [myCalPERS](#).

Q. Who can I contact if I have myCalPERS access issues?

A. Each HR Office has a designated myCalPERS system access administrator. If it is not resolved at that point, please contact CalPERS contact center at 888-225-7377.

Q. When Reciprocal Self-Certification information is entered in myCalPERS for a member that changes their enrollment level, who is responsible to update the Retirement Account code in the Employment History to ensure it matches the enrollment level in myCalPERS?

A. The Departments must key a 505 transaction to reflect the Retirement Account Code of the correct Enrollment Level as declared in the employee's Reciprocal Self-Certification Form.

Q. Who should I contact if the Reciprocity section is not visible when the appointment is missing?

A. You can send an email to PPSD Civil Service Retirement at ppsdcsretirement@sco.ca.gov regarding missing appointments in myCalPERS.

Q. What if I have an old form that was submitted to SCO prior to January 1, 2024? Should I resubmit a new form?

A. No, SCO will still process forms that were submitted to SCO prior to the January 1, 2024 implementation. Any forms that need processing on or after January 1, 2024 should be processed by the departments themselves.

Q. For example, there is an employee whose reciprocity was not entered into the myCalPERS when the employee was first hired in the State in 2014 and was later found and brought up by the employee. Who will update the information in the Employment History and in the myCalPERS?

A. The current employer must enter the reciprocity information in myCalPERS and must key a 505 transaction in the Employment History to reflect the self-certified reciprocity information submitted by the employee.