

**Department of Personnel Administration
Memorandum**

TO: Personnel Management Liaisons (PML)

SUBJECT: Alternate Retirement Program (ARP) Eligibility Worksheet Revision	REFERENCE NUMBER: 2006-031
DATE ISSUED: 08/28/06	SUPERSEDES:

This memorandum should be forwarded to:

**Employee Benefits Officers
Personnel Officers
Personnel Transaction Supervisors
Personnel Transaction Staff**

FROM: Department of Personnel Administration
Savings Plus Program

CONTACT: Savings Plus Program
(916) 324-2909
Fax: (916) 327-1885

The Savings Plus Program (Savings Plus) has revised the ARP Eligibility Worksheet to reflect the recent change to retirement benefits for Bargaining Unit (BU) 2 employees.

We added the two new ARP account codes for BU 2 miscellaneous and industrial employees hired on or after July 1, 2006 with no prior CalPERS service.

Code Definition

TG BU 02 CalPERS miscellaneous member subject to Social Security and Medicare
TH BU 02 CalPERS industrial member subject to Social Security and Medicare

The ARP Eligibility Worksheet is available on the Personnel Information Exchange (PIE) System under Policies and Regulations. This interactive worksheet prompts you to answer questions about an employee to help determine if he or she is subject to ARP. Please complete the worksheet for each employee, and use the appropriate retirement code on the PAR. If you don't have access to PIE, you can use the attached ARP Eligibility Worksheet.

Personnel offices with questions about ARP can access the updated [ARP Fact Sheet](#) on DPA's Web site, or can contact Savings Plus at (916) 324-2909, Monday through Friday between 8:30 a.m. and 4:00 p.m.

/s/ Lura Franzella

Lura Franzella
Administrator
Savings Plus Program

ALTERNATE RETIREMENT PROGRAM (ARP) ELIGIBILITY WORKSHEET

Personnel Office: If you don't have access to DPA's **Personnel Information Exchange (PIE)** to complete the online ARP Eligibility Worksheet, you can complete this form for each new employee and retain it in the employee's personnel file. Do not mail completed form to DPA or CalPERS.

Department Name: _____

Section 1: Employee Information

Name: _____

Section 2: CalPERS Membership Category

Miscellaneous Industrial Safety State Patrol POFF

If you checked Miscellaneous or Industrial complete this form. The employee may be subject to ARP. If you have checked Safety, State Patrol, or POFF do not complete this form. The employee is not subject to ARP.

Section 3: Appointment Information

- (1) Is the first hire date prior to August 11, 2004? Yes No
If Yes, do not complete this form. The employee is not subject to ARP. If No, answer the following questions.
- (2) Does the employee have prior State employment? Yes No
If Yes, was the employee a member of CalPERS? Yes No
If the answer is Yes to the prior questions, do not complete this form. The employee is not subject to ARP. If the answer is No to either portion of Question (2) the employee may be subject to ARP. Continue completing this form.
- (3) Is this a reappointment where the employee's original date of hire was more than 24 months ago? Yes No
If Yes, do not complete this form. The employee is not subject to ARP. If No, answer the following questions.

Section 4: Prior Employment not Subject to ARP

Name of Employer/Agency: _____

- (1) Is the employee a member of CalPERS, Judges' Retirement Systems (I/II), Legislators' Retirement System, CalSTRS, or the UC Retirement System? Yes No
If the answer is Yes, do not complete this form. The employee is not subject to ARP. If the answer is No, answer the following question.
- (2) Is the prior employer a CalPERS reciprocal retirement system? Yes No
If the answer is Yes, and the employment was within the six months prior to the CalPERS membership date the employee is not subject to ARP. If the employment was more than six months prior to this date the employee may be subject to ARP. Continue completing this form. If the answer is No, continue completing this form.

For a listing of the reciprocal retirement systems please refer to the *CalPERS State Handbook* or the booklet *When You Change Retirement Systems* (PERS-PUB-16). To see if the employee was a previous member of CalPERS, refer to ACES under the "Participant Inquiry Screen". If you need additional assistance contact CalPERS at 888-225-7377.

Section 5: Non-resident Alien

Is the employee a non-resident alien working under the provisions of a Visa F-1, J-1, M-1, or Q-1, and not coordinated with Social Security? Yes No

If the answer is Yes, do not complete this form. The employee is not subject to ARP. If No, continue completing this form.

Section 6: The employee is subject to ARP: Retirement Identification Codes

Departments are responsible for establishing the correct retirement ID code on the employee's employment history records. The following codes apply to employees subject to ARP:

Code Definition

TK CalPERS miscellaneous member subject to Social Security and Medicare
TP CalPERS industrial member subject to Social Security and Medicare
TR BU 18 CalPERS industrial member subject to Social Security and Medicare at Porterville Developmental Center
TG BU 02 CalPERS miscellaneous member subject to Social Security and Medicare (hired on or after 07/01/06)
TH BU 02 CalPERS industrial member subject to Social Security and Medicare (hired on or after 07/01/06)

Authorized Employer Signature _____ Date _____