

**Department of Personnel Administration  
Memorandum**

**TO: Personnel Management Liaisons (PML)**

<b>SUBJECT:</b> Alternate Retirement Program (ARP) Eligibility Worksheet Revision	<b>REFERENCE NUMBER:</b> 2006-053
<b>DATE ISSUED:</b> 12/21/06	<b>SUPERSEDES:</b>

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 (Savings Plus)

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

Effective January 1, 2007, the ARP Eligibility Worksheet will have three new ARP account codes, issued by SCO (Personnel Letter 06-020).

These changes result from bargaining, in which 16 units agreed to change the retirement benefit formula for all new miscellaneous and industrial rank-and-file employees hired on or after January 1, 2007.

Use the following codes for miscellaneous and industrial rank-and-file employees with original hire dates on or after **January 1, 2007**, in Bargaining Units 1, 3, 4, 7, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, and 21:

The agreement does not affect excluded employees.

**Code Definitions**

- TJ CalPERS miscellaneous member subject to Social Security and Medicare hired on or after January 1, 2007
- TS CalPERS industrial member subject to Social Security and Medicare hired on or after January 1, 2007.
- TL BU 18 CalPERS miscellaneous member subject to Social Security and Medicare at Porterville Developmental Center hired on or after January 1, 2007.

The revised ARP Eligibility Worksheet will be available on the Personnel Information Exchange (PIE) System under Policies and Regulations by the middle of January. 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.

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If you don't have access to PIE, you can use the attached ARP Eligibility Worksheet. To ensure you have the most recent version with all the codes, please discard any other copies you have. If you have questions about ARP, access the [ARP Fact Sheet](#) on DPA's Web site or 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 the completed form to DPA or CalPERS.

**Department Name:**

**Employee Name:**

**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.

**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.

**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.

**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, the employee is subject to ARP. Refer to the table on Page 2 of this form to determine the employee's correct ARP account code.

**ARP Account Codes**

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

<b>For Bargaining Units 1,3,4,7,10,11,12,13,14,15,16,17,18*,19,20,21</b>	
<b>Hired on or after 8/11/04 through 12/31/06:</b>	<b>Hired on or after 1/1/07:</b>
TK: CalPERS miscellaneous member subject to Social Security and Medicare	TJ: CalPERS miscellaneous member subject to Social Security and Medicare
TP: CalPERS industrial member subject to Social Security and Medicare	TS: CalPERS industrial member subject to Social Security and Medicare
TR: * BU 18 - CalPERS miscellaneous member subject to Social Security and Medicare <b>at Porterville Developmental Center</b>	TL: * BU 18 - CalPERS miscellaneous member subject to Social Security and Medicare <b>at Porterville Developmental Center</b>
<b>For Bargaining Unit 2</b>	
<b>Hired on or after 8/11/04 through 6/30/06:</b>	<b>Hired on or after 7/1/06:</b>
TK: CalPERS miscellaneous member subject to Social Security and Medicare	TG: CalPERS miscellaneous member subject to Social Security and Medicare
TP: CalPERS industrial member subject to Social Security and Medicare	TH: CalPERS industrial member subject to Social Security and Medicare
<b>For Excluded Employees</b>	
<b>Hired on or after 8/11/04:</b>	
TK: CalPERS miscellaneous member subject to Social Security and Medicare	
TP: CalPERS industrial member subject to Social Security and Medicare	

Authorized Employer Signature \_\_\_\_\_ Date \_\_\_\_\_