SAN MATEO COUNTY OFFICE OF EDUCATION

New Hire Packet Checklist

District: _____ Payroll Cycle/Type: _____

NEW HIRES ONLY

REQUIRED NEW EMPLOYEE DOCUMENTATIONS FOR _____
Employee Name

Please ***attach*** a copy of the following: (Check boxes and use drop down boxes to indicate documents are attached.)

- ☐ Report 98a Employee Information
- ☐ Print Screen from Employee Management– Retirement and Assignment tabs
- ☐ *Copy of* PERS Reciprocal Certification Form
- ☐ Print Screen from Employee Management - Tax tab

☐ REAP Verification Print — Effective Date: _____
*Enter DB Date on REAP screen or 1st day of the month hired.

☐ Screen MYCalPERS — Effective Date: _____
*Enter hire date or qualifying date

☐ Verification Dual Enrollment

☐ Check primary

OTHER REQUIRED DOCUMENTS (PLEASE *ATTACH* ONLY IF APPLICABLE) - NEW EMPLOYEE ONLY

(Check box if you have attached documents)

- ☐ Visa - copy only. Type: (e.g., H1B, F1, J1, etc.):
- ☐ Exchange/Sojourn teacher.
- ☐ Form W-4 or DE-4 (if applicable) Withholding (Exempt Status only)
- ☐ PERS Reinstatement Letter (prior PERS retirees only) - copy
- ☐ STRS CB 533 Cash Balance Benefit Program (D19 San Bruno and D31 JUHSD only)
- ☐ STRS ES 350 Permissive Election
- ☐ STRS ES 372 Retirement System Election (Irrevocable)
  (PERS members in Certificated positions or STRS members in Classified Positions)
- ☐ Others:

CalPERS Termination Process

From CalPERS Circular Letter No.: 200-04-12:

Proper Reporting
It is imperative that an employer report a permanent separation when an employee retires or otherwise ends employment with your agency, regardless of the reason. All transactions within mylCalPERS, including health and retirement, rely on the permanent separation date to be reported to determine proper benefit eligibility and cost for both the employer and the member.

Event Details:

- Site Change – Not applicable at this time
- Appointment Change - **When an Appointment Termination should be reported:**
  An employee permanently separates from the employer, including:
  - Termination with a possibility of appeal
  - Transferring from one school district to another school district (even within the same county office of education)
  - Job changes: if the change impacts benefits, it should be reported as an appointment change.
- Begin Leave - Starting leave of absence
- End Leave -Returns from leave of absence
- Permanent Separation - When an employee separates from your agency

Separation Reason:

- Layoff – Suspension or termination of employment by agency not caused by any fault of the employee
- Death – End of life
- Termination with Cause-Termination with Cause is used when an employee is fired for gross misconduct. The employee would not be eligible for continued health coverage under COBRA based on the reason. Termination with Cause should be used with caution. If appealed and determined not to be gross misconduct, an employer may be subject to cash penalties.
- Retirement – Voluntary withdrawal from active participation in an agency
- Quit – Employee leaves or gives up employment in the agency
- Other – Reasons other than the above