



PUBLIC EMPLOYEES RETIEMENT ASSOCIATION OF NEW MEXICO (PERA) VOLUNTEER FIREFIGHTER ANNUAL REPORTING CHECKLIST

1. BEFORE THE ANNUAL REPORTING DEADLINE – PREPARE

- Gather driver's licenses and social security cards for all members if it hasn't been done and make two printed copies of each form of identification. Mail or scan and email one copy to PERA. **Keep copies of both items for your department's records.** You will not be required to do this every year as long as you have already sent a copy to PERA.
- When new members join the department each month, download the current fillable PDF "Member Enrollment for Volunteer Firefighters Form" from www.nmpera.org. New Members must complete the top sections of this form. The Department Chief should complete the department certification section and mail, or scan and email the completed form to PERA. **Keep a copy for your department's records.** To make annual reporting easier for all parties involved PERA suggests that departments complete and submit the enrollment form and provide supporting documentation each month as new member(s) join the department.

2. ANNUAL REPORTING FORM

- Download current fillable PDF "Volunteer Firefighters Annual Reporting Form" from www.nmpera.org.
- Complete Section A. Include all current contact information.
- Complete Section B. Double check department totals before including final numbers. PERA will NOT accept forms that contain marks and/or correction tape. These total numbers must reflect ALL members included in the Qualification Record Forms.
- Complete Section C. PERA will NOT accept forms that are missing required signatures and notarized signatures. All dates must match notary signature.
- Verify that the form has no strikethrough or white-out marks.
- Mail (suggest via preferred method of delivery confirmation) or hand deliver completed form to PERA on or before March 31st. **Keep a copy for your department's records.**

3. QUALIFICATION RECORD FORM

- Download current fillable PDF “Volunteer Firefighter Service Credit Qualification Record Form” from www.nmpera.org.
- Verify that new members, retired members, current active members are on the correct designated form.
- Include social security numbers for each member. Verify that it is correct by referring to social security card. Include each member’s current legal name and address.
- Indicate date of birth for member.
- Indicate if member should/should not receive service credit based on current service credit eligibility requirements.
- Verify that department fire chief or authorized person signed and dated at the bottom of the form.
- Mail or hand-deliver (with Annual Reporting Form) completed form(s) to PERA on or before March 31st. **Keep a copy for your department’s records.**

4. VFD FIRE CHIEF & REPORTER CONTACT INFORMATION

- Verify that the current department fire chief and reporter’s information is provided.
- Mail or hand-deliver (with Annual Reporting Form) completed form(s) to PERA on or before March 31st. **Keep a copy for your department’s records.**

5. MEMBER ENROLLMENT FORM

- For each new member in your department, download current fillable PDF “Member Enrollment for Volunteer Firefighters Form” from www.nmpera.org.
- Complete Member Information section. Include all current contact information. The member must use her/his name as it appears on legal documents, and not a nickname.
- Complete Martial Information section. Attach a copy of spouse’s social security card and **keep another copy for your department’s records.**
- Department Chief needs to complete Member Certification section with department name, five-digit department number, signature and date.
- Complete Volunteer Firefighter Department Certification section. Verify that you have included the correct start date and obtained fire chief signature and date.
- Attach copy of social security card and driver’s license for new member with form. **Keep copies for your department’s records.**
- Mail completed form and copies of social security cards and driver licenses to PERA preferably each month but no later than March 31st each year. **Keep a copy for your department’s records.**

PERA suggests that you keep copies of every form and every form of identification for your department’s records in the case of an audit conducted by the State Fire Marshal’s Office.