



**PERA**

# **Termination Reporting**



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### PERA TERMINATION NOTICE FORM

Instructions: Please print or type in dark ink. The original of this form must be completed in its entirety and returned to PERA for processing. Required fields are in **BOLD ITALICS**

<b>MEMBER'S SOCIAL SECURITY NUMBER or PERA ID NUMBER</b>		
<b>FIRST NAME</b>	<b>MI</b>	<b>LAST NAME</b>
<b>Employer's Certification of Termination</b>		
<b>PERA EMPLOYER NAME</b>	<b>PERA EMPLOYER NUMBER</b>	
This is to certify that the above-named member terminated employment on _____; this is a bona fide termination and that there is no intention of re-employing the member at this time.		
<b>Authorized Employer's Printed Name:</b> _____		
<b>Authorized Employer's Signature:</b> _____		
<b>Title:</b> _____	<b>Date:</b> _____	<b>Telephone No:</b> _____
<b>Employer's Certification of Transfer to Another PERA Entity</b>		
This is to certify that the above named member began employment on _____; with another PERA Entity.		
<b>NAME OF DEPARTING ENTITY :</b> _____	<b>PERA EMPLOYER # :</b> _____	
<b>NAME OF DESTINATION ENTITY :</b> _____		
<b>Authorized Employer's Printed Name:</b> _____		
<b>Authorized Employer's Signature:</b> _____		
<b>Title:</b> _____	<b>Date:</b> _____	<b>Telephone No:</b> _____

By completing this form the Authorized Employer is certifying that the PERA member is no longer employed by the contributing entity. If the member is terminating employment and would like information to obtain a member refund, they must contact PERA directly for a *Member Request for Refund/Rollover Form*. The PERA Member can find the *Member Request for Refund/Rollover Form* at [www.nmpera.org](http://www.nmpera.org), as well as all rules and regulations for the refunds request.

September 2015



Effective 8/1/2017 - PERA staff will ask for adjustments instead of paper documents to terminate members employment. PERA will still accept paper documents sent in from Employers.

10/1/2017 - PERA will no longer accept paper termination forms and will require all terminations be done through RIO Self Service in either the regular reporting file or an adjustment report.

Employers should evaluate their systems and processes to ensure they are using the status code and date boxes correctly to adhere to the new protocol.

## Benefits of File Reporting

- Less paperwork for employer to fill out and remit to PERA.
- Increased efficiency with member records
- Decreased member wait time for retirement or refund processing
- Reduction in paper usage

# Regular File Reporting

## Tips to Reporting in your Regular Report File:

- Ensure that the PERA format has been properly programmed with your file transmission. (Upload Method Only)
- After each file upload, make sure that you visit the records of all employees terminated in that pay period and ensure that the status field has been properly filled out.
- Here is how to properly fill out a status field for an employee.

The screenshot displays the PERA RIO interface. The top navigation bar includes 'Logoff', 'Forms', 'Publications', 'Help', and 'About PERA'. The left sidebar contains 'Things To Do' and 'Work on Reports' sections. The main content area shows a list of reports under the heading 'Regular Reports'.

Status	File Load Status	Date Submitted	Date Range	Delete?	Edit?	Current Report Status	Reconcile	View Totals/Details?
Added	Loaded	06/19/2017	05/28/2017 - 06/11/2017	<a href="#">delete</a>	<a href="#">edit</a>	Confirmed	<a href="#">Reconcile</a>	<a href="#">View Totals</a>

  

Status	File Load Status	Date Submitted	Date Range	Delete?	Edit?	Current Report Status	Reconcile	View Totals/Details?
Added	Not Loaded	06/19/2017	04/03/2017 - 04/16/2017	<a href="#">delete</a>	<a href="#">edit</a>	Confirmed	NA	<a href="#">View Totals</a>

  

Status	File Load Status	Date Submitted	Date Range	Report Type	View	Reconcile	View Totals/Details
Posted	Loaded	05/31/2017	05/15/2017 - 05/28/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	05/22/2017	05/01/2017 - 05/14/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	05/04/2017	04/17/2017 - 04/30/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	05/04/2017	04/03/2017 - 04/16/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	05/23/2017	03/20/2017 - 04/02/2017	Adjustment	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	04/11/2017	03/20/2017 - 04/02/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	04/11/2017	03/06/2017 - 03/19/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	03/07/2017	02/26/2017 - 03/05/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	02/21/2017	02/06/2017 - 02/19/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	02/07/2017	01/23/2017 - 02/05/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	01/27/2017	01/09/2017 - 01/22/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	01/12/2017	12/26/2016 - 01/09/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	12/27/2016	12/12/2016 - 12/25/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	12/12/2016	11/28/2016 - 12/11/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	11/30/2016	11/14/2016 - 11/27/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	11/18/2016	10/31/2016 - 11/30/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	10/31/2016	10/17/2016 - 10/30/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	10/17/2016	10/03/2016 - 10/16/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	10/07/2016	09/19/2016 - 10/02/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	09/20/2016	08/05/2016 - 08/18/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	09/13/2016	08/22/2016 - 09/04/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	08/29/2016	08/08/2016 - 08/21/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	08/24/2016	07/25/2016 - 08/07/2016	Adjustment	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>





# Adjustment File Reporting (Continued)

Scenario #2 – Termination date is the pay period end date.

The screenshot displays the PERA RIO (Retirement Information Online) web application. The header includes the PERA logo and navigation links for Logoff, Forms, Publications, Help, About PERA, and Contact Us. The main content area shows the user's profile (Employer Summary) and a list of reports. A specific report is highlighted with a mouse cursor, showing its status as 'Confirmed' and a date range of 04/03/2017 - 04/16/2017. Below this, a table lists various 'Posted Reports' with columns for Status, File Load Status, Date Submitted, Date Range, Report type, View, Reconcile, and View Totals/Details.

**Public Employees Retirement Association of New Mexico**  
**RIO - Retirement Information Online**

**Things To Do**  
**Employer Summary**  
 Emp# 02300  
 Name: ESTANCIA TOWN OF  
[Employer Home](#)

**Work on Reports**  
[Cash Not Tied to Report](#)  
[View Employee Info](#)  
[Update My Profile](#)  
[Payable and Receivable](#)  
[Payable to Report](#)  
[Missing Reports and Payments](#)  
[View Modified Member Records](#)

Below is a list of the latest Wage and Contribution Reports. Select an action that is available next to the report or you can also [Create a New Report](#)

- [Work with Unposted Reports](#)
- [Work with Posted Reports](#)
- [Learn more about working with employer reports.](#)

**Regular Reports**  
 You have no Regular Reports at this time.

**Adjustment Reports**

Status	File Load Status	Date Submitted	Date Range	Delete?	Edit?	Current Report Status	Reconcile	View Totals/Details
Added	Not Loaded	06/28/2017	04/03/2017 - 04/16/2017	<a href="#">delete</a>	<a href="#">edit</a>	Confirmed	n/a	<a href="#">View Totals</a>

**Posted Reports**

Status	File Load Status	Date Submitted	Date Range	Report type	View	Reconcile	View Totals/Details
Posted	Loaded	05/31/2017	05/15/2017 - 05/28/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	05/22/2017	05/01/2017 - 05/14/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	05/04/2017	04/17/2017 - 04/30/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	05/04/2017	04/03/2017 - 04/16/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	05/23/2017	03/20/2017 - 04/02/2017	Adjustment	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	04/11/2017	03/20/2017 - 04/02/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	04/11/2017	03/08/2017 - 03/19/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	03/07/2017	02/20/2017 - 03/05/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	02/21/2017	02/06/2017 - 02/19/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	02/07/2017	01/23/2017 - 02/05/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	01/27/2017	01/09/2017 - 01/22/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	01/12/2017	12/26/2016 - 01/08/2017	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	12/27/2016	12/12/2016 - 12/25/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	12/12/2016	11/28/2016 - 12/11/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	11/30/2016	11/14/2016 - 11/27/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	11/18/2016	10/31/2016 - 11/13/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	10/31/2016	10/17/2016 - 10/30/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	10/17/2016	10/03/2016 - 10/16/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	10/07/2016	09/19/2016 - 10/02/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	09/20/2016	09/05/2016 - 09/18/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	09/13/2016	08/22/2016 - 09/04/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	08/29/2016	08/09/2016 - 08/21/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	08/29/2016	07/25/2016 - 08/07/2016	Adjustment	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>
Posted	Loaded	08/10/2016	07/25/2016 - 08/07/2016	Regular	<a href="#">view</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>

## Recap – Important Items to Remember

- This new initiative is meant to help the process of reporting terminations be more efficient and friendly for members, employers, and for PERA.
- You can report a termination by using the status code and status date boxes in either your regular reporting file or an adjustment file.
- For adjustment reporting, you can report multiple employees for multiple pay periods. You do not need to do one adjustment report per person.
- If you require assistance, please contact your PERA representative.
- If your entity uploads PERA reports, ensure that the correct format has been programmed properly to include termination status'.



## PERA Contribution Accounting Contacts

<b>Renee Baros</b>		<b>Nicole Tapia</b>		<b>Ryan Serrano</b>		<b>Rosemary Rodriguez</b>		<b>Valerie Hayas</b>	
<a href="mailto:renee.baros@state.nm.us">renee.baros@state.nm.us</a>		<a href="mailto:nicole.tapia@state.nm.us">nicole.tapia@state.nm.us</a>		<a href="mailto:ryans.serrano@state.nm.us">ryans.serrano@state.nm.us</a>		<a href="mailto:Rosemary.Rodriguez@state.nm.us">Rosemary.Rodriguez@state.nm.us</a>		<a href="mailto:valerie.hayas@state.nm.us">valerie.hayas@state.nm.us</a>	
<b>505-476-9321</b>		<b>505-476-9345</b>		<b>505-476-9320</b>		<b>505-476-9337</b>		<b>505-476-9342</b>	
Bloomfield	02090	ABQ Housing Auth	04560	Animal Service Center of the	04460	Alb/Bern Wa Auth	04380	Albuquerque	02020
Cibola (County)	03040	Alamogordo	02010	Anthony Water and Sanitatio	04030	Angel Fire	02900	AMAFCA	04580
DFA (All State)	01341	Arch Hurlley Conservancy Di	02030	Anthony, City of	04500	Cimarron	02140	Aztec	02040
East Rio Arriba	02240	Artesia	02980	Bayard	02050	Clayton	02160	Bernalillo (County)	03010
El Dorado Area Water and Sa	04470	Belen, City of	02060	Bayard Housing Auth	04090	Clovis Housing Auth	04100	Bernalillo (Town)	02080
Espanola	02290	Bosque Farms	02100	Camino Real Regional Utility	04510	Colfax (County)	03050	Ciudad Soil and Water Cons.	03480
Gallup (City)	02330	Carlsbad	02110	Capitan	04300	Curry (County)	03060	Claunch Pinto Soil and Water	02150
Gallup Housing	04140	Carlsbad Irrigation Dist	04340	Carrizozo	04430	Des Moines	02220	Corrales	03490
Los Alamos (County)	03170	Carlsbad Soil and Water Con	02120	Carrizozo Soil and Water Co	04410	Eagle Nest	02930	Cuba (Village)	02190
McKinley(County)	03200	Chaves (County)	03030	Catron (County)	03020	El Prado Water and Sanit. Dis	04060	Cuba Housing	04110
North Central NM Econ.Dev.	02520	Chaves Soil and Water Cons.	03390	Chama	02130	El Valle De Los Ranchos Wat	04320	Cuba Soil & Water Cons. Dist	02200
North Central Regional Trans	03450	Cloudcroft	02170	Columbus	04350	Grady (Village)	02340	Disciplinary Board of the NM	08012
North Central Solid Waste	04310	Clovis	02180	Deaf School F/T	08002	Guadalupe (County)	03120	East Torrance Soil and Water	02250
Rio Arriba County Housing A	03400	De Baca (County)	03070	Deming	02210	Harding (County)	03130	EMW Gas Assoc.	02940
Rio Arriba(County)	03240	De Baca Family Practice Clini	03360	Dona Ana (County)	03090	Logan	02420	Estancia	02300
San Juan Water	04390	Dexter	02230	Dona Ana Mutual Domestic V	04550	Maxwell	02990	Estancia Valley Solid Waste A	03430
San Juan(County)	03260	Eddy (County)	03100	Elephant Butte	04020	Maxwell Housing Auth	02995	Farmington	02310
State Fair Commission	08003	Edgewood	04290	Elephant Butte Irrigation Dist	03460	Melrose	02880	Jemez Springs	02390
		Edgewood Soil and Water Co	04070	Grant (County)	03110	Mora (County)	03210	Las Vegas	02410
		Elida	02270	Grants (City)	02350	Mora Mutual Domestic Water	04530	Los Ranchos de Albq	02450
		Eunice	02850	Greentree Solid Waste Auth	03440	Mosquero	02920	Magdalena	02460
		Fort Sumner (Village)	02320	Hatch	02360	Northern Regional Housing A	04215	MID. Rio Grande Cons Dist	02480
		Ft. Sumner Housing Auth.	04130	Hidalgo (County)	03140	Pecos Valley Cons Dist	02540	Mid-Region Council Of Gove	04570
		Hagerman	02960	Las Cruces	02400	Pojoaque Valley Irrigation Di	04330	Moriarity	02500
		Hobbs	02370	Lincoln (County)	03160	Quay (County)	03230	Mountainair	02510
		Jal (City)	02380	Lordsburg	02430	Raton	02570	NW NM Council of Govnmnts	02860
		Lea (County)	03150	Lordsburg Housing Auth	04160	Raton (City) Housing Auth	04170	Pecos (Village)	02530
		Los Lunas (Village)	02440	Luna (County)	03180	Raton Public Service	02580	Questa	02560
		Loving (Village)	04040	Mesilla (Town)	02470	Roy	02640	Red River	04250
		Lovington (City)	04370	Mesilla Valley Public Housin	04150	Santa Rosa	02710	Rio Rancho	02620
		Milan	02490	Region V Housing Auth.	02590	South Central Council of Gov	04010	San Miguel (County)	03270
		Northwest NM Regional Solid	02870	Reserve	02610	Southwest Solid Waste	03370	San Ysidro	02680
		Otero (County)	03220	Ruidoso	02660	Springer	02750	Sandoval (County)	03280
		Otis Mutual Domestic Water	04400	Ruidoso Downs	02650	Springer Housing Auth	04520	Santa Fe (City)	02690
		Portales	02550	Santa Clara	02970	Taos (County)	03320	SF Solid Waste	04270
		Region IV Housing Authority	02600	Santa Clara Housing Auth	04200	Taos (Town)	02770	Socorro (City)	02730
		Regional Emerg. Dispatch Au	04480	Sierra (County)	03300	Taos Ski Valley	04490	Socorro (County)	03310
		Roosevelt (County)	03250	Sierra Soil and Water Cons. D	03420	Taos Soil and Water Conserv	03410	Socorro Soil and Water Dist	03470
		Roswell	02630	Silver City	02720	Texico	02780	SSCAFCA	03380
		Santa Fe (City) Civic Housing	04260	Sunland Park	02950	Town of Kirtland	03000	Tierra y Montes SWCD	02790
		Santa Fe (County)	03290	SW NM COG	02740	Tucumcari	02810	Tijeras	02800
		SNMEDD	02670	T or C	02760	Union (County)	03340	Torrance (County)	03330
		Timberon Water and Sanitatio	02910	T or C Housing Auth	04180	Vaughn	04050	Willard	04000
		Town of Peralta	04245	Upper Hondo Soil and Water	04420	Wagon Mound	02830		
		Tularosa	04440	Visually Handicap School	08010	Western Mora Soil and Conse	04450		
		Valencia (County)	03350	Williamsburg	02840				

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