

PAYROLL USERS GROUP

Wednesday, August 25, 2021

9:30 AM

Zoom Webinar

AGENDA

1. CalPERS
 - a. Service Credit Purchases
 - a. Check in MyCalPERS frequently for Member Requests
 - b. Reporting tab, Member Requests
 - a. You only have 30 days to complete
2. CalSTRS
 - a. System Change Delayed
 - b. Retirement System Election forms are only given to employees who belong to one system and are taking a job with the other that would require membership.
 - c. Permissive Membership forms are only given to substitute and part time/extra help employees.
 - d. Certificated Rate Request forms should only be given to contracted teachers.
3. Listings
4. Superintendent Contracts
5. Payroll Pick Up Authorizations
6. Please use Auditing@kern.org
7. CSEA reset after September Mid's
8. CTA Dues
 - a. Vol ded changes for amounts or frequency, if pay schedule changes
9. Routing Prelists
 - a. If you are not ready when it is due, you can send what you have ready. Do not send a new prelist every time you make a change. Send the 1st and then keep track of the changes until you are audited. We charge your district for each printing by the page.
 - b. Send the PAY 510, 512, 513, 620, RCA500, CRD132
10. Check and change Child Support Information screen when you change Deduction screen

Deductions
99 - TEST DISTRICT
QSS/OASIS

File Options Window

Switch to: All Positions Deductions Pay Lines W4 Data

BOBBY, BOB 99/654-32-1987 29 SEID n/a
ChangeMode
Show SSN EJP-08/23/2021-12:03:23

Edit Ded Add Ded Copy Ded Copy Selected Delete Ded Reset Ded Delete All Reset All Hold All Ded Ignore All Ded Clear Hold/Ignore Verify Data

Ln	DS	Code	Code Name	Employee	Employer	T	RL	B	F	S	vb	Minimum	Maximum	Balance	Limit	Start	End
1		0199	STATE DISBURSEMENT UNIT	100.00	0.00							0.00	0.00	0.00	0.00		

Total Employee Deductions 100.00
Total Employer Deductions 0.00

Yr: 2022 Dist: 97 Site: 00 GS: W 8/23/2021 12:04:05 PM

CHILD Support Information

File Options Window

File Options Window

BOBBY, BOB 99/654-32-1987 29 SEID n/a

ChangeMode

Show SSN ☒ ????-????-????-????

VolDed: 0199 - STATE DISBURSEMENT UNIT

Select

Selected VolDed: 0199 - STATE DISBURSEMENT UNIT

Amount: 100.00

Maintain Cases Show Deductions Case History Manual Adjustments

+ Add Case X Delete Case

Case Identifier	Ign	Percent	Amount	Rec Amt	Total	Pending	Comment
ABC1234	→	100.0000	100.00	← 100.00	100.00	← .00	
** Case Totals **		100.0000	100.00				
** Difference **		0.0000					

Yr: 2022 Dist: 97 Site: 00 GS: W 8/23/2021 12:05:00 PM

Child Support
Information Screen

in Payroll folder
in EE maintenance

Request Payroll Pre-List Reports (PAYSUB)

File Options



District Selection Payroll Selection Report Selection Optional Selection

Request Payroll Pre-list Reports

Reporting Options

Report Title SEPT EOM w child support 2021

SSN Masking L 0 = none, 1-9 = mask, L/R = ExtRef

	Select	Num Copies	Totals Only	Reports
	<input checked="" type="checkbox"/>	01	<input type="checkbox"/>	PAY510 - Payroll Pre-list
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY240 - Payroll Fund Transfer
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY250 - Alpha Payroll Register
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY260 - Payroll Earnings Register
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY270 - Labor Distribution
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY290 - Emps. Paid First Time
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY320 - Benefits Distribution
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY322 - Benefits Distribution (alpha)
	<input checked="" type="checkbox"/>	01	<input type="checkbox"/>	PAY600 - Vol-ded by Vol-ded number
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY610 - Vol-ded by Employee
	<input checked="" type="checkbox"/>	01	<input type="checkbox"/>	PAY620 - Vol-ded Summary
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY615 - Garnishment Report
	<input type="checkbox"/>	01	<input type="checkbox"/>	RCA500 - Retirement Exception List
	<input type="checkbox"/>	01	<input type="checkbox"/>	RCA310 - STRS Pre-list / F496 File
	<input type="checkbox"/>	01	<input type="checkbox"/>	RCA320 - PERS Pre-list / Data File
	<input checked="" type="checkbox"/>	01	<input type="checkbox"/>	CRD132 - Credential Audit
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY612 - H/W vs VLD Difference
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY225 - A.P.D. Deposit Register
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY226 - Credit Union Deposit Register
	<input checked="" type="checkbox"/>	01	<input type="checkbox"/>	PAY228 - Child Care Deductions
	<input type="checkbox"/>	01	<input type="checkbox"/>	Save a snapshot for comparison
	<input type="checkbox"/>	01	<input type="checkbox"/>	PCM200 - Payroll Compare/Audit
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY248 - Payroll Gross Net by Pay Code
	<input type="checkbox"/>	01	<input type="checkbox"/>	PAY232 - A.P.D. Stub Roster

Request Payroll Pre-List Reports (PAYSUB)

File Options



District Selection Payroll Selection Report Selection **Optional Selection**

Screen Audit



Screen IDs :

PAY500

Report Title

PAY500 Sort Option

Report Zero Units ☐

PAY510/512/250

PAY510 Sort Option

Print Deduction Detail ☒

PAY512 Sort Option

Suppress PPO Detail ☐



Pay Type

PAY250 Sort Option

RCA500

Sort Option

Comments

Error Codes



Comment Types

Comment Dates

From



To

RCA310 (STRS/F496 File)

Service Period

From



To

File:

Arrears

From



To

Reporting Period - Year:

Month:

Month ID:

RCA320 (PERS/Data File)

Service Period

Arrears:

File:

PAY600

Vol-Ded Numbers

From

 (0 - 9999 = All)

To

 (0 - 9999 = All)

PAY615

Vol-Ded Numbers

From

 (0 - 9999 = All)

To

 (0 - 9999 = All)

PAY232

Location Break:

Banking Info:

Stub Selection:

Suppression:

Save Snapshot

Snapshot Name

Overwrite ☐

Snapshot Desc.

PAY228 L.00.02
AUG EOM child support
PAYNAME: EOM

KERN COUNTY SUPERINTENDENT OF SCHOOLS
CHILD SUPPORT DEDUCTION REGISTER FOR 09/30/2021
SCHOOLS PAYROLL REVOLVING FUND

08/23/21 PAGE 1

DI	VDNO	EMP-ID	TERM	NAME	AMOUNT	FLG	WARRANT#	TRACE NUMBER	CASE IDENTIFICATION
	0199				400.00				0290000251735
	VOL DED			TOTAL AMOUNT OF CHILD SUPPORT:	400.00***				
	VOL DED			TOTAL CHILD SUPPORT TRANSACTIONS:	1				
	EMPLOYEE			TOTAL AMOUNT OF CHILD SUPPORT:	400.00***				
	EMPLOYEE			TOTAL CHILD SUPPORT TRANSACTIONS:	1				
	GRAND			TOTAL AMOUNT OF CHILD SUPPORT:	400.00***				
	GRAND			TOTAL CHILD SUPPORT TRANSACTIONS:	1				
	CANCELLED			TOTAL AMOUNT OF CHILD SUPPORT:	.00***				
	CANCELLED			TOTAL CHILD SUPPORT TRANSACTIONS:	0				
	ADJUSTED			TOTAL AMOUNT OF CHILD SUPPORT:	.00***				
	ADJUSTED			TOTAL CHILD SUPPORT TRANSACTIONS:	0				

pay 228



California Public Employees' Retirement System
P.O. Box 942715 | Sacramento, CA 94229-2715
888 CalPERS (or 888-225-7377) | TTY: (877) 249-7442
www.calpers.ca.gov

Announcements

Circular Letter

April 26, 2021

Circular Letter: 200-021-21

Distribution: IV, V, VI, X, XII, XVI

To: All CalPERS Employers
Subject: New myCalPERS Features for Service Credit Purchases

Purpose

The purpose of this Circular Letter is to inform you that we have expanded our service credit purchase online features to be entirely paperless and make purchasing service credit quicker than ever. Based on feedback from you and your employees, we fully implemented the electronic service credit purchase process. In January, we began by implementing the ability to request to purchase service credit online, and now functionality to elect and select a payment option for service credit purchases in myCalPERS has been added.

Online Process for Employees to Elect and Pay for Service Credit

After an employee has requested a service credit purchase and all required documents and certification are electronically submitted to CalPERS by their employer, they will have the ability to elect and select a payment option for their purchase. To elect and purchase service credit electronically, employees must log in to myCalPERS, go to the **Retirement** tab, select **Service Credit Purchase** and review the **Request** tab. Under **Your Requests**, employees will view the **Actions** column and select the **Purchase Service** button. They will then follow the screen prompts to complete their election.

Benefits of Requesting, Electing, and Purchasing Service Credit Online

In addition to reducing paper, there are several benefits to purchasing service credit online for both employees and employers.

Benefits to employees include:

- Convenient and secure way to submit requests and upload documents in their myCalPERS account
- Faster response and ability to monitor the status of their request from start to finish
- Accelerated access to election document
- Easily and securely submit a payment using a credit or debit card

Benefits to employers include:

- Conveniently certify employees' purchase requests from your myCalPERS account
- Electronically submit required documents in a secure location

Employer Requirement

The **Member Request** tab should be monitored daily to ensure all employer certification requests are completed timely. If the employer certification is not completed, the employee's request will be closed, and they will be required to submit a new request, which will increase the cost and may impact their eligibility.

All service credit request forms that require employer certification must be certified by an authorized payroll, personnel, or human resources employer representative through myCalPERS within 30 days. Ensure your contact lists are updated in myCalPERS with all authorized employer representatives and their email addresses and phone numbers.

We recommend you encourage your employees to request the purchase of service credit early in their career to ensure the availability of payroll records.

Important Information

There is a new notification method for Start Deduction Notices on new purchases. Instead of being mailed, the notices will be uploaded in the Business Partner Document History in myCalPERS. You will receive an email informing you that a new Start Deduction letter is available.

Resources

Encourage your employees to register for and/or log in to [myCalPERS](https://mycalpers.ca.gov). Benefits of service credit purchases and other resources are available on our website at www.calpers.ca.gov.

Questions

If you have any questions about the information provided in this Circular Letter, contact the CalPERS Customer Contact Center at **888 CalPERS** (or 888-225-7377).

Donald R. Martinez, Chief
Member Account Management Division

Retirement System Election – Information and Instructions



The following instructions are to assist you and your employer in completing the *Retirement System Election form* (ES 0372). Please read the instructions and information for retirement system coverage before completing the form. Please type or print legibly in dark ink.

INFORMATION

A member of the CalSTRS Defined Benefit Program who becomes employed by a school district, a community college district, a county superintendent of schools, limited state departments, or the California Community Colleges Board of Governors to perform service that requires membership in a different public retirement system, may elect to receive credit under the CalSTRS Defined Benefit Program for such service by completing a *Retirement System Election form* (ES 0372) within 60 days after the hire date requiring membership in the other system, and CalSTRS must receive the completed form within 60 days of the signature date. If the CalSTRS member does not elect to continue as a member of CalSTRS, all service subject to coverage by the other public retirement system will be reported to that retirement system. (Education Code sections 22508, 22508.5 and 22509)

A member of CalPERS who was employed by a school employer, Board of Governors of the California Community Colleges, or State Department of Education within 120 days before the member's date of hire, or who has at least five years of CalPERS credited service, and who accepts employment to perform creditable service that requires membership by the CalSTRS Defined Benefit Program, may elect to receive credit under CalPERS for such service by submitting a *Retirement System Election form* (ES 0372) to CalPERS, within 60 days after the hire date of employment requiring membership in CalSTRS. If the CalPERS member does not elect to continue as a member of CalPERS, all CalSTRS creditable service will be reported to CalSTRS. (Government Code section 20309).

Education Code section 22509 requires that within 10 working days of hire, an employer must provide all employees who have the right to make this election with the information regarding their election rights and must make available written information about the retirement systems to assist the employee in making an election.

SECTION 1: MEMBER INFORMATION AND ELECTION

Section 1 must be completed by the employee with assistance from the employer. Please complete all entries in Section 1.

EMPLOYEE NAME and SOCIAL SECURITY NUMBER – Enter employee's full name, and full Social Security Number.

RETIREMENT SYSTEM COVERAGE:

If you are a member of CalSTRS and have accepted employment to perform service that requires membership in a different public retirement system, mark the box next to the coverage you elect.

If you are a member of CalPERS and have accepted employment to perform service that requires membership in CalSTRS, mark the box next to the coverage you elect.

EMPLOYEE SIGNATURE – Sign and date the form. By signing this document, you certify that you have received information from your employer regarding your right to the Retirement System Election. You also certify that you understand this election is irrevocable, and that it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering a benefit administered by CalSTRS which may result in up to one year in jail and a fine of up to \$5,000. (Education Code section 22010)

Submit the signed and dated *Retirement System Election form* (ES 0372) to your employer. Retain a copy for your records.

For general membership information, contact CalSTRS by calling 800-228-5453, or write to CalSTRS at P.O. Box 15275, MS 17, Sacramento, CA 95851-0275.

SECTION 2: EMPLOYER CERTIFICATION

Section 2 must be completed by the employer and the County Office of Education. Please complete the employer certification only after the employee has completed Section 1. Employees must qualify for membership before they can retirement system elect.

EMPLOYER:

POSITION HIRE DATE – Enter the date the employee was hired in the position.

POSITION EFFECTIVE DATE – Enter the first date that service was/will be performed by the employee in the new position.

POSITION TITLE – Enter employee's new position title and check the box next to the applicable position type.

CO/DIST CODE/STATE DEPARTMENT – Enter the appropriate county and district codes. Example: Kern

County, Edison Elementary would be 15-012, and CA Department of Education would be 59-174.

EMPLOYER CERTIFICATION – Print school or state official's name, title and phone number, and sign and date the form.

Submit the completed form to the County Office of Education.

If you represent a state department, submit the form directly to CalSTRS and retain a copy of the employee's signed election form.

COUNTY OFFICE OF EDUCATION:

Print the County official's name, title and phone number, and sign and date the form.

Retain a copy for your and the employee's files.

SUBMIT THE FORM:

The *Retirement System Election* form (ES 0372) must be submitted to the retirement system elected by the employee. For additional requirements, please see the Information section.

Mail completed forms to:

CalSTRS
P.O. Box 15275, MS 17
Sacramento, CA 95851-0275

CalPERS
P.O. Box 942709 Sacramento, CA 94229-2709

CalSTRS also accepts the form by secure messaging via the Secure Employer Website.

Retirement System Election

ES 0372 REV 06/21

[For CalSTRS' Official Use Only]

CALSTRS®

California State Teachers' Retirement System

P.O. Box 15275, MS 17

Sacramento, CA 95851-0275

800-228-5453

CalSTRS.com

RETIREMENT SYSTEM ELECTION AND ACKNOWLEDGEMENT OF RECEIPT OF RETIREMENT SYSTEM INFORMATION

Please read the attached information and instructions before completing this form. Please type or print legibly in dark ink.

SECTION 1: Member Information and Election (to be completed by employee)

NAME (LAST, FIRST, MIDDLE INITIAL)

SOCIAL SECURITY NUMBER

A member of **CalSTRS** who becomes employed in a new position by the same or a different school district, a community college district, a county superintendent of schools, limited state employment or the Board of Governors of the California Community Colleges, as defined in Education Code sections 22508 and 22508.5, to perform service that *requires* membership in a different public retirement system will have that service credited with that other public retirement system unless the member files a written election (within 60 days after the date of hire) to have that service covered by CalSTRS, pursuant to Education Code section 22508(a) or 22508.5(a).

I am a member of CalSTRS who has accepted employment to perform service that *requires* membership in a different public retirement system and am eligible to elect to continue retirement system coverage under CalSTRS.

I elect coverage in: (please choose one)

- ☐ CA State Teachers' Retirement System (CalSTRS)
☐ CA Public Employee's Retirement System (CalPERS) *
☐ A Different Public Retirement System identified here:

OR

A member of **CalPERS** who was employed by a school employer, Board of Governors of the California Community Colleges or State Department of Education within 120 days before the member's date of hire, or who has at least five years of CalPERS credited service, as defined in Government Code section 20309, and who is subsequently employed to perform creditable service that requires membership in the Defined Benefit Program of CalSTRS, will have that service credited with CalSTRS unless the member files a written election (within 60 days after the date of hire) to have the service credited with CalPERS, pursuant to Government Code section 20309.

I am a member of CalPERS who has accepted employment to perform service that requires membership in the CalSTRS Defined Benefit Program and am eligible to elect to continue coverage under CalPERS.

I elect coverage in: (please choose one)

- ☐ CA State Teachers' Retirement System (CalSTRS)
☐ CA Public Employee's Retirement System (CalPERS) *



ES0372

With my signature below, I certify that I have received information from my employer regarding my eligibility to elect membership for this position as described on this form. I fully understand that this election is irrevocable. I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering or receiving a benefit administered by CalSTRS and it may result in up to one year in jail and/or a fine of up to \$5,000 pursuant to Education Code section 22010.

EMPLOYEE SIGNATURE

DATE

SECTION 2: Employer Certification (to be completed by employer and County Office of Education)

With my signature below, I certify that I have provided information to the above employee regarding his/her eligibility to elect membership for this position, pursuant to Education Code section 22509. I certify the employee meets the qualifications to make a retirement system election, pursuant to Education Code sections 22508 or 22508.5, or Government Code section 20309.

EMPLOYEE POSITION INFORMATION:

POSITION HIRE DATE

POSITION EFFECTIVE DATE

POSITION TITLE

SELECT ONE:

☐ CREDENTIALLED

☐ CLASSIFIED

☐ STATE SERVICE

EMPLOYER INFORMATION:

CO/DIST/STATE DEPT NAME

CALSTRS REPORT UNIT CODE

SCHOOL/STATE OFFICIAL'S NAME

TITLE

PHONE NUMBER

SIGNATURE OF SCHOOL/STATE OFFICIAL

DATE

COUNTY OFFICIAL'S NAME

TITLE

PHONE NUMBER

SIGNATURE OF COUNTY OFFICIAL

*CALPERS EMPLOYER CODE

File Options



District : 97 - KERN CSOS TRUST/SERVICE FUNDS

Report Title : CSEA

Run Option : 1 - Report Only

Selection Number 1

Voluntary Deduction : 0602 C S E A

Plan Code :



Employees in Pay-Codes :

Skip I/H : ☐ Skip 1-9 Frequency : ☐

Option Old New

Employee :

Employer :

Minimum :

Maximum :

Balance : S - Set 472.50

Limit :

Subjectivity :

Frequency :

Selection Number : 1 Previous Next

myCalPERS Employment Certification Functionality

Student Guide

April 1, 2021



myCalPERS Employment Certification Functionality

This guide provides detailed steps to help you electronically submit employment information for service credit purchases and membership reviews.

Service Credit Purchases

Service credit purchase requests outlining employer certification and payroll detail must now be submitted through myCalPERS. Employees who request to purchase service credit for prior employment periods will need to complete a service credit purchase request via myCalPERS or by downloading and completing the applicable request form from the CalPERS website, and submit the form to the employer associated to the employment period. You must electronically complete the required certification questions, upload the employee's request form, and provide the pay period details.

Membership Reviews

New system enhancements allow you to submit employment information and service period (payroll) details for an employee whose membership status needs to be reviewed. This can be for any type of arrears driven by late enrollment or pre-review for service credit purchase. To ensure an accurate reflection of service credit to your employee's account, your agency must submit this information through myCalPERS for review.

System Access

To access the pages detailed in these scenarios, you **must** be assigned:

- Business Partner Arrears

Along with one or more of the following roles:

- Business Partner Payroll
- Business Partner Payroll RO
- Business Partner Retirement Enrollment
- Business Partner Retirement Enrollment RO

If you are unable to view or process these scenarios, contact your agency's system access administrator to update your myCalPERS access. To locate a list of your agency's System Access Administrator(s), within myCalPERS select Profile > Contacts section > System Admin column displays Y

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

Training Opportunities

Prior to taking a myCalPERS training, new users should review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide and take a Business Rules class. Business rules summarizes the laws defined by the California Public Employees’ Retirement Law (PERL).

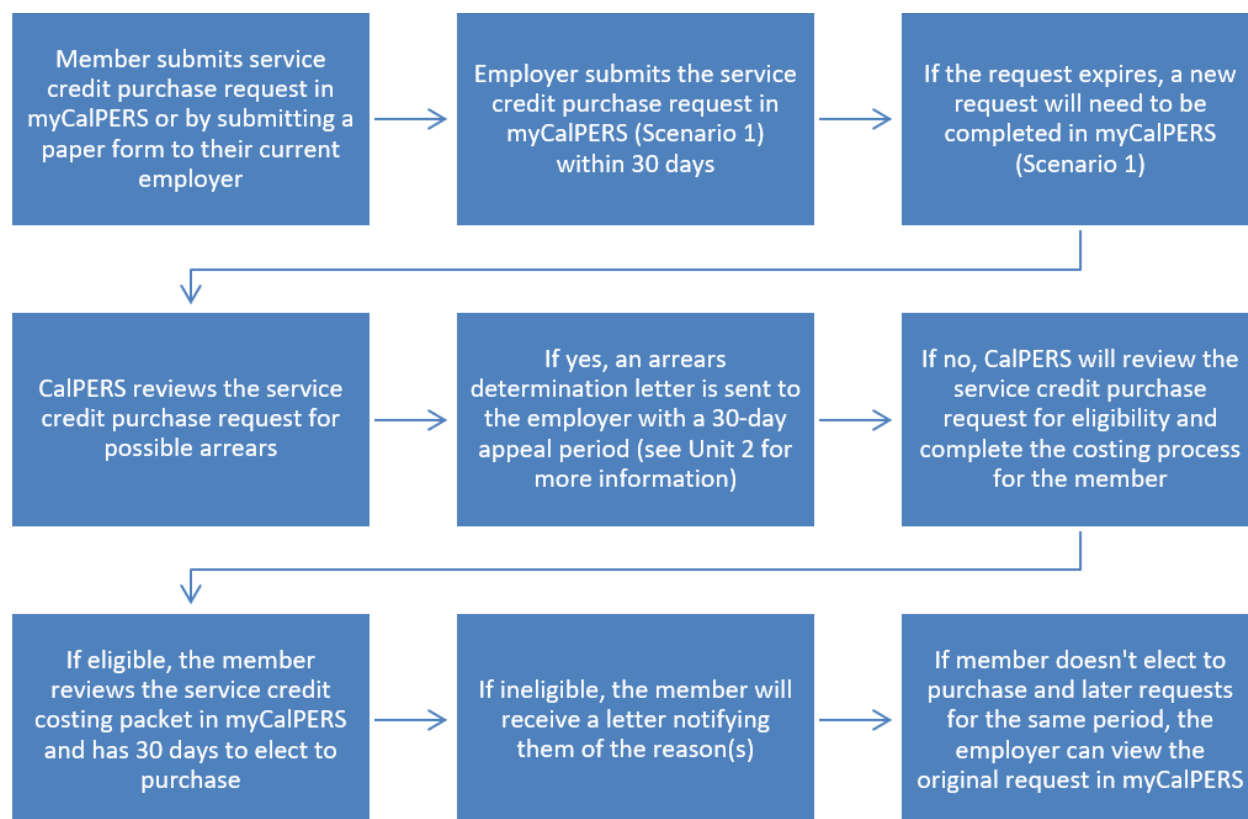
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Unit 1: Service Credit Purchase Requests

Understanding the Service Credit Purchase Process

The chart below details the service credit purchase process and the associated scenario to complete the employer responsibilities:



Employment and Service Period Certification Statuses

The following lists service credit purchase request statuses:

- **Requested:** Service credit purchase has been requested, but not started
- **In-Progress:** Request has been started, but not completed or submitted
- **Certification Expired:** Request has expired due to failure to not submit within 30 days
- **Submitted:** Request has been certified and submitted to CalPERS for review
- **Complete:** CalPERS has completed the service credit purchase request process

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Scenario 1: Submit a Service Credit Purchase Request

Members have two options for submitting a service credit purchase request:

myCalPERS

Once logged into their myCalPERS account, members can request to purchase service credit by completing the service credit purchase request online. Once submitted, you will complete the employer portion of the request using the steps outlined in this scenario starting with step 1.

Request Form

Members can submit their request using the applicable service credit purchase request form. Once completed, the member will submit the form to their current employer. You will then follow the steps outlined in this scenario to submit the member's service credit purchase request form and complete the employer portion of the request starting with step 8.

Frequently Asked Questions and Appendix

For answers to frequently asked question and definitions of the fields within this scenario, see the Frequently Asked Questions and Appendix in the back of this student guide.

Step Actions

myCalPERS

Step 1 Select the **Reporting** global navigation tab.

Step 2 Select the **Member Requests** local navigation link.

Step 3 Within the Employment and Service Period Certification List section, locate the member in the list.

Step 4 Select the **Status** link for the request you wish to complete.

Employment and Service Period Certification List Add New										
Excel						Search: <input type="text"/>				
Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By	
02/22/2021	Requested	Sanchez	Eric		0123456789	03/01/2014	07/19/2014			
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	08/11/2006			
02/04/2021	Requested	Wolfgang	Steven		2345678901	03/06/1998	11/12/1998			
02/08/2021	Requested	French	Douglas		3456789012	03/31/2013	03/22/2019			
01/04/2021	Submitted	Matson	Oleg		4567890123	11/03/2018	06/28/2019	WALKER, L		
01/12/2021	In-Progress	Chen	Roberta		5678901234	01/07/2012	07/26/2019			
01/14/2021	Submitted	Kinser	Kirsti		6789012345	09/22/2014	01/10/2017	WALKER, L		
Showing 1 to 7 of 7 entries										
								Previous	1	Next

Step 5 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Employment Periods [Add New](#)

Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.

Participant	CalPERS Id	Division	Start Date – End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/01/2014 – 07/19/2014			Service Prior to Membership

[Return](#)

Step 6 Complete the Employment Information section.

Employment Information

Participant: * 0123456789 - Eric Sanchez
Business Partner: Agency Name
Division:

Dates of Employment: *
From: 03/01/2014 To: 07/19/2014

Employment Category: *

Primary Position Title as displayed on your publicly available pay schedule: *

Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS? * ☐ Yes ☒ No [View Exclusions](#)

Time Base: *
☐ Full Time
☐ Intermittent
☐ On Call
☐ Part Time
☐ Indeterminate
☐ Work(ed) As Needed

Appointment Tenure: *
☐ Permanent
☐ Indeterminate
☐ Seasonal
☐ Temporary

Months per Year: *
☐ 8 Months
☐ 9 Months
☐ 11 Months
☐ 12 Months
☐ 10 Months

Please upload the participant's hiring document (myCalPERS 2788): [Add Document](#)

Service Credit Purchase Type Requested: Service Prior to Membership

Is the participant above a member of a reciprocal system? * ☐ Yes ☐ No

Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982? * ☐ Yes ☐ No

Was this position filled by an election or appointment to a fixed term of office? * ☐ Yes ☐ No

Was the service rendered through an independent contractor or paid through a third party or temporary employment agency? * ☐ Yes ☐ No

For teacher's assistants in a credential program only:
Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period? * ☐ Yes ☐ No

Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? * ☐ Yes ☐ No

[Save](#) [Return](#)

Step 7 Skip to step 17

Request Form

Step 8 Select the **Reporting** global navigation tab.

Step 9 Select the **Member Requests** local navigation link.

Step 10 Within the Employment and Service Period Certification List section, select the **Add New** button.

Employment and Service Period Certification List [Add New](#)

Excel Search:

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
02/22/2021	Requested	Sanchez	Eric		0123456789	03/01/2014	07/19/2014		
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	08/11/2006		
02/04/2021	Requested	Wolfgang	Steven		2345678901	03/06/1998	11/12/1998		
02/08/2021	Requested	French	Douglas		3456789012	03/31/2013	03/22/2019		
01/04/2021	Submitted	Matson	Oleg		4567890123	11/03/2018	06/28/2019		WALKER, L
01/12/2021	In-Progress	Chen	Roberta		5678901234	01/07/2012	07/26/2019		
01/14/2021	Submitted	Kinser	Kirsti		6789012345	09/22/2014	01/10/2017		WALKER, L

Showing 1 to 7 of 7 entries [Previous](#) [1](#) [Next](#)

Step 11 Complete the Employment Information section.

The screenshot shows the 'Employment Information' section of a web form. It includes fields for Participant (a dropdown menu), Business Partner (Agency Name), BP Contact Name (Alexander Schuman), Division (a dropdown menu), Phone Number, and Ext. There are also date pickers for 'From' and 'To' under 'Dates of Employment'. The 'Employment Category' is a dropdown menu. Below this is a text field for 'Primary Position Title as displayed on your publicly available pay schedule'. A question asks if the participant's employment was excluded from CalPERS membership, with 'Yes' and 'No' radio buttons and a 'View Exclusions' link. The 'Time Base' section has radio buttons for Full Time, Intermittent, On Call, Part Time, Indeterminate, and Work(ed) As Needed. The 'Appointment Tenure' section has radio buttons for Permanent, Indeterminate, Seasonal, and Temporary. The 'Months per Year' section has radio buttons for 8 Months, 11 Months, 9 Months, 12 Months, and 10 Months. There is a text field for 'Please upload the participant's hiring document (myCalPERS 2788)' and an 'Add Document' button. A final question asks if the participant is requesting to purchase Service Credit, with 'Yes' and 'No' radio buttons. At the bottom left is a 'Save' button and at the bottom right is a 'Return' link.

Step 12 Select the **Yes** radio button.

Is the participant requesting to purchase Service Credit?* ☒ Yes ☐ No

Step 13 Select the type of service credit the member is requesting to purchase.

Service Credit Purchase Type Requested:* ☐ Service Prior to Membership
☐ Comprehensive Employment and Training Act (CETA)
☐ Fellowship
☐ Prior Service as Public Service
☐ Local System Redeposit
☐ Optional Arrears

Step 14 Upload the service credit purchase request document by selecting the **Add Document** button.

Please upload the participant's **Service Prior to Membership** related signed service credit purchase request form (myCalPERS 1168): *

Step 15 Locate the document, and then select the **Open** button.

Step 16 Complete the remaining questions.

Is the participant above a member of a reciprocal system? * ☐ Yes ☐ No
Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982? * ☐ Yes ☐ No
Was the service rendered under a fellowship program? * ☐ Yes ☐ No
Was this position filled by an election or appointment to a fixed term of office? * ☐ Yes ☐ No
Was the service rendered through an independent contractor or paid through a third party or temporary employment agency? * ☐ Yes ☐ No
For teacher's assistants in a credential program only:
Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period? * ☐ Yes ☐ No
Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? * ☐ Yes ☐ No

Step 17 Select the **Save** button.

Step 18 Continue to the next page to submit payroll for the service credit purchase request period.

Submit Service Period (Payroll) Details

In addition to submitting employment details, service period (payroll) details for the service credit purchase request period must also be submitted. There are two options for submitting payroll:

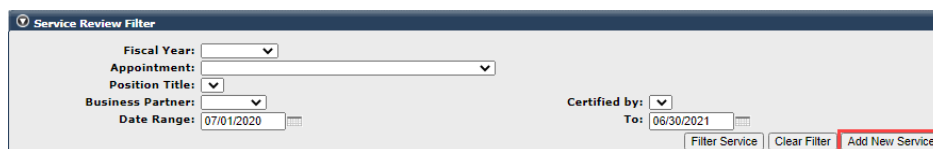
- **Manual entry:** Payroll is entered into myCalPERS manually for each earned period using the steps outlined in this scenario starting with step 19.
- **File upload:** Payroll is uploaded into myCalPERS using only an XML file for each earned period using the steps outlined in this scenario starting with step 36. The [CalPERS Review \(PDF\)](#) file consists of documents and tools needed to develop XML files for this purpose.

System Logic

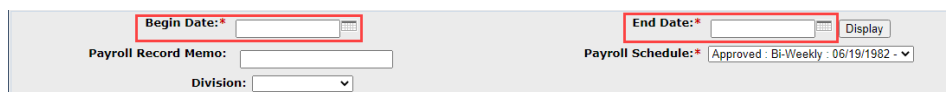
- You must report payroll for the entire service credit purchase period.
- If an earned period does not have reportable earnings, report a zero period record. See the [myCalPERS Payroll Reporting \(PDF\)](#) student guide (Unit 3, Scenario 4) for the proper reporting steps.
- Begin and end dates must be within the same fiscal year. If an earned period crosses fiscal years, separate the payroll into two records.
- Do not report payroll for dates outside of the requested service credit purchase period.

Manual Entry

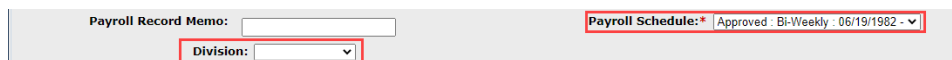
Step 19 Within the Service Review Filter section, select the **Add New Service** button.



Step 20 Within the Maintain Record Details section, enter the begin and end dates of the warned period.



Step 21 If necessary, select the correct **Payroll Schedule** and/or **Division** from the drop-down list.



Step 22 Select from the **Member Category** and **CBU** drop-down lists, and complete the **Position Title** field.

Earnings

Member Category:	<input type="text"/>	Position Title:	<input type="text"/>
CBU:	<input type="text"/>		

Step 23 Select an appointment:
-If you are reporting payroll for an existing appointment in myCalPERS, select the **appointment** radio button.

Earnings

Appointment: ☒ No Appointment ☐ 92139121 : Agency Name - Safety - County Peace Officer - 03/21/2015
☐ 92111572 : Agency Name - Safety - County Peace Officer - 01/10/2015 - 02/25/2015

-If you are reporting payroll for an appointment that isn't in myCalPERS, leave the **No Appointment** radio button selected.

Earnings

Appointment: ☒ No Appointment ☐ 92139121 : Agency Name - Safety - County Peace Officer - 03/21/2015
☐ 92111572 : Agency Name - Safety - County Peace Officer - 01/10/2015 - 02/25/2015

Step 24 Within the Maintain Record Details section, complete the **Pay Rate Type**, **Pay Rate**, and **Reportable Earnings** fields.

Pay Rate Type:	<input type="text"/>	Pay Rate: \$	<input type="text"/>
Reportable Earnings: \$	<input type="text"/>		

Step 25 Complete either the **Scheduled Full Time Hours Per Week** or **Scheduled Full Time Days Per Week** field.
Note: Report what is considered full time for the position whether the member works full time or not.

Scheduled Full Time Hours Per Week:	<input type="text"/>	Scheduled Full Time Days Per Week:	<input type="text"/>
-------------------------------------	----------------------	------------------------------------	----------------------

Step 26 Complete the **Total Hours Worked** field.
Note: Report only the hours for the period in this record.

Total Hours Worked: *	<input type="text"/>	Overtime Hours Worked:	<input type="text"/>
-----------------------	----------------------	------------------------	----------------------

Step 27 Is there special compensation to be reported?

Yes: Continue to step 28

No: Skip to step 34

Step 28 Select the **View Special Compensation** link.

Special Compensation: \$0.00	View Special Compensation
------------------------------	---

Step 29 Within the View Special Compensation section, select the **Add New** button.

Step 30 Within the Maintain Special Compensation Details section, complete the **Special Compensation Category**, **Special Compensation Type**, and **Amount** fields.

Step 31 Is there additional special compensation to add to this record?
Yes: Select the **Save and Add Another** button and return to step 30
No: Continue to step 32

Step 32 Select the **Save** button.

Step 33 Select the **Return** link at bottom right.

Step 34 If applicable, enter the contributions in the appropriate field.

Step 35 Do you have additional periods to report?
Yes: Select the **Save & Continue** button and return to step 20
No: Select the **Save & Return** button and skip to step 52

File Upload

Step 36 Select the **Reporting** global navigation tab.

Step 37 Within the Create or Edit Report section, select **Upload File** from the Method drop-down list.

Step 38 Select the **Continue** button.

Step 39 Within the Upload File section, select the **Choose File** button.

Step 40 Locate the XML file, and then select the **Open** button.

Step 41 Select the **Upload File** button.

The screenshot shows a button labeled "Upload File" in a blue box. Above it, there is a "Browse" button and a "Path:" field containing "CalPERS Rev... Report.xml".

Step 42 Within the File Upload History section, locate your report.

Step 43 Does the File Status of your report show Accepted?

Yes: Continue to step 44

No: Wait for the file status to show Accepted, then continue to step 44

Step 44 Select the **View Preprocessing Areas** link at the bottom right-hand side of page.

The screenshot shows a table titled "File Upload History" with columns: File Type, Upload Date, File Status, Batch Job Status, File Name, Valid, Error, and Total. The table lists multiple payroll reporting entries. At the bottom right, there is a link labeled "View Preprocessing Areas".

Step 45 Within the Preprocessing Area section, select the **Payroll Reporting** link.

The screenshot shows a section titled "Preprocessing Area" with a list of items and their corresponding "Error" status. The items are: Affected Subscriber List, Census, Direct Authorization, Health Carrier Rate Data, Health Carrier ZIP Code Plan Relationship Data, Health Enrollment, Medical Group Assignment List, Out-of-Class Appointments, Payroll Reporting, and Retirement Enrollment. The "Payroll Reporting" item is highlighted with a red box.

Step 46 Within the Work on Existing CalPERS Review Reports, select the appropriate **CalPERS Review Report Date** link to view payroll records for the report.

Note: The report will have a status of Suspended to allow you to edit and add records if needed.

The screenshot shows a section titled "Work On CalPERS Review Reports" with a table of reports. The table has columns: CalPERS Review Report Date, Submit Date, Status, Report Posted Date, Test Report, and Report Name. The "CalPERS Review Report Date" column is highlighted with a red box, showing "11/02/2020".

Step 47 Select the **Reporting** global navigation tab.

Step 48 Select the **Member Requests** local navigation link.

Step 49 Within the Employment and Service Period Certification List section, locate the member in the list.

Step 50 Select the **Status** link for the request you wish to complete.

Employment and Service Period Certification List										Add New
Excel										Search: <input type="text"/>
Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By	
02/22/2021	Requested	Sanchez	Eric		0123456789	03/01/2014	07/19/2014			
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	08/11/2006			
02/04/2021	Requested	Wolfgang	Steven		2345678901	03/06/1998	11/12/1998			
02/08/2021	Requested	French	Douglas		3456789012	03/31/2013	03/22/2019			
01/04/2021	Submitted	Matson	Oleg		4567890123	11/03/2018	06/28/2019		WALKER, L	
01/12/2021	In-Progress	Chen	Roberta		5678901234	01/07/2012	07/26/2019			
01/14/2021	Submitted	Kinser	Kirsti		6789012345	09/22/2014	01/10/2017		WALKER, L	
Showing 1 to 7 of 7 entries										Previous 1 Next

Step 51 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Employment Periods Add New						
Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.						
Participant	CalPERS Id	Division	Start Date – End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/01/2014 – 07/19/2014			Service Prior to Membership
						Return

Submit Service Credit Purchase Request

Step 52 Within the Certification section, select the **certification** check box.

<input checked="" type="checkbox"/> * By signing, I certify the following:
1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of <input type="text"/> Agency Name and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.
Submitted By: Submitted Date:

Step 53 Select the **Submit** button.

You have completed this scenario.

Unit 2: Arrears

Arrears are the cost of retirement contributions due from a member's earnings that were not previously reported to CalPERS. An agency may be responsible for paying both the member and employer contributions along with an administrative fee associated with each arrears determination.

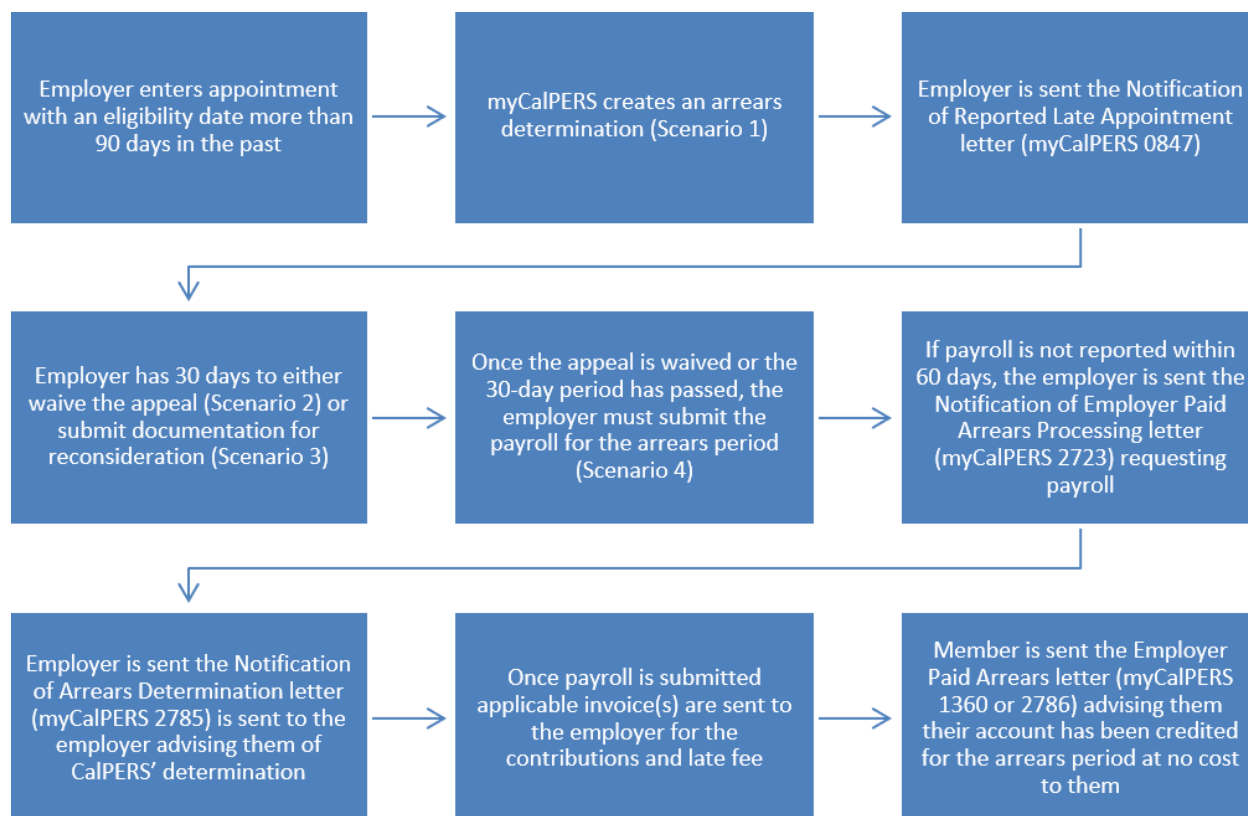
What Causes an Arrears Determination?

- Member not enrolled into membership timely (90-day violation)
- Membership date input error
- Missing payroll
- Employer updates/corrects an appointment
- Service Prior to Membership (SPM) request
- Retirement, death, and/or disability review
- Business partner/member calls the CalPERS Contact Center
- Member refunds or re-deposits

Arrears Determination Processes

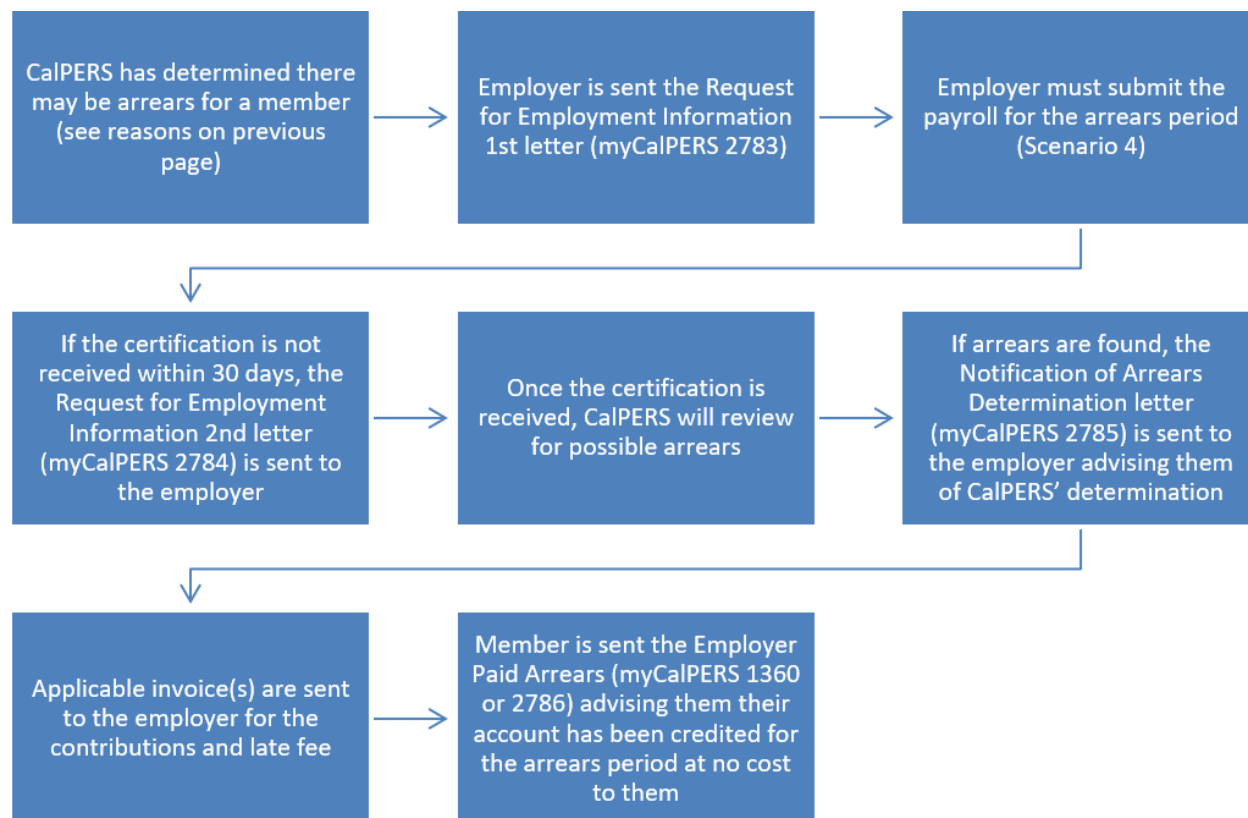
Late Appointments (90-day violation)

The chart below details the process and the associated scenarios related to 90-day violations:



All Other Reasons

The chart below details the process and the associated scenarios for all other arrears reasons (see the list on the previous page):



Frequently Asked Questions and Appendix

For answers to frequently asked question and definitions of the fields within this scenario, see the Frequently Asked Questions and Appendix in the back of this student guide.

Contents

Scenario 1: View Arrears Determination.....	14
Scenario 2: Waive Appeal	15
Scenario 3: Submit Reconsideration	17
Scenario 4: Report Payroll.....	20

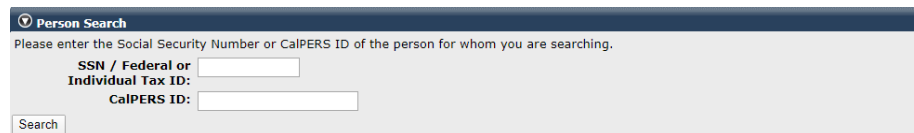
Scenario 1: View Arrears Determination

You want to view an arrears determination.

Step Actions

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



Person Search

Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link.



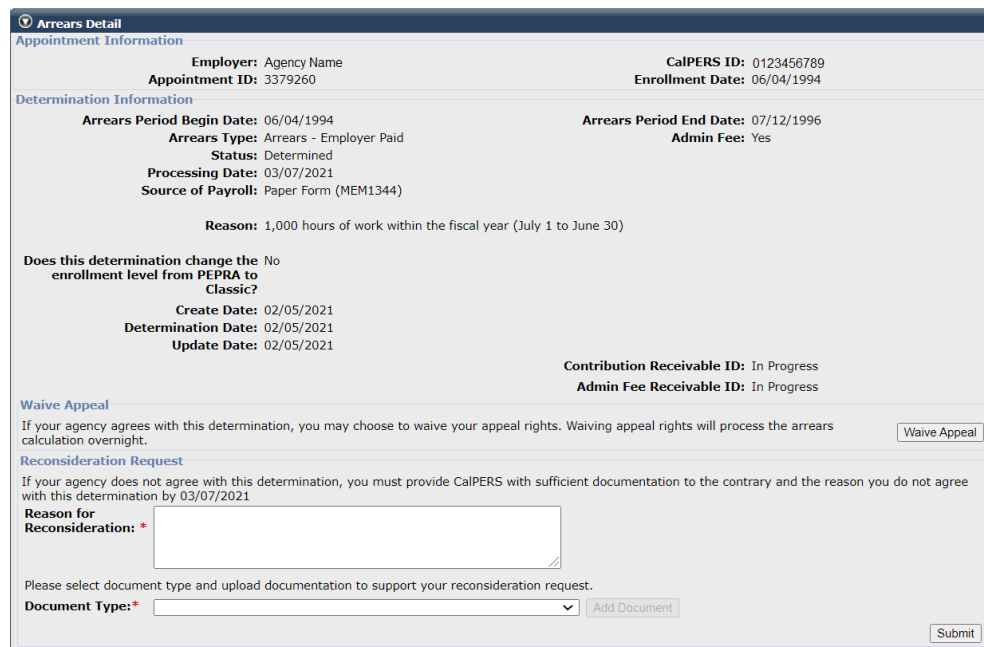
Appointment History		Add New						View More Actions
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date	
Agency Name		Regular		Miscellaneous	Active	07/22/2013		

Step 5 Within the Arrears Determinations section, select the **Details** link.



Employer	BP ID	Appointment ID	Type	Begin Date	End Date	Determination Date	Status	Update Date	
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined		Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020	Details

Step 6 Review the Arrears Detail section.



Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 3379260
CalPERS ID: 0123456789
Enrollment Date: 06/04/1994

Determination Information

Arrears Period Begin Date: 06/04/1994
Arrears Period End Date: 07/12/1996
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 03/07/2021
Admin Fee: Yes
Source of Payroll: Paper Form (MEM1344)

Reason: 1,000 hours of work within the fiscal year (July 1 to June 30)

Does this determination change the enrollment level from PEPRA to Classic?
No
Create Date: 02/05/2021
Determination Date: 02/05/2021
Update Date: 02/05/2021

Contribution Receivable ID: In Progress
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.

Reconsideration Request

If your agency does not agree with this determination, you must provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 03/07/2021.

Reason for Reconsideration: *

Please select document type and upload documentation to support your reconsideration request.

Document Type: *

You have completed this scenario.

Scenario 2: Waive Appeal

You want to waive the appeal period of an arrears determination.

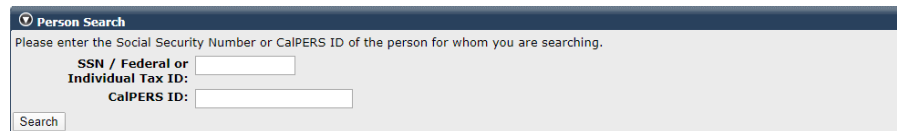
System Logic

- An appeal can only be waived within 30 days of when the arrears determination was created.
- Once an appeal is waived, payroll for the arrears period can be reported. See unit 2, scenario 4 of this student guide for reporting payroll.

Step Actions

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



Person Search

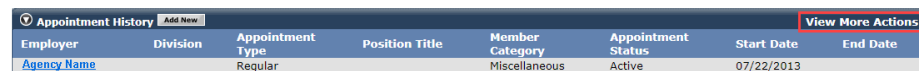
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
Agency Name		Regular		Miscellaneous	Active	07/22/2013	

Step 5 Within the Arrears Determinations section, select the **Details** link.



Employer	BP ID	Appointment ID	Type	Begin Date	End Date	Determination Date	Status	Update Date
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020 Details

Step 6 Within the Arrears Detail section, select the **Waive Appeal** button.



Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes

Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPA to Classic?
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: *

Step 7 Within the Waive Appeal section, select the **Yes** button.

A screenshot of a software dialog box titled "Waive Appeal" with a close button (X) in the top right corner. The main text inside the dialog asks, "Are you sure you want to waive your agency's appeal rights?". At the bottom of the dialog, there are two buttons: "Yes" and "Cancel". The "Yes" button is highlighted with a black border.

Waive Appeal [X]

Are you sure you want to waive your agency's appeal rights?

Yes **Cancel**

You have completed this scenario.

Scenario 3: Submit Reconsideration

You want to submit additional information and documentation for reconsideration for an arrears determination.

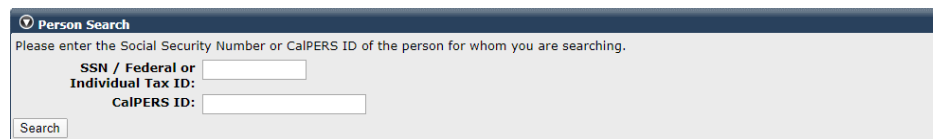
System Logic

- You have 30 days from when the arrears determination was created to submit documentation for reconsideration.
- Once the appeal period closes, if CalPERS determines the arrears stands, your agency will need to report payroll for the arrears period. See unit 2, scenario 4 for reporting payroll of this student guide.

Step Actions

Step 1 Select the **Person Information** global navigation tab.

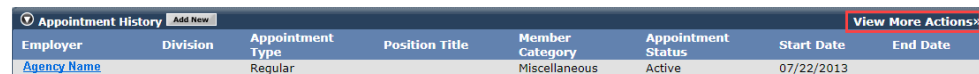
Step 2 Complete the Person Search section.



A screenshot of the 'Person Search' form. It has a title bar with a dropdown arrow and the text 'Person Search'. Below the title bar, it says 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are three input fields: 'SSN / Federal or Individual Tax ID:', 'CalPERS ID:', and a 'Search' button.

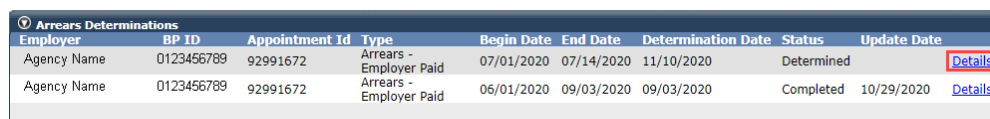
Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link.



A screenshot of the 'Appointment History' table. The table has a title bar with a dropdown arrow, the text 'Appointment History', and an 'Add New' button. The table has columns: Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. The first row has the following values: Agency Name, Regular, Miscellaneous, Active, 07/22/2013. There is a 'View More Actions' link in the top right corner.

Step 5 Within the Arrears Determinations section, select the **Details** link.



A screenshot of the 'Arrears Determinations' table. The table has a title bar with a dropdown arrow and the text 'Arrears Determinations'. The table has columns: Employer, BP ID, Appointment Id, Type, Begin Date, End Date, Determination Date, Status, and Update Date. There are two rows of data. The first row has the following values: Agency Name, 0123456789, 92991672, Arrears - Employer Paid, 07/01/2020, 07/14/2020, 11/10/2020, Determined, 10/29/2020. The second row has the following values: Agency Name, 0123456789, 92991672, Arrears - Employer Paid, 06/01/2020, 09/03/2020, 09/03/2020, Completed, 10/29/2020. There are 'Details' links in the 'Update Date' column for both rows.

Step 6 Within the Arrears Detail section, complete the **Reason for Reconsideration** field.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPPRA to Classic? No
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight. [Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: * [Add Document](#) [Submit](#)

Step 7 Within the Arrears Detail section, select from the **Document Type** drop-down list.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPPRA to Classic? No
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight. [Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: * [Add Document](#) [Submit](#)

Step 8 Within the Arrears Detail section, select the **Add Document** button.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPRA to Classic? No
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight. [Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: Election of Optional Membership - Part-Time Employee: myCalPERS 0843 [Add Document](#)

[Submit](#)

Step 9 Locate the document, and then select the **Open** button.

Step 10 Within the Arrears Detail section, select the **Submit** button.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPRA to Classic? No
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight. [Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: Election of Optional Membership - Part-Time Employee: myCalPERS 0843 [View Document](#) [Replace](#)
Election of Optional Membership.docx is added.

[Submit](#)

You have completed this scenario.

Scenario 4: Report Payroll

CalPERS has requested that you report payroll for an arrears determination.

System Logic

- Only report payroll for the arrears period once the appeal has been waived (Unit 2, Scenario 1 of this student guide) or the 30-day appeal period has closed.
- Continue reporting the member's current payroll in your earned period reports.
- You must report payroll for the arrears period.
- If an earned period does not have reportable earnings, report a zero period record. See the [myCalPERS Payroll Reporting \(PDF\)](#) student guide (Unit 3, Scenario 4) for the proper reporting steps.
- Begin and end dates must be within the same fiscal year. If an earned period crosses fiscal years, separate the payroll into two records.
- Do not report payroll for dates outside of the requested arrears period using this scenario.

Step Actions

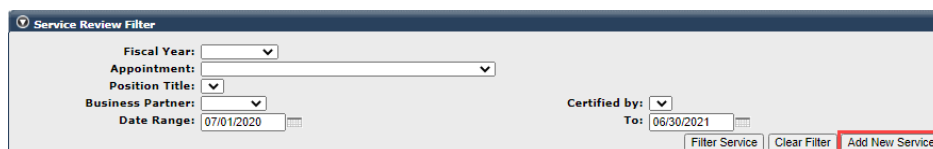
Step 1 How would you like to submit your payroll?

Manual entry: Continue to step 2

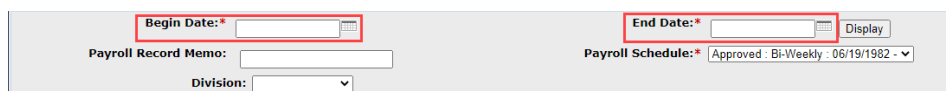
File upload: Skip to step 19

Manual Entry

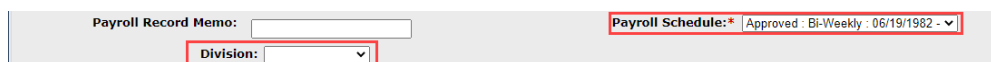
Step 2 Within the Service Review Filter section, select the **Add New Service** button.



Step 3 Within the Maintain Record Details section, enter the begin and end dates of the earned period.



Step 4 If necessary, select the correct **Payroll Schedule** and/or **Division** from the drop-down list.



Step 5 Select from the **Member Category** and **CBU** drop-down lists, and complete the **Position Title** field.

Earnings

Member Category:	<input type="text"/>	Position Title:	<input type="text"/>
CBU:	<input type="text"/>		

Step 6 Select an appointment:
-If you are reporting payroll for an existing appointment in myCalPERS, select the **appointment** radio button.

Earnings

Appointment: ☒ No Appointment ☐ 92139121 : Agency Name - Safety - County Peace Officer - 03/21/2015
☐ 92111572 : Agency Name - Safety - County Peace Officer - 01/10/2015 - 02/25/2015

-If you are reporting payroll for an appointment that isn't in myCalPERS, leave the **No Appointment** radio button selected.

Earnings

Appointment: ☒ No Appointment ☐ 92139121 : Agency Name - Safety - County Peace Officer - 03/21/2015
☐ 92111572 : Agency Name - Safety - County Peace Officer - 01/10/2015 - 02/25/2015

Step 7 Within the Maintain Record Details section, complete the **Pay Rate Type**, **Pay Rate**, and **Reportable Earnings** fields.

Pay Rate Type:	<input type="text"/>	Pay Rate: \$	<input type="text"/>
Reportable Earnings: \$	<input type="text"/>		

Step 8 Complete either the **Scheduled Full Time Hours Per Week** or **Scheduled Full Time Days Per Week** field.
Note: Report what is considered full time for the position whether the member works full time or not.

Scheduled Full Time Hours Per Week:	<input type="text"/>	Scheduled Full Time Days Per Week:	<input type="text"/>
-------------------------------------	----------------------	------------------------------------	----------------------

Step 9 Complete the **Total Hours Worked** field.
Note: Report only the hours for the period in this record.

Total Hours Worked: *	<input type="text"/>	Overtime Hours Worked:	<input type="text"/>
-----------------------	----------------------	------------------------	----------------------

Step 10 Is there special compensation to be reported?

Yes: Continue to step 11

No: Skip to step 17

Step 11 Select the **View Special Compensation** link.

Special Compensation: \$0.00	View Special Compensation
------------------------------	---

Step 12 Within the View Special Compensation section, select the **Add New** button.



Step 13 Within the Maintain Special Compensation Details section, complete the **Special Compensation Category**, **Special Compensation Type**, and **Amount** fields.



Step 14 Is there additional special compensation to add to this record?

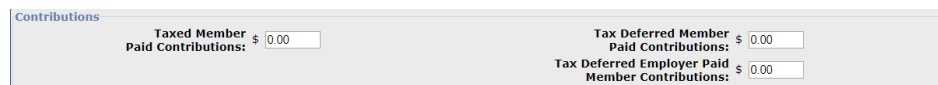
Yes: Select the **Save and Add Another** button, and then return to step 13

No: Continue to step 15

Step 15 Select the **Save** button.

Step 16 Select the **Return** link at bottom right.

Step 17 If applicable, enter the contributions in the appropriate field.



Step 18 Do you have additional periods to report?

Yes: Select the **Save & Continue** button, and then return to step 3

No: Select the **Save & Return** button, and then skip to step 35

File Upload

Step 19 Select the **Reporting** global navigation tab.

Step 20 Within the Create or Edit Report section, select **Upload File** from the Method drop-down list.



Step 21 Select the **Continue** button.

Step 22 Within the Upload File section, select the **Choose File** button.

Upload File
Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.
Path: * **Choose File** No file chosen
Upload File

Step 23 Locate the XML file, and then select the **Open** button.

Step 24 Select the **Upload File** button.

Upload File
Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.
Path: * **Choose File** CalPERS Revi... Report.xml
Upload File

Step 25 Within the File Upload History section, locate your report.

Step 26 Does the File Status of your report show “Accepted?”

Yes: Continue to step 27

No: Wait for the file status to show Accepted, then continue to step 27

Step 27 Select the **View Preprocessing Areas** link at the bottom right-hand side of page.

File Upload History							
File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
Payroll Reporting	11/02/2020	Ready		20200402153458_010_10006_CPRVALID.xml			
Payroll Reporting	10/29/2020	Accepted	Completed	20201029130618_459_10006.xml	97	6	103
7	10/29/2020	Accepted	Completed	20201029122628_668_00007.xml	183	0	183
7	10/29/2020	Accepted	Completed	20201029094907_619_00007.xml	17	0	17
Payroll Reporting	10/28/2020	Accepted	Completed	20201028143230_233_10006.xml	96	6	102
7	10/28/2020	Accepted	Completed	20201028094843_071_00007.xml	157	0	157
Payroll Reporting	10/27/2020	Accepted	Completed	20201027135057_851_10006.xml	97	4	101
Payroll Reporting	10/27/2020	Accepted	Completed	20201027120547_908_10006.xml	93	4	97
7	10/27/2020	Accepted	Completed	20201027084858_151_00007.xml	18	3	21
Payroll Reporting	10/27/2020	Accepted	Completed	20201027102247_211_10006.xml	68	3	71
Payroll Reporting	10/27/2020	Accepted	Completed	20201027090222_960_10006.xml	49	2	51
7	10/23/2020	Accepted	Completed	20201023150829_908_00007.xml	99	0	99
Payroll Reporting	10/23/2020	Accepted	Completed	20201023124658_169_10006.xml	22	4	26
7	10/23/2020	Accepted	Completed	20201023082802_962_00007.xml	8	1	9
Payroll Reporting	10/22/2020	Accepted	Completed	20201022170819_345_10006.xml	21	4	25
Payroll Reporting	10/22/2020	Accepted	Completed	20201022152202_836_10006.xml	20	3	23
Payroll Reporting	10/22/2020	Accepted	Completed	20201022101016_044_10006.xml	19	3	22
Payroll Reporting	10/21/2020	Accepted	Completed	20201021160045_118_10006.xml	18	2	20
7	10/21/2020	Accepted	Completed	20201021152650_409_00007.xml	70	0	70
Payroll Reporting	10/21/2020	Accepted	Completed	20201021145041_045_10006.xml	10	0	10
7	10/21/2020	Accepted	Completed	20201021083533_645_00007.xml	41	0	41
Payroll Reporting	10/21/2020	Accepted	Completed	20201021013201_774_10006.xml	19472	0	19472
Payroll Reporting	10/21/2020	Accepted	Completed	20201020235422_426_10006.xml	19450	23	19473
Payroll Reporting	10/20/2020	Accepted	Completed	20201020224917_631_10006.xml	19450	23	19473
Payroll Reporting	10/20/2020	Accepted	Completed	20201020220424_048_10006.xml	19450	23	19473
Showing records 1 - 25 First << Previous 1 2 3 4 5 6 7 8 9 10 11 Next >> Last View Max							

[View Preprocessing Areas](#)

Step 28 Within the Preprocessing Area section, select the **Payroll Reporting** link.

Preprocessing Area	
Preprocessed Data	Error
Affected Subscriber List	Yes
Census	No
Direct Authorization	Yes
Health Carrier Rate Data	No
Health Carrier ZIP Code Plan Relationship Data	No
Health Enrollment	No
Medical Group Assignment List	No
Out-of-Class Appointments	Yes
Payroll Reporting	No
Retirement Enrollment	Yes

Step 29 Within the Work on Existing CalPERS Review Reports, select the appropriate **CalPERS Review Report Date** link to view payroll records for the report.

Note: The report will have a status of Suspended to allow you to edit and add records if needed.

Work On CalPERS Review Reports					
Fiscal Year: 		Report Status: 		Display	
CalPERS Review Report Date	Submit Date	Status	Report Posted Date	Test Report	Report Name
11/02/2020 - 11/02/2020	11/02/2020	Posted		No	PP 2019 Off Cycle

Step 30 Select the **Reporting** global navigation tab.

Step 31 Select the **Member Requests** local navigation link.

Step 32 Within the Employment and Service Period Certification List section, locate the member in the list.

Step 33 Select the **Status** link for the request you wish to complete.

Employment and Service Period Certification List Add New									
Excel		Search: <input type="text"/>							
Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
02/22/2021	Requested	Sanchez	Eric		0123456789	03/01/2014	07/19/2014		
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	08/11/2006		
02/04/2021	Requested	Wolfgang	Steven		2345678901	03/06/1998	11/12/1998		
02/08/2021	Requested	French	Douglas		3456789012	03/31/2013	03/22/2019		
01/04/2021	Submitted	Matson	Oleg		4567890123	11/03/2018	06/28/2019	WALKER, L	
01/12/2021	In-Progress	Chen	Roberta		5678901234	01/07/2012	07/26/2019		
01/14/2021	Submitted	Kinsler	Kirsti		6789012345	09/22/2014	01/10/2017	WALKER, L	
Showing 1 to 7 of 7 entries									
								Previous	1 Next

Step 34 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Employment Periods Add New						
Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.						
Participant	CalPERS ID	Division	Start Date – End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/01/2014 – 07/19/2014			Service Prior to Membership
						Return

Submit Request

Step 35 Within the Certification section, select the **certification** check box.

<input checked="" type="checkbox"/> By signing, I certify the following:
1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of <input type="text"/> Agency Name and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.
Submitted By: Submitted Date:

Step 36 Select the **Submit** button.

You have completed this scenario.

Frequently Asked Questions

General Questions

For further information on the new employment certification functionality in myCalPERS, view [Circular Letter 200-042-20](#).

Q. How do we use the Employment Certification?

A. This guide provides detailed steps to help you electronically submit employment information (MEM-1344 or similar) for service credit purchases and membership reviews.

Q. When do we use the myCalPERS Employment Certification?

A. The system enhancements will allow you to submit employment information and payroll details for an employee whose membership status needs to be reviewed. This can be for any type of arrears driven by late enrollment or pre-review for service credit purchase. To ensure an accurate reflection of service credit to your employee's account, your agency must submit this information through myCalPERS for review.

Q. How do we know when there is a 90-day violation?

A. CalPERS will send a Notification of Reported Late Appointment (myCalPERS 0847) to your agency. After 30 days from the late appointment entry, another letter will generate for the Notification of Arrears (myCalPERS 2785). The applicable dates and deadlines will be included in the letter.

Q. What reason would we need to enter data into myCalPERS?

A. You received a notification requesting you to enter the required information.

Q. How do I complete the online employment certification request?

A. Follow the steps in Unit 2 of this student guide.

Q: How to I locate my agency's System Access Administrator(s)?

A. To locate a list of your agency's System Access Administrator(s), within myCalPERS select:

Profile > Contacts section > System Admin column displays Y

Q: What if my System Access Administrator has left my agency or there isn't one assigned?

A. Call the employer contact center at **888-CalPERS**.

Q. How do I get access to complete the employment certification?

A. If you are unable to access the pages detailed in these scenarios, contact your agency's system access administrator to request an update to your myCalPERS access.

The required role is Business Partner Arrears along with one or more of the following:

- Business Partner Payroll
- Business Partner Payroll RO
- Business Partner Retirement Enrollment
- Business Partner Retirement Enrollment RO

Review our guidelines on system access and myCalPERS system privileges for business partner roles:

- [myCalPERS System Access Administration \(PDF\)](#) student guide
- [myCalPERS System Privileges for Business Partner Roles \(PDF\)](#) supplemental guide

Q. How do I get a list of all the requests?

A. Log into myCalPERS, select the **Reporting** global navigation tab, then select **Member Requests**. Your agency's requests will be listed in the Employment and Service Period Certification List section.

Q. What are the dates of employment?

A. The date of hire to the date of separation.

Q. Who will receive the notification letters?

A. Your agency and the member will receive notification letters. For school employers, the district and the county office of education will receive notifications.

Q. Who would receive the notification letter at the employer's address?

A. The letter will be mailed to the attention of the Arrears Administrator primary contact on file. If there is no Arrears Administrator contact, the letter will default to the General primary contact.

Q. How do I receive notification when there is a letter to view in myCalPERS?

A. Your system access administrator will need to set up an Arrears Administrator (contact type), select primary contact, and set their email as their contact preference to email. An email will then be sent as notification for the letters distributed to that employer. Your system access administrator can follow the steps in the [myCalPERS System Access Administration \(PDF\)](#) student guide to establish and maintain agency access.

- To view letters in myCalPERS, select **Common Tasks > Document History**
- To view the certification requests, select **Reporting > Member Requests**

Q. What happens after the notification letter?

A. The letter will provide instructions. The employment information needs to be completed as well as the payroll for the requested dates.

Q: What is the myCalPERS 2788 form?

A: This is not a mandatory field. It is an optional field to upload a hiring document to supplement the information provided about the employment.

Payroll

Q. Why am I receiving an error when submitting payroll?

A. Below are some of the common errors that require correction:

- Payroll has not been reported for the entire employment period. Even if the employee didn't work certain months during the employment period that is requested, a zero-payroll record needs to be entered for those pay periods. Refer to the [myCalPERS Payroll Reporting \(PDF\)](#) student guide, Unit 3 Scenario 4 for additional information.
- Payroll has been entered with dates past the membership date.
- The service periods are crossing over the fiscal year (July 1 to June 30). If your agency's payroll period crosses over the fiscal year, split the pay period into proper fiscal year reporting.
- There are missing days, e.g., leap year.
- The position title entered in the earned period record doesn't match the one entered in the Employment Information section.

Q. What if I need to correct something?

A. Go into the record, delete it, and then enter the correct information.

Q. How do we enter payroll for multiple years?

A. Manually enter each pay period separately.

Q. What if the data does not fit into a field?

A. Call the CalPERS Customer Contact Center or email Membership_Reporting@calpers.ca.gov.

Q. Are we only supposed to input data that CalPERS is asking for?

A. Yes. The system will generate an error if you input extra payroll.

Q. How to upload Excel spreadsheet for payroll?

A. Currently, the system does not accept Excel spreadsheets for the payroll detail. XML is the only acceptable format currently. Refer to the Employer Technical Toolkit within the [Technical Resources](#) page. Within the zip folder, read the CalPERS Review Reports folder for all XML file specifications.

Q. Can I pre-pay for my member and employer contributions?

A. You can; however, it is highly recommended that you do not do this. CalPERS recommends that you pay after the contributions have been calculated and invoiced to avoid it being on an adjustment report.

Service Credit Purchase

Q. How do I complete a service credit request?

A. Follow the steps in Scenario 1 of this student guide.

Q. How do we confirm a service credit purchase has been submitted?

A. You will see Submitted at the bottom.

Q. How do we know the status of their SCP request?

A. The employer portion of service credit purchase requests are completed within 90 days. You can call CalPERS at **888-CalPERS** to check the status. You may also verify within the member's account by following Unit 1, Scenario 2 in [myCalPERS Payroll Adjustments \(PDF\)](#) student guide.

Q: How do we answer these questions?

Is the participant above a member of a reciprocal system? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under a fellowship program? *	<input type="radio"/> Yes <input type="radio"/> No
Was this position filled by an election or appointment to a fixed term of office? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered through an independent contractor or paid through a third party or temporary employment agency? *	<input type="radio"/> Yes <input type="radio"/> No
For teacher's assistants in a credential program only:	
Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period? *	<input type="radio"/> Yes <input type="radio"/> No
Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? *	<input type="radio"/> Yes <input type="radio"/> No

A: For additional information, refer to the following resources:

- [Public Agency & Schools Reference Guide \(PDF\)](#)
- [State Reference Guide \(PDF\)](#)

Q: What is a reciprocal system?

A: Reciprocity is an agreement among public retirement systems to allow members to move from one public employer to another within a specific time limit. When a member establishes reciprocity, there is no transfer of funds or service credit between retirement systems. They are a member of both systems and are subject to the membership and benefit obligations and rights of each system, except as they are modified by the reciprocity agreement. For additional information, refer to the following resources:

- [Public Agency & Schools Reference Guide \(PDF\)](#)
- [State Reference Guide \(PDF\)](#)

Q: What is the Comprehensive Employment & Training Act (CETA) from 1973 to 1982?

A: An employee may be eligible for this type of service credit if they worked under CETA for a federal or state sponsored program from 1973 to 1982, such as the Public Employee Program, Public Service Employment, Disabled Veterans Outreach Program, Public Service Employment Program, or Cal Esteem.

Q: What is a teacher assistant?

A: Temporary Teacher or Assistant Certificate Persons employed as teacher-assistants under Education Code section 44926 (who possess a temporary certificate to serve as a teacher assistant and are enrolled in a California teacher training institution) are excluded from CalPERS membership by Gov. Code section 20300(d).

California State University (CSU)

Q. What are the responsibilities of individual CSU campuses?

A. To respond to the requests made through the notification system and letters directly in myCalPERS.

Q. What are the responsibilities of the State Controller's Office?

A. To provide payroll details to the CSUs as needed.

Q. How will non-direct reporters enter their data?

A. Non-direct reporting state agencies will need to enter all requested information in myCalPERS.

Q. Are we responsible for entering the work for multiple campuses?

A. No, each campus would enter their own information for the time worked at their campus.

Q. If An employee receives checks for 12 months but doesn't work every month, how is that entered CalPERS?

A. The appointment would be entered, and the payroll would be entered for the hours they worked for that month. If they did not work, you would report a zero-payroll record. Refer to the [myCalPERS Payroll Reporting \(PDF\)](#) student guide, Unit 3 Scenario 4 for additional information.

Q. How do we handle special consultants?

A. Work with the State Controller's Office, and they will work with CalPERS.

Q. What is a hiring document (myCalPERS 2788)?

A. The hiring agreement used when you hired the member.

Q. If I make a mistake and it has been submitted, how do I correct it?

A. Call CalPERS to unlock the screen, so corrections can be made.

Appendix

For additional information, refer to the following resources:

- [Public Agency & Schools Reference Guide \(PDF\)](#)
- [State Reference Guide \(PDF\)](#)

Employment Certification

Appointment Tenure

Enter the tenure as of the begin date of the requested period.

Contract Exclusions

Confirm if the position is excluded by reviewing your agency's contract exclusions in myCalPERS. Position exclusions do not apply to schools.

Employment Category

This is entered based on what the category of the position would have been if the employee was brought into membership for this position.

Hiring Document (myCalPERS 2788)

This field is optional. If you would like to provide additional information related to the time base and tenure of the appointment, upload it here.

Position Titles

Must match in the Employment Information and Pay Period Detail sections.

Time Base

Enter the time base as of the begin date of the requested period.

Payroll

Begin/End Dates

Earned periods must be entered by pay period and separated by fiscal year. Multiple pay periods cannot be combined.

Division

Only displays for public agency and county office of education employers.

End Date

Earned periods must be entered by pay period and separated by fiscal year. Multiple pay periods cannot be combined.

Overtime Hours

Enter the number of overtime hours for the period.

Pay Rate

Enter the full-time pay rate for the earned period even if the employee is part-time.

Pay Rate Type

Enter the pay rate type (Hourly, Monthly, or Daily) per your pay schedule.

Position Titles

Must match in the Employment Information and Pay Period Detail sections.

Reportable Earnings

Enter the reportable earnings for the earned period.

Scheduled Full Time Hours Per Week

Complete if the Pay Rate Type field is hourly. Enter the hours that are considered full time for the position.

Scheduled Full Time Days Per Week

Complete if the Pay Rate Type field is daily. Enter the days that are considered full time for the position.

Special Compensation

Report only the reportable special compensation for the earned period per your agency's Memorandum of Understanding (MOU).

Total Hours Worked

Report only the hours worked in the earned period.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at www.calpers.ca.gov.

- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides
- [Employer Education Schedule \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides > Employer Education Schedule
- [Online Classes for Employers \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides > Online Classes for Employers
- [myCalPERS Technical Requirements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [Public Agency & Schools Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [State Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Reference Guide (PDF)
- [Circular Letters - CalPERS](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)
- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > Employer Reports (Cognos) Catalog

CalPERS Contacts

Email

- To contact [employer educators](#) for questions and requests, email CalPERS_Employer_Communications@calpers.ca.gov.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email ERT@calpers.ca.gov.
- To contact the [membership team](#) for assistance with the service credit purchase and employment certification processes, email Membership_Reporting@calpers.ca.gov.

Phone or Fax

You can reach CalPERS at **888 CalPERS** (or 888-225-7377), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

Submit Inquiry

You can send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation folder, and then select the **Submit Inquiry** link to submit a question or request.

Completing an Employment Certification School Employers

Employer Account Management Division &
Member Account Management Division

Topics (1 of 2)

Required Roles in myCalPERS

Employment Certifications

Completing the Employment Certification

Employment Information Section

Add Service Period Detail

Submit the Certification

Topics (2 of 2)

Missing Service Period Error

Certification Status

Arrears Determination Options

Resources

Questions

Required Roles in myCalPERS

Required Roles in myCalPERS

Must be assigned the Business Partner Arrears role along with one or more of the following roles:

- Business Partner Payroll
- Business Partner Payroll Read Only
- Business Partner Retirement Enrollment
- Business Partner Retirement Enrollment Read Only

Note: Contact your System Access Administrator to request the required roles.

Employment Certifications

When is an Employment Certification Required?

Service Credit Purchase (SCP) requests initiated by:

- Member through their myCalPERS account
- Member submitting a paper request to their employer for upload and certification

Membership reviews initiated by:

- CalPERS staff
- Employer
- Member

Completing the Employment Certification

Employment Certification (1 of 14)

Complete the following steps when an employee submits an SCP request, or a membership review is needed:

Step 1: Select the **Reporting** global navigation tab



Step 2: Select the **Member Requests** local navigation link

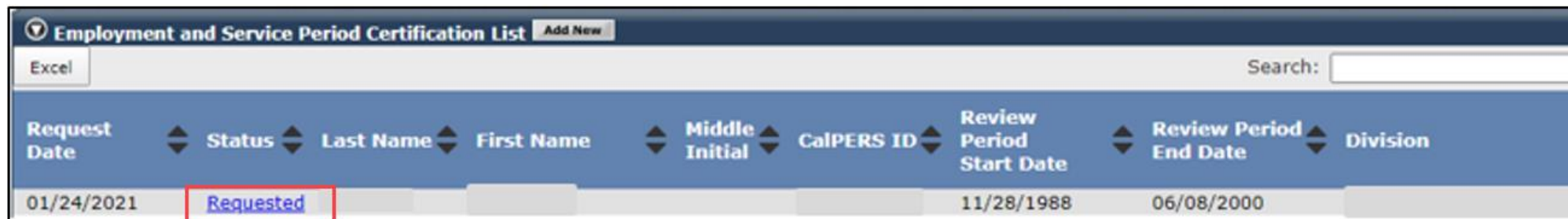


Employment Certification (2 of 14)

Step 3: Review the Employment and Service Period Certification List panel

Is the employee on the list?

- No: Continue to **Step 4**
- Yes: Select the **Requested** status link and continue to **Step 5**



Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division
01/24/2021	Requested					11/28/1988	06/08/2000	

Employment Certification (3 of 14)

Step 4: Select **Add New** in the Employment and Service Period Certification List panel

Employment and Service Period Certification List **Add New**

Excel Search:

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
No results found.									

Showing 0 to 0 of 0 entries Previous Next

Employment Certification (4 of 14)

Complete the Employment Information section

Employment Information

Participant: *

Business Partner:

BP Contact Name:

Phone Number:

Ext:

Dates of Employment: *

From:

To:

Employment Category: *

Primary Position Title as displayed on your publicly available pay schedule: *

Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS? *

Yes

No

[View Exclusions](#)

Time Base: *

☐ Full Time

☐ Intermittent

☐ On Call

☐ Part Time

☐ Indeterminate

☐ Work(ed) As Needed

Appointment Tenure: *

☐ Permanent

☐ Indeterminate

☐ Seasonal

☐ Temporary

Months per Year: *

☐ 8 Months

☐ 11 Months

☐ 9 Months

☐ 12 Months

☐ 10 Months

Please upload the participant's hiring document (myCalPERS 2788):

Add Document

Is the participant requesting to purchase Service Credit? *

Yes

No

Save

[Return](#)

Employment Certification (5 of 14)

Step 5: Is the employee's information displayed?

- Yes: Continue to **Step 6**
- No: **Select** Participant link to add participant's information



Employment Information
Participant: * [Select](#)

Step 6: Confirm the correct business partner and division is listed



Business Partner: Division:

Employment Certification (6 of 14)

Step 7: Enter contact phone number

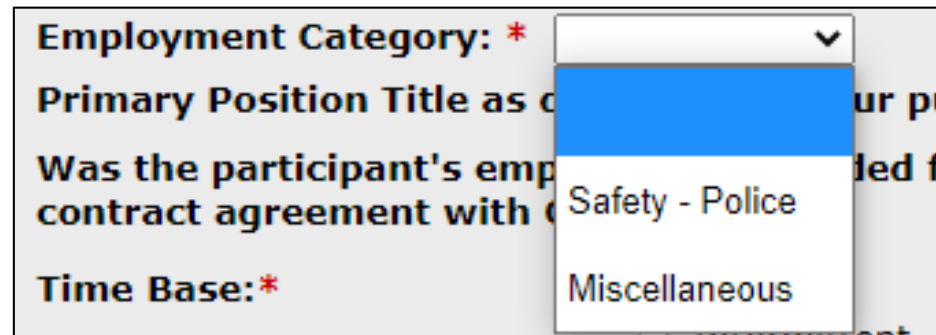
BP Contact Name:	<input type="text"/>	Phone Number:	<input type="text"/>	Ext:	<input type="text"/>
------------------	----------------------	---------------	----------------------	------	----------------------

Step 8: Enter or confirm employment dates

Dates of Employment: *	From:	<input type="text"/>	To:	<input type="text"/>
------------------------	-------	----------------------	-----	----------------------

Employment Certification (7 of 14)

Step 9: Select applicable employment category



The screenshot shows a web form with the following visible fields and labels:

- Employment Category: *** (Dropdown menu is open, showing options: Safety - Police, Miscellaneous)
- Primary Position Title as of** (Text input field)
- Was the participant's employment under a contract agreement with** (Text input field)
- Time Base: *** (Text input field)

This is based on the category the employee would have been if brought into membership for this position

Employment Certification (8 of 14)

Step 10: Enter the position title for the certification

Primary Position Title as displayed on your publicly available pay schedule: *

Step 11: Is employee's employment excluded from CalPERS membership due to your agency's contract agreement or by law under Government Code 20300?

- No: Continue to **Step 12**

Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS? * ☐ Yes ☒ No [View Exclusions](#)

- Yes: Confirm the position is excluded due to a contract exclusion or by law. Continue to **Step 12**

Employment Certification (9 of 14)

Step 12: Select time base and tenure at the start of the employment period

Time Base:*	<input type="radio"/> Full Time	<input type="radio"/> Part Time
	<input type="radio"/> Intermittent	<input type="radio"/> Indeterminate
	<input type="radio"/> On Call	<input type="radio"/> Work(ed) As Needed
Appointment Tenure:*	<input type="radio"/> Permanent	
	<input type="radio"/> Indeterminate	
	<input type="radio"/> Seasonal	
	<input type="radio"/> Temporary	

Example: If request began on January 1, 2019, select time base and tenure effective January 1, 2019.

Employment Certification (10 of 14)

Step 13: Select months per year worked

Months per Year:*	<input type="radio"/> 8 Months	<input type="radio"/> 9 Months	<input type="radio"/> 10 Months
	<input type="radio"/> 11 Months	<input type="radio"/> 12 Months	

Step 14: Select **Add Document**, if necessary, to upload additional information related to the appointment's time base and tenure

Note: This step is optional.

Please upload the participant's hiring document (myCalPERS 2788):	<input type="button" value="Add Document"/>
---	---

Employment Certification (11 of 14)

Step 15: Is the employee requesting to purchase service credit?

- No: This is a membership review, select **Save**
This section is complete

Is the participant requesting to purchase Service Credit?* ☐ Yes ☒ No

Save

- Yes: Continue to **Step 16**

Is the participant requesting to purchase Service Credit?* ☒ Yes ☐ No

Service Credit Purchase Type Requested:*

- ☐ Service Prior to Membership
- ☐ Comprehensive Employment and Training Act (CETA)
- ☐ Fellowship
- ☐ Prior Service as Public Service
- ☐ Local System Redeposit
- ☐ Optional Arrears

Employment Certification (12 of 14)

Step 16: Select service credit type the employee is requesting to purchase

Service Credit Purchase Type Requested:*

- ☐ Service Prior to Membership
- ☐ Comprehensive Employment and Training Act (CETA)
- ☐ Fellowship
- ☐ Prior Service as Public Service
- ☐ Local System Redeposit
- ☐ Optional Arrears

Step 17: Select **Add Document** to upload service credit purchase request document

Please upload the participant's *Service Prior to Membership* related signed service credit purchase request form (myCalPERS 1168): *

Add Document

Note: Skip **Steps 17** and **18** if the SCP request was submitted through myCalPERS account. The request will already be uploaded.

Employment Certification (13 of 14)

Step 18: Locate the document and select **Open**

Step 19: Answer the remaining questions

- Default to **No** if unknown

Is the participant above a member of a reciprocal system? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under a fellowship program? *	<input type="radio"/> Yes <input type="radio"/> No
Was this position filled by an election or appointment to a fixed term of office? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered through an independent contractor or paid through a third party or temporary employment agency ? *	<input type="radio"/> Yes <input type="radio"/> No
For teacher's assistants in a credential program only:	
Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period ? *	<input type="radio"/> Yes <input type="radio"/> No
Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? *	<input type="radio"/> Yes <input type="radio"/> No

Employment Certification (14 of 14)

Step 20: Select **Save**

A screenshot of a web form. The form has a title bar that reads "CalPERS, during the specified time period? *". Below the title bar is a button labeled "Save". The "Save" button is highlighted with a red rectangular box.

Step 21: Do you have additional employment periods to add?

- No: This section is complete, proceed to enter the payroll detail
- Yes: Return to **Step 4**
 - Enter additional employment periods for the following:
 - All positions within the requested time period
 - Time base changes **per** position
 - Separations between appointments **must** be included
Example: 01/01/2000-06/30/2000, separated, started again 08/01/2000–12/31/2000
Each period needs a separate employment period added

Add Service Period Detail

Add Service Period Detail (1 of 14)

Step 1: Select **Add New Service** in the Service Review Filter panel to submit service period detail

- Confirm you have the correct roles assigned if you are unable to view the Add New Service button



The screenshot shows a web interface titled "Service Review Filter". It contains several filter fields: "Fiscal Year:" with a dropdown arrow, "Appointment:" with a text input and a dropdown arrow, "Division:" with a dropdown arrow, "CBU:" with a dropdown arrow, "Business Partner:" with a dropdown arrow, and "Date Range:" with a text input and a calendar icon. On the right side, there are "Position Title:" with a dropdown arrow, "Class Code:" with a dropdown arrow, "Certified by:" with a dropdown arrow, and "To:" with a text input and a calendar icon. At the bottom right, there are three buttons: "Filter Service", "Clear Filter", and "Add New Service". The "Add New Service" button is highlighted with a red rectangular box.

Add Service Period Detail (2 of 14)

Maintain Record Details (Record 1 of 1)

Enter the preferred values below. Dollar amounts must be greater than zero.

Begin Date: *

End Date: *

Display

Payroll Record Memo:

Division:

Reported Name and CalPERS ID

CalPERS ID: *

Last Name: *

First Name: *

Middle Name:

Earnings

Position Title:

Appointment: ☒ No Appointment

College District - Miscellaneous - 05/11/2020

Payroll Schedule: *

Transaction Type: * Prior Period Adjustment

Pay Rate Type:

Pay Rate: \$

Reportable Earnings: \$ 0.00

Scheduled Full Time Hours Per Week: 0.0

Total Hours Worked: *

0.0

Scheduled Full Time Days Per Week: 0.0

Overtime Hours Worked: 0.0

Special Compensation: \$0.00

View Special Compensation

Contributions

Taxed Member Paid Contributions: \$ 0.00

Tax Deferred Member Paid Contributions: \$ 0.00

Tax Deferred Employer Paid Member Contributions: \$ 0.00

Return

Save & Continue

Save & Return

Remove Record

Cancel Report


Add Service Period Detail (3 of 14)


Step 2: Enter the begin and end dates of the period in the Maintain Record Details panel

- Payroll details must be entered by pay period and separated by fiscal year
- Multiple pay periods cannot be grouped together

▼ Maintain Record Details (Record 1 of 1)

Enter the preferred values below. Dollar amounts must be greater than zero.

Begin Date:* 

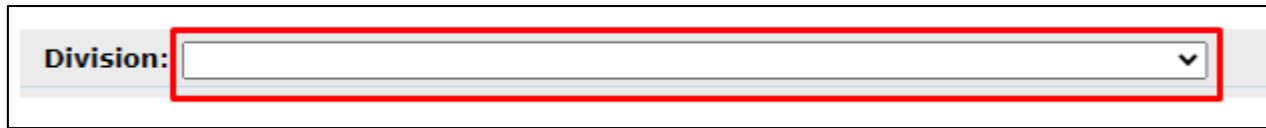
End Date:*  Display

Payroll Record Memo:

Add Service Period Detail (4 of 14)

Step 3: Select from the **Division** drop-down menu, if available

- Districts will not see this field



A screenshot of a web form field labeled "Division:". The field is a horizontal drop-down menu with a light gray background and a white text area. A red rectangular border highlights the text area of the drop-down menu. A small downward-pointing arrow is visible on the right side of the text area.

Add Service Period Detail (5 of 14)

Step 4: Enter **Position Title**

- The position title must match the title entered in the Employment Information section

Position Title:

Add Service Period Detail (6 of 14)

Step 5: Select the **No Appointment** radio button when reporting payroll detail for a time frame **not** in myCalPERS



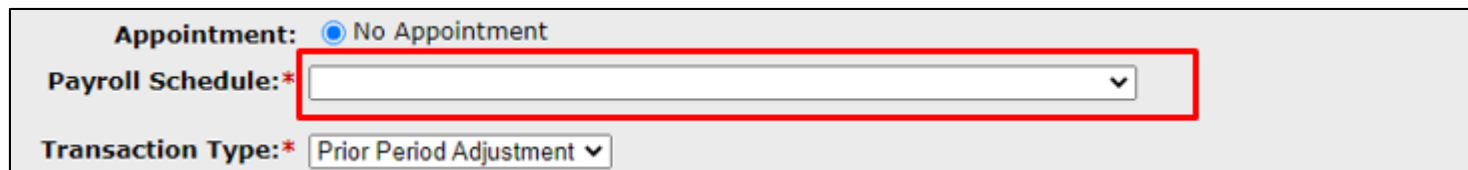
The screenshot shows a form section titled "Appointment:". It features a radio button labeled "No Appointment" which is selected and highlighted with a red box. Below this, there are two unselected radio buttons with associated text: "92139121 : City of Disneyland - Safety - County Peace Officer - 03/21/2015" and "92111572 : City of Disneyland - Safety - County Peace Officer - 01/10/2015 - 02/25/2015".

If reporting payroll detail for an existing appointment in myCalPERS, select the applicable appointment radio button



The screenshot shows the same "Appointment:" form section. In this instance, the radio button for "92139121 : City of District - Safety - County Peace Officer - 03/21/2015" is selected and highlighted with a red box. The other radio button and its text remain visible but unselected.

Step 6: Select from the **Payroll Schedule** drop-down menu



The screenshot shows a form section with three fields. The "Appointment:" field has the "No Appointment" radio button selected. The "Payroll Schedule: *" field is a drop-down menu that is currently empty and highlighted with a red box. The "Transaction Type: *" field is a drop-down menu with "Prior Period Adjustment" selected.

Add Service Period Detail (7 of 14)

Step 7: Complete the **Pay Rate Type**, **Pay Rate** and **Reportable Earnings** fields

Transaction Type:*	<input type="text" value="Prior Period Adjustment"/>
Pay Rate Type:	<input type="text"/>
Reportable Earnings:	<input type="text" value="0.00"/>
	Pay Rate: \$ <input type="text"/>

Pay Rate Type:	<input type="text"/>
	<div>Hourly</div> <div>Daily</div> <div>Monthly</div>

Add Service Period Detail (8 of 14)

Step 8: Complete the **Scheduled Full Time Hours Per Week**

OR **Scheduled Full Time Days Per Week** field depending on pay rate type

- Report what is considered full time for the position whether the member works full time or not

Scheduled Full Time Hours Per Week:	<input type="text" value="0.0"/>	Scheduled Full Time Days Per Week:	<input type="text" value="0.0"/>
--	----------------------------------	---------------------------------------	----------------------------------

Add Service Period Detail (9 of 14)

Step 9: Complete the **Total Hours Worked** and **Overtime Hours Worked** fields

- Only report the hours for the period reported in this record

Total Hours Worked: *	<input type="text" value="0.0"/>	Overtime Hours Worked:	<input type="text" value="0.0"/>
-----------------------	----------------------------------	------------------------	----------------------------------


Step 10: Is there special compensation to be reported?

- Yes: Continue to **Step 11**
- No: Skip to **Step 16**

Special Compensation: \$0.00	View Special Compensation
------------------------------	---

Add Service Period Detail (10 of 14)

Step 11: Select the **Add New** in the View Special Compensation panel



The screenshot shows a web interface titled "View Special Compensation". At the top, there are three buttons: "Select All" (a blue link), "Delete" (a grey button), and "Add New" (a grey button with a red border). Below these buttons is a table with three columns: "Category", "Type", and "Amount". The table is currently empty, displaying the message "No results found." Below the table, there are again three buttons: "Select All" (a blue link), "Delete" (a grey button), and "Add New" (a grey button with a red border).

Add Service Period Detail (11 of 14)

Step 12: Complete the **Special Compensation Category**, **Special Compensation Type** and **Amount** fields in the Maintain Special Compensation Details panel

- Special Compensation Category will generate different special compensation types



▼ Maintain Special Compensation Details

Special Compensation Category:*

Special Compensation Type:*

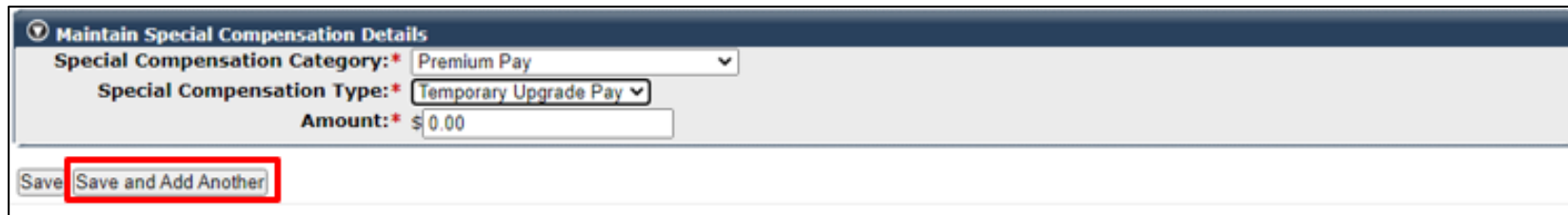
Amount:* \$0.00

Save Save and Add Another

Add Service Period Detail (12 of 14)

Step 13: Is there additional special compensation to add to this record?

- No: Continue to **Step 14**
- Yes: Select **Save and Add Another**, return to **Step 11**



▼ Maintain Special Compensation Details

Special Compensation Category:* Premium Pay ▼

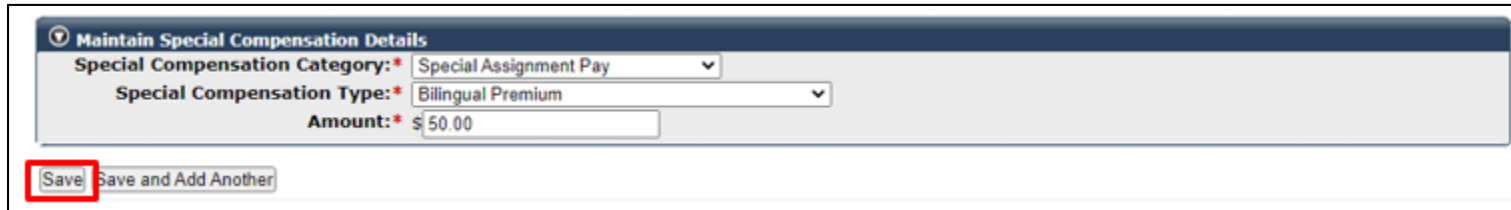
Special Compensation Type:* Temporary Upgrade Pay ▼

Amount:* \$ 0.00

Save Save and Add Another

Add Service Period Detail (13 of 14)

Step 14: Select **Save**



▼ Maintain Special Compensation Details


Special Compensation Category:* Special Assignment Pay

Special Compensation Type:* Bilingual Premium

Amount:* \$ 50.00

Save Save and Add Another

Step 15: Select **Return** located at the bottom right



▼ View Special Compensation

[Select All](#) [Delete](#) [Add New](#)

Category	Type	Amount
<input type="checkbox"/> Special Assignment Pay	Bilingual Premium	\$50.00

[Select All](#) [Delete](#) [Add New](#)

[Return](#)

Add Service Period Detail (14 of 14)


Step 16: Do you have additional periods to report?

- No: Select **Save & Return**



A screenshot of a web interface showing four buttons: 'Save & Continue', 'Save & Return', 'Remove Record', and 'Cancel Report'. The 'Save & Return' button is highlighted with a red rectangular box.

- Yes: Select **Save & Continue**, return to **Step 2**



A screenshot of a web interface showing four buttons: 'Save & Continue', 'Save & Return', 'Remove Record', and 'Cancel Report'. The 'Save & Continue' button is highlighted with a red rectangular box.

- This section is complete

Submit the Certification

Submit the Certification

Prior to submitting the certification, confirm the information provided in the Employment Information and Service List panels are complete and accurate

▼ Certification

☐ **By signing, I certify the following:**

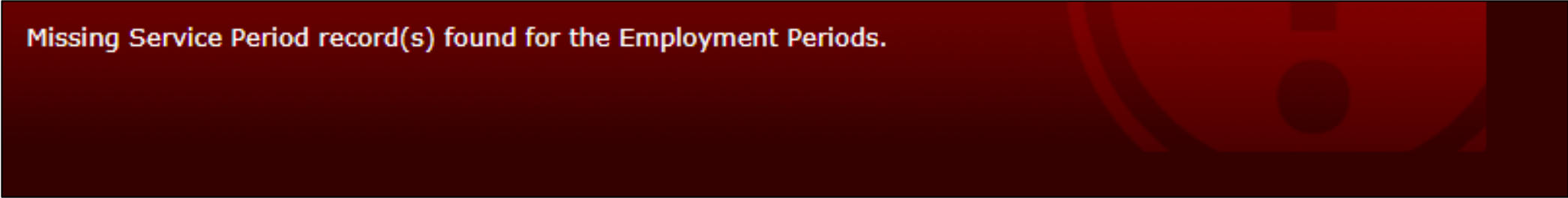
1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of _____ and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

Submitted By:
Submitted Date:

Missing Service Period Error

Missing Service Period Errors (1 of 3)

The error message below will display if any information is missing in the service period detail

A dark red rectangular banner with a subtle circular pattern on the right side. The text is white and positioned on the left.

Missing Service Period record(s) found for the Employment Periods.

Missing Service Period Errors (2 of 3)

Common missing items and/or items requiring correction before submission:

- Missing service period

Example: Add zeros to a pay period with no earnings within the certification period

- Incorrect dates
- Dates outside the certification period

Missing Service Period Errors (3 of 3)

- Fiscal year not separated
- Day missing from a service period
 - Example: Leap year
- Position title does not match the pay period detail and employment information
 - Example: Information Technology I is entered in the employment information, but entered as IT I in the pay period detail

Certification Status

Certification Status (1 of 2)

Requested

- Certification has been requested, but not started

In-Progress

- Certification has been started, but not completed or submitted

Certification Expired

- Certification is expired
 - This is for a Service Credit Purchase not completed within 30 days

Certification Status (2 of 2)

Submitted

- Certification has been certified and submitted to CalPERS for review

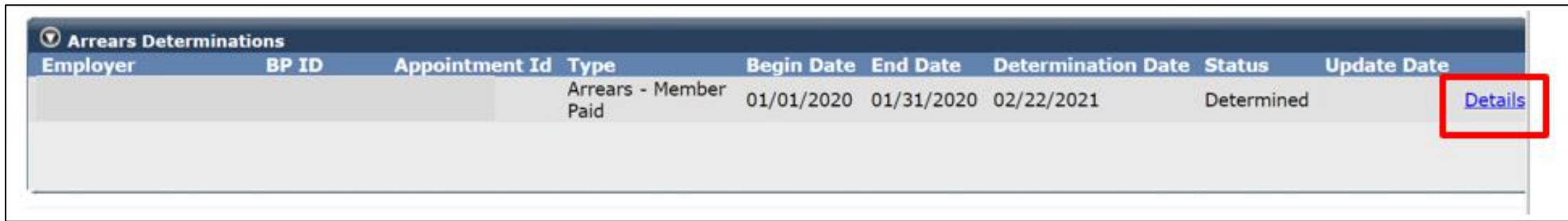
Completed

- Certification process is complete

Arrears Determination Options

Arrears Determination Details

Select **Details** in the Arrears Determinations panel



Arrears Determinations								
Employer	BP ID	Appointment Id	Type	Begin Date	End Date	Determination Date	Status	Update Date
			Arrears - Member Paid	01/01/2020	01/31/2020	02/22/2021	Determined	Details

If arrears is determined, the details are viewable in the employee's account

Waiving Appeal Rights

Arrears Detail

Appointment Information

Employer:

Appointment ID:

CalPERS ID:

Enrollment Date: 01/01/2020

Determination Information

Arrears Period Begin Date: 01/01/2020

Arrears Period End Date: 01/31/2020

Arrears Type: Arrears - Member Paid

Status: Determined

Processing Date: 03/24/2021

Source of Payroll: Service Period Submission in myCalPERS

Reason: 1,000 hours of work within the fiscal year (July 1 to June 30)

Does this determination change the enrollment level from PEPRA to Classic?

No

Create Date: 02/22/2021

Determination Date: 02/22/2021

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.

Waive Appeal

Reconsideration Request

If your agency does not agree with this determination, you must provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 03/24/2021

Reason for Reconsideration: *


Please select document type and upload documentation to support your reconsideration request.

Document Type: *

Add Document

Submit

If your agency agrees with the determination, waive the appeal rights



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Reconsideration Request

Arrears Detail

Appointment Information

Employer:

Appointment ID:

CalPERS ID:

Enrollment Date: 01/01/2020

Determination Information

Arrears Period Begin Date: 01/01/2020

Arrears Period End Date: 01/31/2020

Arrears Type: Arrears - Member Paid

Status: Determined

Processing Date: 03/24/2021

Source of Payroll: Service Period Submission in myCalPERS

Reason: 1,000 hours of work within the fiscal year (July 1 to June 30)

Does this determination change the enrollment level from PEPR to Classic?

No

Create Date: 02/22/2021

Determination Date: 02/22/2021

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.

Waive Appeal

Reconsideration Request

If your agency does not agree with this determination, you must provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 03/24/2021

Reason for Reconsideration: *

Please select document type and upload documentation to support your reconsideration request.

Document Type: *

Add Document

Submit

Provide reason with documentation to submit a request.

Resources

Resources

CalPERS Customer Contact Center

- **888 CalPERS** (or 888-225-7377)

[Circular Letter 200-042-20](#)

Membership_Reporting@calpers.ca.gov

[myCalPERS Employment Certification Functionality Student Guide](#)

[myCalPERS System Access Administration](#)

[myCalPERS System Privileges for Business Partner Roles](#)

Questions