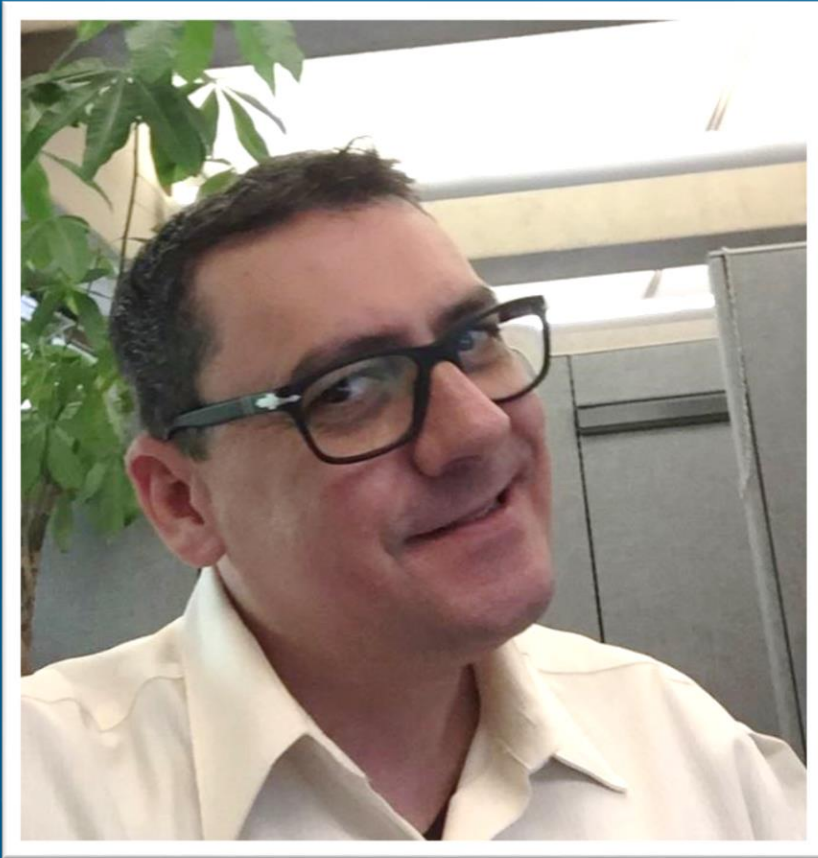


School Employer Advisory Committee

May 12, 2021



William Greenhalgh and Susan Forrer

Employer Response Team

Employer Account Management Division

Housekeeping

Webinar is being recorded

Attendee mics are muted

Meeting materials available on www.calpers.ca.gov

Email: CalPERS_SEAC@calpers.ca.gov

Use the Q&A feature to send questions to all panelists

Legislative Update

Andrea Peters
Legislative Affairs Division

Charter School Contracting Process

Andy Nguyen

Pension Contracts and Prefunding Programs

Charter School Eligibility Criteria

Nonsectarian, tuition-free public school

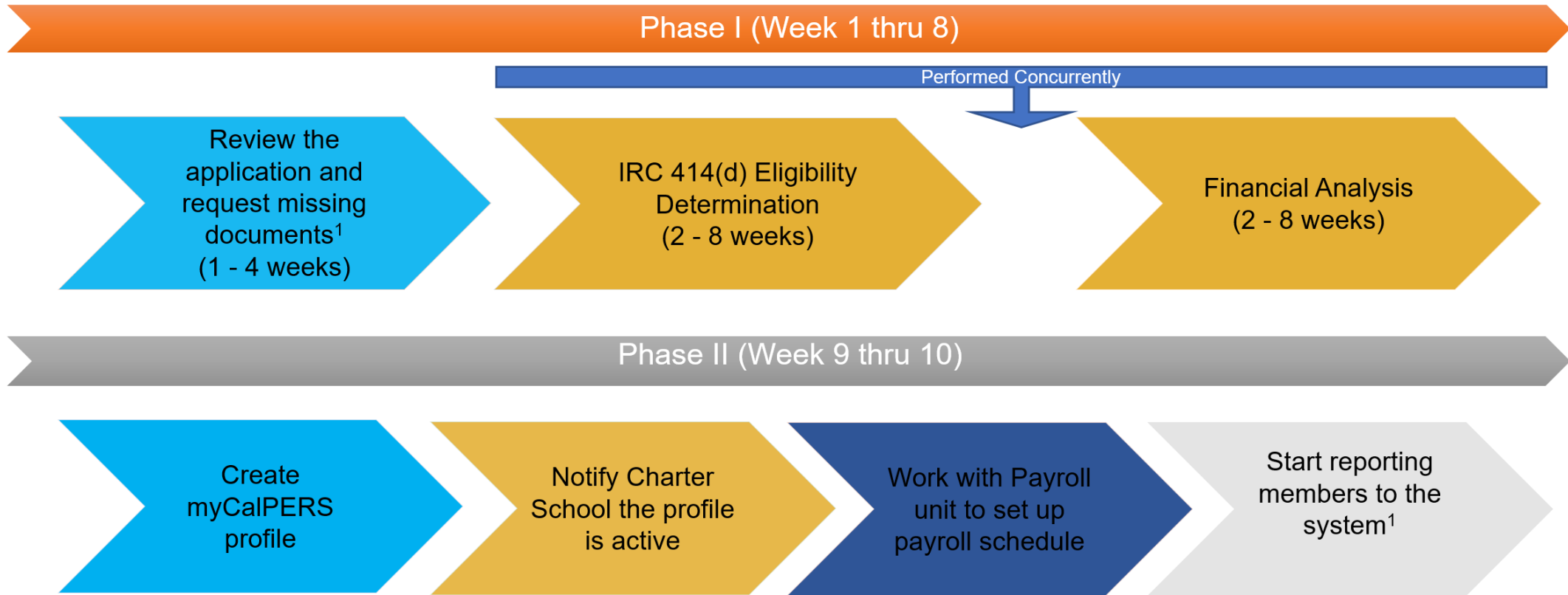
Charter school state statute

Statutory right to participate in the system

Fiscal responsibility

Ownership of assets upon dissolution or liquidation

New Charter School: Processing Timelines



¹Timeline is dependent on the employer

Contact Information

Email	<u>pensioncontracts@calpers.ca.gov</u>
Web Page	<u>https://www.calpers.ca.gov/page/employers/contracts/new-contracts-resolutions</u>

Charter School Questions

Required Contribution Rates Fiscal Year 2021-22

Paul Tschida
Actuarial Office

Overview and Highlights (1 of 2)

Actuarial valuation date of **June 30, 2020**

- Determines required contributions for **fiscal year 2021-22**

Required contributions adopted by CalPERS Board in April

Investment return for fiscal year 2019-20 was 4.7%
(before reduction for administrative expenses)

Overview and Highlights (2 of 2)

The state contributed \$904 million in July 2019 (G.C. §20825.2)

- Spread over three fiscal years to reduce school employer contributions
- Reduced employer contribution rate for 2021-22 by 2.16%
- Improved June 30, 2020 funded status by approximately 0.8%

Funded Status and Required Contributions

(\$ in millions)

	June 30, 2019	June 30, 2020
Market Value of Assets	\$ 68,177	\$ 71,400
Accrued Liability	\$ 99,528	\$ 104,062
Unfunded Accrued Liability	\$ 31,351	\$ 32,662
Funded Status	68.5%	68.6%
	FY 2020-21	FY 2021-22
Employer Normal Cost	9.47%	9.32%
Unfunded Liability Rate	14.13%	15.75%
State Contribution (Section 20825.2) ¹	<u>(2.90%)</u>	<u>(2.16%)</u>
Required Employer Contribution Rate	20.70%	22.91%
PEPRA Member Contribution Rate	7.00%	7.00%

¹ For FY 2021-22, the Unfunded Liability Rate directly incorporates the State Contribution (§20825.2) but is separated here for purposes of illustration

Projected Employer Contribution Rate

	Actual	Projected				
	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
Employer Contribution Rate	22.91%	26.1%	27.1%	27.7%	27.8%	27.6%

Projected rates assume 7% investment return in fiscal year 2020-21 and thereafter with no changes to benefits, assumptions, or methods during the projection period. Projected rates further reflect that the normal cost is expected to continue to decline over time as new employees enter the PEPRA benefit tier. All other demographic experience is assumed to match the actuarial assumptions.

Contribution Rate Questions

myCalPERS System Support

Meghan Korte

Employer Account Management Division

myCalPERS System Support (1 of 3)

Recent Enhancements

- Certificated member indicator
- Payroll errors for lump sums
- Notice of Appointment Change letters
- Cognos report updates

myCalPERS System Support (2 of 3)

Future Enhancements

- Certificated member XML reporting
- Demographic change notification
- Cognos report updates

myCalPERS System Support (3 of 3)

Reminders

- Undeliverable address report
- Automated separations

myCalPERS System Support Questions



Questions & Answers

Renee Ostrander, Brad Hanson, and Christina Rollins

An aerial photograph of a modern university building complex. The central feature is a large, multi-story glass tower with a complex, lattice-like internal structure. To its right is a long, multi-story building with a flat roof and numerous windows. The foreground shows a paved courtyard with several people walking, a road with a yellow crosswalk, and lush green trees. The sky is clear and blue.

Break

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

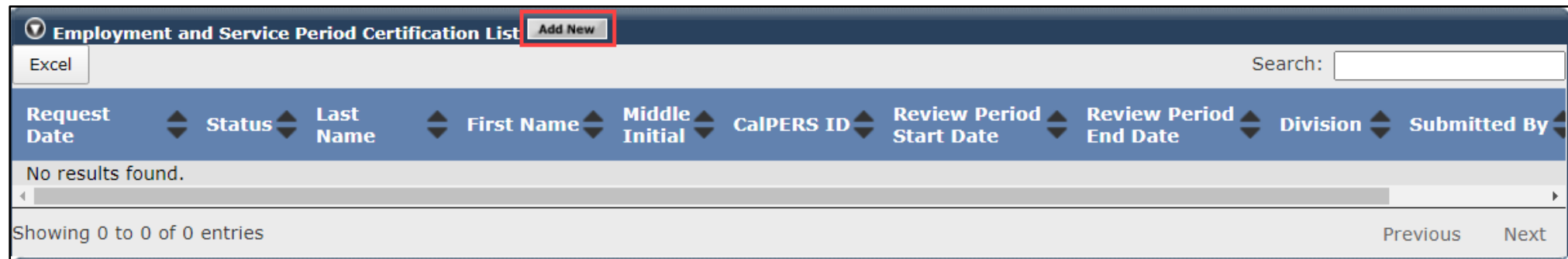
Is the employee on the list?

- 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 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 Part Time
 Intermittent Indeterminate
 On Call Work(ed) As Needed

Appointment Tenure: *
 Permanent
 Indeterminate
 Seasonal
 Temporary

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

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

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

[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



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



Employment Certification (6 of 14)

Step 7: Enter contact phone number

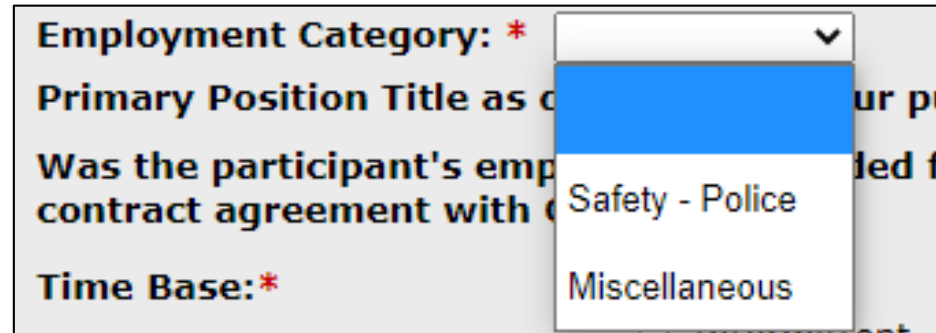
BP Contact Name: Phone Number: Ext:

Step 8: Enter or confirm employment dates

Dates of Employment: * From: To:

Employment Certification (7 of 14)

Step 9: Select applicable employment category



The image shows a screenshot of a web form. A dropdown menu is open for the field 'Employment Category: *'. The menu lists two options: 'Safety - Police' and 'Miscellaneous'. The 'Safety - Police' option is currently selected and highlighted in blue. Other text visible in the background includes 'Primary Position Title as of', 'Was the participant's employment contract agreement with', and 'Time Base: *'.

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:* 8 Months 9 Months 10 Months
 11 Months 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):

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): *

Note: Skip **Steps 17** and **18** if the SCP request was submitted through a 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**



CalPERS, during the specified time period? *

Save

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 'Service Review Filter' panel with the following fields and buttons:

- Fiscal Year: [dropdown]
- Appointment: [dropdown]
- Division: [dropdown]
- CBU: [dropdown]
- Business Partner: [dropdown]
- Date Range: [text input]
- Position Title: [dropdown]
- Class Code: [dropdown]
- Certified by: [dropdown]
- To: [text input]
- Buttons: Filter Service, Clear Filter, Add New Service (highlighted with a red 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:** *

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](#)

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:*

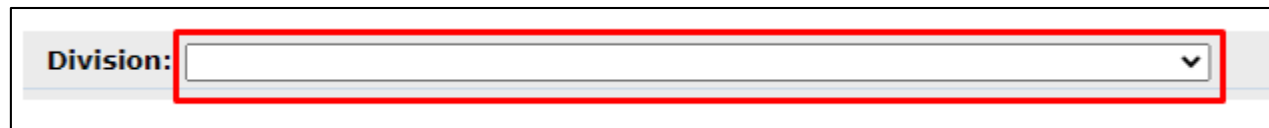
End Date:* Display

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 drop-down menu with a white background and a grey border. A red rectangular box highlights the entire field, including the label and the drop-down arrow on the right side. The field is currently empty.

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

Appointment: No Appointment 92139121 : City of Disneyland - Safety - County Peace Officer - 03/21/2015 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

Appointment: No Appointment 92139121 : City of District - Safety - County Peace Officer - 03/21/2015 92111572 : City of District - Safety - County Peace Officer - 01/10/2015 - 02/25/2015

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

Appointment: No Appointment
Payroll Schedule:*
Transaction Type:*

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"/>	Pay Rate: \$ <input type="text"/>
Reportable Earnings:	\$ <input type="text" value="0.00"/>	

Pay Rate Type:	<input type="text"/>
	<ul style="list-style-type: none">HourlyDailyMonthly

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"/>
----------------------	----------------------------------	------------------------	----------------------------------

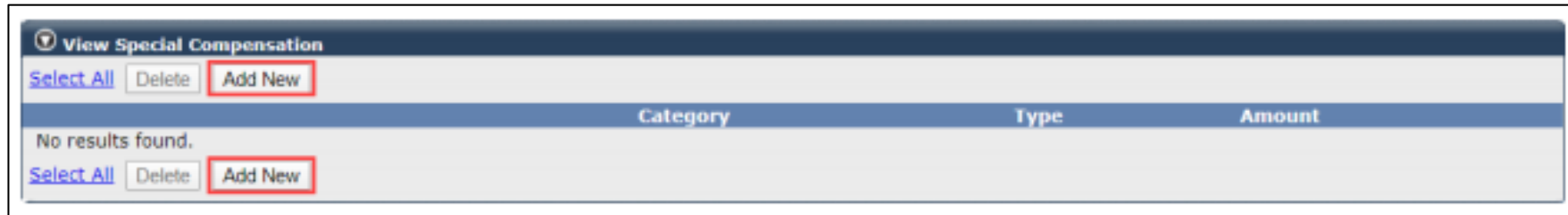
Step 10: Is there special compensation to be reported?

- 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



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:*

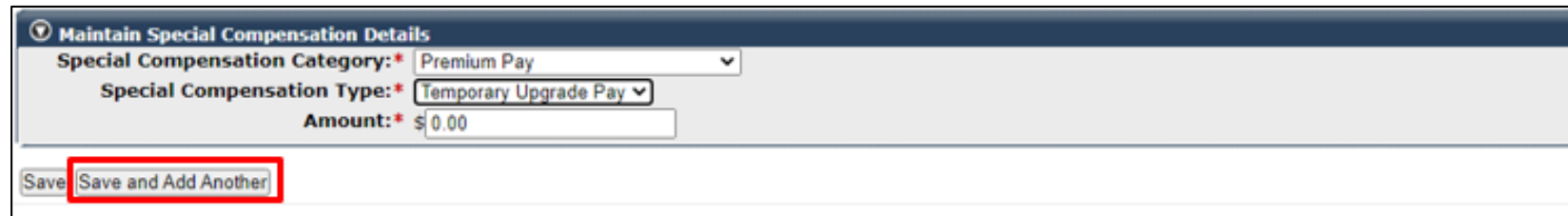
Amount:* \$0.00

Save Save and Add Another

Add Service Period Detail (12 of 14)

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

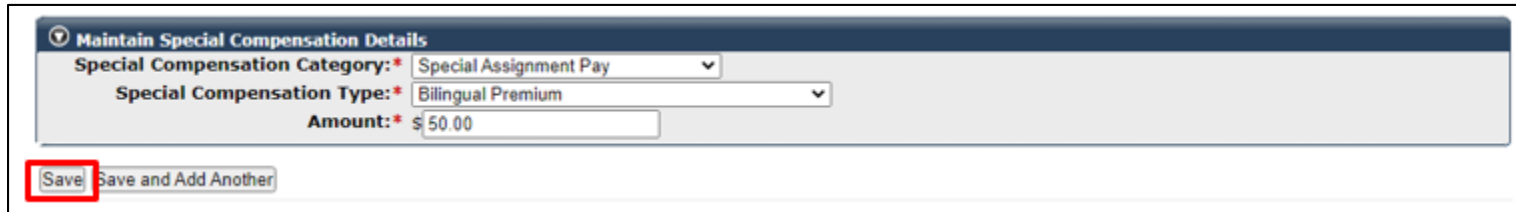
- No: Continue to **Step 14**
- Yes: Select **Save and Add Another**, return to **Step 11**



The screenshot shows a web form titled "Maintain Special Compensation Details". It contains three main input fields: "Special Compensation Category" with a dropdown menu set to "Premium Pay", "Special Compensation Type" with a dropdown menu set to "Temporary Upgrade Pay", and "Amount" with a text input field containing "\$ 0.00". At the bottom left of the form, there are two buttons: "Save" and "Save and Add Another". The "Save and Add Another" button is highlighted with a red rectangular box.

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 horizontal bar containing 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 horizontal bar containing 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:

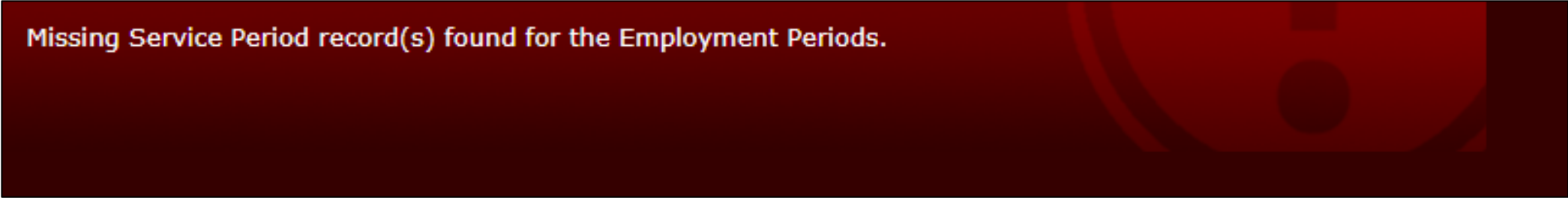
1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of _____ and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information 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



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

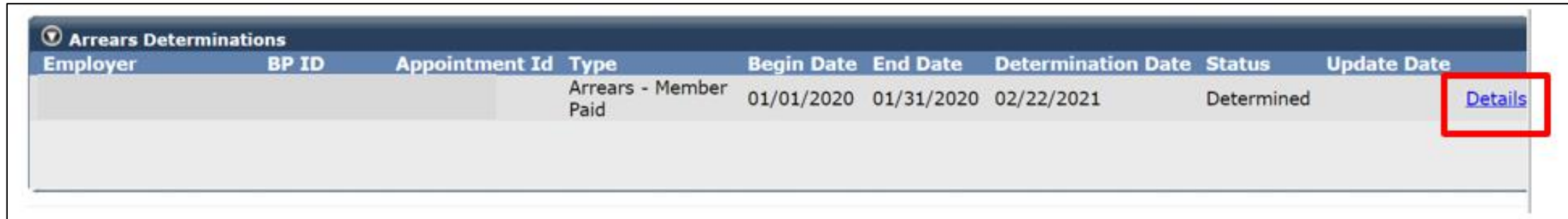
Completed

- 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: [Redacted] CalPERS ID: [Redacted]
Appointment ID: [Redacted] 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.

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: *

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

Reconsideration Request

Arrears Detail

Appointment Information

Employer: **CalPERS ID:**
Appointment 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.

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: *

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](#)

[myCalPERS System Access Administration](#)

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

Questions

Thank you for joining us!

CalPERS School Employer Advisory Committee