

# Completing an Employment Certification State Agencies

Employer Account Management Division &  
Member Account Management Division

# Topics (1 of 2)

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# Required Roles in myCalPERS

# Required Roles in myCalPERS (1 of 2)

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

# Required Roles in myCalPERS (2 of 2)

State Agencies who report payroll through the State Controller's Office (SCO) will only have the options below in addition to the Business Partner Arrears role:

- Business Partner Payroll Read Only
- 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 team members
- Employer
- Member



# Completing the Employment Certification

# Employment Certification (1 of 14)

Steps for 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

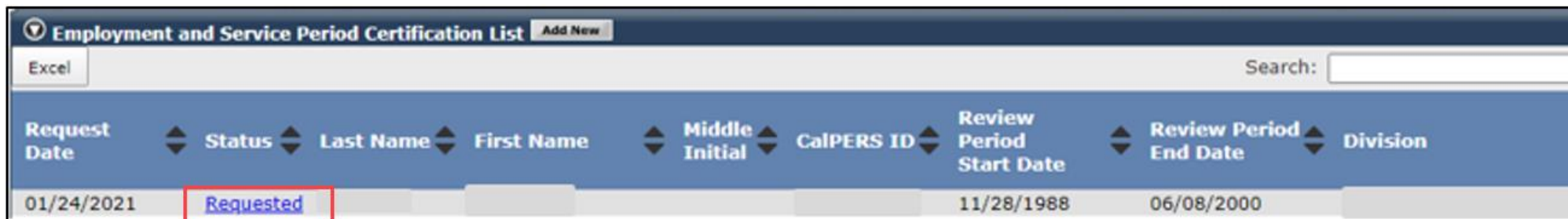


# Employment Certification (2 of 14)

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	<a href="#">Requested</a>					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

The screenshot shows a web interface for 'Employment and Service Period Certification List'. At the top right of the panel, there is a button labeled 'Add New' which is highlighted with a red rectangular box. Below the header, there is a search bar and a table with the following columns: Request Date, Status, Last Name, First Name, Middle Initial, CalPERS ID, Review Period Start Date, Review Period End Date, Division, and Submitted By. The table content is empty, with the text 'No results found.' displayed. At the bottom of the panel, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' navigation buttons.

# Employment Certification (4 of 14)

## Steps to assist with completing the Employment Information section

**Employment Information**

**Participant:** \*

**Participant's Email Address:** \*

**Business Partner:** \*

**Participant's Phone Number:** (999) 888-7777

**Dates of Employment:** \*

**From:** 10/01/1989 **To:** 12/03/1989

**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):**

**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 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

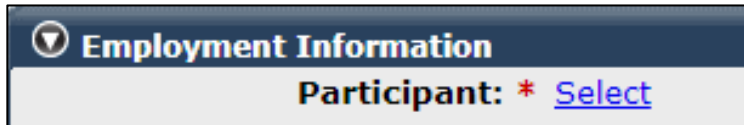
**Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? \***  Yes  No

[Return](#)

# Employment Certification (5 of 14)

## Step 5: Is the employee's information displayed?

- Yes: Continue to **Step 6**. View employee's contact information if necessary.
- No: Select Participant: **Select** 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:

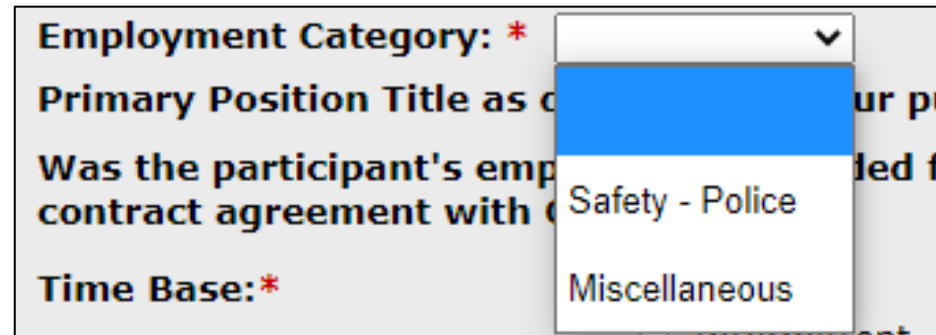
Step 8: Enter or confirm employment dates

Dates of Employment: \*  
From:  To:

**Note:** You may need to correct the Dates of Employment to reflect accurately. If there is a gap of employment you may enter each period as a separate employment periods.

# Employment Certification (7 of 14)

Step 9: Select applicable employment category



The screenshot shows a web form with a dropdown menu for 'Employment Category: \*'. The dropdown is open, showing two options: 'Safety - Police' and 'Miscellaneous'. The 'Safety - Police' option is highlighted in blue. Other form fields visible include 'Primary Position Title as of', 'Was the participant's employment under a 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?

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

- No: Continue to **Step 12**
- Yes: Confirm the position is excluded due to a contract exclusion or by law and continue to **Step 12**

# Employment Certification (9 of 14)

Step 12: Select time base, CBU, Class Code and tenure at the start of the employment period

The screenshot shows a form with the following fields and options:

- Time Base:** Radio buttons for Full Time, Intermittent (selected), On Call, Part Time, Indeterminate, and Work(ed) As Needed.
- CBU:** A dropdown menu highlighted in yellow.
- Class Code:** A text input field highlighted in yellow.
- Appointment Tenure:** Radio buttons for Permanent (selected), Indeterminate, Seasonal, and 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: Answer questions related to the service credit purchase request

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): \***

- 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**



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**

# Add Service Period Detail



# Add Service Period Detail (1 of 13)

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 13)

**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:**

**Reported Name and CalPERS ID**

**CalPERS ID:** \*

**Last Name:** \*  **First Name:** \*  **Middle Name:**

**Earnings**

**Member Category:**

**Position Title:**  **CBU:**

**Appointment:**  No Appointment

**Payroll Schedule:** \* Approved : Bi-Weekly : 06/20/1982 :

**Transaction Type:** \* Prior Period Adjustment

**Pay Rate Type:**  **Pay Rate:** \$

**Reportable Earnings:** \$  0.00

**Scheduled Full Time Hours Per Week:**  0.0

**Scheduled Full Time Days Per Week:**  0.0

**Total Hours Worked:** \*  0.0

**Overtime Hours Worked:**  0.0

**Special Compensation:** \$0.00 [View Social 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 13)


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.

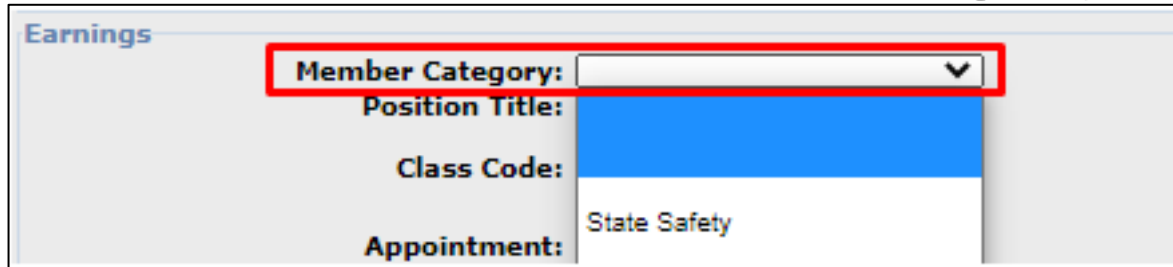
Begin Date:\*  

End Date:\*   Display

Payroll Record Memo:

# Add Service Period Detail (4 of 13)

Step 3: Select from the **Member Category** drop-down menu



The screenshot shows a form titled "Earnings" with several fields. The "Member Category" field is a drop-down menu, highlighted with a red box. The menu is open, showing a blue selection bar and the text "State Safety". Other fields include "Position Title:", "Class Code:", and "Appointment:".

**Note:** Member category provided in the Employment Information should match member category provided in the Service Period Details.

Step 4: Enter **Position Title**

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



The screenshot shows a form with a "Position Title:" label and an empty text input field. The input field is highlighted with a red box.

# Add Service Period Detail (5 of 13)

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 (6 of 13)

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

Transaction Type: \*    
 Pay Rate Type:    
 Reportable Earnings: \$    
 Pay Rate: \$

Pay Rate Type:

**Note:** Please provide the full time payrate. If there is a Retroactive Salary Adjustment (RSA), please provide appropriate Service Period Detail after the RSA has been applied. Do NOT enter RSA as a separate line.

# Add Service Period Detail (7 of 13)

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"/>
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# Add Service Period Detail (8 of 13)

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

- Only report the hours for the period reported in this record.
- Enter overtime hours in the Overtime Hours Worked field. Do not provide overtime hours in the Total Hours Worked field.

Total Hours Worked:*	<input type="text" value="0.0"/>	Overtime Hours Worked:	<input type="text" value="0.0"/>
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## Step 10: Is there special compensation to be reported?

- Yes: Continue to **Step 11**
- No: Skip to **Step 14**

Special Compensation: \$0.00	<a href="#">View Special Compensation</a>
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# Add Service Period Detail (9 of 13)

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



# Add Service Period Detail (10 of 13)

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 (11 of 13)

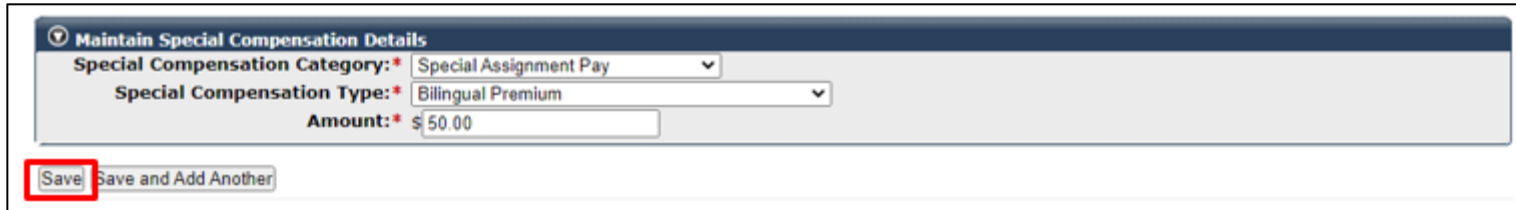
Step 13: Is there additional special compensation to add to this record?

- 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 box 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 (12 of 13)

## 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 (13 of 13)

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 border.

- 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 border.

- This section is complete

# File Upload Option

# File Upload

You can upload a CalPERS Review Report CSV data file in myCalPERS to report Service Periods for the employment certification process.

This is in addition to the existing XML file upload and manual entry option.

# Submit the Certification



# Submit 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:**

# Error Messages

# Error Messages (1 of 4)

**CBU/Class Code Error Message:** The error message below will display if the exclusion question is marked “No” but the entered class code is excluded from the contract agreement with CalPERS.

The class code you have entered is excluded for Service Prior to Membership (SPM) Service Credit Purchase. Please review your response for “Was this participant’s employment excluded from CalPERS membership due to your agency’s contract agreement with CalPERS?” and “Class Code” questions.

- Review the exclusion question regarding exclusions and the class code and make the appropriate updates.

## Error Messages (2 of 4)

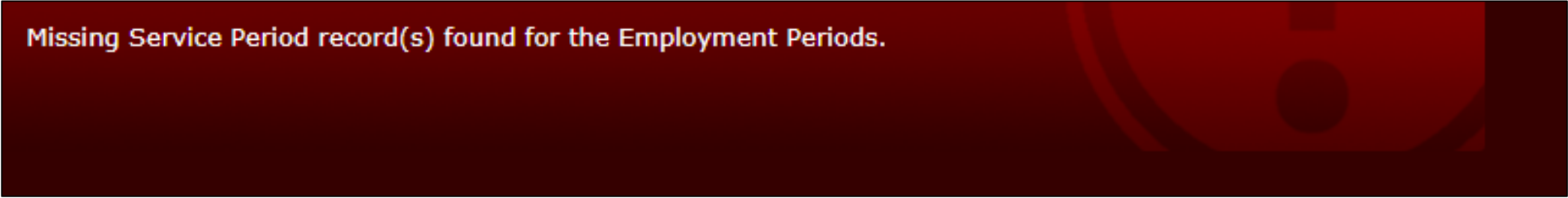
Payroll Outside Employment Error Message: The error message below will display if there are any service periods where the service period end date is after the employment period end date or where the service period begin date is before the employment period begin date.

The payroll you added in the Service Periods List is outside of the requested Employment Period(s) dates. Please review the payroll or employment period(s) and correct before continuing.

- Review the employment period and service periods and make the appropriate updates to the start or end dates.

# Error Messages (3 of 4)

Missing Service Period Errors: 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.

Continued on next slide

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# Error Messages (4 of 4)

- Common missing items and/or required corrections:
  - Missing service period
    - Note:** Pay rate, earnings, and hours are reported as zero (0) if the participant didn't work during a pay period that falls within the service period requested.
  - Incorrect dates
  - Fiscal year not separated
  - Day missing from a service period
    - Example: Leap year

# 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)

## Rejected

- Request has been rejected by employer

## Employer Withdrawn

- Request has been withdrawn by employer

## Submitted

- Certification has been certified and submitted to CalPERS for review

## Completed

- Certification process is complete

# Rejecting or Withdrawing a Request

# Rejecting or Withdrawing a Request (1 of 2)

Employers who initiate a certification request (i.e. initiated via “Add New” button) may select the “Withdraw Certification Request” button to cancel the request.

**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 County of Humboldt 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:

Submit **Withdraw Certification Request**

**Only the same BP Contact that started the certification can withdraw the certification**

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Default Group: Staff | Home | Search | Developer Console  
Build: v9.9 - BuildID: 211225-092151 - v9.9.114.1140 - USD: 1633

# Rejecting or Withdrawing a Request (2 of 2)

Employers can reject a certification request that was initiated by the employee by selecting the “Reject Member SCP Request” button and selecting the appropriate Rejection Reason.

**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 Franchise Tax Board 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:

Submit **Reject Member SCP Request** **Reject button**

**SCP Request Rejection Reason**

Please select a reason for rejecting the member's Service Credit Purchase request. Only required if certification request is being rejected.

Rejection Reason:

- No employment records. Employee never worked for the agency.
- Incorrect Service Credit Purchase request type.
- No payroll records. Purged records, records unavailable, damaged, or destroyed.
- Duplicate request. Same period already requested or submitted for review.
- Requested SPM service period previously purchased.
- Member withdrew the SCP request.

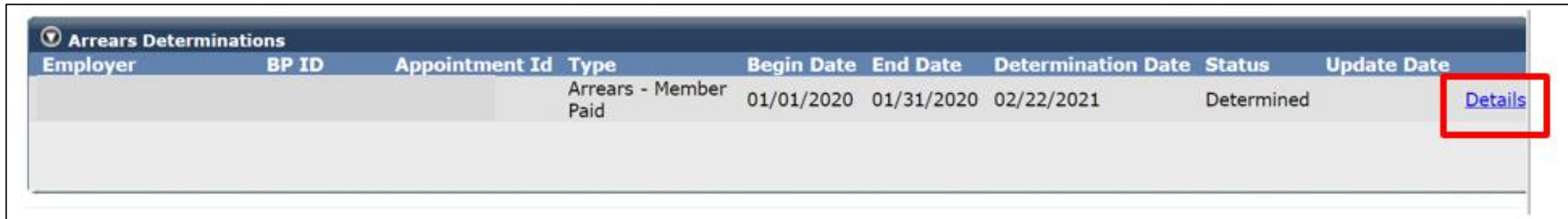
Rejected By:  
Rejected Date:

**Reject Reasons**

# Arrears Determination Options

# Arrears Determination Details

Select **Details** in the Arrears Determinations panel



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	<a href="#">Details</a>

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:** [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: \***

Provide reason with documentation to submit a request.



# Resources

# Resources Information

## CalPERS Customer Contact Center

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

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

[Circular Letter 200-058-21](#)

[Membership\\_Reporting@calpers.ca.gov](mailto:Membership_Reporting@calpers.ca.gov)

[myCalPERS Employment Certification Functionality Student Guide](#)

[myCalPERS System Access Administration](#)

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

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# Questions