Completing an Employment Certification Public Agencies

Employer Account Management Division &

Member Account Management Division

CalPERS

Topics (1 of 2)

Required Roles in myCalPERS

Employment Certifications

Completing the Employment Certification

Employment Information Section

Add Service Period Detail

Upload Option

Submit the Certification

Topics (2 of 2)

Error Messages

Certification Status

Rejecting or Withdrawing a Request

Arrears Determination Options

Resources

Questions

Required Roles in myCalPERS

myCalPERS Required Roles

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

Membership reviews initiated by:

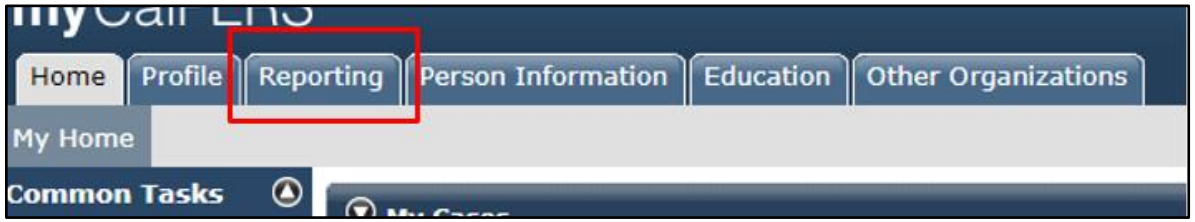
- CalPERS staff
- Employer
- Member

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)

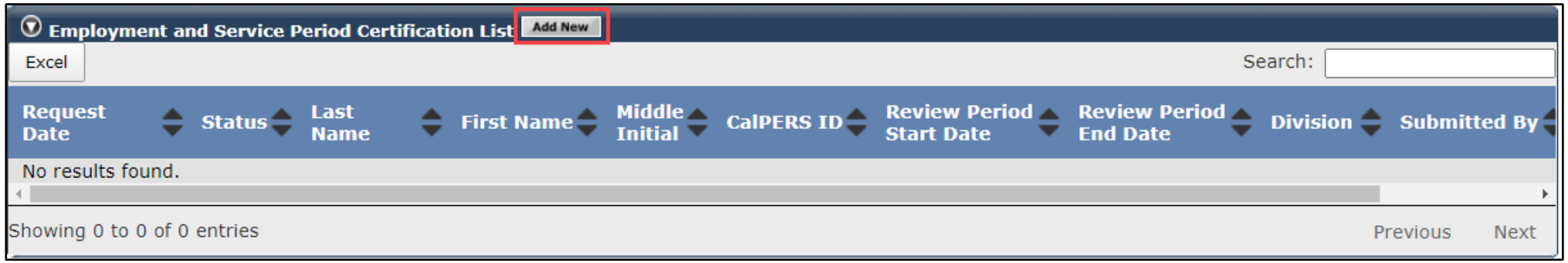
Step 3: Review the Employment and Service Period Certification List panel

Is the employee on the list?

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

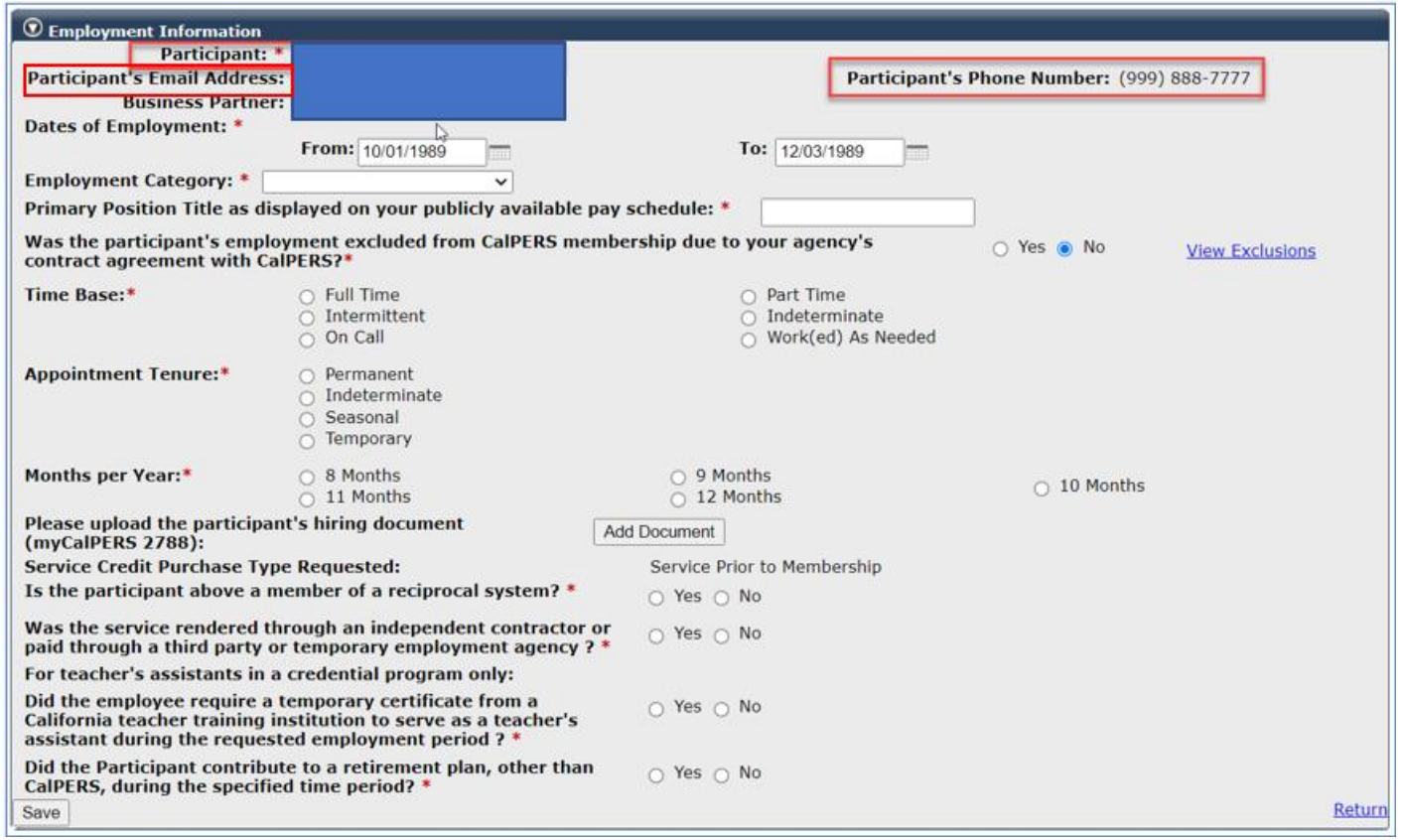
Employment Certification (3 of 14)

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



Employment Certification (4 of 14)

Steps to assist with completing the Employment Information section



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)

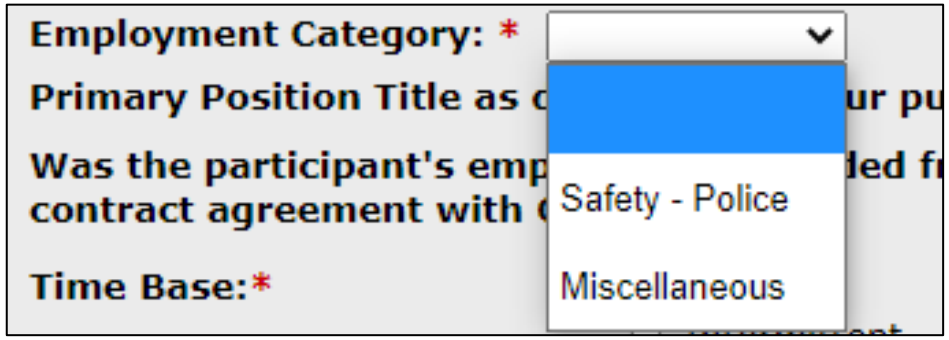
Step 7: Enter contact phone number

Step 8: Enter or confirm employment dates

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



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?

- 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 and 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:*

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

Appointment Tenure:*

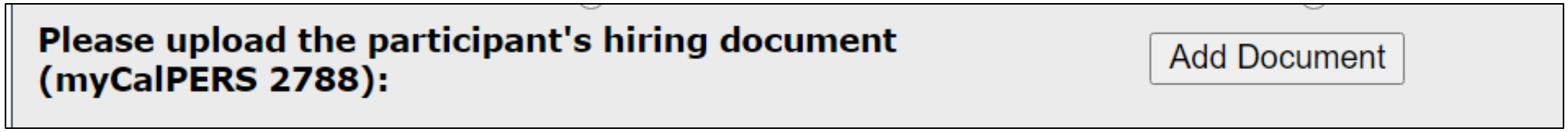
- Permanent
- Indeterminate
- Seasonal
- Temporary

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

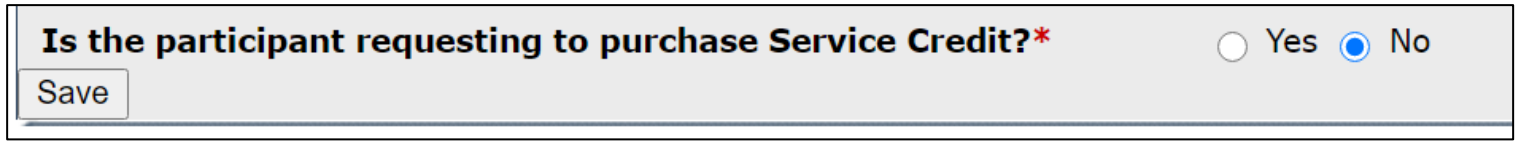
Step 14: Select **Add Document**, if necessary, to upload additional information related to the appointment's time base and tenure
Note: This step is optional



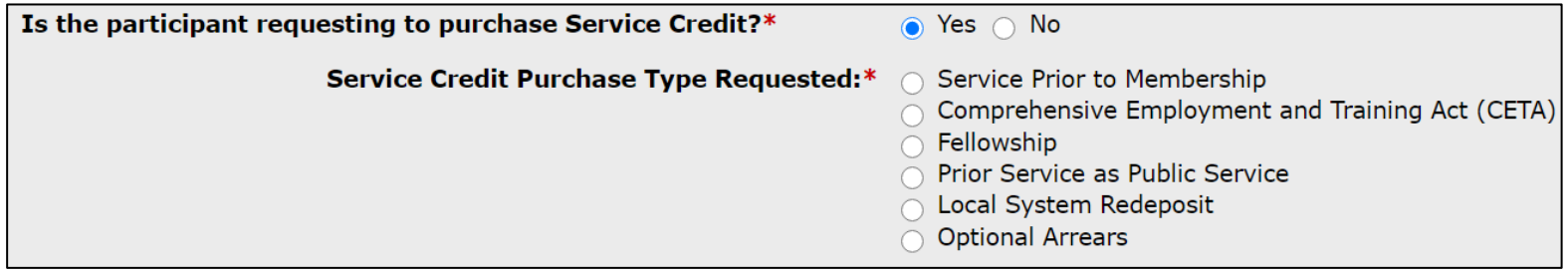
Employment Certification (11 of 14)

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

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



- Yes: Answer questions related to the service credit purchase request



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

- 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? *	○ 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

Employment Certification (14 of 14)

Step 20: Select **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

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:* Display

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 Special Compensation

Contributions

Taxed Member Paid Contributions: $ 0.00 Tax Deferred Member Paid Contributions: $ 0.00

Tax Deferred Employer Paid Member Contributions: $ 0.00

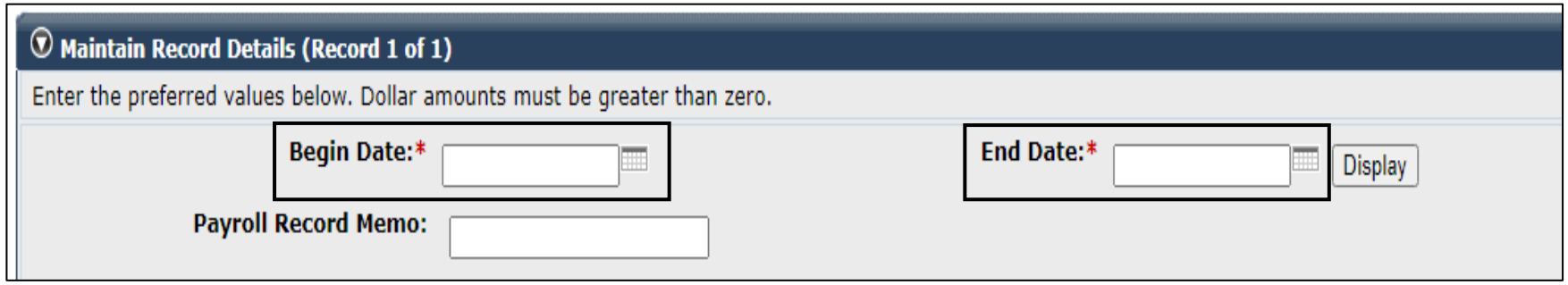
Return

Save & Continue | Save & Return | Remove Record | Cancel Report

Add Service Period Detail (3 of 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



Add Service Period Detail (4 of 13)

Step 3: Select from the **Member Category and CBU** drop-down menus, if available

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

Step 4: Enter **Position Title**

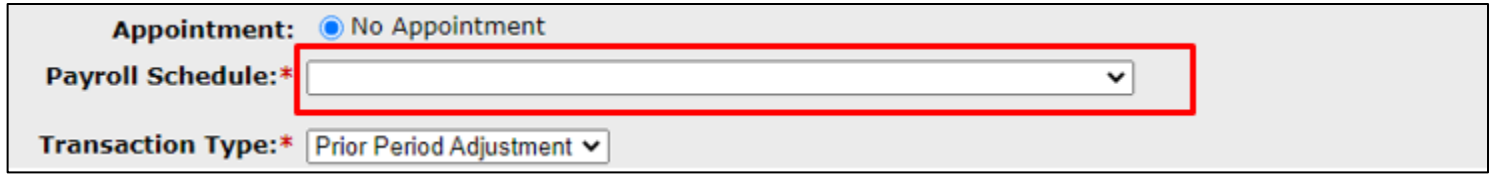
- The position title must match the title entered in the Employment Information section

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

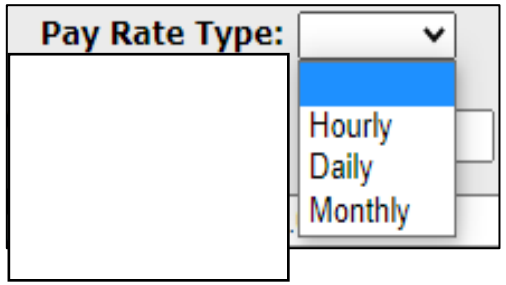
If reporting payroll detail for an existing appointment in myCalPERS, select the applicable appointment radio button

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



Add Service Period Detail (6 of 13)

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



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

Add Service Period Detail (8 of 13)

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

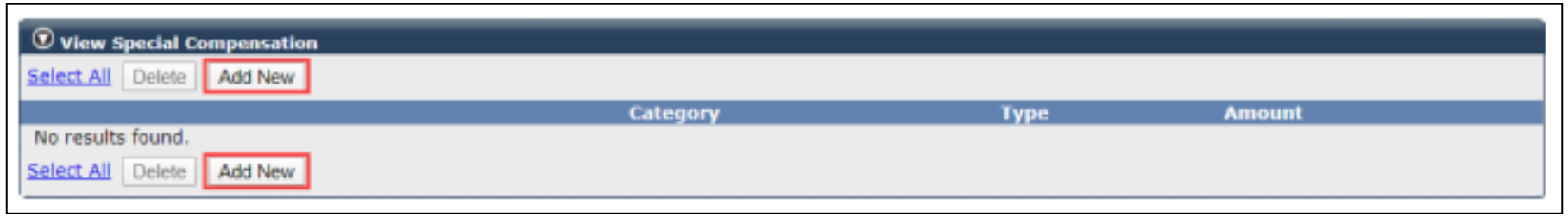
- Only report the hours for the period reported in this record.
- Enter overtime hours in the Overtime Hours Worked field. Do not provide overtime hours in the Total Hours Worked field.

Step 10: Is there special compensation to be reported?

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

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

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**

Add Service Period Detail (12 of 13)

Step 14: Select **Save**

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

Add Service Period Detail (13 of 13)

Step 16: Do you have additional periods to report?

- No: Select **Save & Return**

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

- This section is complete

File Upload Option

File Upload

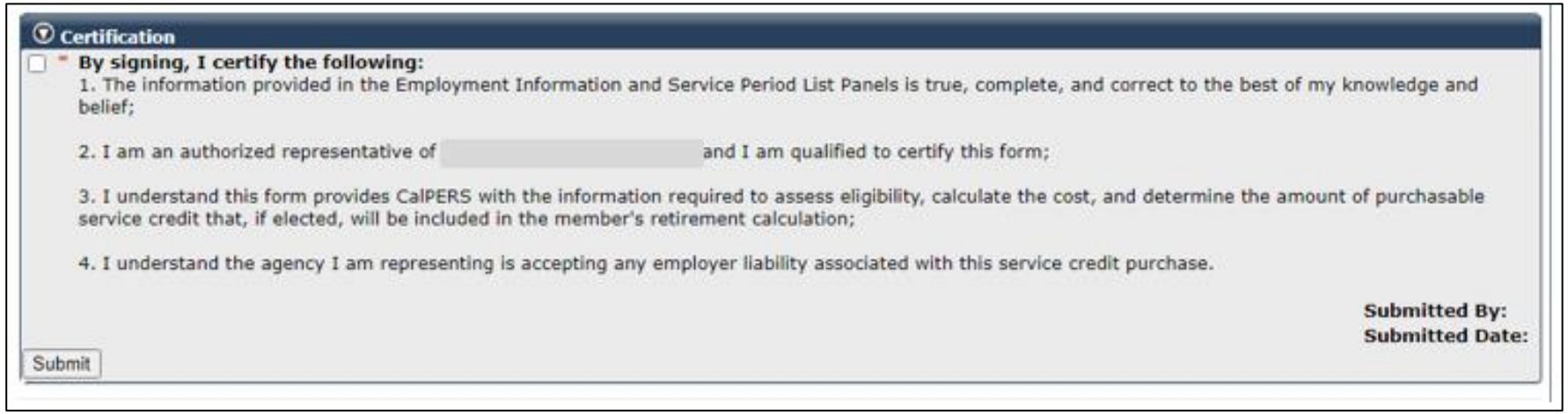
You can upload a CalPERS Review Report CSV data file in myCalPERS to report Service Periods for the employment certification process.

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.

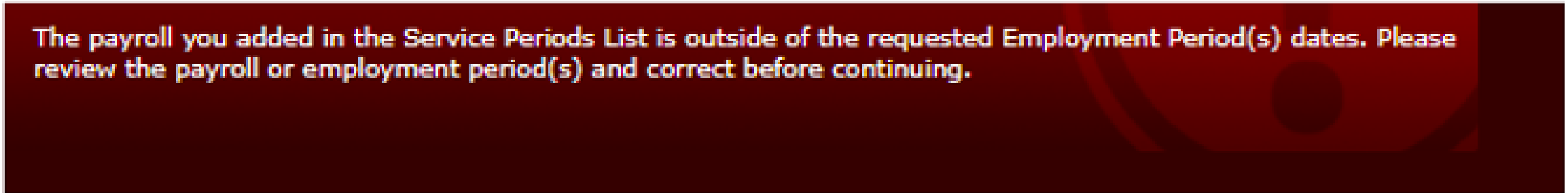
Submitted By:
Submitted Date:

Submit

Error Messages

Error Messages (1 of 3)

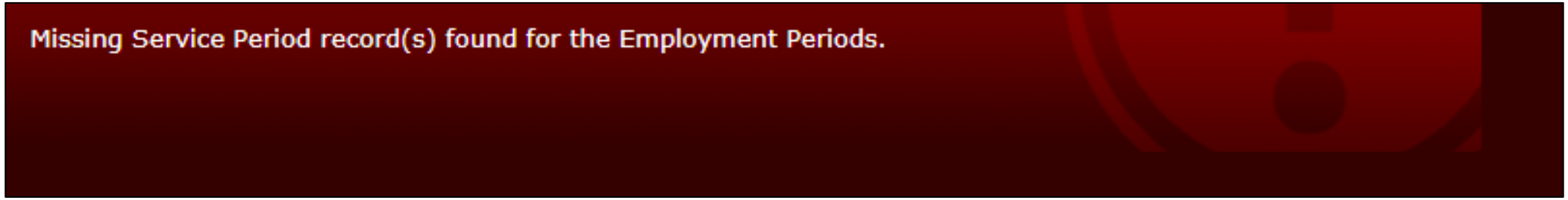
Payroll Outside Employment Error Message: The error message below will display if there are any service periods where the service period end date is after the employment period end date or where the service period begin date is before the employment period begin date.



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

Error Messages (2 of 3)

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



Error Messages (3 of 3)

Common missing items and/or require correction before submission:

- 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

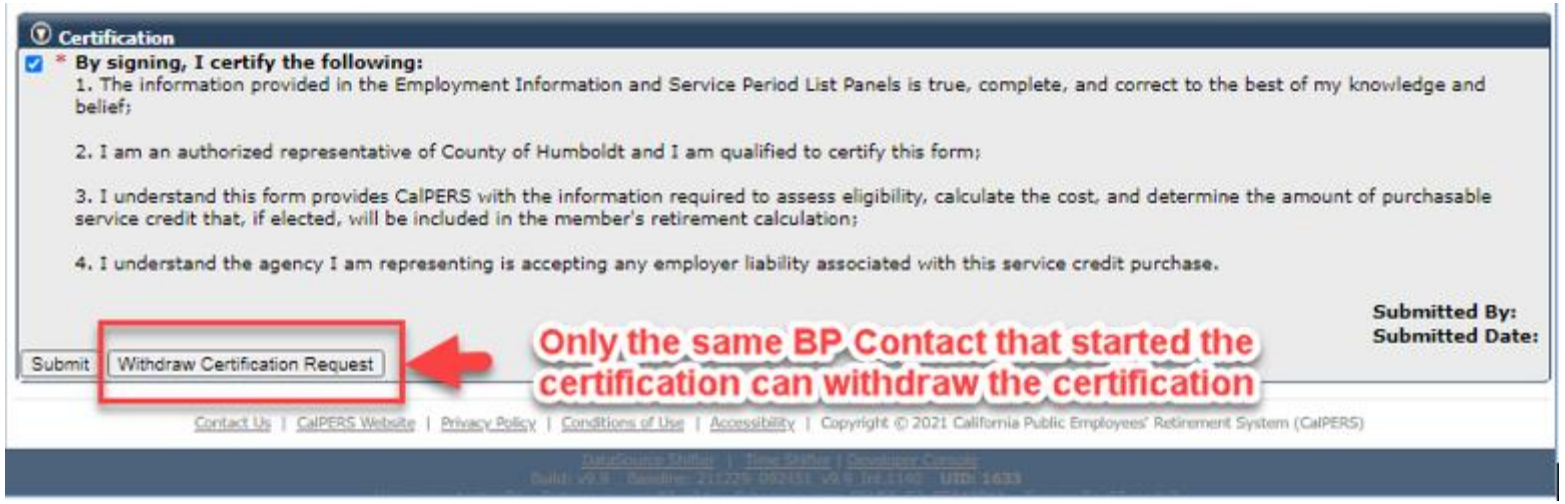
Completed

- Certification process is complete

Rejecting or Withdrawing a Request

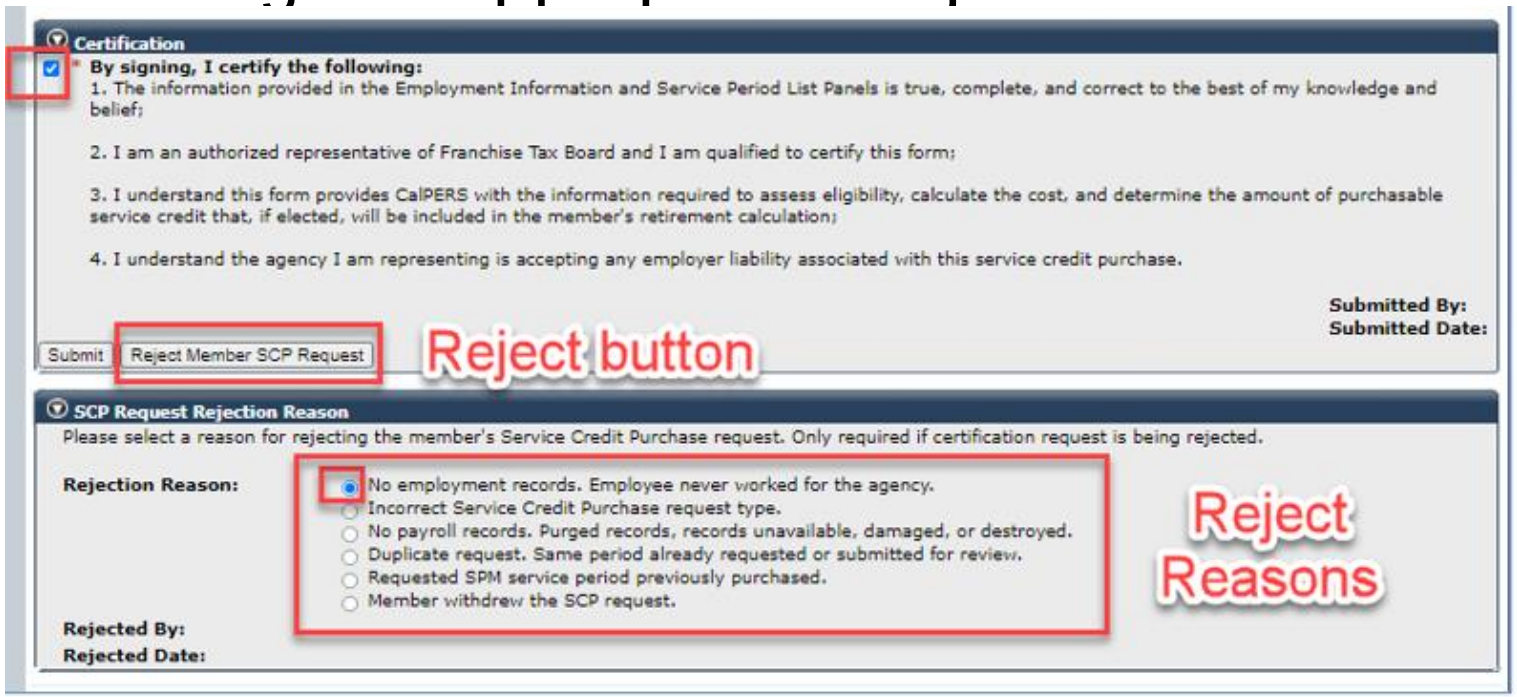
Rejecting or Withdrawing a Request (1 of 2)

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



Rejecting or Withdrawing a Request (2 of 2)

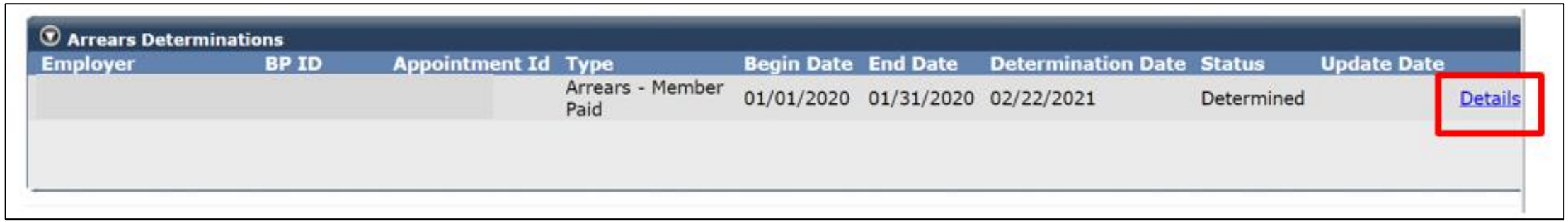
Employers can reject a certification request that was initiated by the employee by selecting the “Reject Member SCP Request” button and selecting the appropriate Rejection Reason.



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

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

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

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 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

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

myCalPERS Employment Certification Functionality Student Guide

myCalPERS System Access Administration

myCalPERS System Privileges for Business Partner Roles

Questions