

myCalPERS Social Security and Medicare Agreement

Student Guide

March 30, 2020



Introduction

This student guide is a resource to assist you with your Section 218 Agreement and Social Security Administration (SSA) Annual Information Request.

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 System Training instructor-led class, new users should review the [Introduction to myCalPERS for Business Partners](#) guide and take a **Business Rules training class**. The Business Rules training (instructor-led or online) class covers the simplified explanation of laws defined by the California Public Employees' Retirement Law.

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Unit 1: State Social Security Administrator

Authorized by California Government Code 22200, the California Public Employees' Retirement System (CalPERS) is the official State Social Security Administrator (SSSA) for the State of California's Section 218 Agreement. A Section 218 Agreement is the agreement that provides Social Security and/or Medicare coverage to employees in government positions.

The SSSA office assists public agencies and schools with:

- Securing Section 218 coverage for their employees
- Resolving issues related to Social Security and Medicare tax withholding
- Support with the Social Security Administration and the Internal Revenue Service to address coverage-related issues and questions
- Requests for education and training to employers and employees

For Non-CalPERS Business Partners

The SSSA office is committed to providing assistance and support to all state and public agencies in California as required by federal and state law.

myCalPERS is available to agencies that do not participate in the CalPERS retirement and health program. As a non-CalPERS agency, myCalPERS will allow you to view or request changes to a Section 218 Agreement and complete your Annual Information Request (AIR) electronically.

Contact the SSSA office for more information about assistance and services provided to California's public agencies and state departments.

Contact Information

The SSSA office can be reached by:

- [Email](mailto:sssa@calpers.ca.gov): sssa@calpers.ca.gov
- Direct Phone: (916) 795-0810
- Mail: CalPERS
State Social Security Administrator
P.O. Box 720720
Sacramento, CA 94229

Unit 2: Access myCalPERS

Learn how to obtain myCalPERS access and log into the system.

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Scenario 1: Obtain Access to myCalPERS

New Agency-level Access

If your agency does not currently have myCalPERS system access, a System Access Administrator (SAA) will need to be assigned.

Contact the SSSA team to request access and assign an SAA:

- **Email:** sssa@calpers.ca.gov
 - Include the requested SAA's contact information (i.e., name, title, phone number, email address)
- Direct Phone: (916) 795-0810

System Access Administrators (SAAs)

Your agency SAA is responsible for granting and maintaining user's access for your agency. Visit the [System Access Administrators](#) page on the CalPERS website for more information.

Pathway: [CalPERS website](#) > Employers > myCalPERS Technical Requirements > System Access Administrators

New User-level Access

If you handle Social Security and Medicare related business for your agency, your SAA will need to grant you the following access roles:

- System Access Administrator (SAA)
- Business Partner Social Security

Scenario 2: Log into myCalPERS

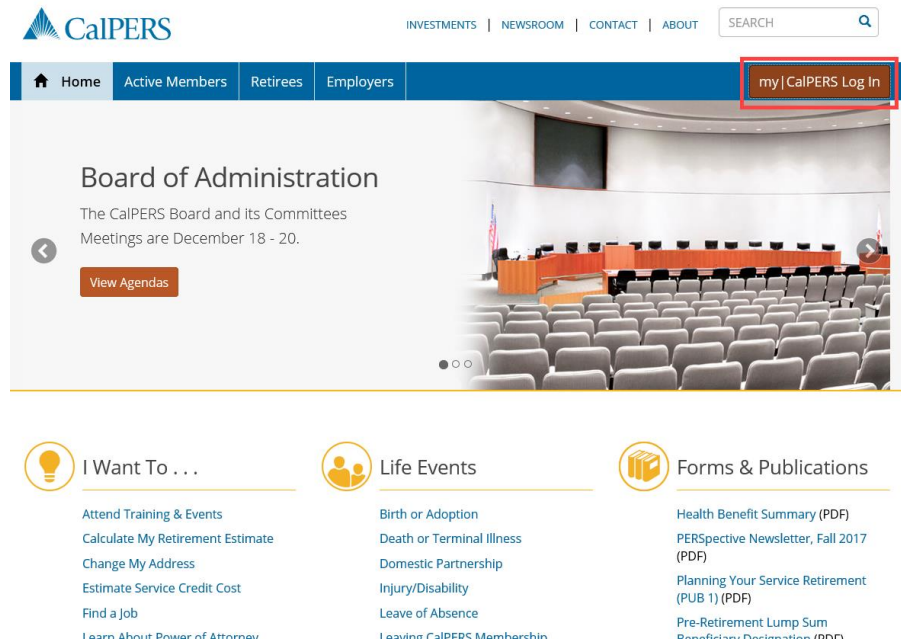
You have completed your registration through myCalPERS and are ready to log in to myCalPERS for your business needs.

Note: For additional assistance with logging in contact CalPERS at **888 CalPERS** (or **888-225-7377**) or TTY (877) 249-7442.

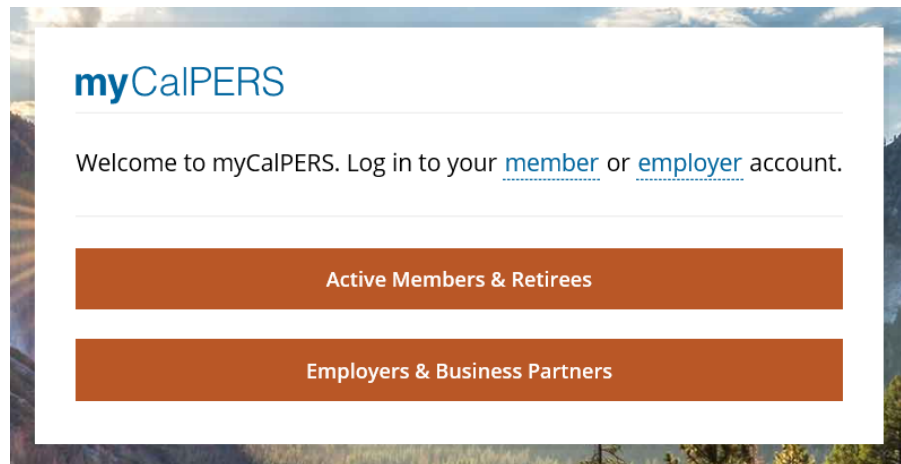
Step Actions

Step 1 Visit the [CalPERS website](http://www.calpers.ca.gov) at www.calpers.ca.gov.

Step 2 Select **myCalPERS Log In**.

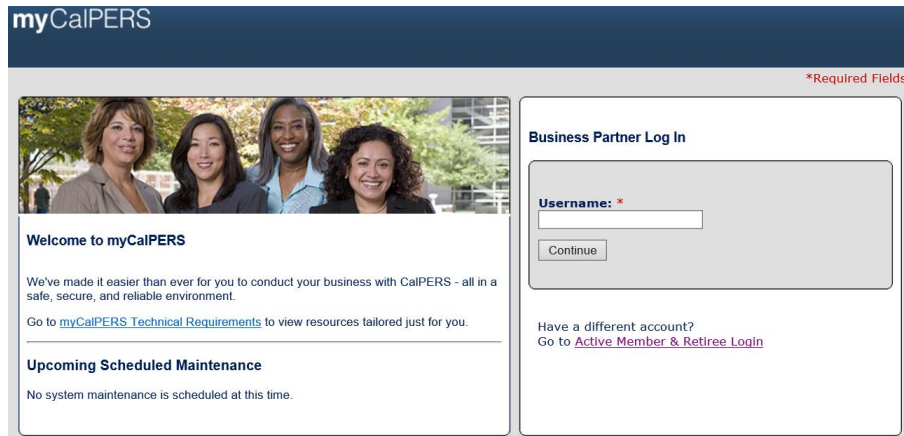


Step 3 Select **Employers & Business Partners**.



Step 4 Select **Continue**.

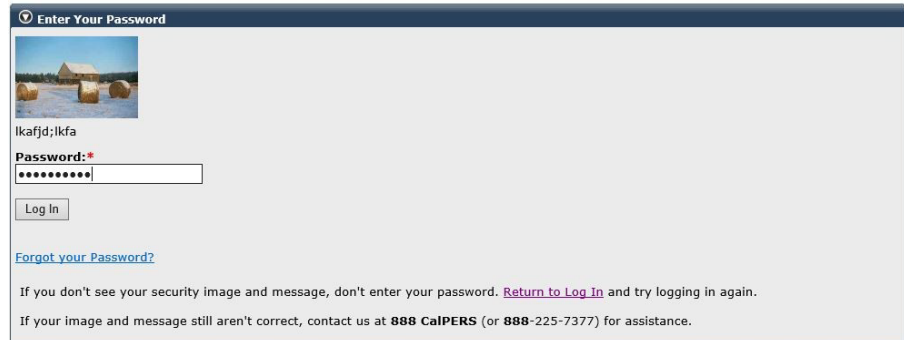
Step 5 Enter your username.



The screenshot shows the myCalPERS website interface. At the top left is the myCalPERS logo. On the right, there is a red asterisk icon with the text "*Required Fields". Below the logo is a photograph of four diverse women smiling. To the right of the photo is a "Business Partner Log In" section with a "Username:" label, a text input field, and a "Continue" button. Below the photo, there is a "Welcome to myCalPERS" heading, a paragraph of text, a link to "myCalPERS Technical Requirements", and an "Upcoming Scheduled Maintenance" section stating that no system maintenance is scheduled at this time. At the bottom right, there is a link for "Active Member & Retiree Login".

Step 6 Select **Continue**.

Step 7 Enter your password.



The screenshot shows the "Enter Your Password" page. At the top left is a small image of a barn and hay bales. Below the image is a security message "lkafjd;lkfa". The "Password:" label is followed by a text input field filled with asterisks and a "Log In" button. Below the input field is a link for "Forgot your Password?". At the bottom, there are two lines of text: "If you don't see your security image and message, don't enter your password. Return to Log In and try logging in again." and "If your image and message still aren't correct, contact us at 888 CalPERS (or 888-225-7377) for assistance."

Step 8 Select **Log In**.

You have completed this scenario.

Unit 3: Social Security/Medicare Agreement

Learn more about your Social Security and/or Medicare Agreement and how to view and upload documents in myCalPERS.

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Scenario 1: Understand Section 218 Agreement

A Section 218 Agreement allows Social Security and/or Medicare coverage access to employees in government positions. Your agency is required to have this agreement to provide Social Security and/or Medicare coverage in addition to a retirement system.

Terminations

As of April 20, 1983, Social Security coverage extended by a Section 218 Agreement may not be terminated. Election to participate is irrevocable.

Modifications

An agency may request to modify an existing Section 218 Agreement to cover:

- New positions
- Previously excluded positions
- Retirement system ineligible
- Employees changing their vote in favor of coverage
- New positions joining a retirement system

Contact Information

For more information or to initiate a Section 218 Agreement, contact the SSSA office by:

- [Email](mailto:sssa@calpers.ca.gov): sssa@calpers.ca.gov
- Direct Phone: (916) 795-0810
- Mail: CalPERS

State Social Security Administrator
P.O. Box 720720
Sacramento, CA 94229

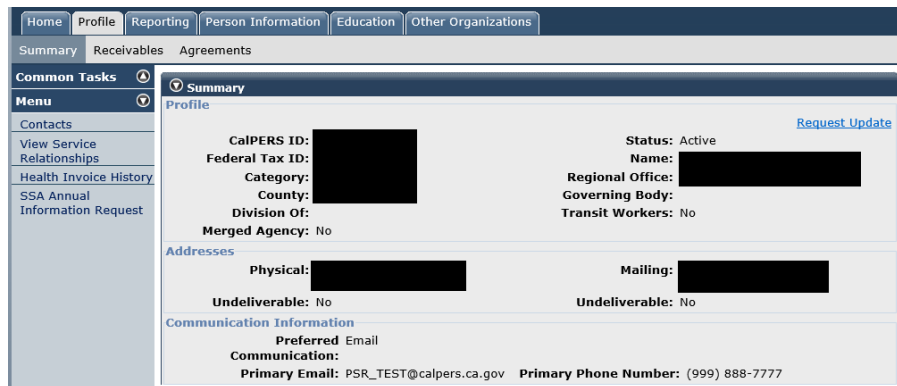
Scenario 2: View your Social Security/Medicare Agreement

Scenario

You need to view your agency's Section 218 Agreement in myCalPERS.

Step Actions

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



Home Profile Reporting Person Information Education Other Organizations

Summary Receivables Agreements

Common Tasks

Menu

Contacts

View Service Relationships

Health Invoice History

SSA Annual Information Request

Summary

Profile

Request Update

CalPERS ID: [REDACTED] Status: Active

Federal Tax ID: [REDACTED] Name: [REDACTED]

Category: [REDACTED] Regional Office: [REDACTED]

County: [REDACTED] Governing Body: [REDACTED]

Division Of: [REDACTED] Transit Workers: No

Merged Agency: No

Addresses

Physical: [REDACTED] Mailing: [REDACTED]

Undeliverable: No Undeliverable: No

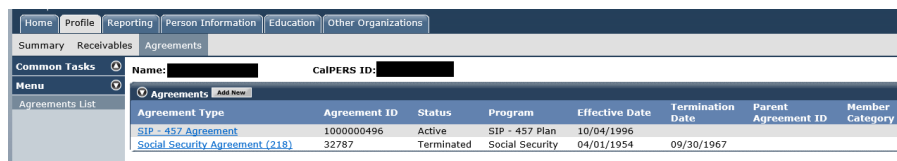
Communication Information

Preferred Email

Communication: [REDACTED]

Primary Email: PSR_TEST@calpers.ca.gov Primary Phone Number: (999) 888-7777

Step 2 Select the **Agreements** local navigation link.



Home Profile Reporting Person Information Education Other Organizations

Summary Receivables Agreements

Common Tasks

Menu

Agreements List

Name: [REDACTED] CalPERS ID: [REDACTED]

Agreements [Add New](#)

Agreement Type	Agreement ID	Status	Program	Effective Date	Termination Date	Parent Agreement ID	Member Category
SIP - 457 Agreement	1000000496	Active	SIP - 457 Plan	10/04/1996			
Social Security Agreement (218)	32787	Terminated	Social Security	04/01/1954	09/30/1967		

Step 3 Select the link for the **Agreement Type** you wish to review.

Step 4 Review the *Agreement Summary* section.



Home Profile Reporting Person Information Education Other Organizations

Summary Receivables Agreements

Common Tasks

Menu

Agreements List

Name: [REDACTED] CalPERS ID: [REDACTED]

Agreement Summary

Agreement: Social Security Agreement (218)

Status: Active

Retirement Plan: Non CalPERS

Social Security Selection: Supplemental

Agreement Effective Date: 08/08/1985

Election Date: 04/08/1985

SSID Number: 69-0933969

Agreement Type: Absolute

Retirement Plan Name: NONE

Member Category: Miscellaneous

Election Type: Majority

Statutes: 69-0933969

Exclusions

Exclusion Type

No results found.

Start Date

End Date

Documents

Document Name	Generation Date	Response Document	Response Date	Upload/Replace
SSA - 218 Agreement - Misc	01/22/2018			Upload/Replace
SSA - 218 Modification - Misc	01/22/2018			Upload/Replace

Step 5 Within the *Exclusions* section, review the agreement exclusions (if any).

You have completed this scenario.

Scenario 3: Upload Agreement Documents

You received a packet of agreement documents from the SSSA office and need to upload them electronically in myCalPERS for review.

Note: Agencies are required to send original documents with wet signature after the SSSA has approved your document.

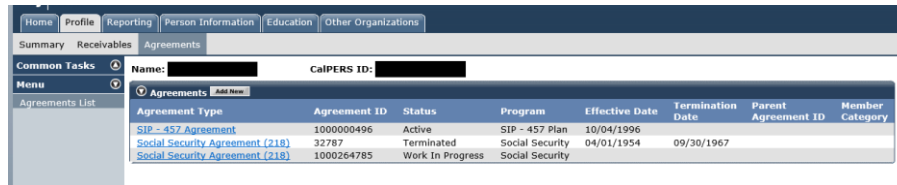
System Logic

- You will be able to view the packet submission and the date it was uploaded in the system
- You may edit the document after submission by repeating the steps below

Step Actions

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

Step 2 Select the **Agreements** local navigation link.



The screenshot shows the 'Agreements' page in the myCalPERS system. The navigation tabs include Home, Profile, Reporting, Person Information, Education, and Other Organizations. The main content area displays a table of agreement records with the following data:

Agreement Type	Agreement ID	Status	Program	Effective Date	Termination Date	Parent Agreement ID	Member Category
SIP--457 Agreement	1000000496	Active	SIP - 457 Plan	10/04/1996			
Social Security Agreement (218)	32787	Terminated	Social Security	04/01/1954	09/30/1967		
Social Security Agreement (218)	1000264785	Work In Progress	Social Security				

Step 3 Select the link for the **Agreement Type** with the **Work in Progress** status.

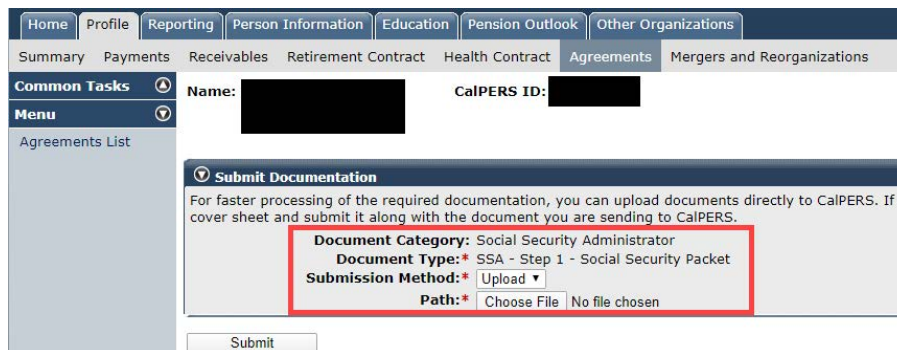
Step 4 Select **Upload/Replace**.



The screenshot shows the 'Agreement Summary' page for a 'Social Security Agreement (218)' with a status of 'Work In Progress'. The page includes sections for 'Exclusions' (No results found) and 'Documents'. The 'Documents' section contains a table with the following data:

Document Name	Generation Date	Response Document	Response Date	Upload/Replace
SSA - Step 1 - Social Security Packet				Upload/Replace

Step 5 Select **Upload** from the Submission Method drop-down list.



The screenshot shows the 'Submit Documentation' page in the myCalPERS system. The page includes a 'Submit Documentation' section with the following information:

For faster processing of the required documentation, you can upload documents directly to CalPERS. If a cover sheet and submit it along with the document you are sending to CalPERS.

Document Category: Social Security Administrator
Document Type: SSA - Step 1 - Social Security Packet
Submission Method: Upload
Path: Choose File No file chosen

Step 6 Select **Choose File** to upload the document.

Step 7 Upload the document from your computer.

Step 8 Select **Submit**.

Step 9 Confirm your document was uploaded.

The screenshot shows a web application interface with a navigation menu on the left and a main content area. The navigation menu includes 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. The main content area has tabs for 'Summary', 'Receivables', and 'Agreements'. The 'Agreements' tab is active, showing a summary for a 'Social Security Agreement (218)' with a status of 'Work In Progress'. Below this, there is a section for 'Exclusions' with the text 'No results found.' and a table for 'Documents'. The 'Documents' table has columns for 'Document Name', 'Generation Date', 'Response Document', 'Response Date', and 'Upload/Replace Response Document'. A red box highlights the 'Response Document' and 'Response Date' columns for the first row.

Document Name	Generation Date	Response Document	Response Date	Upload/Replace Response Document
SSA - Step 1 - Social Security Packet		SSA - Step 1 - Social Security Packet	04/03/2018	Upload/Replace

You have completed this scenario.

Unit 4: Social Security Administration Annual Information Request

As of July 1, 2018, agencies are required to file their Annual Information Request (AIR) form online.

The California State Social Security Administrators (SSSA) office requires all public agencies in the State of California to complete an AIR. The process surveys Social Security and Medicare tax reporting practices for the agency.

What to Know Before You Begin

The following information will be requested on the AIR:

1. Federal Tax Identification (ID) number
2. Supporting documentation for organization changes (name change, merger, dissolution)
3. Contracted public retirement system
4. Social Security and Medicare withholding practices
5. Information for agency subcomponents (departments) using different tax ID number

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Scenario 1: Annual Information Request (AIR) Notifications

CalPERS Business Partner

You will receive notification by mail or email to file the AIR electronically based on your notification preferences in myCalPERS.

Note: The AIR notifications are sent monthly in alphabetical groups of 600, beginning July 1 of each fiscal year. You must wait until you receive the notification to complete the AIR.

School Employer

The County Office of Education (COE) will receive AIR notifications each March. COE's will have 60 days from the date of notification to complete the AIR in myCalPERS.

Non-CalPERS Agency

Agencies not currently covered by CalPERS health and retirement programs will receive the initial notification by mail. Once you set up a profile in myCalPERS, you will receive annual notification by mail or email based on your selected notification preference.

For steps on how to set up a new account in myCalPERS, review [Unit 2; Scenario 1: Obtain Access to myCalPERS](#).

Scenario 2: Complete an AIR

You need to file the AIR form electronically in myCalPERS.

Step Actions

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

Step 2 Select the **SSA Annual Information Request** left-side link.

The screenshot shows the myCalPERS Profile page. The top navigation bar includes Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, there are tabs for Summary, Receivables, and Agreements. The main content area is titled 'Summary' and 'Profile'. It displays fields for CalPERS ID, Federal Tax ID, Category, County, and Division Of. It also shows Status: Active, Name, Regional Office, Governing Body, and Merged Agency: No. There are sections for Addresses (Physical and Mailing) and Communication Information (Preferred Communication, Primary Email, and Primary Phone Number). Below these are sections for Contacts, Business Relationships, and Contracts/Agreements. The 'SSA Annual Information Request' link is highlighted in the left sidebar.

Step 3 Select **Request Date** to view the *Annual Information Request* section.

The screenshot shows the myCalPERS Profile page with the 'SSA 218 - Annual Information Request' section expanded. It displays fields for Name and CalPERS ID. Below this, there is a table with columns for Request Date and Status. The 'Request Date' field is highlighted, showing '01/25/2018' and 'Not Submitted'. The footer contains copyright information for 2018 CalPERS.

Step 4 Enter your Federal Tax ID.

The screenshot shows the 'Annual Information Request' form. It includes a title bar with a dropdown arrow and the text 'Annual Information Request'. Below the title bar, there is a heading 'For instructions, please use the Social Security & Medicare Agr' and a text input field labeled 'Federal Tax ID:'.

Note: If your agency has an Employer Identification Number (EIN) to conduct business with the IRS and you have misplaced it, visit the [IRS website](#) for steps on how to locate your missing EIN number.

Step 5 Has your agency had a name change in the past year (or prior to the last year)?
Yes, select the **Yes** radio button. Continue to **Step 6**.

No, select the **No** radio button and skip to **Step 13**.



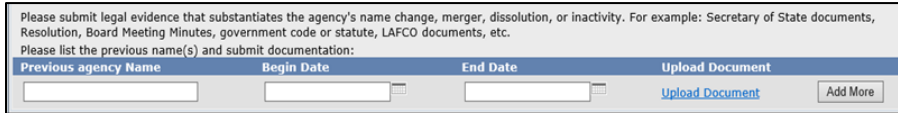
Has the agency had any name changes in the past year?
 Yes No

Step 6 Has your agency reported the change to SSSA?
No, select the **No** radio button. Continue to **Step 7** to upload legal evidence for the name change.

Yes, select the **Yes** radio button. Skip to **Step 13**.

Step 7 Complete the **Previous Agency Name**, **Begin Date** and **End Date** fields, as applicable.

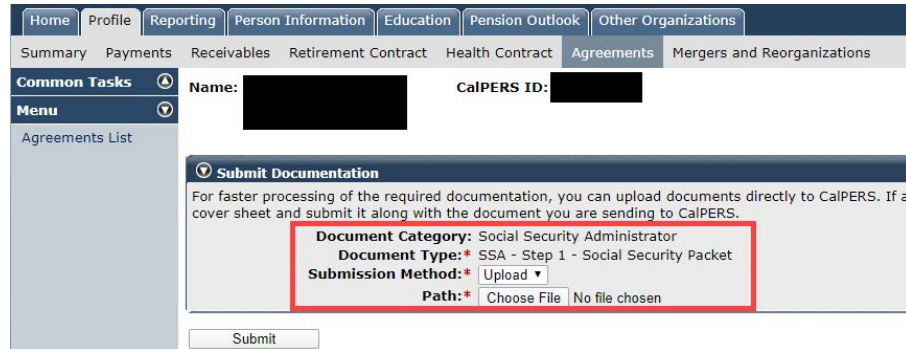
Step 8 Select **Upload Document**.



Please submit legal evidence that substantiates the agency's name change, merger, dissolution, or inactivity. For example: Secretary of State documents, Resolution, Board Meeting Minutes, government code or statute, LAFCO documents, etc.
Please list the previous name(s) and submit documentation:

Previous agency Name	Begin Date	End Date	Upload Document
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Upload Document"/> <input type="button" value="Add More"/>

Step 9 Select **Upload** from the Submission Method drop-down list.



Home Profile Reporting Person Information Education Pension Outlook Other Organizations
Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations
Common Tasks
Menu
Agreements List

Name: [Redacted] CalPERS ID: [Redacted]

Submit Documentation
For faster processing of the required documentation, you can upload documents directly to CalPERS. If a cover sheet and submit it along with the document you are sending to CalPERS.

Document Category: Social Security Administrator
Document Type: * SSA - Step 1 - Social Security Packet
Submission Method: * Upload
Path: * Choose File | No file chosen

Step 10 Select **Choose File** in the Path field to locate the document for upload.

Step 11 Select **Submit**.

Step 12 Do you have additional name changes to report?

No, continue to **Step 13**.

Yes, select **Add More** and return to complete **Steps 7-11**.

Step 13 Does your agency offer or contract with a retirement system?

Yes, select the **Yes** radio button. Continue to **Step 14**.

No, select the **No** radio button. Skip to **Step 17**.



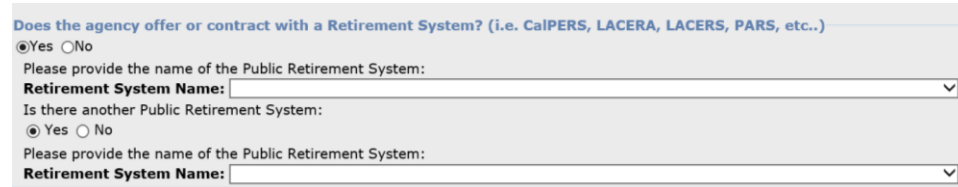
Does the agency offer or contract with a Retirement System?
 Yes No

Step 14 Select the retirement system that covers positions under your agency from the drop-down menu.

Step 15 Does your agency offer another retirement system?

Yes, select the **Yes** radio button. Continue to **Step 16**.

No, select the **No** radio button. Skip to **Step 17**.



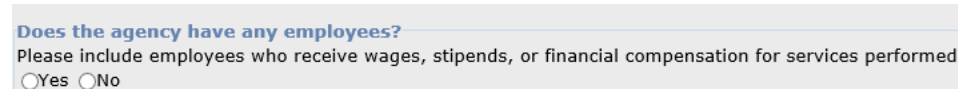
Does the agency offer or contract with a Retirement System? (i.e. CalPERS, LACERA, LACERS, PARS, etc.)
 Yes No
Please provide the name of the Public Retirement System:
Retirement System Name:
Is there another Public Retirement System:
 Yes No
Please provide the name of the Public Retirement System:
Retirement System Name:

Step 16 Select the other retirement system that covers positions under your agency from the drop-down menu.

Step 17 Does your agency have any employees?

Yes, select the **Yes** radio button. Continue to **Step 18**.

No, select the **No** radio button. Skip to **Step 19**.

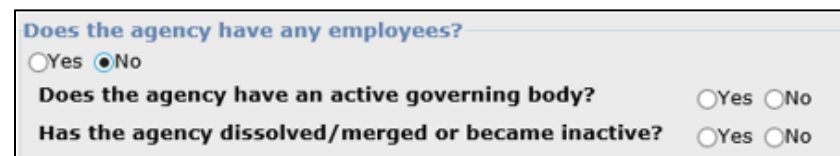


Does the agency have any employees?
Please include employees who receive wages, stipends, or financial compensation for services performed.
 Yes No

Step 18 Provide the number of employees in the agency.
If you selected “Yes” on Step 13, skip to **Step 22**.
If you selected “No” on Step 13, skip to **Step 27**.

Step 19 Does your agency have an active governing body?

Select the appropriate **Yes** or **No** radio button.



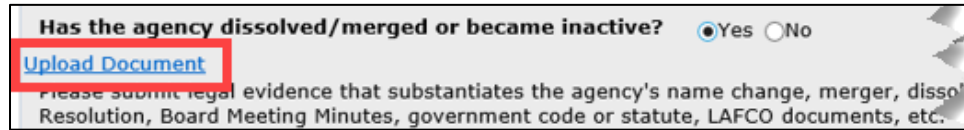
Does the agency have any employees?
 Yes No
Does the agency have an active governing body? Yes No
Has the agency dissolved/merged or became inactive? Yes No

Step 20 Has your agency been dissolved, merged, or become inactive?

Yes, select the **Yes** radio button. Continue to **Step 21**.

No, select the **No** radio button. Skip to **Step 33**.

Step 21 Select **Upload Document** to provide the supporting documentation.
Skip to **Step 33**.



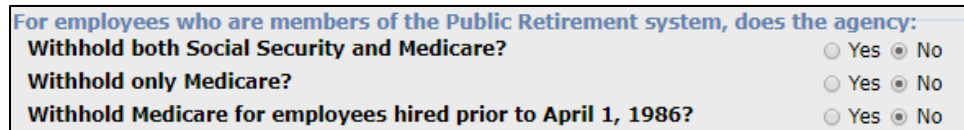
Complete Steps 22-27 for employees who are members of the public retirement system:

Step 22 Does your agency withhold both Social Security and Medicare?
No, select the **No** radio button. Continue to **Step 23**.
Yes, select the **Yes** radio button. Skip to **Step 24**.

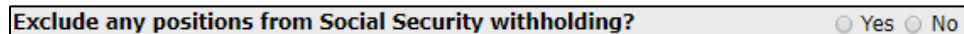


Note: Respond to questions based on your agency's current withholding practices for each group.

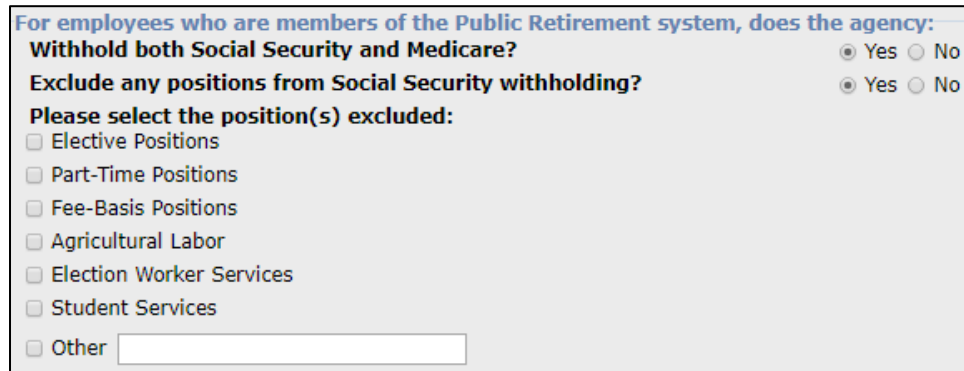
Step 23 Does your agency withhold only Medicare?
Select the **Yes** or **No** radio button. Skip to **Step 26**.



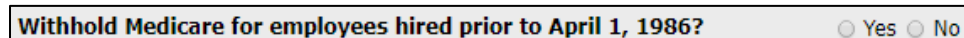
Step 24 Does your agency exclude any positions from Social Security withholding?
Yes, select the **Yes** radio button. Continue to **Step 25**.
Note: Refer to [Positions Excluded from Social Security and Medicare Tax](#) on page 21.
No, select the **No** radio button. Skip to **Step 26**.



Step 25 Select the checkboxes for the positions excluded.



Step 26 Does your agency withhold Medicare for employees hired prior to April 1, 1986?
Select the appropriate **Yes** or **No** radio button.



Step 27 Does your agency have employees who are NOT members of the agency's public retirement system?

Yes, select the **Yes** radio button. Continue to **Step 28**.

No, select the **No** radio button. Skip to **Step 33**.

Does the agency have employees who are not members of the agency's public retirement system?
 Yes No

Complete Steps 28-32 for employees who are not members of the retirement system:

Step 28 Does your agency withhold both Social Security and Medicare?

No, select the **No** radio button. Continue to **Step 29**.

Yes, select the **Yes** radio button. Skip to **Step 30**.

Does the agency withhold both Social Security and Medicare for employees who are not members of the retirement system? Yes No

Note: Respond to questions based on your agency's current withholding practices for each group.

Step 29 Does your agency withhold only Medicare?

Select the **Yes** or **No** radio button. Skip to **Step 32**.

Step 30 Does your agency exclude any positions from Social Security withholding?

Yes, select the **Yes** radio button. Continue to **Step 31**.

Note: Refer to [Positions Excluded from Social Security and Medicare Tax](#) on page 21.

No, select the **No** radio button. Skip to **Step 32**.

Exclude any positions from Social Security withholding? Yes No

Step 31 Select the checkboxes for the positions excluded.

Exclude any positions from Social Security withholding? Yes No
Please select the position(s) excluded:
 Elective Positions
 Part-Time Positions
 Fee-Basis Positions
 Agricultural Labor
 Election Worker Services
 Student Services
 Other

Step 32 Does your agency withhold Medicare for employees hired prior to April 1, 1986?

Select the appropriate **Yes** or **No** radio button.

Step 33 Within your agency, has a new subdivision, component, or division been created with its own Federal Tax ID Number?

Select the appropriate **Yes** or **No** radio button.

Within the agency, has a new subdivision, component or division been created with its own Federal Tax ID Number?
 Yes No

Step 34

Does your agency offer a FICA replacement plan to its employees?
Select the appropriate **Yes** or **No** radio button.

Does the agency offer a FICA replacement plan to its employees?
 Yes No

Step 35

Select **Submit** at the bottom of the screen.

Within the agency, has a new subdivision, component or division been created with its own Federal Tax ID Number?
 Yes No

Does the agency offer a FICA replacement plan to its employees?
 Yes No

Submit

You have completed this scenario.

Positions Excluded from Social Security and Medicare Tax

The Social Security and Medicare tax withholding questions capture information for employees (members and non-members) with a public retirement system. The table below provides definitions for excluded position types:

Exclusion Type	Definition
Elective Positions	<p>Positions filled by an election. The method of selection must constitute an election under state law.</p> <p>For example: mayor, member of legislature, county commissioner, county or city attorney, and board members.</p>
Part-Time Positions	<p>The number of work hours normally required by the position in a week or pay period is less than the normal time requirements for the majority of positions in the employing entity.</p>
Fee-Basis Positions	<p>A fee-based public official who receives and retains remuneration directly from the public.</p> <p>For example: Justice of the peace and local registrar.</p>
Agricultural Labor Positions	<p>Agricultural services that would be excluded from Social Security and Medicare tax if performed by a private employment.</p>
Election Worker Positions	<p>Election workers can be excluded if paid less than the threshold amount mandated by law. For this amount, contact the SSSA.</p>
Student Services	<p>A student performing services in the employ of a school, college, or university where the student is enrolled and regularly attending class.</p>

Scenario 3: Complete an AIR for County Office of Education

You need to file the AIR for a County Office of Education (COE) electronically in myCalPERS.

Step Actions

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

Step 2 Select the **SSA Annual Information Request** left-side link.

The screenshot shows the myCalPERS Profile page. The left-hand menu has "SSA Annual Information Request" highlighted with a red box. The main content area shows the "Summary" section with fields for CalPERS ID, Federal Tax ID, Category, County, and Division Of. It also displays "Status: Active", "Name", "Regional Office", "Governing Body", and "Merged Agency: No". Below this are sections for "Addresses" (Physical and Mailing), "Communication Information" (Preferred Communication, Primary Email, Primary Phone Number), "Contacts" (with a table of Social Security Administrators), "Business Relationships" (with a "No results found" message), and "Contracts/Agreements" (with a table showing a Social Security Agreement).

Contact Type	Name	System Admin	Primary	Phone Number
Social Security Administrator		Y	N	
Social Security Administrator		Y	Y	

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Social Security Agreement (218)	30458	Active	08/08/1985	08/08/1985		

Step 3 Select **Request Date** to view the *Annual Information Request* section.

The screenshot shows the "SSA 218 - Annual Information Request" section. The "Request Date" field is highlighted in blue and contains the value "01/25/2018". The "Status" field is "Not Submitted".

Request Date	Status
01/25/2018	Not Submitted

Step 4 Enter your Federal Tax ID.

The screenshot shows the "Annual Information Request" form. The "Federal Tax ID:" label is followed by an empty input field.

Note: If you have an Employer Identification Number (EIN) to conduct business with the IRS and you have misplaced it, visit the [IRS website](#) for steps on how to locate your missing EIN number.

Step 5 Have you had any organizational changes to any of your districts?

Yes, select the **Yes** radio button. Continue to **Step 6**.

No, select the **No** radio button. Skip to **Step 16**.

Are there any organizational changes to School Districts within the County Office of Education?
 Yes No

Note: An organization change includes the a creation, dissolution, unification, unionization, annexation, or lapsation of any new school district(s).

Step 6 Are there school district(s) out of existence in the current fiscal year due to dissolution, unification, unionization, annexation, or lapsation?

Yes, select the **Yes** radio button. Continue to **Step 7**.

No, select the **No** radio button. Skip to **Step 11**.

Step 7 Select **Upload Document**.

Are there school district(s) out of existence in the current fiscal year due to dissolution, unification, unionization, annexation or lapsation?
 Yes No
Please upload documents substantiating change [Upload Document](#)

Step 8 Select **Upload** from the Submission Method drop-down list.

The screenshot shows the CalPERS web application interface. The top navigation bar includes tabs for Home, Profile, Reporting, Person Information, Education, Pension Outlook, and Other Organizations. Below this is a secondary navigation bar with tabs for Summary, Payments, Receivables, Retirement Contract, Health Contract, Agreements, and Mergers and Reorganizations. The main content area is titled 'Submit Documentation' and contains the following information:

- Name: [Redacted]
- CalPERS ID: [Redacted]
- Document Category: Social Security Administrator
- Document Type: * SSA - Step 1 - Social Security Packet
- Submission Method: * Upload (selected in a dropdown menu)
- Path: * Choose File No file chosen

A 'Submit' button is located at the bottom of the form.

Step 9 Select **Choose File** in the Path field to locate the document for upload.

Step 10 Select **Submit**.

Step 11 Are there new school district(s) in existence in the upcoming fiscal year?

Yes, select the **Yes** radio button. Continue to **Step 12**.

No, select the **No** radio button. Skip to **Step 16**.

Step 12 Select **Upload Document**.

Are there new school district(s) in existence in the upcoming fiscal year?
 Yes No
Please upload documents substantiating change [Upload Document](#)

Step 13

Select **Upload** from the Submission Method drop-down list.

The screenshot shows a web application interface with a navigation menu at the top including Home, Profile, Reporting, Person Information, Education, Pension Outlook, and Other Organizations. Below the navigation, there are tabs for Summary, Payments, Receivables, Retirement Contract, Health Contract, Agreements, and Mergers and Reorganizations. The main content area is titled 'Submit Documentation' and contains the following text: 'For faster processing of the required documentation, you can upload documents directly to CalPERS. If a cover sheet and submit it along with the document you are sending to CalPERS.' Below this text, there are four fields: 'Document Category: Social Security Administrator', 'Document Type: * SSA - Step 1 - Social Security Packet', 'Submission Method: * Upload' (with a dropdown arrow), and 'Path: * Choose File | No file chosen'. A 'Submit' button is located at the bottom of the form.

Step 14

Select **Browse...** in the Path field to locate the document for upload.

Step 15

Select **Submit**.

Step 16

Does your agency have any employees?

Yes, select the **Yes** radio button. Continue to **Step 17**.

No, select the **No** radio button. Skip to **Step 18**.

The screenshot shows a question: 'Does the agency have any employees?' with the instruction 'Please include employees who receive wages, stipends, or financial compensation for services performed.' Below the question are two radio buttons: 'Yes' and 'No'.

Step 17

Enter the number of employees in your agency.

The screenshot shows the same question as in Step 16, but with the 'Yes' radio button selected. Below the question is a text input field with the value '250' entered.

Step 18

Select **Submit** at the bottom of the screen.

The screenshot shows a form titled 'Annual Information Request' with the instruction 'For instructions, please use the Social Security & Medicare Agreement'. The form contains several sections: 'Federal Tax ID:' with an empty text input field; 'Are there any organizational changes to School Districts with...' with 'Yes' and 'No' radio buttons, where 'No' is selected; 'Please follow the instructions in the job aid located at http://www.c...'; and 'Does the agency have any employees?' with 'Yes' and 'No' radio buttons, where 'No' is selected. A 'Submit' button is located at the bottom of the form and is highlighted with a red box.

Confirm School Reorganization

Step 19 Select the **Mergers and Reorganizations** local navigation tab.

Step 20 Select the most current date under **Effective Date** in the *School District Reorganizations* section.

Home	Participant	Business Partner	Reporting	Admin	Workflow	my toolbox
Summary	Financials	Retirement Contract	Health Contract	Agreements	Mergers and Reorganizations	Reports
Common Tasks						
Menu						
Merger History						
Merger Descriptions						
No results found.						
School District Reorganizations						
Effective Date	Status	Addition(s)	Dissolution(s)	View More Actions»		
07/01/2019	Complete	0	0			
07/01/2018	Complete	0	0			

Step 21 Did your district have an organizational change (i.e., Addition or dissolution of a school district)?

Yes, contact the [SSSA](#) for further assistance. Do not proceed further.

No, **you have completed this scenario.**
