

myCalPERS Retirement Enrollment

Student Guide

September 23, 2023



Introduction

This student guide can assist you when adding, modifying, and reconciling retirement appointments. Employers must report an employee’s initial retirement enrollment and ongoing appointment information to CalPERS in a timely manner. An appointment is a continuous term of employment with a single employer, from the point of membership eligibility until permanent separation. Any changes to an employee’s appointment status such as permanent separation, leave of absence, or change in their appointment are reportable events, which must be reflected in their appointment history with your agency. However, if an existing employee is a retired annuitant with your agency and is reinstating from retirement, then you will need to create a separate membership appointment for this change.

Disclaimer

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

System Access

If myCalPERS does not allow you to do these scenarios, contact your agency’s system access administrator to update your myCalPERS access.

Training Opportunities

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

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Unit 1: Person Search Tool

The Person Search tool allows you to verify membership status and confirm appointment information.

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Scenario 1: Verify CalPERS Membership

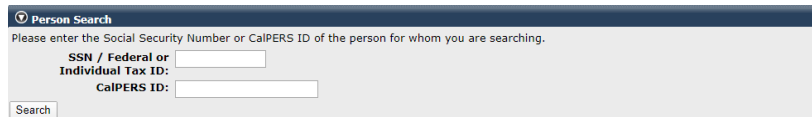
You hired a new employee and will verify their membership status (if they have member contributions on file with CalPERS, have a future dated appointment, or you are verifying election eligibility for an ES372 CalSTRS covered position).

If an employee's appointment doesn't qualify for membership, verify membership status in myCalPERS for all CalPERS-eligible positions. If an employee is eligible for membership and you do not enroll an employee into CalPERS membership within 90 days, then you will be required to pay all arrears contributions (both member and employer) and an administrative fee (\$500 per employee).

Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.



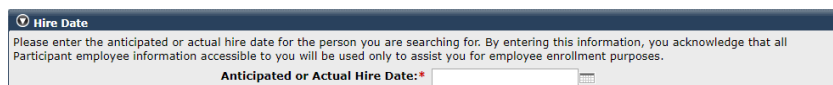
Step 3 Select the **Search** button.

Step 4 Did the Search Results section display “No results found.”?

Yes: They are not a member. You have completed this scenario.

No: Continue to step 5

Step 5 In the Hire Date section, enter the appropriate date into the Anticipated or Actual Hire Date field.



Step 6 Select the **Continue** button.

Step 7 Is your employee electing CalPERS for a certificated position? (schools only)

Yes: Skip to step 9.

No: Continue to step 8 if verifying current membership or future appointments.

Step 8 Review the Summary section.

Verify CalPERS membership.

Summary Profile

Name: Tina Jones CalPERS ID: 0123456789

Prior School Membership: No Optional Member: No

Member: Yes Prior School Membership Date:

Membership Date: 05/21/2007 Retired: No

ARP: No Retirement Date:

5 Year Service Credit: Yes ARP Effective Date:

View future appointments.

Summary Profile

Name: Lucy Ball CalPERS ID: 1835659540

Prior School Membership: No Optional Member: No

Member: No Prior School Membership Date:

Membership Date: Retired: No

ARP: No Retirement Date:

5 Year Service Credit: No ARP Effective Date:

Appt ID	Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
93587657	Agency Name		Regular	Analyst 1	Miscellaneous	Active	01/01/2025	

The **Member** field will indicate:

Yes, if they have member contributions (may or may not be actively working) or

No, if they are a non-member (no member contributions on file), e.g., a prior member who refunded, a dependent on health benefits, etc.

NOTE: The appointment history panel will display previous, current, or future appointments with your agency.

You have completed this scenario.

Step 9 Review the Summary section (schools only).

Summary Profile

SSN: xxx-xx-0000 CalPERS ID: 0123456789

Name: Asher Solo Optional Member: No

Date of Birth: 08/01/1991 Date of Death:

Prior School Membership: Yes Prior School Membership Date: 01/01/2017

Membership Date: 01/01/2017 Retirement Date:

Eligibility for Retirement System Election as of Today: Yes

Communication Undeliverable Date

Preferred Communication: Mail

Primary Phone Number: (999) 888-7777 Update

Primary Email Address: PSR_TEST@calpers.ca.gov Update

Mailing Address: 1234 Main St. Update

Artesia, CA 90702

Physical Address: Update

The “Eligibility for Retirement System Election as of today” field will indicate as of the date you are viewing:

Yes if they currently have 5 years of service credit in CalPERS OR if they have previous employment within 120 days of new position hire date with a school district, Board of California Community Colleges, or Dept of Education

No if they have less than 5 years of service credit in CalPERS and were not previously employed with a school district, Board of California Community Colleges, or Department of Education either:

- Within 120 days or
- Employed with any other CalPERS covered employer

Note:

This indicator was added to the member profile to indicate if the member is eligible for the Retirement System Election (ES372) process. The indicator will say “yes” if the member has either 5+ years of service credit OR if they have qualified employment within 120 days with an eligible employer (employed by a school employer, Board of Governors of Community College Districts, or State Department of Education). This indicator tells you if the individual meets the CalPERS criteria.

However, the indicator:

- does not provide direction on the CalSTRS criteria if the position mandatorily qualifies for CalSTRS membership upon hire. It is your agency’s responsibility to ensure the position does in fact meet the criteria.
- only shows eligibility as of the date you are viewing it. For best practices, verify the eligibility indicator on the date of hire to determine ES 372 eligibility.
- does not currently take into consideration if a member is refunded or retired from CalPERS, so it may say “yes” even if they are ineligible due to being refunded or retired. It is your responsibility, therefore, to verify the employee’s status before making a final determination.

You have completed this scenario.

Scenario 2: Review Retirement Appointment Details

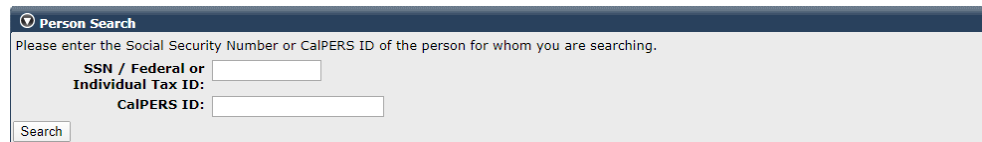
myCalPERS will only allow you to access appointment information specific to your agency. Verify your employee's retirement appointment details, as this ensures the accuracy of their appointment (start date, enrollment level, etc.) and historical information (service credit, member funds on deposit, and membership date). The following may be reviewed:

- Appointment Event History
- Appointment Details
- Membership Information
- Reciprocity
- Retired Annuitant Information
- Retired Annuitant Special Criteria

Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.

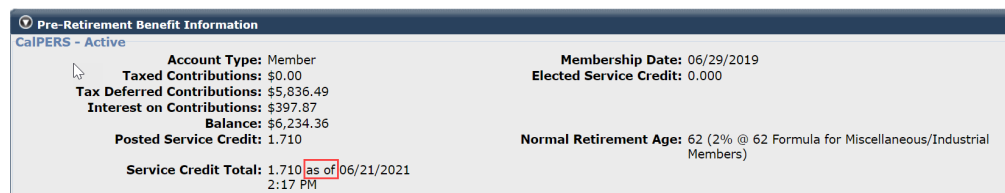


The screenshot shows a 'Person Search' form with the following fields and labels:

- SSN / Federal or Individual Tax ID: [Text Input]
- CalPERS ID: [Text Input]
- Search: [Button]

Step 3 Select the **Search** button.

Step 4 Within the Pre-Retirement Benefit Information section, verify the service credit and member contributions.

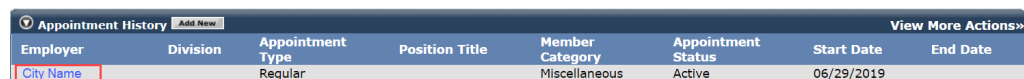


The screenshot shows the 'Pre-Retirement Benefit Information' section for a CalPERS - Active member. The information displayed is as follows:

Account Type: Member	Membership Date: 06/29/2019
Taxed Contributions: \$0.00	Elected Service Credit: 0.000
Tax Deferred Contributions: \$5,836.49	
Interest on Contributions: \$397.87	
Balance: \$6,234.36	
Posted Service Credit: 1.710	Normal Retirement Age: 62 (2% @ 62 Formula for Miscellaneous/Industrial Members)
Service Credit Total: 1.710 as of 06/21/2021 2:17 PM	

The service credit total "as of" date will always reflect the current date and time even though the totals are when payroll was last posted.

Step 5 Within the Appointment History section, select the appropriate **Employer** link to review your employee's current active appointment and event details.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Appointment Event History

This provides a list of the employee's appointment events and their event details. Their history begins with a new appointment and ends with a permanent separation. In between, they may have an appointment change, site change, and/or a leave of absence (begin and/or end leave). A **View Event Details** link may be selected to review the history of an appointment event, such as when the event was created or an update was made and who made the change.

Appointment Event History Extended Appointment History Appointment Detail Change Report Appointment Event Details		
<input type="button" value="Correct Event"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> View All Site Events <input type="button" value="Display"/>
Event Date	Event	Event Details
<input type="radio"/> 05/12/2019	Appointment Change	View Event Details
<input type="radio"/> 07/10/2014	End Leave	View Event Details
<input type="radio"/> 02/16/2014	Begin Leave	Family Medical Leave
<input type="radio"/> 12/05/2011	New Appointment	View Event Details
<input type="button" value="Correct Event"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> View All Site Events <input type="button" value="Display"/>

Appointment Details

Appointment Details	
Programs	
Program: CalPERS	Membership Date: 12/05/2011
Membership Status: Active	Enrollment Eligibility Date: 12/05/2011
Position Information	
Employer: City Name	CalPERS ID (Employer): 0987654321
Original Hire Date: 12/05/2011	Work Calendar: Work 12 Months/Paid 12 Months
Member Category: Safety - Fire	Temporary Position: No
Transit Worker: No	Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)? No
Position Title:	Appointment ID: 91619490
CBU: -	Contributing Appointment Date: 12/05/2011
Retired Annuitant: No	Leave Type:
Enrollment Reason:	Formula Name: 3% @ 55 Formula for State Peace Officer/Firefighter or Local Safety Member
Contributing Appointment: Yes	Cost Share: 4.0
Appointment Status: Active	
Years Prior Service:	
Enrollment Level: Classic	
Member Base Rate: 9.0	
Contribution Modification:	
Created by User: Employer	
Created on: 02/11/2022 09:35 AM	
Appointment Profile Last Refreshed: 02/11/2022 09:35 AM	Refunded Appointment: No

- **Membership Date:** The date the member became eligible for CalPERS membership.
 - **Member Category:** Based on their position at your agency, this information is entered when processing a new retirement enrollment.
 - **Enrollment Level:** There are two enrollment levels, Classic and PEPPA New. This is based on the membership date and if they have reciprocity.
 - **Member Base Rate:** The member's enrollment level and formula determine their base rate (contribution rate). This is the percentage of their reportable earnings that is paid to CalPERS to fund their retirement.
 - **Formula Name:** This includes the member's category, benefit level, and normal retirement age. This formula is used when CalPERS calculates the member's retirement.
- Note:** The member category, enrollment level, and membership date determine the member's base rate and formula.

Membership Information

The questions in this section are based on your agency's contract and the member's appointment details. This includes CalPERS and CalSTRS election, Social Security, '59 survivor benefits, optional member election, and certificated employee (school employers only).

Reciprocity

Completion of the Reciprocal Self-Certification Form does not establish reciprocity. To request to establish reciprocity, the employee must download the [When You Change Retirement Systems \(PUB 16\) \(PDF\)](#) publication to obtain the Confirmation of Intent to Establish Reciprocity When Changing Retirement Systems (PERS-CASD-255) form and submit the form to CalPERS.

Reciprocity

The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant. For auditing purposes, the employer must sign and retain the completed Reciprocal Self-Certification form for their records. Do not send a copy of the form to CalPERS.

Reciprocal Member Indicator: Yes

Most Recent Reciprocal Agency: Alameda County Employees' Retirement Association

Earliest Qualifying Reciprocal Membership Date: 07/05/2005

Most Recent Reciprocal Permanent Separation Date: 05/10/2013

Retired Reciprocal Member Indicator: No

Reciprocal Retirement Date: N/A

Refunded Reciprocal Member Indicator:

Reciprocal Refunded Date: N/A

- **Reciprocal Member Indicator:** Identifies if the employee has reciprocity with a reciprocal retirement system.
 - **Yes:** The member has reciprocal membership.
 - **No:** The member does not have reciprocal membership.
- **Most Recent Reciprocal Permanent Separation Date:** This date with other factors determine the member's enrollment level (Classic or PEPRA) under your agency.

Retired Annuitant Information

This includes the retired annuitant (RA) type, 180-day exception, and 180-day exception reason.

Retired Annuitant Information

Retired Annuitant Type: Extra Help

180-Day Exception? Yes

180-Day Exception Reason: Appointed by governing body

Retired Annuitant Special Criteria

Displays if the RA was hired with an earnings limit or due to an executive order.

Retired Annuitant Special Criteria

Earnings Limit? No

Executive Order? Yes

Executive Order Number: B-53-18 Shasta Lake, Mendocino and Siskiyou

Executive Begin Date: 12/30/2020

Executive End Date: 02/05/2021

You have completed this scenario.

Unit 2: New Appointments

This unit provides the steps on how to add a new appointment for eligible employees and retired annuitants.

Contents

Scenario 1: Add a New Retirement Enrollment..... 10

Scenario 2: Add a Retired Annuitant Appointment..... 13

Scenario 1: Add a New Retirement Enrollment

It is your responsibility to enroll qualifying CalPERS members within 90 days. If the member is not enrolled timely, CalPERS will assess administrative costs and arrears contributions (member and employer). Enroll your employee into CalPERS membership by completing the following:

- Verify if the employee has an existing myCalPERS account
- Confirm demographics
- Report appointment details
- Indicate reciprocal self-certification if it is applicable

Step Actions

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

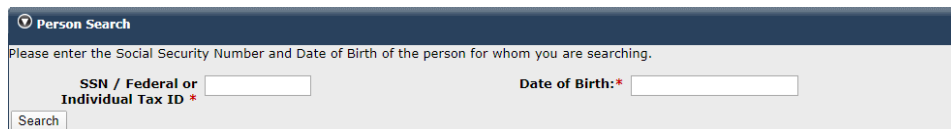
Step 2 Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.



▼ Create or Edit Report
Method: * Add Retirement Enrollment | Continue

Step 3 Select the **Continue** button.

Step 4 Complete the Person Search section.



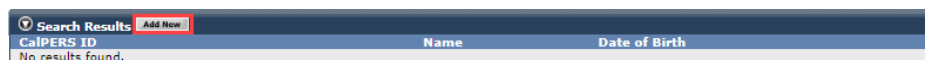
▼ Person Search
Please enter the Social Security Number and Date of Birth of the person for whom you are searching.
SSN / Federal or Individual Tax ID * Date of Birth: *
Search

Step 5 Select the **Search** button.

Step 6 What displayed next?

- **Search Results section shows “No results found”**: Continue to step 7.
- **Appointment Details page**: Skip to step 14.

Step 7 Within the Search Results section, select the **Add New** button.



▼ Search Results | Add New
CalPERS ID | Name | Date of Birth
No results found.

Step 8 Complete the Person Details, Address Details, and Communication Details sections.

The screenshot shows three sections of a web form. The first section, 'Person Details', includes fields for Prefix, First Name, Middle Name, Last Name, Suffix, Date of Birth, Gender, SSN, and Confirm SSN. The second section, 'Address Details', includes fields for Address Type, Address, Country (set to United States), City, State (set to California), and Zip Code. The third section, 'Communication Details', has a table with columns for Primary, Phone Type, Phone Number, Extension, and International. The Phone Type options are Work, Fax, TTY, Cellular, Home, and Other. Below the table are fields for Primary and Email.

Step 9 Select the **Primary** radio button for one phone number and an email address.

Step 10 Select the **Save & Continue** button.

Step 11 If multiple addresses display, select the radio button for the correct address.

Step 12 Select the **Confirm** button.

Step 13 Select the **Save & Continue** button.

Step 14 Complete the Appointment Details section.

The screenshot shows the 'Appointment Details' section of a web form. It includes a 'Program' dropdown set to 'CalPERS' and an 'Enrollment Eligibility Date' field. The 'Position Information' section includes fields for Employer (City Name), Division, Original Hire Date, Member Category, Position Title, and Work Calendar. It also has radio buttons for 'Retired Annuitant?' (Yes/No) and 'Refunded Appointment?' (Yes/No). There are also fields for 'CUBU' and 'Enrollment Reason'.

Step 15 Complete the Membership Information section.

Note: Questions displayed are based on your agency type (non-central state, school, or public agency) and the selected member category.

The screenshot shows the 'Membership Information' section of a web form. It includes two questions with radio button options: 'Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?' and 'Is the member subject to Social Security?'. Below these is the 'Optional Member Election' section with the question 'Optional Member?' and radio button options for Yes and No.

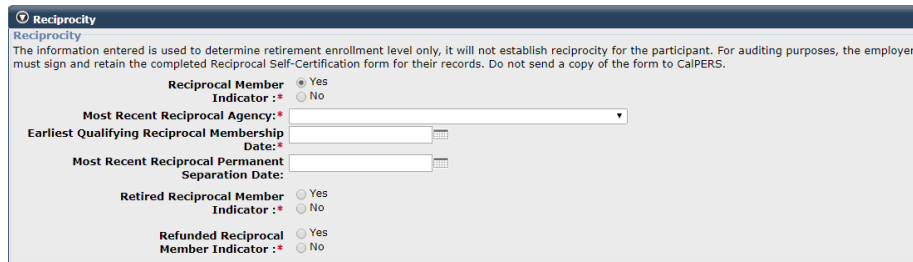
Step 16 On the Reciprocal Self-Certification Form (PERS-EAMD-801) section 1, did the member indicate that they have membership in a defined benefit plan?

Yes: Continue to step 17.

No: Skip to step 20.

Step 17 In the Reciprocity section, select the **Yes** radio button.

Step 18 Complete the Reciprocity section using the information the Reciprocal Self-Certification Form (PERS-EAMD-801).



Reciprocity
The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant. For auditing purposes, the employer must sign and retain the completed Reciprocal Self-Certification form for their records. Do not send a copy of the form to CalPERS.

Reciprocal Member Indicator: * Yes No

Most Recent Reciprocal Agency: *

Earliest Qualifying Reciprocal Membership Date: *

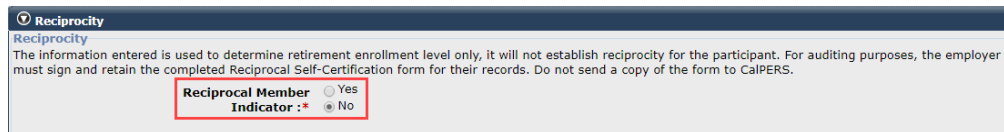
Most Recent Reciprocal Permanent Separation Date: *

Retired Reciprocal Member Indicator: * Yes No

Refunded Reciprocal Member Indicator: * Yes No

Step 19 Skip to step 21

Step 20 In the Reciprocity section, select the **No** radio button.

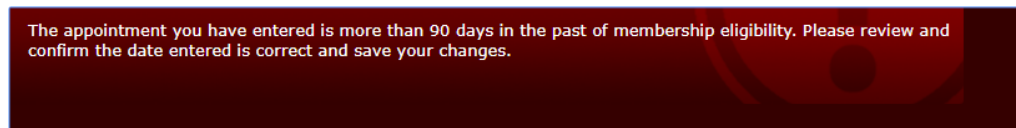


Reciprocity
The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant. For auditing purposes, the employer must sign and retain the completed Reciprocal Self-Certification form for their records. Do not send a copy of the form to CalPERS.

Reciprocal Member Indicator: * Yes No

Step 21 Select the **Save** button.

Step 22 Did the following message display?



Yes: Select the **Save** button. **You have completed this scenario.**

No: **You have completed this scenario.**

Scenario 2: Add a Retired Annuitant Appointment

A retired annuitant's appointment must be entered within 30 days of their hire date; otherwise, a \$200 late reporting fee will be assessed for each month the appointment is late. If the RA retired from your agency, myCalPERS will require the original hire date at your agency. When a new RA appointment is entered in myCalPERS, employers and RAs will receive information regarding the rules and regulations about post-retirement CalPERS employment. Add a retired annuitant appointment by completing the following:

- Validate if the retiree worked for your agency
- Confirm demographics
- Report appointment details
- Identify the retired annuitant type
- Determine if exempt from the 180-day wait period
- Determine the retiree's normal retirement age (bona fide separation requirement)

Step Actions

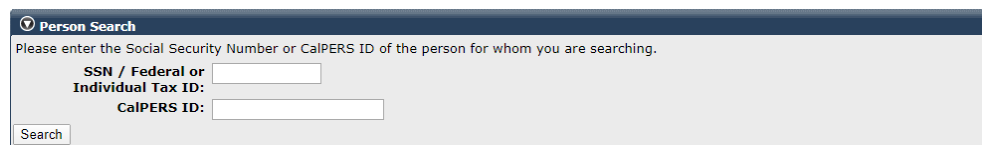
Step 1 Did the retired annuitant previously work for your agency?

Yes: Continue to step 2.

No: Skip to step 7.

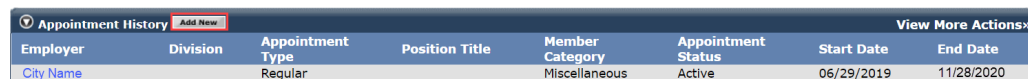
Step 2 Select the **Person Information** global navigation tab.

Step 3 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.



Step 4 Select the **Search** button.

Step 5 Within the Appointment History section, select the **Add New** button.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	11/28/2020

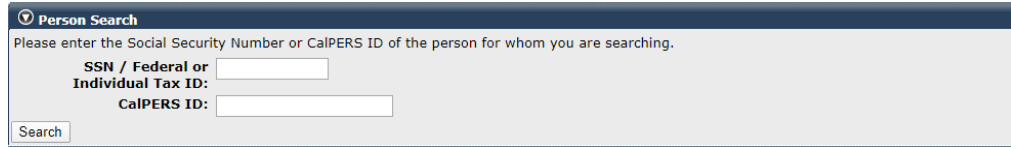
Step 6 Skip to step 12.

Step 7 Select the **Reporting** global navigation tab.

Step 8 Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.

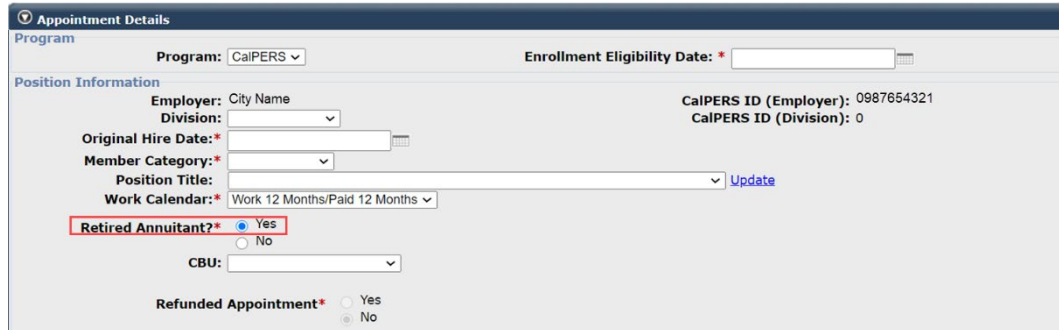
Step 9 Select the **Continue** button.

Step 10 Complete the Person Search section.



Step 11 Select the **Search** button.

Step 12 Complete the Appointment Details section.



If the RA retired from your agency, myCalPERS will require the original hire date at your agency. Refer to unit 1, Review Retirement Appointment Details for where to locate this information.

Step 13 Select the **Search** button.

Step 14 Within the Retired Annuitant Information section, select from the Retired Annuitant Type drop-down list.

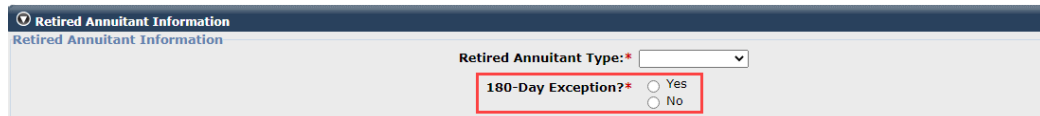


Step 15 Does this appointment have a 180-day exception?

Yes: Select the **Yes** radio button and continue to step 16.

No: Select the **No** radio button, and then skip to step 21.

Note: If they are returning due an Executive Order, select **No**.



RAs working under an executive order must be entered but will be exempt from work-hour limitations and the 180-day break in service requirements.

Step 16 Within the Retired Annuitant Information section, select from the 180-Day Exception Reason drop-down list.

Retired Annuitant Information
Retired Annuitant Information

Retired Annuitant Type:*

180-Day Exception? * Yes
 No

180-Day Exception Reason:*

* [Provide Document](#)

Step 17 Within the Retired Annuitant Information section, select the **Provide Document** link unless it is for the Returning Safety Position reason.

Retired Annuitant Information
Retired Annuitant Information

Retired Annuitant Type:*

180-Day Exception? * Yes
 No

180-Day Exception Reason:*

* [Provide Document](#)

Step 18 Within the Submit Documentation section, select from the Submission Method drop-down list.

Submit Documentation

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

Document Category: Retirement Enrollment
Document Type: Retired Annuitant Exception Correspondence

Submission Method:* Upload

Path:* Choose File No file chosen

Step 19 What submission method did you select?

Mail: Mail the documentation to CalPERS, and then skip to step 21.

FAX: Fax the documentation to CalPERS, and then skip to step 21.

Upload (preferred): Select the **Choose file** button, and then continue to step 20.

Step 20 Upload the file.

Step 21 Select the **Submit** button.

Step 22 Skip the Retired Annuitant Special Criteria section.

Retired Annuitant Special Criteria
Retired Annuitant Special Criteria

Earnings Limit?* Yes
 No

Executive Order?* Yes
 No

Step 23 Within the Reciprocity section, select the **No** radio button.

Reciprocity
Reciprocity

The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant. For auditing purposes, the employer must sign and retain the completed Reciprocal Self-Certification form for their records. Do not send a copy of the form to CalPERS.

Reciprocal Member Indicator:* Yes
 No

Step 24 Select the **Save** button.

Step 25

Verify the Appointment Details section is correct.

Appointment Details	
Programs	
Program: CalPERS	Membership Date: 12/02/1996
Membership Status: Retired	Enrollment Eligibility Date: 01/15/2021
Position Information	
Employer: City Name	CalPERS ID (Employer): 0987654321
Original Hire Date: 12/02/1996	Work Calendar: Work 12 Months/Paid 12 Months
Member Category: Miscellaneous	Temporary Position: No
Transit Worker: No	Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?
Position Title: CBU: -	Appointment ID: 67890
Retired Annuitant: Yes	Leave Type:
Enrollment Reason:	Formula Name: 2.5% @ 55 Formula for Local Miscellaneous Members
Contributing Appointment: No	Cost Share: 0.0
Appointment Status: Active	
Years Prior Service:	
Enrollment Level: Classic	
Member Base Rate: 8.0	
Contribution Modification:	
Created by User: Employer	
Created on: 01/15/2021 12:44 PM	
Appointment Profile Last Refreshed: 01/15/2021 12:44 PM	Refunded Appointment: No
Retired Annuitant Information	
Retired Annuitant Type: Extra Help	
180-Day Exception? Yes	
180-Day Exception Reason: Appointed by governing body	
Retired Annuitant Special Criteria	
Earnings Limit? No	
Executive Order? Yes	
Executive Order Number: B-53-18 Shasta Lake, Mendocino and Siskiyou	
Executive Begin Date: 12/30/2020	
Executive End Date: 02/05/2021	

You have completed this scenario.

Unit 3: Maintain Enrollment

You may update and maintain your employees' accounts, enrollments, and appointments.

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Scenario 9: Delete an Appointment Event	27

Scenario 1: Update Demographic Information

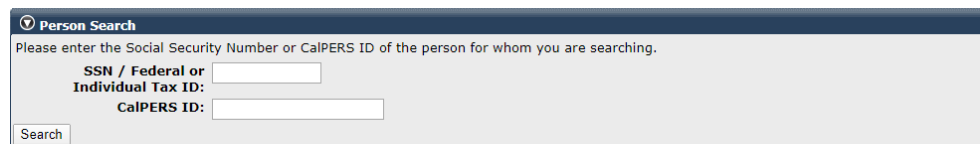
System Logic

- Before correcting demographic information, your employee must provide a verification document. Refer to the [Public Agency & Schools Reference Guide \(PDF\)](#) for a list of acceptable documentation.
- Name changes/corrections will impact payroll reporting.
- If the member is also enrolled in health benefits with CalPERS, the demographic changes will be reported to their health carrier.
- When demographic information is updated in myCalPERS, a letter is mailed to the member advising them of the change(s).

Step Actions

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


Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.



The screenshot shows a 'Person Search' form with a title bar. Below the title bar, there is a prompt: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button is located at the bottom left of the form.

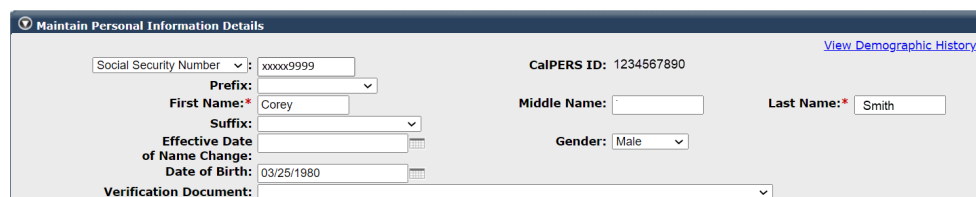
Step 3 Select the **Search** button.

Step 4 Within the Summary section, select the **Update Personal Information** link.



The screenshot shows a 'Summary' profile page. The 'Profile' section contains the following information: SSN: xxx-xx-9999, Name: Corey Smith, Date of Birth: 03/25/1980, Prior School Membership: No, Membership Date: 06/29/2019, Restrictions: No, Last Reporting Date: 12/11/2020. The 'Communication' section contains: Preferred Communication: Mail, Primary Phone Number: (916) 795-3000, Primary Email Address: CoreySmith@CalPERS.CA.GOV, Mailing Address: 400 Q Street, Sacramento, CA 95811, Physical Address: (same as mailing address). There are 'Update' links next to the phone number, email address, mailing address, and physical address. A red box highlights the 'Update Personal Information' link in the top right corner.

Step 5 Complete the Maintain Personal Information Details section.



The screenshot shows the 'Maintain Personal Information Details' form. It includes a 'Social Security Number' dropdown menu with 'xxxx9999' entered, a 'Prefix' dropdown menu, 'First Name:*' with 'Corey' entered, 'Suffix' dropdown menu, 'Effective Date of Name Change' date field, 'Date of Birth' with '03/25/1980' entered, and 'Verification Document' dropdown menu. On the right side, there is a 'CalPERS ID: 1234567890' field, 'Middle Name:' field, 'Last Name:*' with 'Smith' entered, and 'Gender:' with 'Male' selected. A 'View Demographic History' link is located in the top right corner.

Step 6 Select the **Save** button.

You have completed this scenario.

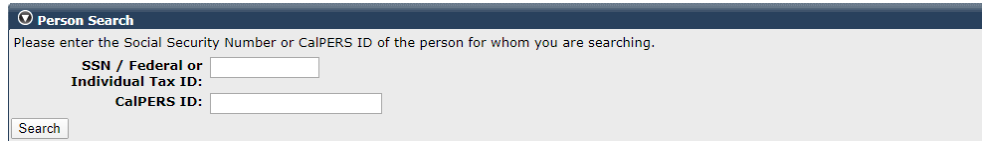
Scenario 2: Update Employee Contact Information

It's important to update the employee's contact information when needed.

Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.



The screenshot shows a 'Person Search' form with a dark blue header. Below the header, there is a text prompt: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button is located at the bottom left of the form.

Step 3 Select the **Search** button.

Step 4 Within the Summary section, select the appropriate **Update** link.



The screenshot shows an 'Employee Summary' page with a dark blue header. The page is divided into two main sections: 'Profile' and 'Communication'. The 'Profile' section contains fields for SSN, Name, Date of Birth, Prior School Membership, Membership Date, Restrictions, Last Reporting Date, CalPERS ID, Optional Member status, Date of Death, Prior School Membership Date, and Retirement Date. There is a blue link 'Update Personal Information' in the top right of the Profile section. The 'Communication' section contains fields for Preferred Communication, Primary Phone Number, Primary Email Address, Mailing Address, and Physical Address. There are three blue 'Update' links in the right column of the Communication section, each enclosed in a red box. There is also an 'Undeliverable Date' field.

Step 5 Complete the Maintain Communication Details section.

Step 6 Select the **Save** button.

If you updated the address, you will be asked to confirm the address. And will need to select the **Save** button again.

You have completed this scenario.

Scenario 3: Correct Retirement Appointment Events

This scenario can be used to correct retirement appointment events, including new appointments, permanent separations, leave of absence, and appointment changes.

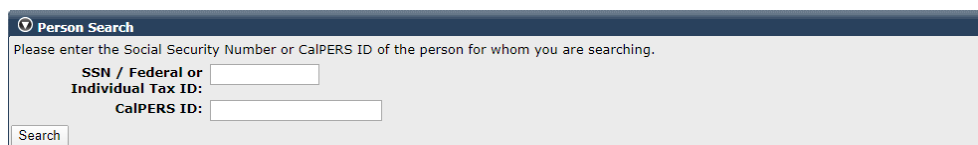
System Logic

Corrections to appointment information may affect the health enrollment and payroll reporting of the member.

Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.



The screenshot shows a 'Person Search' form with the following fields and controls:

- Header: Person Search
- Instruction: Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.
- Input fields: SSN / Federal or Individual Tax ID (with a text box), and CalPERS ID (with a text box).
- Control: A 'Search' button.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active **Employer** link.



The screenshot shows a table with the following columns and data:

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5 Within the Appointment Event History section, select the radio button of the appointment event to correct.



The screenshot shows the 'Appointment Event History' section with the following elements:

- Buttons: Correct Event, Delete, View All Site Events, Display.
- Table with columns: Event Date, Event, Event Details.
- Row 1: 12/03/2016, New Appointment, [View Event Details](#).
- Control: A radio button is selected in the first column of the first row.

Step 6 Select the **Correct Event** button.

Step 7 Correct the appropriate information.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 4: Delete a Retirement Appointment

On a rare occasion, you may need to delete a retirement appointment. This can only be completed if the appointment does not have health and/or payroll history. If they have either, contact CalPERS for more information.

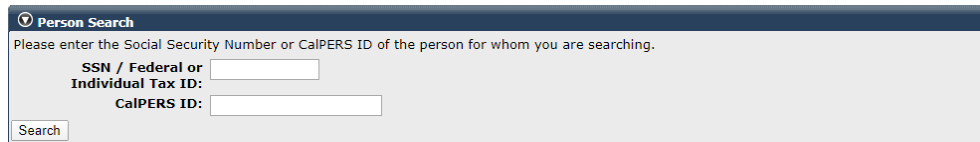
System Logic

The demographic information and CalPERS ID will remain in myCalPERS; however, there will be no appointment information affiliated to your agency.

Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.

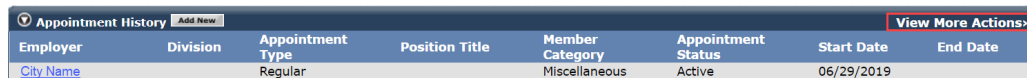


The screenshot shows a 'Person Search' form with the following fields and controls:

- Header: Person Search
- Instruction: Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.
- Input fields: SSN / Federal or Individual Tax ID: [text box], CalPERS ID: [text box]
- Control: Search [button]

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link or **Appointment History** left-side link.



The screenshot shows the 'Appointment History' table with the following structure:

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Additional UI elements: 'Add New' button, 'View More Actions' link (highlighted in red).

Step 5 Within the Appointment History section, select the radio button for the appointment.



The screenshot shows the 'Appointment History' table with a radio button selected in the first column:

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
<input checked="" type="radio"/> City Name		Regular		Miscellaneous	Active	06/29/2019	

Additional UI elements: 'Delete' button above the table, 'Delete' button below the table.

Step 6 Select the **Delete** button.

You have completed this scenario.

Scenario 5: Process a Leave of Absence

If an employee goes on a leave of absence, e.g., unpaid leave or FMLA, a Begin Leave event should be entered. It is recommended that you add a future End Leave event when the Begin Leave event is entered. Refer to unit 3, scenario 3 if the End Date event needs to be changed.

System Logic

For public agencies and schools, myCalPERS will cancel the health enrollment for employees placed on a leave of absence unless it is due to Family Medical Leave Act or Maternity/Paternity leave.

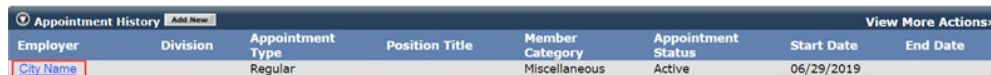
Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.

Step 3 Select the **Search** button.

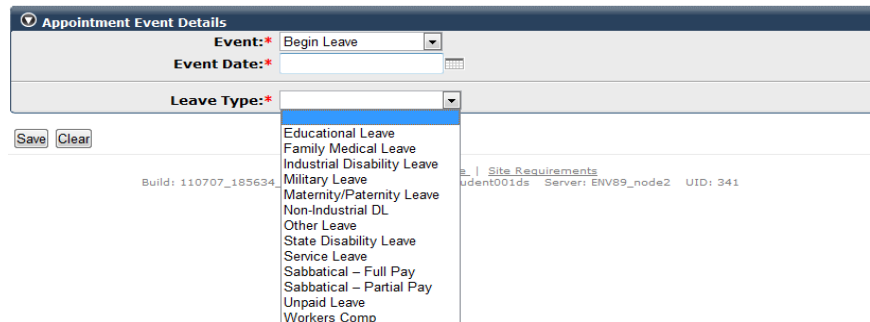
Step 4 Within the Appointment History section, select the appropriate active **Employer** link.



The screenshot shows a table titled "Appointment History" with columns: Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. A row is visible with "City Name" in the Employer column, "Regular" in Appointment Type, "Miscellaneous" in Member Category, "Active" in Appointment Status, and "06/29/2019" in Start Date. There are "Add New" and "View More Actions" buttons at the top right.

Step 5 Within the Appointment Event History section, select the **Add New** button.

Step 6 Complete the Appointment Event Details section.



The screenshot shows the "Appointment Event Details" form. It has fields for "Event:" (set to "Begin Leave"), "Event Date:" (with a calendar icon), and "Leave Type:". A dropdown menu is open for "Leave Type:", listing options: Educational Leave, Family Medical Leave, Industrial Disability Leave, Military Leave, Maternity/Paternity Leave, Non-Industrial DL, Other Leave, State Disability Leave, Service Leave, Sabbatical - Full Pay, Sabbatical - Partial Pay, Unpaid Leave, and Workers Comp. There are "Save" and "Clear" buttons. At the bottom, there is a "Site Requirements" link and some technical information: "Build: 110707_185634", "User: 001ds", "Server: ENV89_node2", "UID: 341".

The **Begin Leave** event is the day after the last day at your agency, even if it is a weekend or holiday.

Step 7 Select the **Save** button.

Step 8 Do you want to add the End Leave event?

Yes: Return to step 5.

The **End Leave** event is entered as the date the employee will return to work.

No: You have completed this scenario.

Scenario 6: Process an Appointment Change

Changes can occur throughout an employee's career with your agency. The following appointment changes can be made:

- Member category
- Collective bargaining unit (CBU)
- Position title
- Work calendar

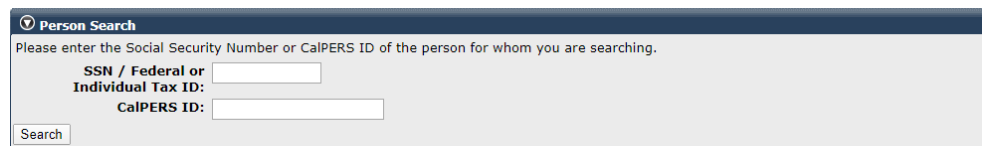
Best Practices

If you make an appointment change that affects the employee's base rate, notify your agency's payroll department.

Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.

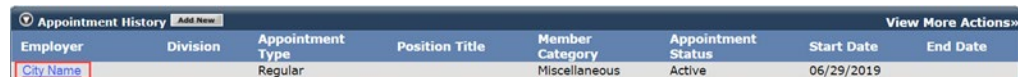


The screenshot shows a 'Person Search' form with the following fields and controls:

- Header: Person Search
- Instruction: Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.
- Input fields: SSN / Federal or Individual Tax ID (with a search icon), and CalPERS ID.
- Control: Search button.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active **Employer** link.

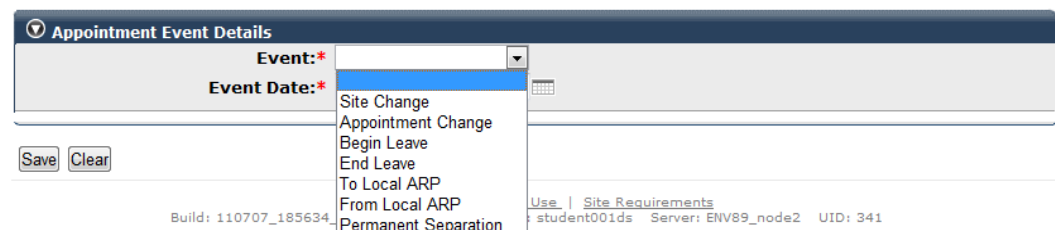


The screenshot shows a table with the following columns and data:

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5 Within the Appointment Event History section, select the **Add New** button.

Step 6 Complete the Appointment Event Details section.



The screenshot shows the 'Appointment Event Details' form with the following elements:

- Header: Appointment Event Details
- Fields: Event:* (dropdown menu), Event Date:* (calendar icon).
- Buttons: Save, Clear.
- Footer: Build: 110707_185634, Use | Site Requirements, student001ds Server: ENV89_node2 UID: 341.

Step 7 Select the **Save** button.

You have completed this scenario.

Scenario 7: Process a Permanent Separation

System Logic

- The permanent separation date must be reported as the day after the last day an employee works for your agency, which is often the day after the last day on payroll, even if it falls on a weekend or a holiday.
- A refunded appointment will not allow for a Permanent Separation event to be deleted.
- A permanent separation will affect the employee's payroll reporting and health enrollment.
- A permanent separation will deactivate the employee's myCalPERS employer system access. Refer to the [myCalPERS System Access Administration \(PDF\)](#) student guide for information.
- Active employees with no posted payroll within the last six months will automatically be permanently separated through a monthly process.

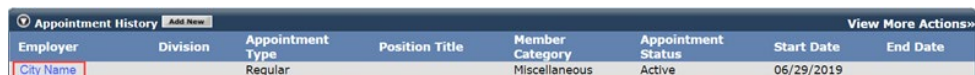
Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.

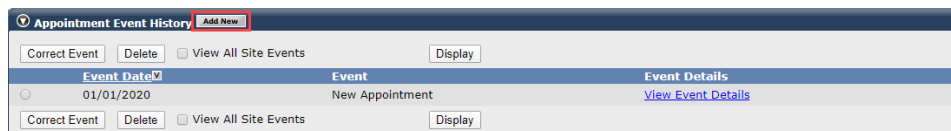
Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate **Employer** link.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5 Within the Appointment Event History section, select the **Add New** button.



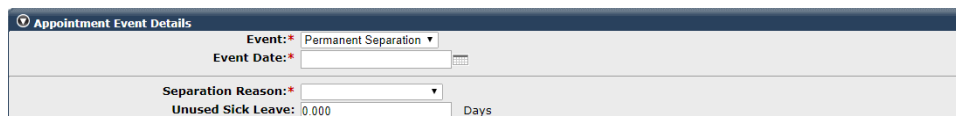
Appointment Event History [Add New](#)

View All Site Events

Event Date	Event	Event Details
01/01/2020	New Appointment	View Event Details

View All Site Events

Step 6 Complete the Appointment Event Details section.



Appointment Event Details

Event: * Permanent Separation ▼

Event Date: *

Separation Reason: *

Unused Sick Leave: 0.000 Days

The permanent separation date must be entered as at least one day after the last day at your agency, even if the date falls on a weekend or a holiday.

Note: The unused sick leave field is only provided if your agency contracts for the optional benefit and is only converted into service credit if the separation reason is Retirement.

Step 7

Select the **Save** button.

Note: The member will be mailed an Options at Separation letter advising of their options as an inactive member.

You have completed this scenario.

Scenario 8: Update a Permanent Separation

System Logic

- A permanent separation affects the employee's payroll reporting and/or health enrollment.
- A refunded appointment will not allow for a Permanent Separation event to be deleted.

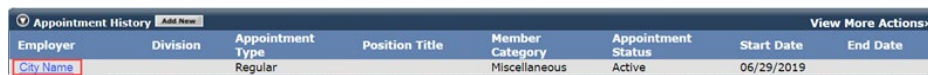
Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active **Employer** link.



The screenshot shows a table titled "Appointment History" with columns: Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. A row is highlighted with a red box under the "Employer" column, containing the text "City Name".

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5 Select the radio button of the appointment you wish to correct.

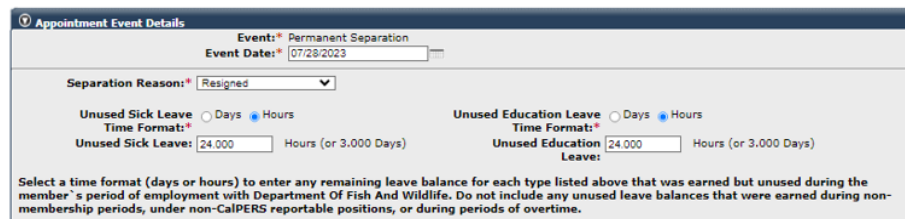


The screenshot shows a table titled "Appointment Event History" with columns: Event Date, Event, and Event Details. Two rows are visible. The first row has a radio button selected (indicated by a red box) and contains "06/26/2020", "Permanent Separation", and "Retirement". The second row has an unselected radio button and contains "02/20/1999", "New Appointment", and "View Event Details".

Event Date	Event	Event Details
<input checked="" type="radio"/> 06/26/2020	Permanent Separation	Retirement
<input type="radio"/> 02/20/1999	New Appointment	View Event Details

Step 6 Select the **Correct Event** button.

Step 7 Update the Appointment Event Details section.



The screenshot shows the "Appointment Event Details" form for a "Permanent Separation" event dated "07/28/2023". The "Separation Reason" is set to "Resigned". There are two sections for leave: "Unused Sick Leave" and "Unused Education Leave". Each section has radio buttons for "Days" and "Hours" (with "Hours" selected) and a text input field with "24,000" and "Hours (or 3,000 Days)". A note at the bottom states: "Select a time format (days or hours) to enter any remaining leave balance for each type listed above that was earned but unused during the member's period of employment with Department Of Fish And Wildlife. Do not include any unused leave balances that were earned during non-membership periods, under non-CalPERS reportable positions, or during periods of overtime."

The unused sick leave and/or unused educational leave field:

- Will only display if your agency contracts for the optional benefit.
- Is only converted into service credit if the separation reason is Retirement.
- Can be entered in days or hours.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 9: Delete an Appointment Event

Maintaining employee appointment details is essential for data integrity. To remove an inaccurate appointment event from your employee accounts, follow the steps below to delete the appointment event.

System Logic

- You are unable to delete a retirement appointment using this scenario. Refer to unit 3, scenario 5 to delete an appointment.
- Deleting an appointment event may impact payroll reporting. Be sure to report any changes to your agency's payroll department.

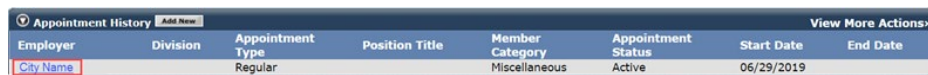
Step Actions

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

Step 2 Enter either the **SSN/Federal or Individual Tax ID** or **CalPERS ID**.

Step 3 Select the **Search** button.

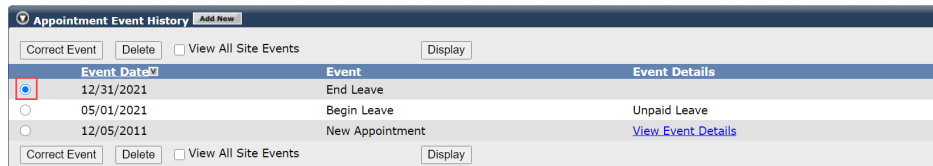
Step 4 Within the Appointment History section, select the appropriate active **Employer** link.



A screenshot of a web application interface showing a table titled "Appointment History". The table has columns for Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. A red box highlights the "City Name" text input field under the Employer column. The first row of data shows "Regular" under Appointment Type, "Miscellaneous" under Member Category, "Active" under Appointment Status, and "06/29/2019" under Start Date. There are "Add New" and "View More Actions" buttons at the top right of the table.

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5 Select the radio button of the event you wish to delete.



A screenshot of a web application interface showing a table titled "Appointment Event History". The table has columns for Event Date and Event. There are radio buttons next to each row. A red box highlights the radio button for the first row. The first row shows "12/31/2021" under Event Date and "End Leave" under Event. The second row shows "05/01/2021" under Event Date and "Begin Leave" under Event. The third row shows "12/05/2011" under Event Date and "New Appointment" under Event. There are "Correct Event", "Delete", "View All Site Events", and "Display" buttons at the top and bottom of the table. A "View Event Details" link is present next to the "New Appointment" event.

Event Date	Event	Event Details
<input checked="" type="radio"/> 12/31/2021	End Leave	
<input type="radio"/> 05/01/2021	Begin Leave	Unpaid Leave
<input type="radio"/> 12/05/2011	New Appointment	View Event Details

Step 6 Select the **Delete** button.

You have completed this scenario.

Unit 4: Retirement Appointment Reconciliation

Retirement Appointment Reconciliation (RAR) identifies appointments with unposted payroll records for your agency. Of those identified, you may maintain or delete the appointment. The following appointment events may be maintained:

- Permanent Separation
- Begin Leave
- End Leave
- Delete a Retirement Appointment

System Logic

- You may select multiple appointments to maintain.
- myCalPERS will update the RAR page on the last day of each month.
- Maintaining appointments within the RAR page automatically updates the list.
- Transactions completed outside the RAR page, e.g., updating the appointment within the employee’s profile page will update the list the following business day.
- On Leave appointments with the following will be excluded from the list:
 - Appointments without an End Leave event will be excluded for six months.
 - Appointments with an End Leave event will be excluded for the entire leave.
- Active employees with no posted payroll within the last six months will automatically be permanently separated through a monthly process.

Refer to the [myCalPERS Retirement Appointment Reconciliation \(PDF\)](#) student guide for additional information.

Contents

Scenario 1: Add an Appointment Event.....	29
Scenario 2: Delete a Retirement Appointment	30

Scenario 1: Add an Appointment Event

You may add Permanent Separation, Begin Leave, or End Leave events.

Step Actions

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

Step 2 Select the **Retirement Appointment Reconciliation** local navigation link.

Step 3 In the Participants With Unposted Payroll section, select the check box for the employee(s) that has an appointment you need to maintain.

Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Last Reported Earned Period	Payroll Past Due	Unposted Payroll Periods
<input checked="" type="checkbox"/>	0123456789 Jones, Jason L.	01234	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input type="checkbox"/>	1234567890 Pham, Chi Thao A.	2345	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input type="checkbox"/>	2345678901 Smith, Boyd B.	9876	Active	Active	No	11/14/2020 - 11/27/2020	Yes	Review

Step 4 Select the **Maintain Enrollment** button.

Step 5 Complete the Appointment Event Details section.

Appointment Event Details (1 of 3)

Participant CalPERS ID: 1234567890
Name: Pham, Chi Thao A.
Member Category: Miscellaneous
Enrolled in Health: Yes
Health Payment Method: Standard

Appt ID: 2345
Start Date: 9/03/1962
Appt Status: Active
Last Reported Earned Period: 11/14/2020-11/27/2020

[View Appointment History](#)
[View Transaction History](#)

Event: *
Event Date: *

Delete Appointment Skip Appointment

- The Begin Leave event is the day after the last day at your agency, even if it is a weekend or holiday.
- The End Leave event is entered as the date the employee returns to work.
- The permanent separation date must be entered as at least one day after the last day at your agency, even if the date falls on a weekend or a holiday.

Step 6 Select the **Save & Go to Next** button if needed.

Note: If the Event type is Begin Leave, you may select the **Save & Add Event** button to add an End Leave event for this employee.

Step 7 Did you select more than one check box?

Yes: Return to step 5.

No: You have completed this scenario.

Scenario 2: Delete a Retirement Appointment

System Logic

You are unable to delete an appointment that has payroll and/or health benefits attached. Contact CalPERS for assistance.

Step Actions

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

Step 2 Select the **Retirement Appointment Reconciliation** local navigation link.

Step 3 In the Participants With Unposted Payroll section, select the check box for the employee(s) that has an appointment you need to delete.

Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Last Reported Earned Period	Payroll Past Due	Unposted Payroll Periods
<input type="checkbox"/>	0123456789 Jones, Jason L.	01234	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input type="checkbox"/>	1234567890 Pham, Chi Thao A.	2345	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input type="checkbox"/>	2345678901 Smith, Boyd B.	9876	Active	Active	No	11/14/2020 - 11/27/2020	Yes	Review

Step 4 Select the **Maintain Enrollment** button.

Step 5 Select the **Delete Appointment** button.

Participant CalPERS ID: 2345678901
Name: Smith, Boyd B.
Member Category: Miscellaneous
Enrolled in Health: Yes
Health Payment Method: Standard

Appt ID: 9876
Start Date: 9/03/1962
Appt Status: Active
Last Reported Earned Period: 11/14/2020-11/27/2020

[View Appointment History](#)
[View Transaction History](#)

Event: *
Event Date: *

Step 6 Select the **Save & Go to Next** button if needed.

Step 7 Did you select more than one check box?

Yes: Return to step 5.

No: You have completed this scenario.

CalPERS Resources

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

- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > I Want To...: Attend Training & Events > Business Rules & myCalPERS Classes
- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > I Want To...: Access myCalPERS Student Guide
- [myCalPERS Technical Requirements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [Public Agency & Schools Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [Circular Letters - CalPERS](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations> Public Employees' Retirement Law (PERL)
- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog
 - Automatic Permanent Separation-Potential Appointments Report (PDF)
 - Benefit Recipients by Employer Report (PDF)
 - Business Partner On Leave Report (PDF)
 - CalPERS ID and Appointment ID Report (PDF)
 - Confirmation of No Payroll Contributions Reportable Report (PDF)
 - Overtime Appointment Identifier Report (PDF)
 - Participant Appointment Details Report (PDF)
 - Participant Enrollment History Report (PDF)
 - Participant Pension Enrollment Data Report (PDF)
 - Participant Undeliverable Address Report (PDF)
 - Retired Annuitant Hours Worked Report (PDF)
 - Retired Annuitant Late Fee Status Report (PDF)
 - Retirement Appointment Reconciliation Report (PDF)
 - Separated Retirement Reconciliation Appointments Report (PDF)

CalPERS Contacts

Email

- To contact the [Employer Education Team](#) for questions and requests, email **calpers_employer_communications@calpers.ca.gov**.
- To contact the [Employer Account Management Division](#) for questions related to Retirement Appointment Reconciliation, email **employertechnicalsupport@calpers.ca.gov**.
- To contact the [Employer Account Management Division](#) for questions about membership, email **membership_reporting@calpers.ca.gov**.
- To contact the [Membership and Post Retirement Employment Determinations Team](#) for post-employment questions, email **working_after_retirement@calpers.ca.gov**.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.

Phone or Fax

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

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

Submit Inquiry

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