Completing an Employment Certification School Employers

Employer Account Management Division &

Member Account Management Division

CalPERS

Topics (1 of 2)

Required Roles in myCalPERS

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Required Roles in myCalPERS

myCalPERS Required Roles

Must be assigned the Business Partner Arrears role along with one or more of the following roles:

- Business Partner Payroll

- Business Partner Payroll Read Only

- Business Partner Retirement Enrollment

- Business Partner Retirement Enrollment Read Only

Note: Contact your System Access Administrator to request the required roles.

CalPERS

Employment Certifications

When is an Employment Certification Required?

Service Credit Purchase (SCP) requests initiated by:

- Member through their myCalPERS account

- Member submitting a paper request to their employer for upload and certification

Membership reviews initiated by:

- CalPERS staff

- Employer

- Member

Completing the Employment Certification

Employment Certification (1 of 14)

Complete the following steps when an employee submits an SCP request, or a membership review is needed:

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

Step 2: Select the **Member Requests** local navigation link
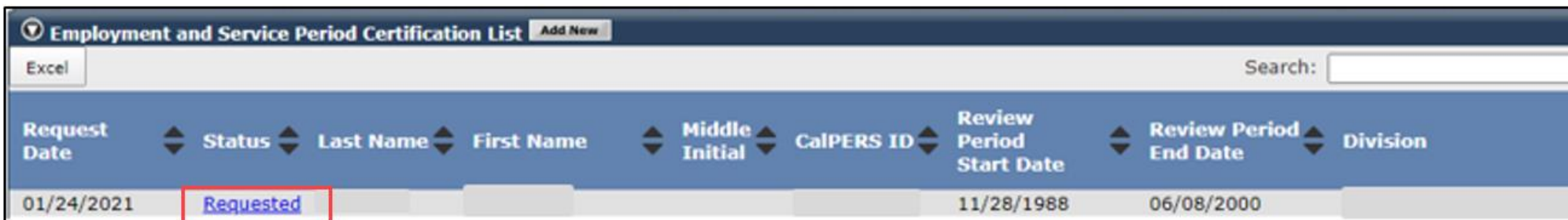
Employment Certification (2 of 14)

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

Is the employee on the list?

- No: Continue to **Step 4**

- Yes: Select the **Requested** status link and continue to **Step 5**

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division
01/24/2021	Requested					11/28/1988	06/08/2000	

Employment and Service Period Certification List Add New

Excel   Search:

Employment Certification (3 of 14)

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

Employment Certification (4 of 14)

Complete the Employment Information section

Employment Certification (5 of 14)

Step 5: Is the employee's information displayed?

- Yes: Continue to **Step 6.** View employee's contact information if necessary.

- No: **Select** Participant link to add participant's information

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

Employment Certification (6 of 14)

Step 7: Enter contact phone number
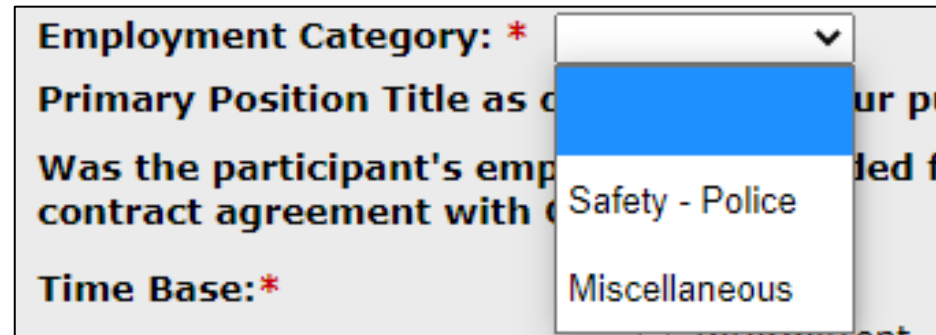
| BP Contact Name: | | Phone Number: | | Ext: | |

Step 8: Enter or confirm employment dates

Dates of Employment: *

From: To:

Employment Certification (7 of 14)

Step 9: Select applicable employment category

This is based on the category the employee would have been if brought into membership for this position

Employment Certification (8 of 14)

Step 10: Enter the position title for the certification

Primary Position Title as displayed on your publicly available pay schedule: *

Step 11: Is employee's employment excluded from CalPERS membership due to your agency's contract agreement or by law under Government Code 20300?

- No: Continue to **Step 12**

Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS?*   ○ Yes ● No   View Exclusions

- Yes: Confirm the position is excluded due to a contract exclusion or by law. Continue to **Step 12**

CalPERS

Employment Certification (9 of 14)

Step 12: Select time base and tenure at the start of the employment period

Time Base:*	○ Full Time	○ Part Time
	○ Intermittent	○ Indeterminate
	○ On Call	○ Work(ed) As Needed
Appointment Tenure:*	○ Permanent	
	○ Indeterminate	
	○ Seasonal	
	○ Temporary	

Example: If request began on January 1, 2019, select time base and tenure effective January 1, 2019.

CalPERS

Employment Certification (10 of 14)

Step 13: Select months per year worked

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

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

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

CalPERS

Employment Certification (11 of 14)

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

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

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

- Yes: Continue to **Step 16**

Is the participant requesting to purchase Service Credit?*	● Yes ○ No
Service Credit Purchase Type Requested:*	○ Service Prior to Membership
	○ Comprehensive Employment and Training Act (CETA)
	○ Fellowship
	○ Prior Service as Public Service
	○ Local System Redeposit
	○ Optional Arrears

CalPERS

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Employment Certification (12 of 14)

Step 16: Select service credit type the employee is requesting to purchase

Service Credit Purchase Type Requested:*
- Service Prior to Membership
- Comprehensive Employment and Training Act (CETA)
- Fellowship
- Prior Service as Public Service
- Local System Redeposit
- Optional Arrears

Step 17: Select **Add Document** to upload service credit purchase request document

Please upload the participant's *Service Prior to Membership* related signed service credit purchase request form (myCalPERS 1168): *   [Add Document]

Note: Skip **Steps 17** and **18** if the SCP request was submitted through myCalPERS account. The request will already be uploaded.

CalPERS

Employment Certification (13 of 14)

Step 18: Locate the document and select **Open**

Step 19: Answer the remaining questions

- Default to **No** if unknown

Is the participant above a member of a reciprocal system? *   ○ Yes ○ No

Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982?*   ○ Yes ○ No

Was the service rendered under a fellowship program? *   ○ Yes ○ No

Was this position filled by an election or appointment to a fixed term of office? *   ○ Yes ○ No

Was the service rendered through an independent contractor or paid through a third party or temporary employment agency ? *   ○ Yes ○ No

For teacher's assistants in a credential program only:

Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period ? *   ○ Yes ○ No

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

Employment Certification (14 of 14)

Step 20: Select **Save**

CalPERS, during the specified time period? *

Save

Step 21: Do you have additional employment periods to add?

- No: This section is complete, proceed to enter the payroll detail

- Yes: Return to **Step 4**

   o Enter additional employment periods for the following:

   ▪ All positions within the requested time period

   ▪ Time base changes **per** position

   ▪ Separations between appointments **must** be included
   Example: 01/01/2000-06/30/2000, separated, started again 08/01/2000–12/31/2000
   Each period needs a separate employment period added

CalPERS

Add Service Period Detail

Add Service Period Detail (1 of 14)

Step 1: Select **Add New Service** in the Service Review Filter panel to submit service period detail

- Confirm you have the correct roles assigned if you are unable to view the Add New Service button

Add Service Period Detail (2 of 14)

Add Service Period Detail (3 of 14)

Step 2: Enter the begin and end dates of the period in the Maintain Record Details panel

- Payroll details must be entered by pay period and separated by fiscal year

- Multiple pay periods cannot be grouped together

Maintain Record Details (Record 1 of 1)

Enter the preferred values below. Dollar amounts must be greater than zero.

| Begin Date:* | | End Date:* | | Display |
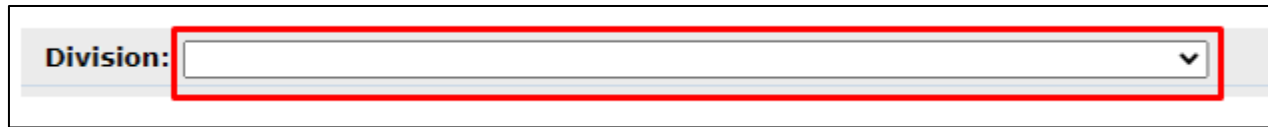
Payroll Record Memo:

Add Service Period Detail (4 of 14)

Step 3: Select from the **Division** drop-down menu, if available

- Districts will not see this field

Division: [▾]

Add Service Period Detail (5 of 14)

Step 4: Select from the Member Category drop-down menus, if available

Member Category:	▾
Position Title:	

Step 5: Enter **Position Title**

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

Position Title:

Add Service Period Detail (6 of 14)

Step 6: Select the **No Appointment** radio button when reporting payroll detail for a time frame **not** in myCalPERS
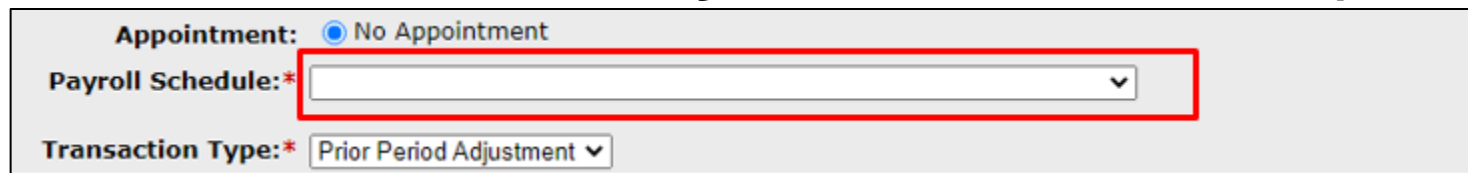
Appointment:	⦿ No Appointment ▾
	○ 92139121 : City of Disneyland - Safety - County Peace Officer - 03/21/2015
	○ 92111572 : City of Disneyland - Safety - County Peace Officer - 01/10/2015 - 02/25/2015

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

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

Step 7: Select from the **Payroll Schedule** drop-down menu

Appointment:	⦿ No Appointment
Payroll Schedule:*	[▾]
Transaction Type:*	Prior Period Adjustment ▾

Add Service Period Detail (7 of 14)

Step 8: Complete the **Pay Rate Type, Pay Rate** and **Reportable Earnings** fields

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

CalPERS

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Add Service Period Detail (8 of 14)

Step 9: Complete the **Scheduled Full Time Hours Per Week**

OR **Scheduled Full Time Days Per Week** field depending on pay rate type

- Report what is considered full time for the position whether the member works full time or not

Scheduled Full Time Hours Per Week: 0.0

Scheduled Full Time Days Per Week: 0.0

Add Service Period Detail (9 of 14)

Step 10: Complete the **Total Hours Worked** and **Overtime Hours Worked** fields

- Only report the hours for the period reported in this record

- Enter overtime hours in the Overtime Hours Worked field. Do not provide overtime hours in the Total Hours Worked field.

Total Hours Worked:*	0.0	Overtime Hours Worked:	0.0

Step 11: Is there special compensation to be reported?

- Yes: Continue to **Step 11**

- No: Skip to **Step 16**

Special Compensation: $0.00   View Special Compensation

Add Service Period Detail (10 of 14)

Step 12: Select the **Add New** in the View Special Compensation panel

Add Service Period Detail (11 of 14)

Step 13: Complete the **Special Compensation Category, Special Compensation Type** and **Amount** fields in the Maintain Special Compensation Details panel

- Special Compensation Category will generate different special compensation types

Add Service Period Detail (12 of 14)
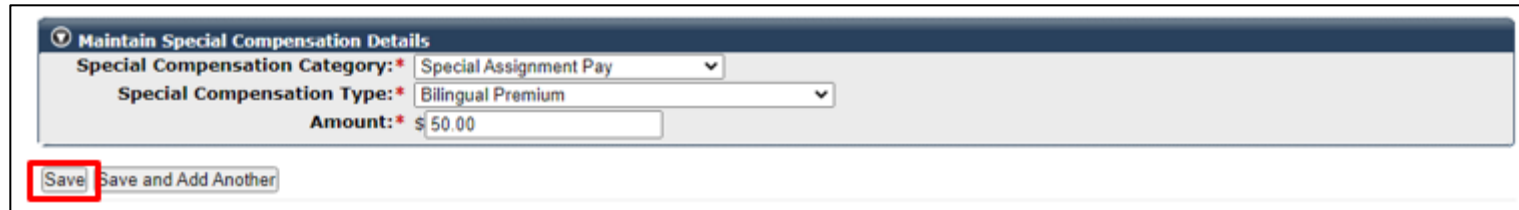
Step 14: Is there additional special compensation to add to this record?

- No: Continue to **Step 14**

- Yes: Select **Save and Add Another**, return to **Step 11**

Add Service Period Detail (13 of 14)

Step 15: Select **Save**

Step 16: Select **Return** located at the bottom right

Add Service Period Detail (14 of 14)

Step 17: Do you have additional periods to report?

- No: Select **Save & Return**

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

- This section is complete

File Upload Option

File Upload

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

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

Submit the Certification

Submit Certification

Prior to submitting the certification, confirm the information provided in the Employment Information and Service List panels are complete and accurate

Error Messages

Error Messages (1 of 3)

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

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

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

Error Messages (2 of 3)

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

Missing Service Period record(s) found for the Employment Periods.

Missing Service Period Errors (2 of 3)

Common missing items and/or require correction before submission:

- Missing service period

  Note: Pay rate, earnings, and hours are reported as zero (0) if the participant didn't work during a pay period that falls within the service period requested.

- Incorrect dates

- Fiscal Year not separated

- Day missing from a service period

  o Example: Leap year

Certification Status

Certification Status (1 of 2)

Requested

- Certification has been requested, but not started

In-Progress

- Certification has been started, but not completed or submitted

Certification Expired

- Certification is expired
  - This is for a Service Credit Purchase not completed within 30 days

Certification Status (2 of 2)

Rejected

- Request has been rejected by employer

Employer Withdrawn

- Request has been withdrawn by employer

Submitted

- Certification has been certified and submitted to CalPERS for review

Completed

- Certification process is complete

Rejecting or Withdrawing a Request

Rejecting or Withdrawing a Request (1 of 2)

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

Rejecting or Withdrawing a Request (2 of 2)

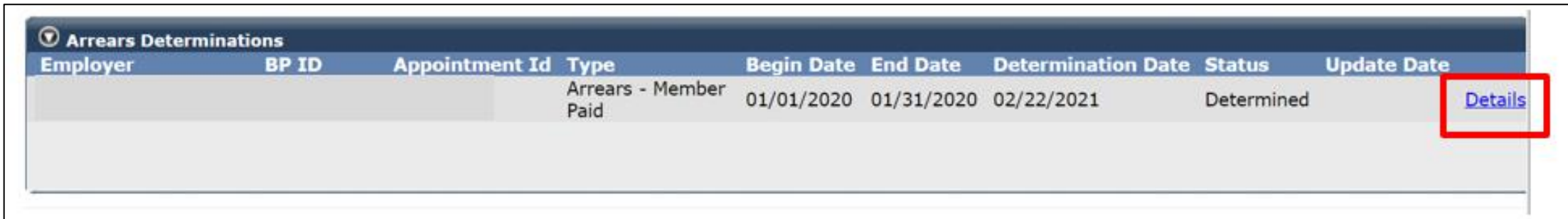Employers can reject a certification request that was initiated by the employee by selecting the "Reject Member SCP Request" button and selecting the appropriate Rejection Reason.

Arrears Determination Options

Arrears Determination Details

Select **Details** in the Arrears Determinations panel

If arrears is determined, the details are viewable in the employee's account

Waiving Appeal Rights

Arrears Detail

Appointment Information

Employer:	
Appointment ID:	

CalPERS ID:

Enrollment Date: 01/01/2020

Determination Information

Arrears Period Begin Date: 01/01/2020   **Arrears Period End Date:** 01/31/2020

Arrears Type: Arrears - Member Paid

Status: Determined

Processing Date: 03/24/2021

Source of Payroll: Service Period Submission in myCalPERS

Reason: 1,000 hours of work within the fiscal year (July 1 to June 30)

Does this determination change the No
enrollment level from PEPRA to
Classic?

Create Date: 02/22/2021

Determination Date: 02/22/2021

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.   [Waive Appeal]

Reconsideration Request

If your agency does not agree with this determination, you must provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 03/24/2021

Reason for
Reconsideration: *

Please select document type and upload documentation to support your reconsideration request.

Document Type:* [▼] [Add Document]

[Submit]

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

Reconsideration Request

Provide reason with documentation to submit a request.

Resources

Resources Information

CalPERS Customer Contact Center

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

Circular Letter 200-042-20

Circular Letter 200-058-21

Membership_Reporting@calpers.ca.gov

myCalPERS Employment Certification Functionality Student Guide

myCalPERS System Access Administration

myCalPERS System Privileges for Business Partner Roles

CalPERS

Questions