

School Employer Advisory Committee

July 19, 2023

Housekeeping (1 of 2)

Webinar is being recorded

Attendee mics are muted

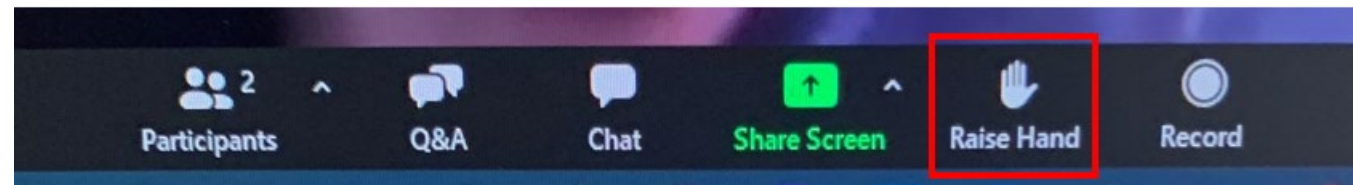
Meeting materials available on www.calpers.ca.gov

Email: CalPERS_SEAC@calpers.ca.gov

Housekeeping (2 of 2)

Options to submit a question for panelist(s):

- Q&A feature
- Raise Hand feature
 - Select **Raise Hand** to indicate you have a question. The host will call on you to unmute your mic and pose your question.
 - While unmuted, your profile picture and name will display to the host and panelists
 - Only your name will display to the other attendees
 - Select **Lower Hand** to lower, if needed. **Note:** This will **NOT** automatically mute your mic



Agenda (1 of 2)

Reciprocal Self-Certification Form – Ranpreet Ball

Completing the Annual Information Request (AIR) Form – Veronica Silva-Gil

Employment Certification – Ryan Bieker

myCalPERS Employer Reports (Cognos) Catalog – Erika Sanchez

Break – 10 minutes

Agenda (2 of 2)

Off-Salary-Schedule Pay – Kevin Fine

Full-Time Equivalent Payrate Calculator (Classified School Members) – Truc Nguyen

Retroactive Payroll Reporting – Carlos Velazquez

Coaching Stipends – Ken Noss

Questions and Answers – Renee Ostrander, Christina Rollins, and Dianne Cooper

Reciprocal Self-Certification Form

Ranpreet Ball

Employer Account Management Division

Public Employees' Pension Reform Act

Also known as PEPRA

- Effective January 1, 2013
- Created a new level of benefits
- Enrollment level determined for each new enrollment in CalPERS
- Reciprocal Self-Certification form

Enrollment levels

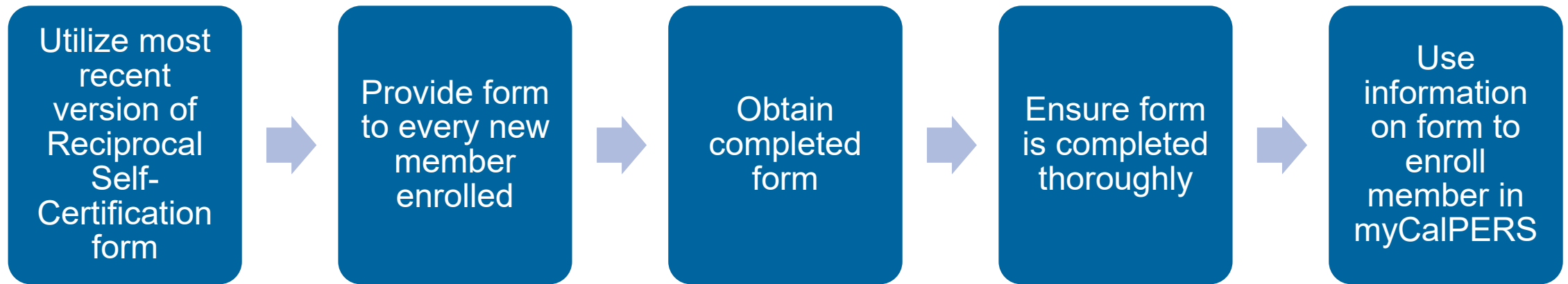
PEPRA

- Hired by a different CalPERS-covered employer following a break in service of more than six months
- No prior membership in another California public retirement system.
- Not subject to reciprocity upon joining CalPERS

Classic

- Any enrollment that does not meet the definition of a new member

Employer Responsibilities



Reciprocal Self-Certification Form - Revised

Effective July 1, 2023



California Public Employees' Retirement System
www.calpers.ca.gov

Reciprocal Self-Certification Form

Complete the following information and return this form to your employer within 10 business days to determine your eligibility for benefits in CalPERS. To ensure this form is completed correctly, please reference the enclosed *List of Qualifying Reciprocal Retirement Systems in California*.

Section 1: Member Information

Member Name (Last)			Member Name (First)			Member Name (Middle)		
Date of Birth			CalPERS ID			Enrollment Date with this Employer		

Are you a member of CalPERS with funds on deposit? Yes No

Are you a member of the defined benefit plan of one of the retirement systems listed on the attached *List of Qualifying Reciprocal Retirement Systems in California*? Yes No If yes, complete Section 2 with membership information for each qualifying reciprocal retirement system. Do not provide CalPERS data on this form. If no, skip to Section 3.

Section 2: Qualifying Reciprocal Membership Information

Data must be validated with reciprocal system prior to completion. Failure to validate information may result in enrollment errors. Refer to the *List of Qualifying Reciprocal Retirement Systems in California*. Only include details on this form if you are a member under the retirement systems listed and not CalPERS-covered.

1) Full name of most recent reciprocal retirement system (do not provide an acronym): _____
Membership date in most recent reciprocal system (MM/DD/YYYY): _____
Are you currently active with this reciprocal system? Yes No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): _____
Did you receive a refund from this reciprocal system? No Yes, provide refund date (MM/DD/YYYY): _____
Did you retire from this reciprocal system? No Yes, provide retirement date (MM/DD/YYYY): _____
Note: If you have additional reciprocal membership, provide the details below for reciprocal system #2. If you do not, skip to Section 3.

2) Full name of reciprocal retirement system (do not provide an acronym): _____
Membership date (MM/DD/YYYY): _____
Are you currently active with this reciprocal system? Yes No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): _____
Did you refund from this reciprocal system? No Yes, provide refund date (MM/DD/YYYY): _____
Did you retire from this reciprocal system? No Yes, provide retirement date (MM/DD/YYYY): _____
Note: If you have additional reciprocal membership, attach a second form. If you do not, skip to Section 3.

Section 3: Sign and Certify

I understand that I am subject to the applicable laws and regulations of each system where I have membership. I also understand that completing this form will only determine my enrollment eligibility in CalPERS. It is not a request to establish reciprocity.

I certify that the information on this form has been verified with the qualifying reciprocal retirement system as true and correct and any information found to be incorrect may require corrections to my CalPERS account including, but not limited to, my retirement enrollment level or formula and adjustments to my member contributions. CalPERS may make any necessary corrections to my account to ensure I am properly enrolled and eligible to receive the correct retirement benefits.

Member Signature	Date
------------------	------

Revised Form (1 of 3)

Section One

Reciprocal Self-Certification Form

Complete the following information and return this form to your employer within 10 business days to determine your eligibility for benefits in CalPERS. To ensure this form is completed correctly, please reference the enclosed **List of Qualifying Reciprocal Retirement Systems in California**.

Section 1: Member Information

Member Name (Last)	(First)	(Middle)
Date of Birth	CalPERS ID	Enrollment Date with this Employer

Are you a member of CalPERS with funds on deposit? Yes No

Are you a member of the defined benefit plan of one of the retirement systems listed on the attached **List of Qualifying Reciprocal Retirement Systems in California**? Yes No If yes, complete Section 2 with membership information for each qualifying reciprocal retirement system. Do not provide CalPERS data on this form. If no, skip to Section 3.

Revised Form (2 of 3)

Section Two

Section 2: Qualifying Reciprocal Membership Information

Data must be validated with reciprocal system prior to completion. Failure to validate information may result in enrollment errors. Refer to the *List of Qualifying Reciprocal Retirement Systems in California*. Only include details on this form if you are a member under the retirement systems listed and not CalPERS-covered.

1) Full name of most recent reciprocal retirement system (do not provide an acronym): [redacted]
Membership date in most recent reciprocal system (MM/DD/YYYY): [redacted]
Are you currently active with this reciprocal system? Yes No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): [redacted]
Did you receive a refund from this reciprocal system? No Yes, provide refund date (MM/DD/YYYY): [redacted]
Did you retire from this reciprocal system? No Yes, provide retirement date (MM/DD/YYYY): [redacted]

Note: If you have additional reciprocal membership, provide the details below for reciprocal system #2. If you do not, skip to Section 3.

2) Full name of reciprocal retirement system (do not provide an acronym): [redacted]
Membership date (MM/DD/YYYY): [redacted]
Are you currently active with this reciprocal system? Yes No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): [redacted]
Did you refund from this reciprocal system? No Yes, provide refund date (MM/DD/YYYY): [redacted]
Did you retire from this reciprocal system? No Yes, provide retirement date (MM/DD/YYYY): [redacted]

Note: If you have additional reciprocal membership, attach a second form. If you do not, skip to Section 3.

Revised Form (3 of 3)

Section Three

Section 3: Sign and Certify

I understand that I am subject to the applicable laws and regulations of each system where I have membership. I also understand that completing this form will only determine my enrollment eligibility in CalPERS. It is not a request to establish reciprocity.

I certify that the information on this form has been verified with the qualifying reciprocal retirement system as true and correct and any information found to be incorrect may require corrections to my CalPERS account including, but not limited to, my retirement enrollment level or formula and adjustments to my member contributions. CalPERS may make any necessary corrections to my account to ensure I am properly enrolled and eligible to receive the correct retirement benefits.

Member Signature

Date

myCalPERS

Reciprocity Panel

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

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

Resources

Upcoming:

- Circular Letter
- Updated Public Agency & Schools Reference Guide
 - Instructions for the Reciprocal Self-Certification Form
- Webpage instructions on completing the Reciprocal Self-Certification Form

Call us: **888 CaIPERS** (or **888-225-7377**)

Questions

AIR: School Districts and County Offices of Education (COEs)

Veronica Silva-Gil
State Social Security Administrator Program



Overview

What is the AIR?

Navigating myCalPERS

Viewing Social Security and/or Medicare agreement details

Completing the AIR

AIR Form



Official State Social Security Administrator



What is the AIR form?

Federal requirement

Employment tax survey

Updates the SSSA Section 218 coverage database

AIR Process Overview

Completed electronically in myCalPERS

COEs and schools: Issued March and April

Issued alphabetically by county

30-day reminder

Employers may receive a follow-up email or telephone call

Navigating myCalPERS



myCalPERS System Access Role

Business Partner Social Security

- Contact for SSSA correspondence
- Request new or modify Section 218 Agreement
- Upload documents
- Respond to the AIR

CalPERS Website



INVESTMENTS | NEWSROOM | CONTACT | ABOUT

ENHANCED BY Google



Home

Active Members

Retirees

Employers

myCalPERS Log In

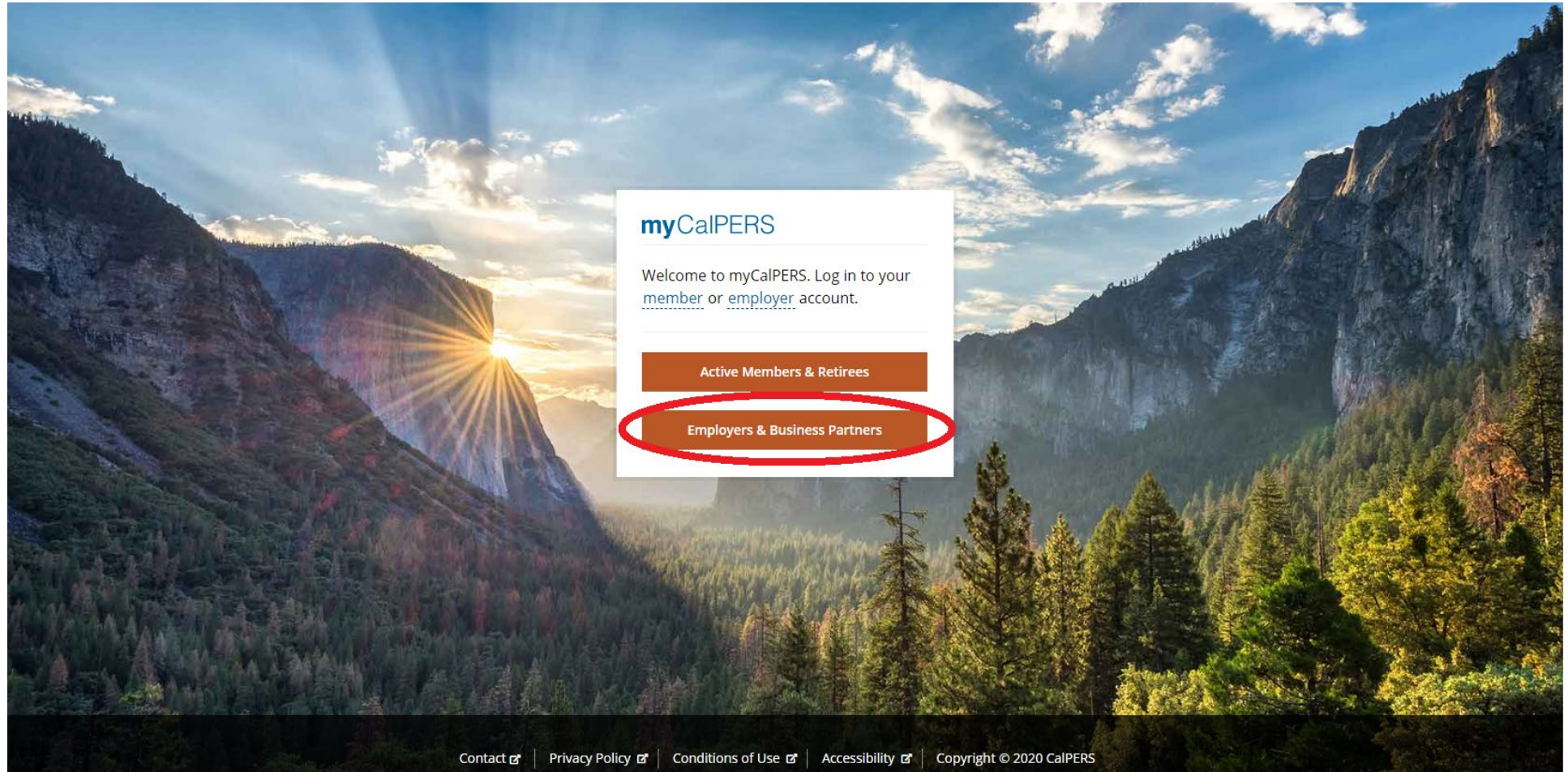
Regional Offices Open

To make a pre-scheduled appointment to discuss your benefits, select the **Education** tab in myCalPERS.

Log in to myCalPERS



myCalPERS Pre-Log In Screen



myCalPERS Home

Home Profile Reporting Person Information Education Other Organizations

My Home Requests

Common Tasks ▲

Menu ▼

Person Search

Contact Personal Security Settings

Welcome
Upcoming Scheduled Maintenance
my|CalPERS will be unavailable as follows:

- **From 8:00 p.m. on August 22 until 1:00 a.m. on August 23 (PT)**

Users will be unable to access my|CalPERS during system maintenance. We apologize for the inconvenience.

Employer News

For Direct Authorization Vendors, Health Plan Business Partners, and Dental Plan Carriers:

- [2018 Important Dates for Direct Authorization Vendors \(PDF\)](#)
- [Direct Authorization Vendor User Guide \(PDF, 4.43 MB\)](#)
- [my|CalPERS Enhancements Presentation \(PPT, 3.65 MB\)](#)

Cognos Reports

- Visit [my|CalPERS Employer Reports \(Cognos\)](#) to view the updated list of available reports.
- View [my|CalPERS Cognos Reports Browser Requirements \(PDF\)](#) to ensure your browser is properly configured.
- View [my|CalPERS Employer Reports \(Cognos\) \(PDF, 2 MB\)](#) for instructions on how to generate reports.

My Messages

Date	Message
08/13/2018	2018 CalPERS Public Agency Member Board Election Toolkit The board election is coming up on August 31 and ballots are in the mail. Help get the word out with our easy-to-use toolkit at www.calpers.ca.gov/page/about/board/board-elections/employer-toolkit .
08/13/2018	Open Enrollment for Employers Web Page Now Available The 2018 Open Enrollment for Employers web page is now available. Find information to assist your employees with open enrollment at www.calpers.ca.gov/openenrollmentemployers .

CalPERS MARKET VALUE
\$360.74 billion
Reflects market value as of close on 08/21/21
[View By Asset Class >>](#)

Forms and Publications Center >>

QUICK LINKS
CalPERS Quick Picks
[CalPERS website](#)

[Edit Quick Links >>](#)

New Online Reference Guide!
Learn how to conduct business with CalPERS.
[Go Now](#)

Profile

Home
Profile
Reporting
Person Information
Education
Pension Outlook
Other Organizations

Summary
Payments
Receivables
Retirement Contract
Health Contract
Agreements
Mergers and Reorganizations

Common Tasks ▲

Menu ▼

- Contacts
- View BP Relationships
- Divisions
- View Service Relationships
- Health Invoice History
- Findings
- SSA Annual Information Request

▼ Summary
View More Actions»

Profile

CalPERS ID: 7974191690

Federal Tax ID: 12-3456789

Category: Public Agency

County:

Division Of:

Status: Active [Request Update](#)

Name: ABC City

Regional Office:

Governing Body: City Council

Merged Agency: No

Addresses

Physical: 1 MAIN ST
SACRAMENTO, CA 95814

Undeliverable: No

Mailing:

Undeliverable: No

Communication Information

Preferred Communication: Mail

Primary Email:

Primary Phone Number: (916) 555-1212

▼ Contacts
Add New
View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
General	Trevor Gohl	Y	Y	

▼ Business Relationships
Add New
View More Actions»

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

▼ Contracts/Agreements
View More Actions»

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Social Security Agreement (218)	1000371809	Active	03/18/2020	01/01/2000		
SIP - 457 Agreement	1000372809	Work In Progress	03/19/2020	03/19/2020		
Social Security Agreement (218)	1000372810	Cancelled	03/19/2020	01/01/2000		

Social Security Agreement

Home **Profile** Reporting Person Information Education Pension Outlook **Agreements** Other Organizations

Summary Payments Receivables Retirement Contract Health Contract **Agreements** Mergers and Reorganizations

Common Tasks

Menu

- Contacts
- View BP Relationships
- Divisions
- View Service Relationships
- Health Invoice History
- Findings
- SSA Annual Information Request

Summary

Profile

[Request Update](#)

CalPERS ID: 7974191690 **Status:** Active
Federal Tax ID: 12-3456789 **Name:** ABC City
Category: Public Agency **Regional Office:**
County: **Governing Body:** City Council
Division Of: **Merged Agency:** No

Addresses

Physical: 1 MAIN ST
SACRAMENTO, CA 95814 **Mailing:**
Undeliverable: No **Undeliverable:** No

Communication Information

Preferred Communication: Mail **Primary Phone Number:** (916) 555-1212
Primary Email:

Contacts [Add New](#) [View More Actions»](#)

Contact Type	Name	System Admin	Primary	Phone Number
General		Y	Y	

Business Relationships [Add New](#) [View More Actions»](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements [View More Actions»](#)

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
SIP - 457 Agreement	1000000655	Terminated	07/31/2002	06/01/1995	07/31/2002	
PEMHCA Non-CalPERS Health Contract	34475	Amended	01/01/2020	09/01/1983		
Retirement Contract	20316	Active	08/02/1983	08/02/1983		
PEMHCA CalPERS Health Contract	34143	Amended	01/01/2020	09/01/1983		
Social Security Agreement (218)	21503	Terminated	02/28/1965	01/01/1956	02/28/1965	

Locating the AIR form in myCalPERS (1 of 2)

The screenshot displays the myCalPERS user interface. At the top, there is a navigation bar with tabs for Home, Profile, Reporting, Person Information, Education, Pension Outlook, and Other Organizations. Below this is a secondary navigation bar with links for Summary, Payments, Receivables, Retirement Contract, Health Contract, Agreements, and Mergers and Reorganizations. On the left side, there is a sidebar menu with sections for Common Tasks and Menu. The 'SSA Annual Information Request' link is highlighted with a red box. The main content area shows the 'Profile' section with various fields: CalPERS ID (7974191690), Federal Tax ID (12-3456789), Category (Public Agency), County, and Division Of. It also includes Status (Active), Name (ABC City), Regional Office, Governing Body (City Council), and Merged Agency (No). There is a 'Request Update' link. Below the profile information are sections for 'Addresses' (Physical and Mailing) and 'Communication Information' (Preferred Communication and Primary Phone Number).

Navigation	Profile Information
Home	CalPERS ID: 7974191690
Profile	Federal Tax ID: 12-3456789
Reporting	Category: Public Agency
Person Information	County:
Education	Division Of:
Pension Outlook	Status: Active
Other Organizations	Name: ABC City
Summary	Regional Office:
Payments	Governing Body: City Council
Receivables	Merged Agency: No
Retirement Contract	Request Update
Health Contract	Addresses
Agreements	Physical: 1 MAIN ST
Mergers and Reorganizations	SACRAMENTO, CA 95814
Common Tasks	Mailing:
Menu	Undeliverable: No
Contacts	Communication Information
View BP Relationships	Preferred Communication: Mail
Divisions	Primary Email:
View Service Relationships	Primary Phone Number: (916) 555-1212
Health Invoice History	
Findings	
SSA Annual Information Request	

Locating the AIR form in myCalPERS (2 of 2)

The screenshot shows the myCalPERS user interface. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, Pension Outlook, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, Retirement Contract, Health Contract, Agreements, and Mergers and Reorganizations. A left sidebar contains a 'Common Tasks' section with a 'Menu' dropdown. The main content area displays 'Name:' and 'CalPERS ID:' fields. Below these is a table with the following data:

Request Date	Status	Receivable Status
03/04/2019	Not Submitted	N/A

Below the table, there is a footer area with various links and technical information:

[Contact Us](#) | [CalPERS Website](#) | [Privacy Policy](#) | [Conditions of Use](#) | [Accessibility](#) | © Copyright 2020 CalPERS

[DataSource Shifter](#) | [Time Shifter](#) | [Developer Console](#) | [Data Search Tool](#) | [Batch Analysis Tool](#)
 Build: v8.7 Baseline: 200318_085612_v8.7_Int.5388 UID: 1553
 Username: tgohl Datasource: env91_s1ds Schema owner: ENV91_S1_PSRAPPXA Server: ENV91_node3
 Last imported dataset name: 2020/03/05 00:01:03 FULL UNMASKED
 Current patch level: UNKNOWN Database: MYC91_S1.CALPERS.CA.GOV
 Action class :
 psr.web.mvc.common.contract.agreements.ssa.SsaAnnualInformationRequestListAction

JSP : contracts/agreements/ssaAnnualInformationRequestList.jsp
 SQL query executed by this page: 1 in 0.053 seconds with 1 rows received.
 Duplicate queries executed by this page: 0 in 0.000 seconds with 0 rows received.
 Action execution time: 0.079 seconds

Completing the AIR Form: COEs



COE AIR Process

Two-part process

1. Confirmation of organization changes
2. School reorganization

COE AIR: No Organizational Changes (1 of 2)

Home Profile Reporting Person Information Education Pension Outlook Other Organizations

Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations

Common Tasks **Menu**

- Contacts
- View BP Relationships
- Divisions
- View Service Relationships
- Health Invoice History
- Findings
- SSA Annual Information Request

Name: **CalPERS ID:**

Annual Information Request
For instructions, please use the Social Security & Medicare Agreement Student Guide located at www.calpers.ca.gov/sssa under resources

Federal Tax ID: 123456789

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

Please follow the instructions in the job aid located at <http://www.calpers.ca.gov/sssa>.

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

Please provide total number of employees in the agency: 1000

Submit

COE AIR: No Organizational Changes (2 of 2)

Confirmation

Home	Profile	Reporting	Person Information	Education	Pension Outlook	Other Organizations
Summary	Payments	Receivables	Retirement Contract	Health Contract	Agreements	Mergers and Reorganizations
Common Tasks	Name: CalPERS ID:					
Menu	<div style="border: 1px solid green; background-color: #e0f0e0; padding: 10px;"><p>Thank you for completing the Annual Information Request. If you have any questions, please contact your State Social Security Administrator at sssa.air@calpers.ca.gov</p></div>					
Contacts	Annual Information Request					
View BP Relationships	Federal Tax ID: 123456789					
Divisions	Are there any organizational changes to School Districts within the County Office of Education?					
View Service Relationships	<input type="radio"/> Yes <input checked="" type="radio"/> No					
Health Invoice History	Please follow the instructions in the job aid located at http://www.calpers.ca.gov/sssa .					
Findings	Does the agency have any employees?					
SSA Annual Information Request	Please include employees who receive wages, stipends, or financial compensation for services performed.					
	<input checked="" type="radio"/> Yes <input type="radio"/> No					
	Please provide total number of employees in the agency: 1000					

COE AIR: Organizational Changes (1 of 3)

Home Profile Reporting Person Information Education Pension Outlook Other Organizations

Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations

Common Tasks **Menu**

- Contacts
- View BP Relationships
- Divisions
- View Service Relationships
- Health Invoice History
- Findings
- SSA Annual Information Request

Name: **CalPERS ID:**

Annual Information Request

For instructions, please use the Social Security & Medicare Agreement Student Guide located at www.calpers.ca.gov/sssa under resources

Federal Tax ID:

Are there any organizational changes to School Districts within the County Office of Education?

Yes No

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](#)

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

Yes No

Please upload documents substantiating change [Upload Document](#)

Does the agency have any employees?

Please include employees who receive wages, stipends, or financial compensation for services performed.


Yes No


COE AIR: Organizational Changes (2 of 3)

Upload Documents


Home Profile Reporting Person Information Education Pension Outlook Other Organizations

Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations


Common Tasks  **Name:** **CalPERS ID:** *Required Fields

Menu 

- Contacts
- View BP Relationships
- Divisions
- View Service Relationships
- Health Invoice History
- Findings
- SSA Annual Information Request

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: Social Security Administrator
Document Type:* SSA - Correspondence - AIR
Submission Method:* 
Path:* No file chosen

COE AIR: Organizational Changes (3 of 3)

Confirmation

Home Profile Reporting Person Information Education Pension Outlook Other Organizations

Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations

Common Tasks **Menu**

- Contacts
- View BP Relationships
- Divisions
- View Service Relationships
- Health Invoice History
- Findings
- SSA Annual Information Request

Name: **CalPERS ID:**

Thank you for completing the Annual Information Request. If you have any questions, please contact your State Social Security Administrator at sssa.air@calpers.ca.gov

Annual Information Request

Federal Tax ID: 123456789

Are there any organizational changes to School Districts within the County Office of Education?

Yes No

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](#) [View Response Document](#)

Are there new school district(s) in existence in the upcoming fiscal year:

Yes No

Does the agency have any employees?

Please include employees who receive wages, stipends, or financial compensation for services performed.

Yes No

COE AIR: School Reorganization Changes (1 of 3)

Home Profile Reporting Person Information Education Pension Outlook Other Organizations

Summary Payments Receivables Retirement Contract Health Contract Agreements **Mergers and Reorganizations**

Common Tasks ▲

Menu ▼

Merger History

Mergers ▼ Add New View More Actions»

[View Merger History](#)

Merger Descriptions	Merger Request Date	Case ID	Case Status
No results found.			

School District Reorganizations ▼ View More Actions»

Effective Date	Status	Addition(s)	Dissolution(s)
07/01/2019	Pending	0	0
07/01/2018	Complete	0	0
07/01/2017	Complete	0	0
07/01/2016	Complete	0	0
07/01/2015	Complete	0	0
07/01/2014	Complete	0	0
07/01/2013	Complete	0	0
07/01/2012	Complete	0	0

COE AIR: School Reorganization Changes (2 of 3)

Home Profile Reporting Person Information Education Pension Outlook Other Organizations

Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations

Common Tasks ▲ *Required Fields

Menu ▼

Merger History

▼ School District Organization Changes

Effective Date: 07/01/2019

Choose:* No, my County will not have School District Organizational changes effective July 1, 2019

Yes, my County will have School District Organizational changes effective July 1, 2019 (one or more existing School Districts will no longer exist and/or one or more new School Districts will be created)

[Review Current List of School Districts](#)

Submit

COE AIR: School Reorganization Changes (3 of 3)

Home Profile Reporting Person Information Education Pension Outlook Other Organizations

Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations

Common Tasks [Add New](#) [View More Actions»](#)

Menu [View Merger History](#)

Merger History

Mergers

Merger Descriptions	Merger Request Date	Case ID	Case Status
No results found.			

School District Reorganizations [View More Actions»](#)

Effective Date	Status	Addition(s)	Dissolution(s)
07/01/2019	Complete	0	0
07/01/2018	Complete	0	0
07/01/2017	Complete	0	0
07/01/2016	Complete	0	0
07/01/2015	Complete	0	0
07/01/2014	Complete	0	0
07/01/2013	Complete	0	0
07/01/2012	Complete	0	0

Completing the AIR Form: School Districts



School District AIR Process (1 of 6)

Home Participant Business Partner Reporting Admin Workflow my Toolbox

Summary Financials Retirement Contract Agreements Mergers and Reorganizations Reports

Common Tasks **Menu**

- Search
- Contacts
- Findings
- View BP Relationships
- Divisions
- View Service Relationships
- Capture Interaction Information
- SSA Annual Information Request

Employer Education

- Activity & History
- Enroll in Class
- Schedule Consultation

Name: _____ CalPERS ID: _____

Annual Information Request

For instructions, please use the Social Security & Medicare Agreement Student Guide located at www.calpers.ca.gov/sssa under resources

Federal Tax ID:

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

In addition to CalPERS and CalSTRS, does the Employer offer a FICA replacement plan? (i.e. APPLE, iCMA, PARS, etc.)
 Yes No

Please provide total number of ALL employees:

For employees who are CalPERS members, does the Employer:
Withhold both Social Security and Medicare? Yes No

For employees who are CalSTRS members, does the Employer:
Withhold both Social Security and Medicare? Yes No

For employees who are NOT member of CalPERS or CalSTRS, does the Employer:
Withhold both Social Security and Medicare? Yes No

School District AIR Process (2 of 6)

Annual Information Request

For instructions, please use the Social Security & Medicare Agreement Student Guide located at www.calpers.ca.gov/sssa under resources

Federal Tax ID:

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

In addition to CalPERS and CalSTRS, does the Employer offer a FICA replacement plan? (i.e. APPLE, iCMA, 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 total number of ALL employees:

School District AIR Process (3 of 6)

For employees who are **CalPERS members**, does the Employer:

Withhold both Social Security and Medicare? Yes No

Exclude any CalPERS-covered 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

Currently have any employees who were hired prior to April 1, 1986 AND have been in continuous employment with the Employer? Yes No

Does the Employer withhold Medicare for this group of employees? Yes No

School District AIR Process (4 of 6)

For employees who are **CalSTRS members**, does the Employer:

Withhold both Social Security and Medicare?

Yes No

Exclude any CalSTRS-covered positions from Social Security withholding?

Yes No

Currently have any employees who were hired prior to April 1, 1986 AND have been in continuous employment with the Employer?

Yes No

School District AIR Process (5 of 6)

For employees who are NOT member of CalPERS or CalSTRS, does the Employer:

Withhold both Social Security and Medicare?

Yes No

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

School District AIR Process (6 of 6)

Summary	Financials	Retirement Contract	Agreements	Mergers and Reorganizations	Reports
Common Tasks	▲	Name:	CalPERS ID:		
Menu	▼	<p>Thank you for completing the Annual Information Request. If you have any questions, please contact your State Social Security Administrator at sssa.air@calpers.ca.gov</p> <p>Annual Information Request</p> <p>Federal Tax ID: 000000000</p> <p>Has the employer had any name changes in the past year? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>In addition to CalPERS and CalSTRS, does the Employer offer a FICA replacement plan? (i.e. APPLE, iCMA, PARS, etc.) <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Please provide total number of ALL employees: 15</p>			
Search					
Contacts					
Findings					
View BP Relationships					
Divisions					
View Service Relationships					
Capture Interaction Information					
SSA Annual Information Request					
Employer Education	▼				
Activity & History					
Enroll in Class					
Schedule Consultation					

Summary

AIR form

Accessing myCalPERS

Viewing Social Security and/or Medicare agreement

Completing the AIR for COEs and school districts

Resources



SSSA Contact Information

Email: sssa@calpers.ca.gov

Call: (916) 795-0810

Mail: CalPERS

State Social Security Administrator

P.O. Box 720720

Sacramento, CA 94229

Employer Resources

Social Security: State and Local Government Employers

- www.ssa.gov/slge

Federal, State, and Local Governments

- www.irs.gov/government-entities/federal-state-local-governments

Social Security & Medicare Webpage:

- www.calpers.ca.gov/ssa
- [myCalPERS Social Security & Medicare Agreement Student Guide](#)

Upcoming Webinar Schedule

Get the Facts About Worker Classification (Joint with CalPERS)

- Wednesday, August 23, 2023
10:00 - 11:00 a.m.

WEP & GPO Impacts on Your Social Security Benefit

- Wednesday, December 13, 2023
10:00 - 11:00 a.m.

Register for a [Social Security & Medicare Webinar](#)

Questions



Official State Social Security Administrator

Employment Certification

Ryan Bieker

Membership Review Team EAMD

Most Common Mistakes

Employer Certification

Certifying the wrong position

Incorrectly certifying “part-time” status

Overtime

Missing periods: report zeros, e.g., summer months

Adding Service Prior to Membership (SPM) time with membership time

Certifying the Wrong Position Using Current Time Base and Tenure

Manage Reports Billing and Payment Summary Payroll Schedules Out-of-Class Validation **Service Credit Purchase** Health Reconciliation Retirement Appointment Reconciliation

Common Tasks **Menu**

Name: Gotham City CalPERS ID: 1234567890 *Required Fields

Employment Information

Participant: * Bruce Wayne
Participant's Email Address: DarkKnight@gmail.com
Business Partner: Gotham City **Division:**

Dates of Employment: * **From:** 06/01/2010 **To:** 02/13/2011

Service Credit Purchase Type Requested: Service Prior to Membership

Employment Category: * Miscellaneous

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

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

Time Base: * Full Time Intermittent On Call Part Time Indeterminate Work(ed) As Needed

Appointment Tenure: * Permanent Indeterminate Seasonal Temporary

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

Certifying the Wrong Position (1 of 2)

Using Current Time Base and Tenure

Per Government (Gov.) Code sections 20281 & 20305, employees who must be enrolled into CalPERS membership on the date of hire are:

- Already a CalPERS member (unless excluded)
- Hired to work full time for more than 6 months
- Working “regular, part-time service” (20 hours) 1 year or longer

[Public Agency & Schools Reference Guide](#)

Certifying the Wrong Position (2 of 2)

Certify for the position between the dates of employment

Employment Information

Participant: * Bruce Wayne
Participant's Email Address: DarkKnight@gmail.com
Business Partner: Gotham City

Division:

Dates of Employment: *
From: 06/01/2010
To: 02/13/2011

Service Credit Purchase Type Requested: Service Prior to Membership

Employment Category: * Miscellaneous

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

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

Time Base: *

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

Appointment Tenure: *

Permanent
 Indeterminate
 Seasonal
 Temporary

Term End Date: 02/13/2011

Months per Year: *

8 Months 9 Months 10 Months
 11 Months 12 Months

Please upload the participant's hiring document:

Membership Based on Time Base and Tenure

Positions that mandate CalPERS membership on date of hire

- Full-time, permanent employees
- Full-time employees with tenure in excess of 6 months
- Regular, part time, working 20 hours per week for one year or longer

Positions that need to be monitored for membership

- All less than full-time employees

Overtime

When monitoring an employee for the 1,000-hour threshold, **all hours** the employee is compensated for must be counted

Once membership is established, overtime hours are no longer counted

Overtime Example

Member applies for SPM service credit

The time period is from 08/01/1999-05/01/2000

Member hit 1,000-hours in January (overtime hours combined with normal working hours)

After January, only report full-time hours worked

Missing Pay Periods

Incorrect:

Begin Date	End Date	Appointment ID	Transaction Type	Pay Rate Type	Pay Rate	Reportable Earnings	Scheduled Full-Time Hours Per Week	Scheduled Full-Time Days Per Week	Total Hours Worked	Overtime Hours Worked	Position Title	CBU	Member Category
8/1/2000	8/31/2000	12345678	PPA	Hourly	30	3500	40	0	40	0	Teacher Aide		Miscellaneous
5/1/2000	5/31/2000	12345678	PPA	Hourly	30	1000	40	0	40	0	Yard Duty		Miscellaneous

Correct:

Begin Date	End Date	Appointment ID	Transaction Type	Pay Rate Type	Pay Rate	Reportable Earnings	Scheduled Full-Time Hours Per Week	Scheduled Full-Time Days Per Week	Total Hours Worked	Overtime Hours Worked	Position Title	CBU	Member Category
8/1/2000	8/31/2000	12345678	PPA	Hourly	30	3500	40	0	40	0	Teacher Aide		Miscellaneous
7/1/2000	7/1/2000	12345678	PPA	Hourly	30	0	40	0	0	0			
6/1/2000	6/30/2000	12345678	PPA	Hourly	30	0	420	0	0	0			
5/1/2000	5/31/2000	12345678	PPA	Hourly	30	1000	40	0	40	0	Yard Duty		Miscellaneous

Adding SPM Time With Membership Time

Scenario:

An employee obtains membership on 7/15/22, when reporting employment certification

<input type="checkbox"/>	Start Date	End Date	Appointment ID	Position Title	Full Time Pay Rate	Reportable Earnings	FT Hours per Week	Reportable Hours Worked
<input type="checkbox"/>	10/01/2015	10/31/2015		Para Special Ed Substitute	\$16.86	\$2,300	37.5	140

<input type="checkbox"/>	Start Date	End Date	Appointment ID	Position Title	Full Time Pay Rate	Reportable Earnings	FT Hours per Week	Reportable Hours Worked
<input type="checkbox"/>	10/01/2015	10/26/2015		Para Special Ed Substitute	\$16.86	\$1,820.88	37.5	108.0
<input type="checkbox"/>	10/27/2015	10/31/2015		Para Special Ed Substitute	\$16.86	\$380	37.5	40

Questions

myCalPERS Employer Reports (Cognos) Catalog

Erika Sanchez
myCalPERS System Support

Certificated Members With Less Than a Full Year of Service Credit Report (1 of 2)

By law, a certificated member is to receive a full service credit for each academic year

- CalPERS will notify the certificated member in a letter that they are missing service credit if they do not receive a full year of service credit

This report allows employers to check all the certificated members on the roster

Certificated Members with Less Than a Full Year of Service Credit Report (2 of 2)

Common Tasks > Reports Tab > Team Content > PSR_REPORTS_Env98

Certificated Members with Less than a Full Year of Service Credit																		
As Of: 06/26/2023																		
Fiscal Year: 2021/2022																		
BP CalPERS ID: Pineapple County Schools																		
Pineapple																		
Participant CalPERS ID	Last Name	First Name	Middle Initial	Participant Status	Appointment Identifier	Appointment Start Date	Appointment End Date	Appointment Status	Business Partner Name	Business Partner ID	Division Name	Division ID	Work Calendar	Fiscal Year	Service Credit Earned by Appointment in FY	Total Service Credit Earned in FY	Automated Letter Indicator	Contains Non-Contributory Period
	Belke	Rodie		Active	9304789	11/07/2020		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	6860889051	Work 12 Months/Paid 12 Months	2021/2022	0.326	0.326	Y	N
	De Arrielo	Ventura	F	Active	31340810	06/18/2006		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	2126074268	Work 12 Months/Paid 12 Months	2021/2022	0.847	0.847	Y	N
	Zavaloyas	Tina	A	Active	91588084	02/06/2012		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	1101477156	Work 12 Months/Paid 12 Months	2021/2022	0.999	0.999	Y	N
	Levia	Gordano		Active	92294941	01/28/2016		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	1101477156	Work 12 Months/Paid 12 Months	2021/2022	0.923	0.923	Y	N
	Lohela	Lella	E	Active	30234150	06/24/2005		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	1302283599	Work 12 Months/Paid 12 Months	2021/2022	0.602	0.602	Y	N
	Loreziana	Negan	X	Active	93051862	11/13/2020		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	6860889051	Work 12 Months/Paid 12 Months	2021/2022	0.684	0.684	Y	N
	Sokolova	Anne	R	Active	9009370	10/26/2020		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	6860889051	Work 12 Months/Paid 12 Months	2021/2022	0.664	0.664	Y	N


Reported Compensation by Calendar Year Summary and Detail Reports

These reports give employers member earnings information across all CalPERS-covered employment per calendar year

Designed for employers to track member compensation limits

- Displays member's earnings from any other additional CalPERS-covered employer

Reported Compensation by Calendar Year Summary Report



Reported Compensation by Calendar Year Summary Report

Program : CalPERS
Business Partner : City of Smallville
Calendar Year : 2022

Click on the hyper link to open detailed report

Participant CalPERS ID	Last Name	First Name	Middle Name	Division	Reported Earnings by Business Partner	Reported Special Compensation by Business Partner	Total Compensation Reported by Business Partner	Total Calendar Year Compensation	Enrollment Level	Social Security	Calendar Year Compensation Limit
123456789	DOE	JOHN			\$91,943.73	\$0.00	\$91,943.73	\$91,943.73	EPRA	N	\$153,971.00
234567891	DOE	JANE			\$62,577.98	\$0.00	\$62,577.98	\$62,577.98	EPRA	N	\$153,971.00
345678912	SMITH	DAVE			\$134,549.33	\$17,927.60	\$152,476.93	\$152,476.93	CLASSIC	N	\$290,000.00
456789123	JOHNSON	JACK			\$103,284.16	\$13,040.20	\$116,324.36	\$116,324.36	EPRA	N	\$153,671.00
567891234	DOE	JAYNE			\$124,171.62	\$13,580.32	\$137,751.94	\$137,751.94	EPRA	N	\$153,671.00
678912345	SMITH	JACKSON			\$74,419.53	\$146.18	\$74,565.71	\$74,565.71	EPRA	N	\$153,671.00

Reported Compensation by Calendar Year Detail Report

Reported Compensation by Calendar Year Detail Report															
Begin Date	End Date	Transaction Type	Record Status	Rate Plan	Pay Rate Type	Pay Rate	Reportable Earnings	Tax Deferred Member Paid Contributions	Effective Employer Rate	1959 Survivor Contribution	Scheduled Full Time Hours Per Week	Appointment Identifier	Member Category	Enrollment Level	Social Security
10/3/2022	10/16/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y
9/19/2022	10/2/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y
9/5/2022	9/18/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y
8/22/2022	9/4/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y
8/8/2022	8/21/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y

Out-of-Class (OOC) Employer Detail Report

Once a year at the end of June employers are notified to report OOC hours to CalPERS for the past fiscal year

This report enables us or business partners to view Out-of-Class records reported in myCalPERS

Out-of-Class Employer Detail Report



Out-of-Class

Fiscal Year: 2018/2019

Business Partner: ABC Company - 1234567890

Business Partner Category:

Member Category:

Record Status:

Business Partner CalPERS ID	Business Partner Name	Participant CalPERS ID	Participant Name	Active Appointment Member Category	Active Appointment Enrollment Level	Active Position Title	Active Position Pay Rate Type	Active Position Pay Rate	Total
1234567890	ABC Company	2345678901	Bircham, Jaxon D	Miscellaneous	Classic	COMMUNICATIONS DISPATCHER III	Hourly	\$51.94	
1234567890	ABC Company	2345678901	BUNGERT CP PEND, Myeeshia T	Miscellaneous	Classic	MENTAL HEALTH PROG SPEC II	Monthly	\$3,559.82	
1234567890	ABC Company	2345678901	Cherlyan, Emerencian	Miscellaneous	Classic	ADMIN SUPPORT OFFICER III	Daily	\$100.00	
1234567890	ABC Company	2345678901	Cherlyan, Maria K D	Miscellaneous	Classic	MAINTENANCE WORKER II	Hourly	\$34.60	
1234567890	ABC Company	2345678901	Debayona, MARA LEE J	Safety - County Peace Officer	Classic	PROBATION OFFICER	Hourly	\$58.75	
1234567890	ABC Company	2345678901	Debayona, Shirazali G	Safety - County Peace Officer	Classic	PROBATION OFFICER	Hourly	\$58.75	
1234567890	ABC Company	2345678901	ENSLOW, Lixuan Y	Miscellaneous	Classic				
1234567890	ABC Company	2345678901	ENSLOW, T'Pring S	Miscellaneous	Classic				
1234567890	ABC Company	2345678901	Fowkes, Yung Hui A	Miscellaneous	Classic				
1234567890	ABC Company	2345678901	Guldner, Hamdan D	Miscellaneous	Classic				
1234567890	ABC Company	2345678901	Macapinlac, Czynus	Miscellaneous	Classic				
1234567890	ABC Company	2345678901	Onigkeit, MARA LEE L	Safety - County	Classic				

Employer Detail Report

08/09/2019, 11:32 AM

Active Position	Out-of-Class Position Title	Out-of-Class Pay Rate Type	Out-of-Class Pay Rate	Out-of-Class Total Earnings	Out-of-Class Total Paid Temporary Upgrade Pay	Out-of-Class Period Begin Date	Out-of-Class Period End Date	Out-of-Class Total Hours Worked	Difference in Earnings	Out-of-Class Penalty	Internal Override	Record Status	Receivable Status
94	SR COMMUNICATIONS DISPATCHER	Hourly	\$57.09	\$18,268.80	\$0.00	12/03/2018	02/24/2019	320	(\$1,648.00)	\$0.00	N	Error	
92	HEALTH CARE PROGRAM MGR II	Monthly	\$3,559.82	\$14,239.28	\$712.02	11/19/2018	03/24/2019	981	\$0.00	\$357.15	N	Reviewed-Invalid	
7	ADMIN SERVICES MGR II	Daily	\$100.00	\$10,000.00	\$2,500.00	10/10/2018	03/10/2019	223	\$0.00	\$0.00	N	Error	
60	MAINTENANCE WORKER III	Hourly	\$36.28	\$8,308.12	\$0.00	02/25/2019	03/10/2019	1,020	(\$384.72)	\$192.99	N	Reviewed-Valid	
75	SUPV PROBATION OFFICER	Hourly	\$66.68	\$20,737.48	\$2,000.00	08/27/2018	03/24/2019	15	(\$2,466.23)	\$0.00	N	Reported	
10	OFFICE MGMT COORD	Hourly	\$37.20	\$9,858.00	\$750.00	12/03/2018	05/17/2019	265	\$0.00	\$0.00	N	Reported	
7	SUPV RECORDABLE DOC TECH	Hourly	\$30.29	\$7,723.95	\$0.00	07/01/2018	06/30/2019	990	(\$808.35)	\$0.00	N	Error	
7	DEPT FISCAL OFFICER	Hourly	\$65.53	\$25,360.11	\$500.00	11/19/2018	03/24/2019	387	(\$2,809.62)	\$0.00	N	Reported	
7	MAINTENANCE WORKER III	Monthly	\$4,500.00	\$38,000.00	\$3,000.00	08/01/2018	03/31/2019	1,050	\$0.00	\$1,347.30	N	Pending Validation	
7	SUPV CLINICAL LAB SCIENTIST	Monthly	\$7,200.00	\$21,600.00	\$6,000.00	12/03/2018	03/10/2019	990	\$0.00	\$2,694.60	N	Pending Validation	
2	PROGRAM MGR I	Hourly	\$52.35	\$19,840.65	\$0.00	01/28/2019	04/15/2019	379	(\$2,020.07)	\$0.00	N	Reported	
3	NRS MGR PEDIATRICS-ICU	Hourly	\$108.25	\$28,576.00	\$0.00	08/27/2018	02/24/2019	264	(\$3,463.68)	\$0.00	N	Reported	

SPS4209

Questions?

Off-Salary-Schedule Pay (OSSP)

Kevin Fine

Employer Account Management Division

OSSP Requirements (1 of 2)

California Code of Regulations (CCR) 571(a)

Lump-sum compensation in addition to base salary paid to a group or class of employees

Negotiated through collective bargaining in lieu of increases to the salary schedule

Can't exceed six percent per fiscal year

OSSP Requirements (2 of 2)

CCR 571(a)

Similar action may be adopted for non-represented groups or classes through collective bargaining negotiation

Only CalPERS classic members are eligible

Group or Class

OSSP must be for a group or class of employees who routinely and consistently are assigned similar tasks, **not** an individual employee

In Lieu of Increase to the Salary Schedule

There can't be a general or COLA increase in the same fiscal year in which the OSSP is awarded

Employees receiving step or merit increases can qualify for OSSP

Labor Policy

OSSP:

Negotiated through collective bargaining

Must be included in a written labor policy or agreement

Approved in open session by the contracted employer's governing body

Lump-Sum Reporting (1 of 2)

OSSP:

Must be reported in the fiscal year earned and prorated on a monthly basis

Can't be reported to CalPERS as a lump-sum amount

Can be reported monthly, or entered as a yearly total with the date range, and myCalPERS will prorate the amount

Lump-Sum Reporting (2 of 2)

If OSSP is reported in myCalPERS as a lump sum in one pay period, this error can cause:

- Delays in retirement payments
- Audit observations
- Costly overpayments
- Lawsuits

OSSP Can't Exceed Six Percent

Example: An 8% OSSP is negotiated for a group or class of employees; only 6% can be reported to CalPERS.

Scenario	Results
OSSP Approved	September 1, 2022
OSSP Approved for Fiscal Year	2021-2022
OSSP Percentage	8%
OSSP Percentage Reportable to CalPERS	6%
Annual Earnings	\$48,000.00 (\$4,000.00 multiplied by 12 months)
Total OSSP	\$3,840 (\$48,000.00 multiplied by 8%)
Total OSSP Reportable to CalPERS	\$2,880.00 (\$48,000 multiplied by 6%)
OSSP Reporting (July 2021 – June 2022)	\$240.00 per month (\$2,880.00 divided by 12 months)

Resources

Website – www.calpers.ca.gov

- Public Employees Retirement Law (PERL)
- Public Agency & Schools Reference Guide
- Circular Letters
- Compliance in Compensation Reporting Webpage

Email us: MOU_Review@calpers.ca.gov

Call us: **888 CaIPERS** (or **888-225-7377**)

Questions

Full-Time Equivalent Payrate Calculator

Truc Nguyen

Employer Account Management Division

Full-Time Equivalent (FTE) Payrate (1 of 2)

Gov. Code 20636.1

Pursuant to Gov. Code 20636.1(b), for **classified school members**, “payrate” means the normal monthly rate of pay for services rendered on a full-time basis, during normal working hours. Full-time employment is 40 hours per week, and payments for services rendered, not to exceed 40 hours per week, shall be reported as compensation earnable for all months of the year in which work is performed.

Full-Time Equivalent (FTE) Payrate (2 of 2)

A full-time payrate must be reported to us for **classified** school positions

Full-time payrate is based on:

- 8 hours per day
- 40 hours per week (8 hours per day x 5 days per week)
- 173.33333 hours per month (2,080 hours per year / 12 months per year)
- 2,080 hours per year (40 hours per week x 52 weeks per year)
- 260 days per year (2,080 hours per year / 8 hours per day)

Service Credit

Gov. Code 20962 and 20966

Full-time service credit

One year of service credit:

- 10 months
- 215 days
- 1,720 hours

Earnings/pay rate = service credit

Reporting Errors

Result of Incorrect Pay Rate Reporting

Inaccurate service credit accrual

Inaccurate final compensation

Miscalculated retirement benefits

- Could lead to a retiree repaying an overpayment amount or receiving a lesser retirement benefit

Unfunded liability and risk to the pension fund

- Could lead to an increase to employer contribution rates

Example (1 of 3)

37.5 Hours Per Week Employee

Monthly earnings = \$5,000.00

Months worked per year = 10

Days worked per year = 205

Hours worked per day = 7.5

Hours worked per week = 37.5

Example (2 of 3)

Calculating Hourly FTE			
Hours Worked	x	Days Worked	= Total Hours Worked
7.5		205	1537.5
Monthly Pay Rate	x	Total Months Worked	= Annual Earnings
\$5,000.00		10	\$50,000.00
Annual Earnings	÷	Total Hours Worked	= Hourly Pay Rate
\$50,000.00		1537.5	\$32.52

Example (3 of 3)

Applying Hourly FTE Payrate for Daily and Monthly FTE Payrates				
Hourly Pay Rate	x	Full Time Hours	=	Daily Pay Rate
\$32.52		8		\$260.16
Hourly Pay Rate	x	Monthly Conversion	=	Monthly Pay Rate
32.52		173.33333		\$5,636.80
Hourly Pay Rate	x	Hours Per Year	=	Annual
32.52		2080		\$67,641.60

Impact of Misreported FTE (1 of 3)

Incorrect FTE Reporting					
Monthly Earnings	÷	Monthly Pay Rate	÷	Factor	= Monthly Service Credit
\$5,000.00		\$5,000.00		10.000	0.1
Monthly Service Credit	x	Months Worked	=	Service Credit Per Year	
0.100		10		1.000	
Total Service Credit	x	Benefit Factor	x	Service Credit Factor	= % of Final Compensation
20.000		2.00%		1.000	40.00%
Monthly Pay Rate	x	% of Final Compensation	=	Unmodified Allowance	
\$5,000.00		0.4		\$2,000.00	

Impact of Misreported FTE (2 of 3)

Correct FTE Reporting						
Monthly Earnings	÷	Monthly Pay Rate	÷	Factor	=	Monthly Service Credit
\$5,000.00		\$5,636.80		10.000		0.089
Service Credit Per Month	x	Months Worked	=	Service Credit Per Year		
0.089		10		0.890		
Service Credit	x	Benefit Factor	x	Service Credit Factor	=	% of Final Compensation
20.000		2.00%		0.890		35.60%
Monthly Pay Rate	x	% of Final Compensation	=	Unmodified Allowance		
\$5,636.80		35.60%		\$2,006.70		

Impact of Misreported FTE (3 of 3)

Retirement Allowance Difference

Reported	Final Compensation	Monthly Allowance
Incorrect FTE	\$5,000.00	\$2,000.00
Correct FTE	\$5,636.80	\$2,006.70
Difference	\$636.80	\$6.70

FTE Calculator (1 of 6)

CalPERS Website – Search “Compliance”

The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are navigation links: INVESTMENTS | NEWSROOM | CONTACT | ABOUT. A search bar contains the text "Compliance" and is highlighted with a red box. Below the search bar is a navigation menu with "Home", "Active Members", "Retirees", and "Employers" (the current page). A "myCalPERS Log In" button is on the right. Below the menu is a secondary navigation bar with "Actuarial Resources", "Benefit Programs", "Contracts", "myCalPERS Technical Requirements", and "Policies & Procedures". The breadcrumb trail reads: Home > Employers > Policies & Procedures > Compliance in Compensation Reporting. The main heading is "Compliance in Compensation Reporting". The main text explains the importance of accurate reporting for retirement benefits. On the right, a sidebar titled "Policies & Procedures" lists several links: Affordable Care Act (ACA) Guidance, Circular Letters, Compliance in Compensation Reporting, Health Procedures, Pension Reform Impacts, and Reference & Health Guides. A red arrow points from the search bar to the "Compliance in Compensation Reporting" link in the sidebar.

CalPERS

INVESTMENTS | NEWSROOM | CONTACT | ABOUT

Compliance

Home | Active Members | Retirees | Employers | myCalPERS Log In

Actuarial Resources | Benefit Programs | Contracts | myCalPERS Technical Requirements | Policies & Procedures

Home > Employers > Policies & Procedures > Compliance in Compensation Reporting

Compliance in Compensation Reporting

It's important for employers to report accurate member information in compliance with the [Public Employees' Retirement Law \(PERL\)](#) Government (Gov.) Code and California Code of Regulations (CCR). This ensures accurate retirement benefits for our members and their beneficiaries. Retirement benefits are calculated based on a member's years of service credit, age at retirement, and final compensation (average salary for a defined period of employment). Inaccurate reporting of compensation can cause inaccurate calculation of retirement benefits that may result in underpayment or overpayment for both members and employers.

Policies & Procedures

- [Affordable Care Act \(ACA\) Guidance](#)
- [Circular Letters](#)
- [Compliance in Compensation Reporting](#)
- [Health Procedures](#)
- [Pension Reform Impacts](#)
- [Reference & Health Guides](#)

FTE Calculator (2 of 6)

The screenshot shows the CalPERS website interface. At the top, there is a navigation bar with links for INVESTMENTS, NEWSROOM, BLOG, CONTACT, and ABOUT, along with a search bar and a 'myCalPERS Log In' button. Below this is a secondary navigation bar with links for Home, Active Members, Retirees, and Employers. The main content area is titled 'Compliance in Compensation Reporting' and includes a breadcrumb trail: Home > Employers > Policies & Procedures > Compliance in Compensation Reporting. The page contains two main sections: 'Compliance in Compensation Reporting' and 'Audit Compliance & Resolution'. The 'Audit Compliance & Resolution' section features a list of resources, with a red arrow pointing to the link 'Calculate Full-Time Equivalent (FTE) Payrate for Classified School Members'. To the right of the main content, there are two sidebars: 'Policies & Procedures' and 'Resources', each containing several links related to the page's topic.

CalPERS INVESTMENTS | NEWSROOM | BLOG | CONTACT | ABOUT ENHANCED BY Google

Home Active Members Retirees Employers myCalPERS Log In

Actuarial Resources | Benefit Programs | Contracts | myCalPERS Technical Requirements | Policies & Procedures

Home > Employers > Policies & Procedures > Compliance in Compensation Reporting

Compliance in Compensation Reporting

Compliance with the [Public Employees' Retirement Law \(PERL\)](#) Government (Gov.) Code and California Code of Regulations (CCR) requires employers to accurately report member information to ensure retirement benefits are correctly calculated. Retirement benefits are calculated based on a member's years of service credit, age at retirement, and final compensation (average salary for a defined period of employment). Inaccurate reporting of compensation can cause inaccurate calculation of retirement benefits that may result in underpayment or overpayment for both members and employers.

Audit Compliance & Resolution

The CalPERS Audit Compliance & Resolution team assists employers to ensure compliant reporting. We provide direct service in reviewing labor policies, agreements, and pay schedules to determine if compensation can be reported for retirement benefits. Below are some helpful resources available to employers for various audit scenarios and resolutions, as well as references to applicable PERL, Gov. Codes, and CCRs:

- + Reporting Compensation
- + Pay Schedules
- + Calculate Full-Time Equivalent (FTE) Payrate for Classified School Members
- + Sample Language
- + Resources for Compliance

Policies & Procedures

- Affordable Care Act (ACA) Guidance
- Circular Letters
- Compliance in Compensation Reporting
- Employment Certification
- Health Procedures
- Pension Reform Impacts
- Reference & Health Guides

Resources

- Publicly Available Pay Schedule Checklist
- Publicly Available Pay Schedule Examples
- Special Compensation Reportability Table

FTE Calculator (3 of 6)

Calculate Full-Time Equivalent (FTE) Payrate for Classified School Members

It's important for all CalPERS-contracted employers to report payrates appropriately for their CalPERS-covered employees, in accordance with Government Code and regulations, found in the California Public Employees' Retirement Law (PERL). Incorrect payrate reporting will cause inaccurate service credit accrual and inaccurate retirement benefit calculations.

Defining Payrates for School Employees

Pursuant to Gov. Code 20636.1(b), "payrate" is the normal monthly rate of pay, or base pay, for a school member; for classified members, **full-time is defined as 40 hours per week**. Payments for services rendered, not to exceed 40 hours per week, shall be reported as compensation earnable for all months of the year in which work is performed.

Reporting monthly earnings as payrates for classified school members is a common payroll reporting error. When a payrate isn't based on 40 hours per week, 173.3333 hours per month, or 2,080 hours per year, the payrate and service credit will be reported inaccurately, which will cause inaccurate accrual of service credit and miscalculated final compensation.

Full-time is based on 40 hours per week. 2,080 hours per year is based on 40 hours per week multiplied by 52 weeks. 173.333 hours per month is based on 2,080 hours per year divided by 12 months per year.

Calculating the FTE Payrate

School employers report hourly, daily, and monthly payrates. However, many school employers have full-time employees who work less than 40 hours per week. Due to Government Code 20636.1(b), all full-time employees must have an FTE payrate reported to CalPERS. We've provided an example that displays how to calculate the FTE payrate, and how the properly reported FTE payrate affects service credit reporting.

The information listed on this page provides school employers with the knowledge they need to report accurate FTE payrates. We've also provided an FTE calculator that will assist in confirming your FTE calculations.

FTE Payrate Calculator
(Classified School Members)



FTE Calculator (4 of 6)

Full-Time Equivalent Payrate Calculator (Classified School Members)

Terms of Use

The Full-Time Equivalent (FTE) Payrate Calculator is intended for classified school member employers to use for confirmation purposes only. For the calculator to compute an accurate FTE payrate, you must input the exact monthly earnings, hours per week, months worked per year, and days worked per year. Any variation from the required information will result in an inaccurate calculation. The calculator was created to comply with [California Public Employees' Retirement Law \(PERL\)](#). If there is a conflict between PERL and the information you provided, the law takes precedence.

By accepting, I agree to the terms of use.

I Accept




FTE Calculator (5 of 6)

Full-Time Equivalent Payrate Calculator (Classified School Members)

Provide the information for your employees using exact numbers.

Monthly Earnings (required) Example: 4321.00	Hours Worked Per Day (required) Example: 7.50
\$ 5000	7.5
Months Worked Per Year (required) Enter a whole number between 9 and 12	Days Worked Per Year (required) Example: 175.00
10	205



FTE Calculator (6 of 6)

Full-Time Equivalent Payrate Calculator (Classified School Members)

Based on the information provided, the employee's FTE payrate is:

Monthly: \$5,636.86

Daily: \$260.16

Hourly: \$32.52



If the FTE provided by this calculator differs from the FTE you previously calculated, confirm the information was entered correctly and recalculate. If you require additional assistance, email MOU_Review@calpers.ca.gov or call 888 CalPERS (888-225-7377).

Resources

Website – www.calpers.ca.gov

- Public Employees Retirement Law (PERL)
- Public Agency & Schools Reference Guide
- Circular Letters
- Compliance in Compensation Reporting Webpage

Email us: MOU_Review@calpers.ca.gov

Call us: **888 CalPERS** (or **888-225-7377**)

Questions

Retroactive Payroll Reporting

Carlos Velazquez

Employer Account Management Division

Types of Payroll Transactions

Contributory Appointments

- Earned Period Reporting (EPR)
- Prior Period Adjustment (PPA)
- Retroactive Salary Adjustment (RSA)
- Retroactive Special Compensation Adjustment (RSC)

Non-Contributory Appointments

- Earned Period No Contribution and No Service (EPN)
- Prior Period No Contribution and No Service (PPN)
- Retroactive Salary Adjustment (RSA)

EPR Transactions (1 of 2)

Used to report a member's current payroll information

- Pay rate
- Earnings
- Scheduled full-time hours/days per week
- Special compensation (if applicable)
- Contributions

EPR Transactions (2 of 2)

Can only be reported in the Earned Period Report

Above rules also apply to EPN transactions

- Instead of reporting contributions, report total hours worked

PPA Transactions (1 of 3)

Used to report payroll information for a previous earned period or to correct previously reported payroll information

- Pay rate
- Earnings
- Scheduled full-time hours/days per week
- Special compensation (if applicable)
- Contributions

PPA Transactions (2 of 3)

Can be reported in the regular Earned Period Report or in an Adjustment Report

Must be reported earned period by earned period

PPA Transactions (3 of 3)

When using to reverse previously reported EPR or PPA transactions, always mirror:

- Dates
- Pay rate type
- Pay rate
- Scheduled hours/days per week
- Contribution type

Above rules also apply to PPN transactions

- Instead of reporting contributions, report total hours worked

RSA Transactions (1 of 2)

Used only to report an increase to an already reported pay rate

- Dates
- Pay rate type
- Pay rate
- Earnings
- Scheduled full-time hours/days per week
- Contributions

RSA Transactions (2 of 2)

Reported in the regular Earned Period Report or in an Adjustment Report

Reported earned period by earned period, or over a span of time

Doesn't accrue service credit

Common RSA Errors – CRB00105

“There is a missing payroll record during the retroactive adjustment period”

- Occurs when a regular payroll record has not yet been posted to the member’s account
- Post either an EPR or PPA transaction with the member’s regular earnings to clear the error

Common RSA Errors – CRB00123

“The payrate in the retroactive salary adjustment cannot be less than or equal to the payrate reported in the earned period record”

- Occurs when the pay rate reported on the RSA record is less than or equal to the pay rate already reported on the member’s regular payroll record
- Review the posted payroll for the timeframe in question and correct the pay rate on the RSA record if reporting a pay rate increase, or correct the transaction type to PPA if reporting additional earnings

Common RSA Errors – CRB00274 (1 of 2)

“The reported earnings exceed the maximum allowable earnings for the reported time period. Please verify and update your entry”

- Occurs when the earnings reported are more than the expected amount, based on the payroll previously reported
- Review the posted payroll for the timeframe in question to determine if the earnings being reported on the RSA record are the true difference between the posted pay rate and the increased pay rate.

Common RSA Errors – CRB00274 (2 of 2)

- If you confirmed the earnings are correct, please contact your assigned payroll analyst for assistance posting

Note: If reporting a mid-month increase, you may receive this error due to the system not recognizing the correct payroll schedule

RSC Transactions (1 of 2)

Used only to report special compensation

- Dates
- Scheduled full-time hours/days per week
- Special compensation category
- Special compensation type
- Special compensation amount
- Contributions

RSC Transactions (2 of 2)

Reported in the regular Earned Period Report or in an Adjustment Report

Reported earned period by earned period, or over a span of time

Doesn't accrue service credit

Common RSC Errors – CRB00133

“Earnings cannot be reported with transaction type of Retroactive Special Compensation Adjustment. Remove the earnings from this transaction or report the payroll with transaction type of ‘Retroactive Salary Adjustment’”

- Occurs when regular earnings are being reported on the RSC record
- Report the monies correctly as special compensation or change the transaction type to either a PPA or RSA to clear the error

Common RSC Errors – CRB00273

“Payrate Type and Payrate cannot be reported with the transaction type of Retroactive Special Compensation Adjustment. Please remove the Payrate Type and Payrate from this transaction.”

- Occurs when a pay rate and/or pay rate type has been reported on the RSC record
- Change the pay rate type to blank and the pay rate to \$0.00 to clear the error

Common RSC Errors – CRB00357

“Special Compensation amount exceeds the allowable limit for (identified special compensation type).”

- Occurs when the amount of special compensation being reported is greater than what the system defines as normal, and needs to be reviewed by us to ensure lump-sum amounts are not being reported
- Email a copy of the member’s MOU or Labor Agreement that defines the special compensation to your agency’s payroll analyst for assistance clearing the error

Future of RSC Reporting

RSCs in earned period reports for current earned periods

Normal RSC rules will still apply

Expected to be implemented in myCalPERS by mid-August

Data Element Definitions document in the Technical Toolkit will be updated

Questions

Coaching Stipends

Ken Noss

Employer Account Management Division

Stipends

Gov. Codes 20636.1 and 7522.34, CCR 570.5, 571 and 571.5

- Stipends are not reportable compensation

Compensation Reportable to CalPERS

Gov. Codes 20636.1 and 7522.34

Reportable compensation must meet the definitions of compensation earnable (Gov. Code 20636.1) for classic members or pensionable compensation (Gov. Code 7522.34) for PEPRA members.

Compensation Earnable – Classic Members

Gov. Code 20636.1 and CCRs 570.5 and 571

Compensation earnable is the pay rate and special compensation of the member (Gov. Code 20636.1).

Compensation earnable pay rates are limited to the amounts listed on a publicly available pay schedule (CCR 570.5).

Reportable special compensation items are listed in CCR 571.

Pensionable Compensation – PEPRA Members

Gov. Code 7522.34 and CCR 571.1

Pay rates pursuant to a publicly available pay schedule that are reportable to us must meet the definition of pensionable compensation (Gov. Code 7522.34).

Pensionable compensation is further defined in CCR 571.1, which includes a list of items, other than pay rate, that meet the criteria of pensionable compensation.

Coaching Stipends – Not Reportable (1 of 2)

Generally, stipends are:

- Not tied to a full-time pay rate
- Not an item of special compensation listed in CCR 571
- Not an item of pensionable compensation listed in CCR 571.1

They cannot be reported to CalPERS

Coaching Stipends – Not Reportable (2 of 2)

Coaching stipends are not reportable if:

- Coaching position is not listed on a publicly available pay schedule with a full-time pay rate
- Coaching position is listed on a publicly available pay schedule with the appropriate full-time pay rate, but the person is already a member in a full-time position. The pay is considered overtime. (Gov. Code 20635.1).

Coaching Compensation - Reportable

If a part-time member:

- Performs services as a coach
- The position and full-time pay rate are established and listed on a publicly available pay schedule
 - Aggregate hours for all positions can't exceed 40 hours per week; hours in excess of 40 are considered overtime and can't be reported to CalPERS (Gov. Code 20635.1).

Example Scenarios

Scenario 1 (1 of 2)

The member is working in a full-time position

The member is also employed as a coach

The position is listed on a publicly available pay schedule

Is this reportable to CalPERS?

Scenario 1 (2 of 2)

No, the compensation is not reportable to CalPERS

The member is working in a full-time position; the coaching position and compensation are overtime and not reportable

Scenario 2 (1 of 2)

The member is working in a part-time position

The member is also employed as a coach

The position is listed on a publicly available pay schedule

Is this reportable to CalPERS?

Scenario 2 (2 of 2)

Yes, the compensation is reportable, but only until the member reaches full-time service credit each service period

Scenario 3 (1 of 2)

The member is working in a part-time position

The member is also employed as a coach

The position and full-time payrate are not listed on a publicly available pay schedule

Is this reportable to CalPERS?

Scenario 3 (2 of 2)

No, the compensation is not reportable

The coaching position is considered a stipend

Resources

Website – www.calpers.ca.gov

- Public Employees Retirement Law (PERL)
- Public Agency & Schools Reference Guide
- Circular Letter 200-049-19
- Compliance in Compensation Reporting Webpage

Email us: MOU_Review@calpers.ca.gov

Call us: **888 CaIPERS** (or **888-225-7377**)

Questions

Open Questions and Answers

Renee Ostrander, Christina Rollins, and Dianne Cooper
Employer Account Management Division