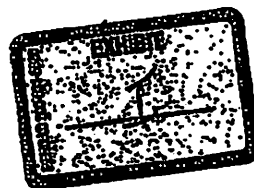


ATTACHMENT I

**DOCUMENTS MARKED FOR IDENTIFICATION AND INCLUDED IN THE
RECORD BUT NOT CONSIDERED BY THE ALJ**

Handwerker Exhibit I



p 1

Received 9/15/10



Member Services Division, P.O. Box 4000, Sacramento, CA 95812-4000
 (833) CALPERS (225-7377) • Telecommunications Device for the Deaf • (916) 795-3240

Request for Service Credit Cost Information Additional Retirement Service Credit (ARSC)

(Air Time or Non-Qualified Service)



Part 1: Member Information

Name Lisa Handwerker Social Security Number _____
 Former Name (if applicable) _____ Current Employer CSU East Bay
 Work Phone _____ Home Phone _____
 Mailing Address _____ City _____ State _____ ZIP Code _____

Part 2: Documentation of Service

☐ I have attached a copy of the estimate to purchase service credit. If not, indicate why _____

Based upon the attached service credit purchase estimate, how many years of ARSC do you intend to purchase? (check one box only) A separate election document with detailed payment options will be mailed to you once this form has been processed.

☐ 1 year ☐ 2 years ☐ 3 years ☐ 4 years ☒ 5 years up to .5 years

Have you requested this cost information before? ☐ Yes ☐ No If yes, enter date request was submitted 1/1

Have you submitted a retirement application? ☐ Yes ☐ No If yes, enter retirement date 1/1

Do you anticipate purchasing this credit with a rollover or plan-to-plan transfer of pre-tax funds? ☐ Yes ☐ No

Part 3: Certification

I hereby certify that the above information is true and correct.

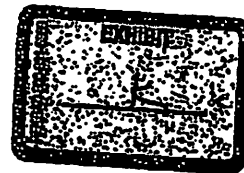
Signature Lisa Handwerker

Date 9/15/2010

Sign and date this request form, make a copy of your request for your records, and attach a copy of your online service credit purchase estimate.

Mail all materials to CalPERS Member Services Division, P.O. Box 4000, Sacramento, CA 95812-4000

Handwerker Exhibit ~~18~~



IMPORTANT RE: AIR TIME

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAAD>

IMPORTANT RE: AIR TIME

Lisa Handwerker [lisahand@juno.com]

Sent: Monday, November 11, 2013 7:44 PM

To: Mark Karpus

Begin forwarded message:

From: George Diehr
Subject: RE: Calpers
Date: January 14, 2010 1:58:05 PM PST
To: Jonathan Karpf
Cc: Lisa Handwerker

I had a good TALK with Lisa today and while it took a while to cut thru misunderstandings to the core issue, I think we now both understand her concerns. Someone at PERS told her that you must have been a member for 5 calendar years to be eligible to buy additional service credit (air time). Clearly, that is not correct. The PERS website says:

"How do I determine if I'm eligible? You must be a CalPERS member in compensated employment with a CalPERS-covered employer and have at least five years of earned service credit [emphasis added] when you make the election. The purchase of other types of service credit may not be used to meet this five-year earned service credit requirement."

Applicable regulation is 20906. And, as you note, service time prior to membership in PERS is "earned" service credit.

She is going to send me her records on service credit as computed by PERS. I am increasingly convinced that they are not treating part-time service correctly for CSU faculty in computing service credit. They should be using WTUs, not months or days worked, to determine service credit (20966(a), not b, c, or d). In a quarter system, each WTU should be 1/15th of a year. Instead, Lisa says they are counting months and partial months and, apparently, using the "10 months = one year rule."

Please give me a call for additional issues:

George Diehr
Professor of Management Science, CSU San Marcos
Member, Board of Administration, CalPERS

From: Jonathan Karpf
Sent: Thursday, January 14, 2010 12:57 AM
To: George Diehr
Subject: Re: Calpers

IMPORTANT RE: AIR TIME

<https://mail.cafac.org/owa/?ae=Item&t=IPM.Note&id=ReAAAAAC>

As you saw in the long email I sent from the Sacramento train station on Tuesday, Service Prior to Membership does count towards vesting, for both the pension and the health benefits. It's earned service credit.

J

Sent from my iPhone

On Jan 12, 2010, at 10:42 AM, "George Diehr" _____ wrote:

> Jonathan must know the answer to this: If Lisa has to buy the part-time service, does that count towards meeting the 5-year requirement
> both for retiree health benefits and eligibility for purchase of air time? It is "real" service time so seems it should count.

>

> If so, the only downside for Lisa if they don't reset her member date to 2004 would be the added cost (interest) for purchase of the part-time service credit. While that is unfortunate, it is a relatively modest issue versus eligibility for retiree health benefits and the right to buy air time.

>

> George Diehr
> Professor of Management Science, CSU San Marcos
> Member, Board of Administration, CalPERS

>

>

> From: Lisa Handwerker
> Sent: Tuesday, January 12, 2010 10:17 AM
> To: George Diehr
> Cc: Jonathan Karpf; Mark Karplus Karplus; Maureen Loughran
> Subject: Calpers

>

> No sorry I realize now you don't know my entire situation. I am in Calpers now. I was originally told I was a member last year but when they started to do calculations I felt something was wrong. I always thought I should be in Calpers earlier. After many phone calls insisting that something was wrong and asking them to recheck they did decide a mistake was made and I should have been in 2006. But I thought it should be earlier and started investigating and asking for my Pims report etc. Csueb also made a mistake that was corrected. But I am not yet vested even with service credit but back. If I get them to enroll me back to winter 2004 it would solve two problems. One I would be vested and two I would be in Calpers for 5 years and if I wanted to could buy back the one time

>

> Sent from my iPhone

>

IMPORTANT RE: AIR TIME

<https://mail.caifac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAD>

> Senior Assisted Living
> Put your loved ones in good hands with quality senior assisted
> living. Click now!
> http://thirdpartyoffers.juno.com/TGL2141/c?cp=FHxcuIYs_da1c6Vm-5KIAAAJ1BKxWEbbcXNi_xh1kvFe1qaAAAYAAAAAAAAAAAAAAAAAADNAAAAAAAAAAAAA
AAAAAAAAASUQAAAAA=

Fwd: Lisa Handwerker--additional issue #1

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAI>

Fwd: Lisa Handwerker--additional issue #1

Lisa Handwerker

Sent: Thursday, November 14, 2013 5:59 PM

To: Mark Karpus; Jonathan Karpf

Begin forwarded message:

From: George Diehr

Subject: FW: Lisa Handwerker--additional issue #1

Date: January 15, 2010 2:21:57 PM PST

To: Lisa Handwerker , Jonathan Karpf

Here is my email to Hamilton on the issue of eligibility for ARSC (air time) purchase.

George

From: George Diehr

Sent: Friday, January 15, 2010 11:02 AM

To: Hamilton, Kathleen

Subject: Lisa Handwerker--additional issue #1

Hi Kathleen,

(What a mess!)

First, let's set aside for now the issue of when Lisa gained membership in PERS--the issue of interpretation of "consecutive quarter." For now, that issue is secondary and not relevant to two larger issues. The first is eligibility to purchase "air time" which I address here. I will address the second in a subsequent email.

There are 3 emails copied below, each incorporates other emails, many of which are not relevant but included for the sake of completeness. I have underlined relevant comments in each letter.

1. From Shirley Liu, Dec. 31.

2. Lisa to Steven Propp, Dec. 31.

3. From Charlene Patton, Oct. 22.

I am quite certain Shirley Liu is incorrect in her statement: "To be eligible to purchase ARSC, the member must have at least five years of earned service credit. SPM purchased time can not be used to meet this five years requirement. Therefore, you will not be eligible to make the ARSC purchase until you have five years of earned service credit." SPM purchased time is earned service credit and therefore qualifies towards the requirement for 5 years of earned

Fwd: Lisa Handwerker--additional issue #1

<https://mail.calfac.org/owa/?ac=Item&t=IPM.Note&id=RgAAAAA>

service credit.

The email from Steven Propp seems correct and seems to allow purchase of air time.

Charlene Patton adds a requirement for: "At least five calendar years as a CalPERS member by the time the election is received." And notes: "Because your membership date with CalPERS is June 19, 2006, you have not been in CalPERS membership for 5 years." I can find no requirement in the PERL that you have to have been a member for 5 calendar years. I conclude that assuming Lisa has 5 years of service credit--as represented by purchase of prior part-time service (SPM) and service credit since she became a member--she is eligible to purchase air time.

Thank you,

George Diehr
Professor of Management Science, CSU San Marcos
Member, Board of Administration, CalPERS

----- Forwarded Message -----

From: "Liu, Shirley"
To: 'Lisa Handwerker'
Cc: "Propp, Steven"
"Eubanks, Matthew"

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Date: Thu, 31 Dec 2009 09:34:39 -0800

Hi Lisa:

To be eligible to purchase ARSC, the member must have at least five years of earned service credit. SPM purchased time can not be used to meet this five years requirement. Therefore, you will not be eligible to make the ARSC purchase until you have five years of earned service credit.

Thank you,

Shirley

-----Original Message-----

From: Propp, Steven
Sent: Thursday, December 31, 2009 8:50 AM
To: 'Lisa Handwerker'; Liu, Shirley

Fwd: Lisa Handwerker--additional issue #1

<https://mail.calfac.org/owa/?ac=Item&t=IPM.Note&id=RgAAAAI>

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Aha! This is becoming clearer, now.

Shirley: Can you answer her question about eligibility for Additional Retirement Service Credit (ARSC, aka "Air Time")? Would either of these scenarios qualify:

1. She has five CALENDAR years of service in membership (e.g., from September 2004-September 2009), but less than five years of SERVICE CREDIT.
2. She has less than five years of service credit in MEMBERSHIP, but when her 2.500 years of SPM are considered, she has more than five years of TOTAL SERVICE CREDIT.

Ms. Handwerker: Eligibility for health benefits I'm not qualified to handle, so I would call our Contact Center about that; since you started working after 1989, however, there will be an additional question you need to have answered about whether your employer will pay any portion of the premiums after you retire.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker |

Sent: Thursday, December 31, 2009 7:45 AM

To: Propp, Steven

Cc: "

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Thank you for this information. I had bought back service credit from CALPERS from Shirley Liu's office but was not told about that.

This is a bit different information than has been explained to me. I may have some additional questions about this. First, I don't know if Shirley Liu told you I already bought back 2.489 years of service credit (I did not know about any other options) from Shirley Liu's office with the understanding that if mistakes were made I would be reimbursed. Second, there is one VERY important aspect you are not mentioning here which is health vestment for myself and my daughter. My understanding after much research, is that in order to be vested for health insurance in CSUEB you need to have a minimum of two classes (over .50) when you decide to retire and a minimum of five years of credit from Calpers (through both buy back service credit and Calpers membership). Since I do not yet have that, there is a lot at stake here for me. Also, if I am in CALPERS starting in Winter 2004 would also put me in Calpers for five years and I would have a one time chance to buy back five additional years of Calpers credit when I did retire. Without my Calpers dating back to winter 2004 I cannot have that opportunity. Is my understanding correct? Thank you again for your time. Have a wonderful and healthy New Year to you and your family.

Fwd: Lisa Handwerker-additional issue #1

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAAC>

Lisa Handwerker, Ph.D., M.P.H.
Email. _____

RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Propp, Steven

Sent: Thursday, December 31, 2009 7:22 AM

To: Lisa Handwerker

Let me answer the second question first; if you are trying to reach 5,000 years in order to qualify to retire, for example, you probably don't need to have 5,000 years of credited service; since you have had regular part-time work, you might qualify to retire with what's known as a "five-year conversion" (based on Government Code 20970), which states that, for qualification purposes, "a year of service shall be credited for each year during which the member was employed throughout the year on a part-time basis and was engaged in his or her duties the full amount of time he or she was required by his or her employment to be so engaged."

To oversimplify, let's say that a member has worked for 6 calendar years at 1/2 time, and therefore has 3,000 years of actual service credit. For purposes of qualification to retire, however, this member would have six years, since she has worked the full amount of time her position required. (Her actual pension would be based only on credited service, of course; but the point is that she could retire without having 5,000 years of actual credited service.) So if you are trying to decide by next Monday if you need to, say, teach two classes instead of one, because you currently have 4,800 years of service credit, you may not need to teach the two classes in order to retire. (Our Customer Contact Center or a Field Office can explain in more detail about a five-year conversion, if you wish.)

For the first question, Arrears is where a person worked enough hours to qualify for PERS membership, but the employer failed to enroll the person into membership; in such a case, the member is required to pay the retirement contributions she should have paid (normally 5% of actual earnings over \$513 per month); no interest is charged, however. We do need to obtain the actual earnings information to do such a calculation, which may be a holdup; although PIMS has been corrected to reflect an 8/15 time base, my analyst is checking with SCO to see whether they are changing your reported EARNINGS as well. (If they just changed the time base to 8/15, but left your actual EARNINGS the same, it won't work.

Service Prior to Membership (SPM), is where the person didn't work enough hours to qualify to retire, but has subsequently qualified for membership, and wants to pay to receive service credit for the SPM period. For SPM, all we need is your Pay Rate at time of membership (which we already know), and your time base (e.g., 8/15, 4/15, etc.), which we also know. Two factors can make SPM costs slightly higher than Arrears: One, if your pay rate was higher at time of membership than during your SPM period; Two, interest (6% compounded annually) is charged on SPM, from your date of membership until the date the calculation is

Fwd: Lisa Handwerker--additional issue #1

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAAD>

done. So if your membership was, say, in 2004 rather than in 2006, that would be two years less interest (at 6%) you would pay. So if, hypothetically, a member's Arrears cost was \$2000, the SPM cost might be \$2300, or something along those lines.

We'll get back to you as soon as we hear from the Chancellor's Office and SCO next week.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker
Sent: Wednesday, December 30, 2009 9:15 PM
To: Propp, Steven
Cc
Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Can you please explain more clearly what you mean by Arrears vs. Service Prior to Membership. I want to make sure I fully understand what you are asking.

Currently, I have several concerns including but not limited to: 1) making sure my Calpers records are correct 2) Getting the correct credit for my CSUEB teaching and 3) reaching a certain threshold of service credit. Why would this make a difference? I am unclear.

Lisa Handwerker, Ph.D., M.P.H.
Email: _____

-----Original Message-----

From: "Propp, Steven"
To: 'Lisa Handwerker'
Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?
Date: Wed, 30 Dec 2009 10:29:13 -0800

I've tried calling Pam Chapin from the Chancellor's Office, but their office is closed until next week.

However, my analyst who reviewed your case has spoken with Ms. Chapin, who agreed with the principle that "for an employee who works during the summer, the time base IS counted toward eligibility."

For my own information, is the focus of your concern purchasing credit for your pre-2006 service as "Arrears" rather than as "Service Prior to Membership"? (Since no interest is charged on Arrears, the cost would be somewhat lower than for Service Prior to Membership.) Or do you have some other primary concern (e.g., reaching a certain threshold of service credit, etc.)?

Steve Propp, Manager

Fwd: Lisa Handwerker-additional issue #1

<https://mail.calfac.org/owa/?as=Item&id=IPM.Note&id=RgAAAAD>

Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker

Sent: Wednesday, December 30, 2009 10:21 AM

To: Propp, Steven

Cc:

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Hello. My understanding according to CalPERS Board Director George Diehr is that summer does not interrupt my march toward eligibility, it is an extra term. Could you please check on this. Thank you.

Lisa Handwerker, Ph.D., M.P.H.

Email: _____

-----Original Message-----

From: "Propp, Steven"

To: 'Lisa Handwerker'

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Date: Wed, 30 Dec 2009 08:00:09 -0800

I've given the package back to my analyst; perhaps she was including the 4/15 6/23/03-9/10/03 period (which presumably was the summer session) as interrupting the 50% time.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker

Sent: Wednesday, December 30, 2009 7:46 AM

To: Propp, Steven

Cc:

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Thank you. I received the fax but unfortunately arrows to left ate cut off. Thank you. Again, I have reviewed the PIMS report many times and with the change (fall 2003 from 4/15 to 8/15) I should have a minimum of 50% in the following four quarters:

Winter 2003 1/6/03 HDEV 4/15 and Anthro 4/15 total 8/15

Spring 2003 4/1/03 HDEV 4/15 and Anthro 4/15 total 8/15

Fwd: Lisa Handwerker--additional issue #1

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAD>.

Fall 2003 9/23/03 HDEV 4/15 and with new PIMS report change is 8/15

Winter 2004 1/5/04 8/15 and 4/15= 12/15

THIS IS THE FOURTH CONSECUTIVE QUARTER EMPLOYED BY MORE THAN 50%.

Can you please tell me specifically which of those quarters you are NOT seeing over 50% or if your records are showing something different for these specific FOUR consecutive quarters.

Lisa Handwerker, Ph.D., M.P.H.

Email: _____ 1

----- Original Message -----

From: "Propp, Steven"

To: 'Lisa Handwerker'

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Date: Wed, 30 Dec 2009 06:51:58 -0800

I'll be glad to fax printed copies to you, if you'll give me your fax number.

Concerning your 8:33 note, are you able to read the spreadsheet (with four columns for your separate positions) I pasted into my note? If not, I'll fax that as well (although the colors won't show up in the fax, obviously).

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker

Sent: Tuesday, December 29, 2009 8:46 PM

To: Propp, Steven

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Steven,

Also, it just occurred to me.....I have my PIMS record as well and I am wondering if we are looking at the same PIMS record. What is the date on your PIMS record? Can you fax me a copy of the PIMS record you are looking at. If so I can send you my fax number.
Thank you.

Lisa Handwerker, Ph.D., M.P.H.

Email: _____

Please note: message attached

Fwd: Lisa Handwerker-additional issue #1

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAD>.

From: "Propp, Steven"
To: 'Lisa Handwerker'
Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?
Date: Tue, 29 Dec 2009 16:39:17 -0800

-----Original Message-----

From: Lisa Handwerker
Sent: Tuesday, December 29, 2009 8:33 PM
To: Propp, Steven
Cc: "
Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

I just realized you sent me something in red below which I cannot read.

Lisa Handwerker, Ph.D., M.P.H.
Email: _____

-----Original Message-----

From: Lisa Handwerker
Sent: Tuesday, December 29, 2009 8:31 PM
To: Propp, Steven
Cc: "
Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

As I mentioned in the previous emails, I am on a quarter basis and according to my PIMS record I worked more than 50% for four quarters. Winter 2003, Spring 2003, Fall 2003 and Winter 2004. I do not understand your calculations. Please explain. Send me the information on a quarter by quarter basis. According to my calculations and others that have looked at it, I should qualify in Winter 2004. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email: _____

From: Patton, Charlene
Sent: Thursday, October 22, 2009 1:58 PM
To: "
Cc: Liu, Shirley
Subject: Additional Retirement Service Credit Eligibility

Additional Retirement Service Credit (ARSC) provides for 1 to 5 years of additional retirement service credit at a present value cost. General eligibility requirements are as follows:

Fwd: Ljsa Handwerker-additional issue #1

<https://mail.calfac.org/owa/?se=Item&t=IPM.Note&id=RgAAAAAD..>

In compensated employment with a CalPERS-covered employer on the date the request is received in CalPERS;

At least five years of CalPERS earned service credit; and

At least five calendar years as a CalPERS member by the time the election is received.

An active member is a CalPERS member who is on active payroll the day the ARSC request is received by CalPERS.

An inactive member is a CalPERS member who has credit posted in CalPERS, but is not on payroll the day the ARSC request is received by CalPERS.

Earned service credit is service credit that is posted through reported employment rather than a service credit purchase (exceptions: Mandatory Arrears; 20283 Arrears; Prior Service; and the Redeposit of previously posted earned service credit).

Additional Retirement Service Credit can be found in the Public Employees' Retirement Law under Section 20809.

Our records show that when you spoke to Michelle Gann on May 26, 2009, she informed you that you could not purchase ARSC because you have to be in CalPERS membership 5 Years and have active payroll. Because your membership date with CalPERS is June 19, 2008, you have not been in CalPERS membership for 5 years.

LifeLock® Official Site

Protect your identity with LifeLock Ultimate™ Today.

LifeLock.com

Handwerker Exhibit 6 L

Fwd: Calpers Calculation

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAI>

Fwd: Calpers Calculation

Lisa Handwerker

Sent: Monday, June 16, 2014 2:30 PM

To: Mark Karpus

more evidence of how confused CalPERS is.

Begin forwarded message:

From: "Jonathan Karpf" _____
Subject: Re: Calpers Calculation
Date: January 15, 2010 2:52:00 PM PST
To: "Lisa Handwerker" _____
Cc: _____

This distinction that Propp draws between being vested for pension vs. being vested for full employer portion of post-retirement health benefits does not apply to CSU employees. 5 years of earned service credit gets you both. Another vivid example supporting George's suggestion that CalPERS train a small cadre of staff to handle the idiosyncracies of CSU employees.

Jonathan

Sent from my iPhone

On Jan 15, 2010, at 10:35 AM, "Lisa Handwerker" _____ wrote:

Sent by Steven Propp:

The Contact Center is our general phone center (1-888-225-7377; make sure that you press the button for "member" rather than "employer"), who are great at handling "basic" questions in areas that I know little about.

There is a difference between being "vested" in the sense of being eligible to RETIRE with five years of service (Gov. Code 21060), and being vested in the sense of being eligible to receive the full "employer" portion of health premiums after retirement (see Gov. Code 22825.2 and 22825.3). The Contact Center will know much more "details" than I do.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

Fwd: Calpers Calculation

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAI>

-----Original Message-----

From: Lisa Handwerker

Sent: Friday, January 01, 2010 8:01 PM

To: Propp, Steven

Cc: Liu, Shirley

Subject: Re: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

What is the contact center and why would they not pay premiums for health if i am vested?

Sent from my iPhone

On Dec 31, 2009, at 8:50 AM, "Propp, Steven"

wrote:

Aha! This is becoming clearer, now.

Shirley: Can you answer her question about eligibility for Additional Retirement Service Credit (ARSC, aka "Air Time")? Would either of these scenarios qualify:

1. She has five CALENDAR years of service in membership (e.g., from September 2004-September 2009), but less than five years of SERVICE CREDIT.
2. She has less than five years of service credit in MEMBERSHIP, but when her 2.500 years of SPM are considered, she has more than five years of TOTAL SERVICE CREDIT.

Ms. Handwerker: Eligibility for health benefits I'm not qualified to handle, so I would call our Contact Center about that; since you started working after 1989, however, there will be an additional question you need to have answered about whether your employer will pay any portion of the premiums after you retire.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker

Sent: Thursday, December 31, 2009 7:45 AM

To: Propp, Steven

Fwd: Calpers Calculation

<https://mail.calfac.org/owa/?ac=Item&t=IPM.Note&id=RgAAAAI>

Cc: --

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Thank you for this information. I had bought back service credit from CALPERS from Shirley Liu's office but was not told about that. This is a bit different information than has been explained to me. I may have some additional questions about this. First, I don't know if Shirley Liu told you I already bought back 2.499 years of service credit (I did not know about any other options) from Shirley Liu's office with the understanding that if mistakes were made I would be reimbursed. Second, there is one VERY important aspect you are not mentioning here which is health vestment for myself and my daughter. My understanding after much research, is that in order to be vested for health insurance in CSUEB you need to have a minimum of two classes (over .50) when you decide to retire and a minimum of five years of credit from Calpers (through both buy back service credit and Calpers membership). Since I do not yet have that, there is a lot at stake here for me. Also, if I am in CALPERS starting in Winter 2004 would also put me in Calpers for five years and I would have a one time chance to buy back five additional years of Calpers credit when I did retire. Without my Calpers dating back to winter 2004 I cannot have that opportunity. Is my understanding correct? Thank you again for your time. Have a wonderful and healthy New Year to you and your family.

Lisa Handwerker, Ph.D., M.P.H.

Email: --

Please note: message attached

From: "Propp, Steven"

To: 'Lisa Handwerker'

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Date: Thu, 31 Dec 2009 07:22:02 -0800

Lisa Handwerker, Ph.D., M.P.H.

Email: --

Diet Help

Fwd: Calpers Calculation

<https://mail.calpac.org/owa/?ac=Item&t=IPMNote&id=RgAAAAI>

Cheap Diet Help Tips. Click here.

[http://thirdpartyoffers.juno.com/TGL2141/c?cp=AEU-](http://thirdpartyoffers.juno.com/TGL2141/c?cp=AEU-7G0wKWLijkWVw4u7pwAAJ1DqLdzJsZFY3xAv8iOn-BjSAAYAAAAAAAAAAAAAAAAAADNAAAAAAAAAAAAAAAAAYQAAAAA=)

[7G0wKWLijkWVw4u7pwAAJ1DqLdzJsZFY3xAv8iOn-](http://thirdpartyoffers.juno.com/TGL2141/c?cp=AEU-7G0wKWLijkWVw4u7pwAAJ1DqLdzJsZFY3xAv8iOn-BjSAAYAAAAAAAAAAAAAAAAAADNAAAAAAAAAAAAAAAAAYQAAAAA=)

[BjSAAYAAAAAAAAAAAAAAAAAADNAAAAAAAAAAAAAAAAAYQAAAAA=](http://thirdpartyoffers.juno.com/TGL2141/c?cp=AEU-7G0wKWLijkWVw4u7pwAAJ1DqLdzJsZFY3xAv8iOn-BjSAAYAAAAAAAAAAAAAAAAAADNAAAAAAAAAAAAAAAAAYQAAAAA=)

Fwd: IMPORTANT: Handwerker Follow-up

<https://mail.calfac.org/owa/?ae=Item&t=IPM.Note&id=KgAAAAU>

Fwd: IMPORTANT: Handwerker Follow-up

Lisa Handwerker

Sent: Friday, June 13, 2014 6:09 PM

To: Mark Karplus

So again, I am getting very confused. Remember we had the grievance in which we showed that I had worked two courses in fall 2003.

Isn't my scenario is .50 on fall, .50 in winter, .50 in spring summer one course and fall .50

Begin forwarded message:

From: "Lisa Handwerker"

Subject: Re: FW: IMPORTANT: Handwerker Follow-up

Date: December 2, 2009 11:37:00 AM PST

To:

Cc:

Why did someone not let me know sooner that you did not get my fax. I faxed it attention to you, Shirley Liu, and it was faxed to main Calpers fax number in Sacramento. It was a letter showing my change in appointment time for fall 2003. I am unclear why you did not tell me the day I alerted you I was sending it, more than one week ago. You are now telling me no one has my fax!!!! So many different people are dealing with me. Steven Propp is not the person you told me about last week.

Lisa Handwerker, Ph.D., M.P.H.

Email:

----- Original Message -----

From: "Liu, Shirley"

To:

Cc: "Propp, Steven" <

Subject: FW: IMPORTANT: Handwerker Follow-up

Date: Wed, 2 Dec 2009 11:12:24 -0800

Hello Lisa:

The membership review process may take some time to complete. So far, MBSD did not receive any fax from you regarding the possible correction of your membership date. Please let Steven Propp know if you faxed the paperwork to AESD staff. Steven Propp is the manager in AESD membership review unit. If you need any urgent assistance, please contact Steven Propp at

Thank you for your patient,

Shirley

Fwd: IMPORTANT: Handwerker Follow-up

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAD>.

-----Original Message-----

From: Lisa Handwerker

Sent: Wednesday, December 02, 2009 10:22 AM

To: Liu, Shirley; Patton, Charlene; Eubanks, Matthew

Cc: Faulk-Damiano, Lynn; Propp, Steven; Eubanks, Matthew

Subject: IMPORTANT: Handwerker Follow-up

I was contacted on Thursday by someone and I left a return message but since then received nothing from the membership department about the new information I faxed in and my request to have them review my 2003/4 year in which I now believe I am eligible for Calpers starting in winter 2004. I had requested something in writing by Dec 1 as I am having important discussions with CSUEB administration about the errors in my teaching records. Can someone please contact me today by email and let me know what is going on. Thank you.

Lisa Handwerker, Ph.D., M.P.H.

Email: _____

Water Heater

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http://thirdpartyoffers.juno.com/TGL2141/c?cp=1YvvhfRWIDvUBn_u3XNZgAAJlBaRXedwOU-hs8nOxmck2p3AAAYAAAAAAAAAAAAAAAAADNAAAAAAAAAAAAAAAAAGIGMhXU

Fwd: Handwerker IMPORTANT RUSH Follow-up

<https://mail.calfac.org/owa/?ac=Item&t=IPM.Note&id=RgAAAAD..>

Fwd: Handwerker IMPORTANT RUSH Follow-up

Lisa Handwerker

Sent: Friday, June 13, 2014 6:10 PM

To: Mark Karpus

Begin forwarded message:

From: "Propp, Steven"

Subject: RE: Handwerker IMPORTANT RUSH Follow-up

Date: December 3, 2009 4:06:02 PM PST

To: "Propp, Steven" ; "Lisa Handwerker"

Cc: "Liu, Shirley" ; "DeFlores, Emily"

Just to clarify the issue; if you *didn't* work "half-time or more" for three consecutive quarters, and then receive an appointment in the fourth quarter for "half-time or more," you would not be eligible to have your membership date changed.

However (and this may be the subject of your meeting next Monday), if there are additional positions that are not showing on the PIMS database that need to be corrected (such as will presumably take place with your 9/23/03 appointment), this could change this status.

I will be here until 5:00 this afternoon, and be in at 7:00 Monday morning.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

From: Propp, Steven

Sent: Thursday, December 03, 2009 2:52 PM

To: 'Lisa Handwerker'

Cc: Liu, Shirley; DeFlores, Emily

Subject: RE: Handwerker IMPORTANT RUSH Follow-up

I was able to get in touch with Linda Dobb. we discussed the matter, and she confirmed that they had forwarded the letter dated November 16th reflecting the corrected time base for 9/23/03 to 8/15.

However, they have apparently not worked with the Human Resources Department at CSUEB to have the necessary corrections made to the PIMS database; she said that she would contact the HR department today, and see what was required to have this correction made. In the meantime, I have a question.

The requirement for CalPERS membership in Government Code section 20305 for CSU temporary faculty appointments is as follows:

6/17/2014 9:06 /

Pwt: Handwerker IMPORTANT RUSH Follow-up

<https://mail.cafac.org/owa/?ac=Item&t=IPM.Note&id=RgAAAAAD..>

4) He or she is a temporary faculty member of the California State University and meets one of the following conditions:

(A) He or she works two consecutive semesters or three consecutive quarters at half-time or more, and is not otherwise excluded pursuant to this article, in which case, membership shall be effective with the start of the next consecutive semester or quarter if the appointment requires service of half-time or more.

Here is an excerpt from the history on PIMS for your positions around this time:

03/22/05 S31 229-065-2358-001 EAST BAY	03/06/05 TM 04/15
01/03/05 A52 229-065-2358-001 HAYWARD	01/11/05 TM 04/15
09/07/04 S31V 229-065-2358-001 HAYWARD	08/23/04 TM 07/15
08/31/04 S31 229-065-2358-001 HAYWARD	03/11/05 TM 07/15
03/29/04 405 229-065-2358-001 HAYWARD	04/16/04 TM 07/15
01/05/04 405 229-065-2358-001 HAYWARD	01/21/04 TM 08/15
09/23/03 A52 229-065-2358-001 HAYWARD	09/18/03 TM 04/15
09/10/03 S31 229-090-2358-221 HAYWARD	09/08/03 TM 04/15 (This is the
position that Ms. Dobb said should be 8/15, not 4/15).	
06/23/03 A52 229-090-2358-221 HAYWARD	06/13/03 TM 04/15

Therefore, you were working 8/15 on a quarterly basis from 9/23/03, as well as on 1/5/04; however, the CSU PIMS database currently shows you as having been reduced to a 7/15 time base (i.e., less than half-time) as of the 3/29/04 quarter.

For temporary faculty employed on a quarterly basis (Ms. Dobb confirmed to me on the phone that you were employed on a quarterly basis), the third consecutive quarter must also be at "half-time or more" in order to qualify for membership. Was there also a similar error made (e.g., a second position left off), that would have shown you as working 8/15 or greater for that third quarter?

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker
Sent: Thursday, December 03, 2009 11:44 AM
To: Propp, Steven
Cc: Liu, Shirley; DeFlores, Emily
Subject: RE: Handwerker IMPORTANT RUSH Follow-up

We are playing phone tag. I just called you back and discussed the importance of why I needed something in writing by end of today (my fax is :) especially if your office is closed tomorrow. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email: j

-----Original Message-----

From: "Propp, Steven"
To: 'Lisa Handwerker'
Cc: 'Liu, Shirley' ; 'DeFlores, Emily'

Fwd: Handwerker IMPORTANT RUSH Follow-up

<https://mail.calfac.org/owa/?as=Item&tr=IPM.Note&id=RgAAAAD..>

Subject: RE: Handwerker IMPORTANT RUSH Follow-up
Date: Thu, 3 Dec 2009 11:29:14 -0800

I just called, but got your VoiceMail message; please call me back at your earliest opportunity to discuss your concerns.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker
Sent: Thursday, December 03, 2009 11:23 AM
To: Propp, Steven
Cc: Lin, Shirley;
Subject: RE: Handwerker IMPORTANT RUSH Follow-up

Dear Steven Propp,

I am very surprised that you did not address any of my concerns from my last email and in fact, ignored them. My concerns were about my interaction with Jamilla. To ignore my concerns, is a strange way for a manager to address them. While I understand she may be your most experienced analyst, if she is rude to a client (which I feel she was to me) or does not provide the information that I client asks (I asked for the raw data when she makes her calculations) that is a problem that needs to be resolved. As the manager of that department you need to address that, as well and not just her calculations. She also asked me to come to Sacramento to meet with her in person --until I told her I lived in Berkeley. It is very uncomfortable now for me to deal with her--especially since she knows I have complained about her. I am requesting that whoever contact me does so by written form and I believe it is my right to ask for the "raw data". If there is a problem asking for raw data, please let me know what it is. Mistakes have been made by both CSUEB and Calpers with respect to my account and I am trying to prevent a similar problem from happening. Also you did not mention when I would hear back from your department. I had requested a response by December 1 and clearly that did not happen since no one emailed me that they fax was lost in Calpers maze. I appreciate you following up with me. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email:

Please note: message attached

From: "Propp, Steven" <[redacted]>
To: "
Cc: "Ponley, Jamilla" <[redacted]>; "Faulk-Damiano, Lynn" <[redacted]>; "DeFlores, Emily" <[redacted]>

Subject: RE: Handwerker Follow-up
Date: Wed, 2 Dec 2009 14:56:30 -0800

Fwd: Handwerker IMPORTANT RUSH Follow-up

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAD..>



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Fwd: IMPORTANT: HANDWERKER PIMS REPORT

<https://mail.calpac.org/owa/?ac=Item&t=IPM.Note&id=RgAAAAAD>.

Fwd: IMPORTANT: HANDWERKER PIMS REPORT

Lisa Handwerker

Sent: Friday, June 13, 2014 5:53 PM

To: Mark Karplus

So it looks like the chancellor's office at one time agreed with CalPERS???

Begin forwarded message:

From: "Propp, Steven"

Subject: RE: RE: IMPORTANT: HANDWERKER PIMS REPORT

Date: December 31, 2009 8:40:30 AM PST

To: "Patton, Charlene"

— 'Lisa Handwerker'

Cc: "Liu, Shirley"

To make this determination, we are waiting to hear from (1) Pam Chapin of the CSU Chancellor's Office as to the effect of summer session employment on the "four consecutive quarters" matter, and (2) SCO, as to whether Ms. Handwerker will have her compensation corrected for the 8/15 time base change that was recently made.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Patton, Charlene

Sent: Thursday, December 31, 2009 8:38 AM

To: 'Lisa Handwerker'

Cc: Liu, Shirley

Subject: RE: RE: IMPORTANT: HANDWERKER PIMS REPORT

If the analyst Steve has working on your membership review determines that you qualified for an earlier retirement date, then it could be that some or all of the 2,499 years of SPM you purchased would be recalculated as Arrears. If this is the case, then you would not have to pay interest on the Arrears period, therefore the Arrears cost would be less than the SPM cost, and CalPERS would return the difference in cost to you.

-----Original Message-----

From: Lisa Handwerker

Sent: Thursday, December 31, 2009 8:31 AM

To: Patton, Charlene

Cc: Liu, Shirley

Subject: RE: RE: IMPORTANT: HANDWERKER PIMS REPORT

Fwd: IMPORTANT: HANDWERKER PIMS REPORT

<https://mail.calfac.org/owa/?ae=Item&t=IPM.Note&id=RgAAAAD..>

I am trying to understand this since this is the first time I heard some of this. Does that mean I had a cheaper/different option than to buy back my service credit for 2.499 years????

Lisa Handwerker, Ph.D., M.P.H.

Email: ..

----- Original Message -----

From: "Patton, Charlene"

To: 'Lisa Handwerker'

Cc: "Liu, Shirley"

Subject: RE: RE: IMPORTANT: HANDWERKER PIMS REPORT

Date: Thu, 31 Dec 2009 08:10:20 -0800

My understanding is the same for the SPM and Arrears. As far as the information on qualifying to retire with less than 5.000 years credited, I am not sure, since the Service Credit Section in which I work does not handle retirement qualifications. I'm sure Steve is correct, and would not give you information that would be misleading.

-----Original Message-----

From: Lisa Handwerker

Sent: Thursday, December 31, 2009 7:49 AM

To: Liu, Shirley; Patton, Charlene

Cc:

Subject: Fw: RE: IMPORTANT: HANDWERKER PIMS REPORT

Can you tell me if you have the same understanding of this information?

Lisa Handwerker, Ph.D., M.P.H.

Email: ..

Please note: forwarded message attached

From: "Propp, Steven"

To: 'Lisa Handwerker'

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Date: Thu, 31 Dec 2009 07:22:02 -0800

Fwd: **IMPORTANT: HANDWERKER PIMS REPORT**

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAD..>

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Fwd: Service Credit Buy Back

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAA>

Fwd: Service Credit Buy Back

Lisa Handwerker

Sent: Monday, June 16, 2014 2:43 PM

To: Mark Karpus

Attachments: artime-form.pdf (54 KB)

This is the date I applied for ARSC the first time since they were still discussing and disagreeing whether or not I was eligible. Shirley Liu told me to apply BEFORE the deadline so that I would be eligible for the lower rate.

Begin forwarded message:

From: "Liu, Shirley" < >
Subject: RE: Service Credit Buy Back
Date: September 15, 2010 4:38:19 PM PDT
To: 'Lisa Handwerker' < >

Hi Lisa:

Here is the ARSC form. Please fill it out and scan or fax to me at 916-795-4019. Thank you, Lisa.

Shirley

-----Original Message-----

From: Lisa Handwerker [
Sent: Wednesday, September 15, 2010 4:33 PM
To: Liu, Shirley
Subject: RE: Service Credit Buy Back

You called and when I went to pick up you hung up. Please call on my home.

Lisa Handwerker, Ph.D., M.P.H.
Email: < >

-----Original Message-----

From: "Liu, Shirley" < >
To: 'Lisa Handwerker' < >
Subject: RE: Service Credit Buy Back
Date: Wed, 15 Sep 2010 14:25:34 -0700

Hi Lisa:

Can you give me a call before 4:30pm at

Thank you.

Fwd: Service Credit Buy Back

<https://mail.calfas.org/owa/?se=Item&t=IPM.Note&id=RgAAAAAD>

Shirley

-----Original Message-----

From: Lisa Handwerker
Sent: Wednesday, September 15, 2010 10:26 AM
To: Liu, Shirley
Cc: Patton, Charlene
Subject: RE: Service Credit Buy Back

Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email: lisahand@juno.com

----- Original Message -----

From: "Liu, Shirley"
To: 'Lisa Handwerker'
Cc: "Patton, Charlene"
Subject: RE: Service Credit Buy Back
Date: Wed, 15 Sep 2010 09:54:00 -0700

Dear Ms. Handwerker:

All of your SPM service credit has been posted to your account in fiscal year 2009/2010. Your 2009/2010 Annual Member Statement should reflect your SPM service credit. You should receive your 09/10 Annual Member Statement in November 2010.

Please feel free to let me know if you have any additional questions.

Thank you,

Shirley Liu

-----Original Message-----

From: Lisa Handwerker
Sent: Wednesday, September 15, 2010 7:05 AM
To: Liu, Shirley; Patton, Charlene
Cc:
Subject: Service Credit Buy Back

I believe all my service credit buy back has been purchased but if not, I would like to make sure to secure my application to lock in rates, as I heard as of tomorrow the rates are going up. Can you please confirm that all my service credit buy back is finalized and I am fine. Thank you.

Fwd: Service Credit Buy Back

<https://mail.calfac.org/owa/?as=Item&t=IPM.Note&id=RgAAAAC>

Lisa Handwerker, Ph.D., M.P.H.

Email:

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Fwd: Hearing and Relevant Materials

<https://mail.caifac.org/owa/?ae=Item&t=IPM.Note&id=RgAAAAI>

Fwd: Hearing and Relevant Materials

Lisa Handwerker

Sent: Tuesday, November 05, 2013 4:37 PM

To: Mark Karpus

Attachments: Handwerker cover letter re~1.pdf (36 KB) ; ATT00001.htm (206 B) ; Handwerker Notice of Hearing~1.pdf (631 KB) ; ATT00002.htm (206 B) ; Handwerker SOI cover letter.pdf (284 KB) ; ATT00003.htm (195 B)

strange...

Sent from my iphone

Begin forwarded message:

From: "Salazar, Renee"

Date: November 5, 2013, 4:00:35 PM PST

To: Lisa Handwerker

Subject: RE: Hearing and Relevant Materials

Dear Ms. Handwerker,

The attached letters were sent to you last month, so I am unsure why the cover letter to the request for records was not included with the packet you received. The packet with the records from your member file would have included copies of the documents that CalPERS will use as exhibits at the hearing. That said, I am in the process of putting together the exhibit binder that CalPERS will submit at the hearing, which may include a few additional records from your employer that would not have been part of your CalPERS member file. I am hoping to have the exhibit binder completed by the end of the week and will send you a copy via overnight delivery so that you will receive it prior to the hearing.

Please provide me with a copy of the documents you plan to use as exhibits at the November 14, 2013 hearing, as requested in the October 18, 2013 letter, a copy of which is attached to this email. Since CalPERS will label its exhibits with numbers, please use letters for your exhibits, and include a cover page that identifies the exhibit and its corresponding letter.

If you have any questions, please let me know.

Thank you,

Renee R. Salazar
Senior Staff Attorney
CalPERS Legal Office

(916) 795-3659 (fax)

—Original Message—

Fwd: Hearing and Relevant Materials

<https://mail.calfac.org/owa/?ae=item&t=IPM.Note&id=RgAAAAD>

From: Lisa Handwerker
Sent: Monday, November 04, 2013 4:21 PM
To: Salazar, Renee
Cc: _____
Subject: RE: Hearing and Relevant Materials

I received a packet from CalPERS that seemed to be my member files but interestingly, there was no letter enclosed nor any other materials related to the hearing. You had mentioned I would receive this before or on November 4 so I am contacting you again regarding this. At this point, if there is any additional information I would appreciate if it could be given in a PDF format via email, if possible. Thank you.

Also, can you please reconfirm the exact date, time and location of the hearing. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email: _____

Please note: message attached

Return-Path:
Received: from _____ 75))
by _____
for _____ > (sender
Tue, 15 Oct 2013 14:38:24 -0700 (PDT)
Received: from _____
by _____
for _____
Tue, 15 Oct 2013 14:38:22 -0700 (PDT)
Received: from unknown _____
by _____ with ESMTP/TLS/AES128-SHA; 15 Oct 2013 15:08:40 -0700
Received: from _____ ([169.254.1.98]) by _____
([10.1.9.53]) with mapi id 14.03.0146.000; Tue, 15 Oct 2013 14:38:59 -0700
From: "Salazar, Renee" <_____
To: Lisa Handwerker
Subject: RE: Hearing and Relevant Materials
Thread-Topic: Hearing and Relevant Materials
Thread-Index: AQH0wI7X1mqwP0nEN0yDxhwdLJQ0q5mrpF1ggAB+nICACjflgA=
Date: Tue, 15 Oct 2013 21:38:58 +0000
Message-ID: _____
References: _____

In-Reply-To: _____
Accept-Language: en-US

Fwd: Hearing and Relevant Materials

<https://mail.calfac.org/owa/?ac=Item&t=IPM.Note&id=RgAAAAI>

Content-Language: en-US
X-MS-Has-Attach: yes
X-MS-TNEF-Correlator:
x-originating-ip: [10.1.1.15]
Content-Type: multipart/related;
boundary="_____
type="multipart/alternative"
MIME-Version: 1.0
X-UNTD-BodySize: 26414
X-UNTD-Peer-Info:
199.164.57.51
X-UNTD-UBE:-1

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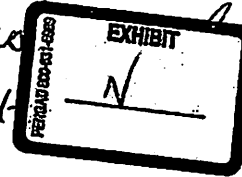
FAX 622-2743

(+hard copy will be mailed) June 11, 2014

TO: Judge Cheryl R. Tompkins,

Presiding Administrative

OAH



In case # 2013080276, Petitioner CalPERS
 Membership and Respondent: Lisa
 Handwerker (and CSU East Bay)

I, Lisa Handwerker request the petitioner
 CalPERS provide me with documents listed
 in the Subpoena Duces Tecum sent by
 registered return receipt on June 9, 2014.
 If these documents are not received
 before set hearing on June 18, 2014 9am at
 OAH, I request the judge to make a
 motion to have the Petitioner provide the
 respondent with the documents, including
 the evidence binder, which was promised
 on several occasions but never received.
 If I need to submit anything additional please
 let me know. These are necessary documents to

Lisa Handwerker, PhD, JPH

Substantiate my
 argument at
 hearing.

L. Handwerker

Total 11 pages

SENDER: COMPLETE THIS SECTION		COMPLETE THIS SECTION ON DELIVERY	
<p>1. Article Addressed to:</p> <p><i>CalPERS legal office</i> <i>Renée Salazar,</i> <i>Senior Staff Attorney</i> <i>400 Q Street, Rm. 3340</i> <i>Sacramento, CA</i> <i>95811</i></p>		<p>A. Signature</p> <p><i>X [Signature]</i> <input type="checkbox"/> Agent</p>	
<p>2. Article Number</p> <p><i>7012 0470 0000 6765 3590</i></p> <p><i>(Transfer from service label)</i></p>		<p>B. Received by (Printed Name)</p> <p><i>R. Carr</i> <input type="checkbox"/> Addressee</p>	
<p>3. Service Type</p> <p><input checked="" type="checkbox"/> Certified Mail <input type="checkbox"/> Express Mail</p> <p><input type="checkbox"/> Registered <input type="checkbox"/> Return Receipt for Merchandise</p> <p><input type="checkbox"/> Insured Mail <input type="checkbox"/> C.O.D.</p>		<p>C. Date of Delivery</p> <p><i>6/11/14</i></p>	
<p>4. Restricted Delivery? (Extra Fee) <input type="checkbox"/> Yes</p>		<p>D. Is delivery address different from item 1? <input type="checkbox"/> Yes</p> <p>If YES, enter delivery address below: <input type="checkbox"/> No</p>	
<p>PS Form 3811, February 2004 Domestic Return Receipt</p>			
<p>102595-02-M-1510</p>			

BEFORE THE
OFFICE OF ADMINISTRATIVE HEARINGS

In the Matter of:

JUN 06 2014

Office of Administrative Hearings
By _____

Agency / Agency Case No.

OAH No. 2013080276

SUBPOENA: Requesting Testimony
or Things

SUBPOENA DUCES TECUM: Requesting the Production of Records

THE PEOPLE OF THE STATE OF CALIFORNIA SEND GREETINGS TO:		(name and address of person being subpoenaed) CALPERS legal office, Renee Salazar, Senior Staff Attorney, 400 Q street Room 3340 Sacramento, CA 95811
1. At the request of <input type="checkbox"/> Petitioner <input checked="" type="checkbox"/> Respondent (party name) LISA HANDWERKER 1 and Csu East Bay		(name, address and telephone number of contact person) Lisa Handwerker
2. You are hereby commanded, business and excuses being set aside, to appear as a witness on: (date) _____, at (time) _____, and then and there to testify at: (location) <input type="checkbox"/> OAH, 560 J Street, Suite 300, Sacramento CA 95814 <input type="checkbox"/> OAH, 1515 Clay Street, Suite 206, Oakland CA 94612 <input type="checkbox"/> OAH, 320 West Fourth Street, Room 630, Los Angeles CA 90013 <input type="checkbox"/> OAH, 1350 Front Street, Room 6022, San Diego CA 92101 <input type="checkbox"/> Other: _____, California.		
3. You are not required to appear in person if you produce the records described in the accompanying affidavit and a completed declaration of custodian of records in compliance with Evidence Code sections 1560, 1561, 1562, and 1271. (1) Place a copy of the records in an envelope (or other wrapper). Enclose your original declaration with the records. Seal them. (2) Attach a copy of this subpoena to the envelope or write on the envelope the case name and number, your name and date, time, and place from item 2 (the box above). (3) Place this first envelope in an outer envelope, seal it, and mail it to the Office of Administrative Hearings at the address checked in item 2. (4) Mail a copy of your declaration to the attorney or party shown in item 1.		
4. You are not required to appear in person if you produce the records described in the accompanying affidavit and a completed declaration of custodian of records in compliance with Evidence Code section 1561. By _____ (date), send the records to: NOTE: This manner of production may not satisfy the requirements of Evidence Code section 1561 for admission at hearing.		
5. You are ordered to appear in person and to produce the records described in the accompanying affidavit. The personal appearance of the custodian or other qualified witness and the production of the original records is required by this subpoena. The procedure authorized by subdivision (b) of section 1560, and sections 1561 and 1562 of the Evidence Code will not be deemed sufficient compliance by this subpoena.		

6. Disobedience to this subpoena will be punished as contempt of court in the manner prescribed by law.
7. **Witness Fees:** Upon service of this subpoena, you are entitled to witness fees and mileage actually traveled both ways, as provided by law, if you so request. You may request them before your scheduled appearance from the person named in item 1. See Government Code sections 11450.05, 11450.50, 68092.5-68093, and 68096.1-68097.10.
8. IF YOU HAVE ANY QUESTIONS ABOUT WITNESS FEES OR THE TIME OR DATE YOU ARE TO APPEAR, OR TO BE CERTAIN THAT YOUR PRESENCE IS REQUIRED ON THE DATE AND TIME SPECIFIED ABOVE, CONTACT THE PERSON REQUESTING THIS SUBPOENA, LISTED IN ITEM 1 ABOVE, BEFORE THE DATE LISTED IN ITEM 2 ABOVE.

(Date Issued) June 6, 2014 (Signature of Authorizing Official)

(Printed Name) CHERYL R. TOMPKIN (Title) PRESIDING ADMINISTRATIVE LAW JUDGE

DECLARATION FOR SUBPOENA DUCES TECUM

(Any party issuing a subpoena for production of books and/or records must complete this section.)

The undersigned states that the books, papers, documents and/or other things named below and requested by this subpoena are material to the proper presentation of this case, and good cause exists for their production by reason of the following facts:

Please see attached sheet (1 page). Request is for complete evidence binder from Petitioner CalPERS Membership. Previously, Dr. Handwerker requested the information from CalPERS legal Dept 90 Renee Salazar, Senior Staff Attorney. Ms. Salazar mentioned in several emails that evidence binder would be forthcoming (see emails) but it was never received and is necessary for substantiating my appeal, along with

(Use additional pages, if necessary, and attach them to this subpoena.) (attached 1 sheet) other requested documents,

Executed June 9, 20 14, at Berkeley, California.

I declare under penalty of perjury that the foregoing is true and correct.

R. Handwerker
(Signature of Declarant)

METHOD OF DELIVERY of this subpoena:

☐ Personal Service – In accordance with Code of Civil Procedure sections 1987 and 1988, delivery was effected by showing the original and delivering a true copy thereof personally to:

☐ Messenger Service – In accordance with Government Code section 11450.20, an acknowledgement of the receipt of this subpoena was obtained by the sender after it was delivered by messenger to:

☒ Certified Mail, Return Receipt Requested – I sent a true copy of this subpoena via certified mail, return receipt requested to:
(name and address of person)

CalPERS Legal Office
Attn: Renee Salazar, Senior Staff Attorney
400 Q Street, Room 3340
Sacramento, CA 95811

at the hour of _____ m., on June 9, 20 14

City of Berkeley, State of California

R. Handwerker
(Signature of Declarant)

Attached Sheet 1 page

DECLARATION FOR SUPEONA DUCES TECUM

OAH NO: 2013080276

In the matter of CalPERS Membership of LISA HANDWERKER, respondent and CALIFORNIA STATE UNIVERSITY, EAST BAY, Respondent, Dr. Lisa Handwerker is requesting a complete evidence binder of all materials or documents that are to be used by petitioner CalPERS Membership.

Previously, Dr. Handwerker requested information for the hearing of CalPERS Membership Legal Office c/o Renee Salazar, Senior Staff Attorney and Renee Salazar, promised her an evidence binder but it was never received (please see attached emails). Therefore, I am requesting these documents by Supeona Duces Tecum.

In addition, I am requesting other documents. The information requested is material that CalPERS has access to, (and in most cases only CalPERS has access to these documents), and these documents are needed in substantiating my appeal.

- 1) CalPERS written policy that states clearly the rules for entering CalPERS on CSU quarter campuses. Also, the written policy for entering CalPERS on semester campuses.**
- 2) A response to the different scenarios presented (see attached email correspondence) about how actual individuals are placed in CalPERS.**
- 3) A list of all witnesses testifying at the hearing**
- 4) Assuming Dr. Handwerker qualifies for membership in CalPERS in Winter 2004, a document that provides an estimate for what the employer's contributions would be from the beginning of Winter 2004 through the beginning of Spring 2006, broken down monthly or by academic quarter? This was to be calculated both with and without the discrepancy cited by Renee Salazar.**
- 5) Any precedent setting CalPERS cases that will be used in the hearing or that relate to my hearing.**
- 6) Dr. Lisa Handwerker's updated PIMS record, resolving discrepancies referred to by Senior Staff Attorney Renee Salazar.**
- 7) While Dr. Handwerker's member files were sent in response to her request, some documents appeared to be missing including letters and emails in which Dr. Handwerker brought service credit discrepancies to the attention of CalPERS dating back to 1999 through the present. Please provide a complete updated member file with correspondence.**

L Handwerker

Lisa Handwerker

December 3, 2009 7:04 PM

To:

Cc:

RE: Handwerker IMPORTANT RUSH Follow-up

Thank you for getting back to me today. I appreciate that you did that. I believe other errors were made in my teaching records but I don't know the full extent yet.

In my email to you, I mentioned winter 2003, spring 2003, fall 2003 and winter 2004. Thank you. During all of those quarters I was 6/15. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Emsh.

Please note: message attached

From: "Papp, Steven"
To: Lisa Handwerker
Cc: "Liz, Shiley"
Subject: RE: Handwerker IMPORTANT RUSH Follow-up
Date: Thu, 3 Dec 2009 14:52:17 -0800

Hotel

Hotel plan, info and virtual tours. Click here to book a hotel online.
<http://mhp.partycityusa.com/181214147top-FuPpwyAcB4W54lp3QAA18zRfXodeOU-bzShCmedQpSAAYAAATRE180000>
From: "Papp, Steven"
Subject: RE: Handwerker IMPORTANT RUSH Follow-up
Date: December 3, 2009 2:52:17 PM PST
To: Lisa Handwerker
Cc: "Liz, Shiley".

I was able to get in touch with Linda Dobb- , we discussed the matter, and she confirmed that they had forwarded the letter dated November 16th reflecting the corrected time base for 9/23/03 to 8/15.

However, they have apparently not worked with the Human Resources Department at CSUEB to have the necessary corrections made to the PIMS database; she said that she would contact the HR department today, and see what was required to have this correction made. In the meantime, I have a question.

The requirement for CalPERS membership in Government Code section 20305 for CSU temporary faculty appointments is as follows:

- 4) He or she is a temporary faculty member of the California State University and meets one of the following conditions:
(A) He or she works two consecutive semesters or three consecutive quarters at half-time or more, and is not otherwise excluded pursuant to this article, in which case, membership shall be effective with the start of the next consecutive semester or quarter if the appointment requires service of half-time or more.

Here is an excerpt from the history on PIMS for your positions around this time:

03/22/05 S31 229-065-2358-001 EAST BAY
01/03/05 AS2 229-065-2358-001 HAYWARD
09/07/04 S31V 229-065-2358-001 HAYWARD
08/31/04 S31 229-065-2358-001 HAYWARD
09/29/04 405 229-065-2358-001 HAYWARD
01/05/04 405 229-065-2358-001 HAYWARD
09/23/03 AS2 229-065-2358-001 HAYWARD
09/10/03 S31 229-090-2358-221 HAYWARD
said should be 8/15, not 4/15).
06/23/03 AS2 229-090-2358-221 HAYWARD

3/06/05 TM 04/15
01/11/05 TM 04/15
10/23/04 TM 07/15
03/11/05 TM 07/15
04/16/04 TM 07/15
01/21/04 TM 08/15
09/18/03 TM 04/15
4/03/03 TM 04/15 (This is the position that Ms. Dobb
06/13/03 TM 04/15

Juno Email on the Web

FAX DOCUMENTS
(916) 795-3659

6/17/14 12:49 PM



Print Message Close

From : "Lisa Handwerker"
 To :
 Cc : Renee Salazar
 Bcc : mark_jarpha
 Subject : Rex Handwerker, CAM 2013080276, Exhibit Documents (continued)
 Date : Tue, Jun 17, 2014 12:31 PM

Exhibit F: CSU Technical Letter (in my CalPERS Member file and CalPERS exhibit 5) ✓

Exhibit G: Information showing I applied for ARSC on two occasions 2010 (before rate increase) and 2012 (before ARSC was eliminated) and inquired as early as 2009 about ARSC eligibility. ✓

Exhibit H: Emails from Jonathan Karpf, CPA Representative of Health Benefits ✓

Exhibit I: Emails from George Diehr, CalPERS Board Member ✓

Exhibit J: Documents regarding summer quarter teaching ✓

Exhibit K: Dr. Handwerker's complete CalPERS member file (CalPERS sent me a copy but did not including all correspondence between Dr. Handwerker as CalPERS (including but not limited to email correspondence with Steve Propp, Emily de Flores, Shirley Liu, Charlene Patton etc etc). CalPERS should have access to all of these emails but CalPERS did not submit them as part of my CalPERS member file. Other items missing: Armando Gonzalez two tables showing courses taught. They should be part of my member file).

Lisa Handwerker, Ph.D., M.P.H.
 Email:

----- Original Message -----
 Received: from [23.112.80.17] by webmail09.vgs.untel.com with SMTP;
 Mon, 11 Nov 2013 19:18:11 GMT
 X-Originating-IP: [23.112.80.17]
 Mime-Version: 1.0
 From: "Lisa Handwerker"
 Full-Name: "Lisa Handwerker"
 Date: Mon, 11 Nov 2013 19:18:11 GMT
 To: Renee Salazar
 Cc:
 Subject: Handwerker, CAM 2013080276, Exhibit Documents A-E
 X-Mailer: Webmail Version 4.0
 Message-Id: <20131111.111811.10274.
 Content-Type: multipart/mixed; boundary="--_JRM_Jd6E0998.4300628.1da41f68M"

Dear Ms. Salazar,

Hello. I have attached my exhibit documents labeled A-E.

Exhibit 6

p 1

Received 7/15/10



Member Services Division, P.O. Box 4000, Sacramento, CA 95812-4000
 (888) CALPERS (225-7377) • Telecommunications Device for the Deaf • (916) 795-3240

Request for Service Credit Cost Information Additional Retirement Service Credit (ARSC)

(Are You or Not Qualified Service)

Part 1: Member Information

Name Lisa Handwerker Social Security Number _____
 Former Name (if applicable) _____ Current Employer CSU East Bay
 Work Phone _____ Home Phone _____
 Mailing Address _____ City _____ State _____ ZIP Code _____

Part 2: Documentation of Service

☐ I have attached a copy of the estimate to purchase service credit. If not, indicate why _____

Based upon the attached service credit purchase estimate, how many years of ARSC do you intend to purchase? (check one box only) A separate election document with detailed payment options will be mailed to you once this form has been processed

☐ 1 year ☐ 2 years ☐ 3 years ☐ 4 years ☒ 5 years up to 5 years

Have you requested this cost information before? ☐ Yes ☐ No If yes, enter date request was submitted 1/1

Have you submitted a retirement application? ☐ Yes ☐ No If yes, enter retirement date 1/1

Do you anticipate purchasing this credit with a rollover or plan-to-plan transfer of pre-tax funds? ☐ Yes ☐ No

Part 3: Certification

I hereby certify that the above information is true and correct.

Lisa Handwerker
 Signature

Date 7/15/2010

Sign and date this request form, make a copy of your request for your records, and attach a copy of your online service credit purchase estimate.

Mail all materials to CalPERS Member Services Division, P.O. Box 4000, Sacramento, CA 95812-4000

Exhibit 6

2012/12/20 00:37:26 56 414



Member Services Division P.O. Box 4000 Sacramento, CA 95812-4000
CalPERS (888) CalPERS (225 7377) TDD/Communications Device for the Deaf (916) 226 3240

Request for Service Credit Cost Information Additional Retirement Service Credit (ARSC)

Part 1: Member Information

Name Lisa Handwerker Social Security Number _____
Former Name (if applicable) _____ Current Employer _____
Work Phone _____ Home Phone _____
Mailing Address _____ City _____ State _____ ZIP Code _____

Part 2: Documentation of Service

☐ I have attached a copy of the estimate to purchase service credit. If not, indicate why: _____

Based upon the attached service credit purchase estimate, how many years of ARSC do you intend to purchase? (check one box only) A separate election document with detailed payment options will be mailed to you once this form has been processed. I sent an email to CalPERS & did not get a response regarding this (2010 & 2011)

☐ 1 year ☐ 2 years ☐ 3 years ☐ 4 years ☐ 5 years ☐ 6 years ☐ 7 years
Have you requested this cost information before? ☒ Yes ☐ No If yes, enter date request was submitted 11/1/2011
Have you submitted a retirement application? ☒ Yes ☐ No If yes, enter retirement date estimated retirement
Do you anticipate purchasing this credit with a rollover or plan to plan transfer of pre-tax funds? ☒ Yes ☐ No only

Part 3: Certification of Non-Government Employment

(Please refer to the instruction page for information on completing this section.)

I have read the preceding instruction page and certify that I have at least _____ years of service (as calculated according to the instruction page) that has not been taken into account or received under this government plan. Such service is for employment other than as an employee of a CalPERS covered employer, a government agency, an educational organization, or a government employees association. I hereby certify that the above information is true and correct and understand that I may need to provide documentation of such employment if requested.

Lisa Handwerker 12/10/2012
Signature Date

Sign and date this request form, make a copy of your request for your records, and attach a copy of your online service credit purchase estimate.

Mail all materials to CalPERS Member Services Division, P.O. Box 4000, Sacramento, CA 95812-4000.

June 5, 2014

4 Campus

Self-funded classes offered for summer quarter

By Eilek Ocean
Contributor

The Planning and Enrollment Management Office at California State University East Bay announced May 12 that some of this year's summer course offerings will be self-supported instead of regular tuition, changing the amounts students will pay for summer courses.

PEM sent a campus-wide email informing students that self-funded undergraduate courses will be offered through a self-support financial system that does not use the limited California state funding, but instead pays for itself through the revenue the classes generate. PEM officials refused to speak with The Pioneer regarding summer self-support.

By reducing the number of summer courses offered, the colleges will be able to move resources into the academic year and offer more courses to meet student demand during the other three quarters.

"Enrollment has grown over the past three years," said Jeff Bliss, executive director of University Communications and University Advancement. "Our most recent projection is that the University will end this year, say,

Undergraduate Registration Fees, effective Fall 2013		0.1 to 6.0 units	6.1 or more units
Student Body Fee		\$43	\$43
Facilities Fee		\$55	\$55
University Union Fee		\$60	\$60
Instructionally Related Activities Fee		\$8	\$8
Health Services Fee		\$35	\$35
Athletics Fee		\$80	\$80
Academic Excellence Fee		\$1	\$1
Photo ID Fee (quarterly fee)		\$1	\$1
Total		\$246	\$246

Source: California State University East Bay

on percent over the target set by the Office of the Chancellor.

The over enrollment is a direct result of an increasing number of new students, an increase in student retention and an increase in average student class load, said Bliss.

According to Bliss, students that register for summer 2014 will pay less than or similar to regular tuition cost depending on the number of units taken. Self-support must be paid in full, in contrast to regular tuition, which can be broken up into payments. Summer quarter self-support can be paid with financial aid, but only

through federal support, not state. Instructional self-support fees for undergraduate students will be \$181 per unit in summer, while graduate students will pay \$246 per unit. This also includes five-week courses, which are exclusive for summer sessions.

Self-support fees do not include non-resident fees or graduate professional program fees. Certain campus facilities or services such as the RAW Center and the Student Health Center will apply fees to students on an as-used basis. This is not the case in fall, winter and spring under regular tuition guidelines.

"We are most likely to exceed the target again in 2014-15," said Bliss. "Especially if we do not."

visions in the May budget all locates an increase of \$14.2 million to the CSU system.

"According to Bliss, students that register for summer 2014 will pay less than or similar to regular tuition cost depending on the number of units taken."

make other adjustments in making our enrollment."

Gov. Jerry Brown's latest revision which falls short of the \$237.6 million requested by the CSU Board of Trustees in November.

Exhibit 6
Shirley 2009 inquired
about winter 2004
eligibility

From: "Lisa Handwerker"
Subject: Re: FW: IMPORTANT: Handwerker Follow-up
Date: December 2, 2009 11:37:00 AM PST
To: Shirley_Liu - Steven_Propp -
Cc:

Why did someone not let me know sooner that you did not get my fax. I fixed it attention to you, Shirley Liu, and it was fixed to main Calpers fax number in Sacramento. It was a letter showing my change in appointment time for fall 2003. I am unclear why you did not tell me the day I alerted you I was sending it, more than one week ago. You are now telling me no one has my fax!!!! So many different people are dealing with me. Steven Propp is not the person you told me about last week.

Lisa Handwerker, Ph.D., M.P.H.
Email:

----- Original Message -----
From: "Liu, Shirley"
To: "
Cc: "Propp, Steven" <
Subject: FW: IMPORTANT: Handwerker Follow-up
Date: Wed, 2 Dec 2009 11:12:24 -0800

Hello Lisa:

Juno Email on the Web

6/17/14 1:26 PM

The membership review process may take some time to complete. So far, MBSD did not receive any fax from you regarding the possible correction of your membership data. Please let Steven Propp know if you faxed the paperwork to AESD staff. Steven Propp is the manager in AESD membership review unit. If you need any urgent assistance, please contact Steven Propp at 916-795-3127.

Thank you for your patient,

Shirley

-----Original Message-----

From: Lisa Handwerker

Sent: Wednesday, December 02, 2009 10:22 AM

To: Lin, Shirley; Patton, Charlene; Eubanks, Matthew

Cc: Faulk-Damiano, Lynn; Propp, Steven; Eubanks, Matthew

Subject: IMPORTANT: Handwerker Follow-up

I was contacted on Thursday by someone and I left a return message but since then received nothing from the membership department about the new information I faxed in and my request to have them review my 2003/4 year in which I now believe I am eligible for Calpers starting in winter 2004. I had requested something in writing by Dec 1 as I am having important discussions with CSUEB administration about the errors in my teaching records. Can someone please contact me today by email and let me know what is going on. Thank you.

Lisa Handwerker, Ph.D., M.P.H.

Email:

Water Heater

Some like it hot. Click now for a reliable new water heater!

<http://thirdpartyoffers.juno.com/TGL2141/c?>

cp=IYyvhfRWdUBn_u3XNZgAAJ1BaRXcdwQU-hs8nQxmc

K2p3AAYAAAAAAAAAAAAAAAAADNAAAAAAAAAAAAAAAAAAGIGmhXUj=

Exhibit. J

Annual Course Schedule																	
Department of Human Development and Women's Studies, CSUEB																	
Prefix	Number	Title	Units	Type	Prerequisites	Number of Sections to be Offered**											
						Fall			Winter			Spring			Summer		
						H*	C*	O*	H	C	O	H	C	O	H	C	O
HDEV	3101	Lifespan Physical and Cognitive Development	4	core	U.D. standing	2	1	2									1
HDEV	3102	Lifespan Social and Emotional Development (4)	4	core	U.D. standing				2	1	3						1
HDEV	3103	Social and Cultural Dynamics of Human Development	4	core	U.D. standing							2	1	3			1
HDEV	3201	Theories of Human Development (4)	4	core	U.D. standing	3	1	3									1
HDEV	3202	Research Methods in Human Development (4)	4	core	U.D. standing				1	1	3						1
HDEV	3203	Applying Theory and Methods of Human Development	4	core	HDEV3201, 3202							2	1	4			1
HDEV	3301	Child Development (4)	4	core	U.D. standing	1		1	1		1						1
HDEV	3302	Foundational Aspects of Adolescent Development	4	core	U.D. standing				1	1	3						1
HDEV	3303	Adult Development and Aging (4)	4	core	U.D. standing							1	1	3			1
HDEV	3304	Girls and Women Across the Lifespan (4)	4	core	U.D. standing				3	1	1	2					1
HDEV	3800	Human Development and Interaction (4)	4	elect	U.D. standing				3	1		3	2	1	3	1	1
HDEV	4010	Early Childhood Cognitive Development (4)	4	op/1	U.D. standing			1			1						1
HDEV	4030	Early Childhood Social Development (4)	4	op/1	U.D. standing			2			1			1			
HDEV	4110	Child Cognitive Development (4)	4	op/2	U.D. standing	1		2	1		1			1			
HDEV	4120	Child Language Development (4)	4	op/1,2	U.D. standing			2			1			1			1
HDEV	4130	The Social Development of Children (4)	4	op/2	U.D. standing						1						
HDEV	4140	Theories of Childhood (4)	4	op/2	U.D. standing			1			1	1		1			1
HDEV	4150	Children in Families and Communities (4)	4	op/2	U.D. standing				1		2			1	1		1
HDEV	4220	Contemporary Research Topics in Adolescent Development	4	op/3	U.D. standing			1									
HDEV	4230	Prevention and Intervention in Adolescent Development	4	op/3	U.D. standing									1			
HDEV	4310	Human Development in the Changing Workplace	4	op/4	U.D. standing			1			1						
HDEV	4361	Current Issues in Aging (4)	4	op/4	U.D. standing			1									
HDEV	4362	Aging and Diversity (4)	4	op/4	U.D. standing												
HDEV	4363	Cognitive Aging (4)	4	op/4	U.D. standing						1						
HDEV	4430	Intimate Relationships Throughout the Lifespan	4	op/5	U.D. standing			2	1		1			1			1
HDEV	4440	Lesbian and Gay Lifespan Development (4)		op/3,5	U.D. standing							1		1			1
HDEV	4811	Senior Research Seminar in Human Development I (4)	4	cap	40 units				2	2		1			1	1	
HDEV	4812	Senior Research Seminar in Human Development II (4)	4	cap	40 units		1		1	1		1	2		1	1	
		Keys:															
		core	required of all majors														
		elect	elective														
		op/1	early childhood deve. option														
		op/2	childhood deve. option														
		op/3	adolescent deve. option														
		op/4	adult deve. & geron. option														
		op/5	women's deve. option														
		40 units	HDEV 3101-3203, plus 16 HDEV units														

* H=Hayward Campus, C=Concord Campus, O=Completely Online

** Course offerings and number of sections subject to change.

updated 6/18/2011

1/2

EXHIBIT J



Employer Services Division
P O Box 942709
Sacramento, CA 94229-2709
Telecommunications Device for the Deaf (916) 795-3240
888 CalPERS (or 888-225-7377) FAX (916) 795-3005

08-09 US-2010

Dms

May 17, 2010

Lisa Handwerker

338

Dear Ms Handwerker

This is in response to your latest inquiry to Dr George Diehr on May 7, 2010, regarding your account balance and benefits with the California Public Employees' Retirement System (CalPERS)

After review of your account, attached is a service credit breakdown that shows you have 5 108 years of service credit as of February 28, 2010, which has been reported to CalPERS by your employer. Disregarding the email from Charlene Patton dated October 21, 2009, which projected service credit that was less than what your employer actually reported to CalPERS at a later date. You have attained the necessary years of service credit and have reached the minimum age requirement (60) to be eligible to apply for a monthly retirement benefit from CalPERS.

Your eligibility for continued health and dental benefits into retirement as a CSU employee requires you to retire from a position that is eligible for enrollment in health benefits on the date of permanent separation. You must also retire within 120 calendar days following your date of separation and be eligible for a retirement benefit (an annuity).

CalPERS is still evaluating the application of summer session employment and how it is applied throughout the California State University System. Depending on the outcome of your membership eligibility, we will reevaluate your eligibility for ARSC and the cost of the SPM. We appreciate your patience as we continue to analyze these issues.

If you have any questions or concerns regarding this matter, please contact me at ~~~~

Sincerely,

A handwritten signature in black ink, appearing to read "Emily Perez de Flores".

Emily Perez de Flores, Manager
Member Reporting Section
Employer Services Division

cc Dr George Diehr



Employer Services Division
 P O Box 942709
 Sacramento, CA 94229-2709
 Telecommunications Device for the Deaf (916) 795-3240
 888 CalPERS (or 888-225-7377) FAX (916) 795-3006

08-09 052420

340

Reply to Section 127
 Refer to No
 May 17, 2010

2481
 Lisa Handwerker

Worksheet - Summary of years service credit toward retirement as of February 28, 2010

CalPERS membership date June 19, 2008

<u>Fiscal Year</u>	<u>Service Credit</u>	
1997/1998	120	Service Prior to Membership
1998/1999	270	Service Prior to Membership
1999/2000	161	Service Prior to Membership
2000/2001	-0-	Not reported to CalPERS
2001/2002	135	Service Prior to Membership
2002/2003	416	Service Prior to Membership
2003/2004	516	Service Prior to Membership
2004/2005	314	Service Prior to Membership
2005/2006	672	Service Prior to Membership
	053	Arrears
2006/2007	105	Service Prior to Membership
	214	Arrears
2007/2008	533	Arrears
	027	267 month service
2008/2009	880	8 804 months service
2009/2010	693	6 934 months service
TOTAL	5,169	Years of service as of February 28, 2010.

0210

Salazar, Renee

From: Salazar, Renee
Sent: Tuesday, December 10, 2013 6:27 PM
To: 'Lisa Handwerker'
Cc: 'Jonathan Karpf'; 'Mark Karpus'
Subject: RE: follow up Handwerker

Dear Ms. Handwerker,

I had hoped the PIMS documentation would be sufficient, and I had assumed we would receive the necessary documentation from CSU prior to the settlement conference. However, besides being difficult to read, there appears to be some discrepancy in what was initially reported in the PIMS records, and then later corrected and reported by CSU. Therefore, CalPERS needs verification from CSU HR for your time worked between 2003 to 2006.

I do not wish to delay this matter, but without the necessary documentation CalPERS cannot move forward with settlement or a hearing. If you prefer, and in an effort to expedite things, I can request a hearing date (rather than a settlement conference) from Judge Owyang. Then, if we can settle the matter in the interim, we can request the hearing be cancelled; but, if we are unable to settle, we will have a hearing date in hand to proceed. Please let me know your preference.

Thank you,

Renee R. Salazar
Senior Staff Attorney
CalPERS Legal Office

(916) 789-3859 (fax)

-----Original Message-----

From: Lisa Handwerker
Sent: Tuesday, December 10, 2013 5:26 PM
To: Salazar, Renee
Cc:
Subject: RE: follow up Handwerker

Hello. I received your message. CalPERS has determined my service credit from 2003-2006 based on the PIMS records they received from CSU East Bay HR in the past, so I am unclear of the reason for the delay. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email:

From: Salazar, Renee
Sent: Tuesday, December 10, 2013 3:05 PM
To: 'Lisa Handwerker'
Cc: 'Jonathan Karpf'; 'Mark Karpus'
Subject: RE: follow up Handwerker

Dear Ms. Handwerker,

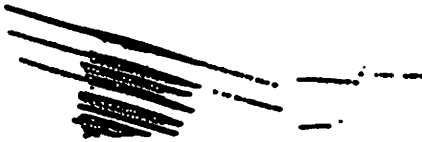
myCalPERS - Home Page

3/5/14 10:28 PM

CalPERS Logo

Home

Annual Member Statement
Your AMS is
Available



CalPERS
Market Value
\$291.2 billion

last reported 2013/2014

\$21,323.72	9.285 years	0.000 years
\$17,304.88	\$4,018.84	2% @ 55
State Miscellaneous		

You are enrolled in
State Shield Access
California
effective April 01, 2009.

Your Health is Important

Learn more about your health plan including
online tools, health and wellness information, and plan coverage.

The new myCalPERS experience provides you easier access to the information you need, right from your home page.
Explore the new features today and come back frequently to learn more about your benefits.

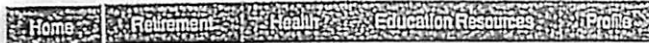
CalPERS © Copyright 2014 | Privacy Policy | Questions of the Day | Retirement Plans | Account Info | Sign In | Contact Us

myCalPERS - Subject: Annual Statements

6/3/14 12:04 AM

myCalPERS

Logged in as Lisa | [Contact Us](#) | [Log Out](#)



Message Center

[Message Inbox](#) [Send a Message](#) [Contact Us](#)

Subject: Annual Statements
Category: Other Id:

Sent 05/05/2014

Is it possible to request BOTH electronic and annual statements? If so please send hard copies to:

I would like copies of all my statements dating back to 1999. Thank you.

CalPERS Reply 05/09/2014

Thank you for contacting the California Public Employees' Retirement System (CalPERS).

Per your request your preferred delivery method for receiving your Annual Member Statements (AMS) has been set to paper. You can view and print your current and past (through 2004) AMS through your myCalPERS account by selecting the Retirement tab and then select Statements. A message has been sent to the appropriate program area to send you copies for AMS from 1999-2003.

If you have additional questions or concerns, please submit another inquiry or call us toll-free at 888 CalPERS (888 225-7377) to speak with a customer service representative Monday through Friday, 8:00 a.m. to 5:00 p.m. (All CalPERS offices are closed on State and federal holidays).

CalPERS Reply 05/14/2014

Thank you for contacting the California Public Employees' Retirement System (CalPERS).

After researching your account, we determined that you were brought into CalPERS membership on 6/16/2005 and your first payroll was reported to CalPERS on 6/1/2009. You purchased Service Prior to Membership (SPM) time back in 2009, which did change your membership date with us to 1/1/1998. However, since you purchased this time back in 2009 that was when we sent you your first Annual Member Statement with the added SPM time. You don't have any Annual Member Statements prior to 2009. If you would like, you can request for us to send you a Service Credit Breakdown, which will break down all the service credit you have earned up to this point. Thank you.

If you have additional questions or concerns, please submit another inquiry or call us toll-free at 888 CalPERS (888 225-7377) to speak with a customer service representative Monday through Friday, 8:00 a.m. to 5:00 p.m. (All CalPERS offices are closed on State and federal holidays).

6/17/14 1:24 PM

----- Original Message -----
 Return-Path:
 Received from mail44.vgs.unil.com (mail44.vgs.unil.com [10.191.44.34])
 by mail01hvr03.vgs.unil.com with CSMTPID AARPARG032A151932
 for
 Wed, 9 Feb 2011 17:14:09 -0800 (PST) --
 Received from smtp2.caipen.ca.gov (smtp2.caipen.ca.gov [189.194.97.50])
 by mail01hvr03.vgs.unil.com with CSMTPID AARPARG032A151932

6/17/14 1:24 PM

(1) with msg: Wed, 9 Feb 2011

"Caffrey, Joseph"

Hi Lisa

We have made a determination of your membership date in GSEP, which has changed to be March 27, 2009 instead of June 19, 2009; this will provide more seamless service credit toward your eligibility to the purchase APRSC. However, we are currently validating the total years of seamless service with our Member Services Division. Once we obtain that information we can send you our letter that provides the confirmation to the change in your membership date.

I will have staff validate that the change to your time base for Spring 2010 has been reflected in your years of service. We will be able to see when the change occurred and that your service credit reflects this change. Let me know if you have any further questions. Thank you.

Emily da Flores, Membership Reporting Section, EPSPD (916) 765-7691

-----Original Message-----
From: Lisa Handwerker [mailto:ljhandw@att.net]
Sent: Wednesday, February 09, 2011 4:58 PM
To: DeFlora, Emily
Cc: Jaramanick, Robert
Subject: RE: COPSIS

I am checking in, as I have not heard anything yet again.

Also, I want to make sure this update is now reflected in my CnPERS membership.

This was sent to me by CSUES HR department:

*Also, Payroll entered a database increase for Salaries 2010 from 478 (2007) to 25 (4) in Anthropology. Please be advised that Payroll can only verify that the transaction was entered into the payroll system. The State Controller's Office sends a payroll report to CalPERS. The information contained in that report is used to update your CalPERS service credit. In this change reflected yet in my CalPERS report for 20092010 year.

Lisa Handwerker, Ph.D., M.P.H.
Email: [REDACTED]

----- Original Message -----
From: Public
Received: from mail02.vpn.usps.com (mail02.vpn.usps.com [191.14.32])
 by mailserver03.vpn.usps.com with SMTP id AABGWTKSCAXLXCL
 for **qdar**
Tue, 1 Feb 2011 18:38:33 -0800 (PST)
Received: from smtp3.cspn.usps.gov (smtp3.cspn.usps.gov [193.184.57.51])
 by mail02.vpn.usps.com with SMTP id AARRWTKSCARY711R
 for **qdar**
Tue, 01 Feb 2011 18:38:33 -0800 (PST)
Received: from unknown (HELO HQWPW603.cspn.usps.gov) (10.1.8.193)

6/17/14 1:24 PM

(=1) with map; Tue, 1 Feb 2011

HE User

I've liked
 I just wanted to provide you an update regarding your membership eligibility. We have a few more things to discuss, but hope to have a decision within the next week as well as coordinate our determination with the Member Services Division for any remaining outstanding issues that need resolved. Again, I apologize for the delay, but as previously indicated I would provide you a status update. Thank you for your continued patience.

~~Original Message~~

From: Lisa Handwerker
Sent: Thursday, January 13, 2011 9:25 AM
To: DeFlores, Emily
Cc:
Subject: RE: CalPERS

Early

Sorry to learn that you are sick. I hope you feel better. I am confirming that I received your phone call this morning telling me that as of today, January 13, 2011, CALPEPS has still not made a decision about whether to grant me the earlier CALPEPS start date (Winter 2009, of which I believe I am eligible). Furthermore, you said that there is no timeframe for when CALPEPS will make the decision. At this point, no decision is a decision. As a lecturer at CSU East Bay, in a vulnerable position this is causing additional emotional stress. This question about my earlier eligibility was raised more than one year ago and now close to two years. I believe this is an unreasonable amount of time to take to make a decision.

Also, (as per your July 2010 email) can you please let me know if all the mistakes in my service credit have been corrected? Additionally, CALPERS told service credit for Spring 2010, an extra 2 units awarded by OSUE2. Can you please send me a new statement of how much service credit I currently have since my annual statement from CALPERS was incorrect. In Feb 2010 I taught 100% or 18 units (paid 15 units) and Winter 2011 I am teaching 18 units (paid 15 units credit) or 100% time. Thank you.

**Use Hardware, Ph.D., M.P.H.
Email:**

Edited Message

```
Return-Path:
Received: from smtp.vga.mil.army.gmra.usg.mil.com [10.181.44.55]
by mailgw07.vga.mil.com with SMTP id AASGEBEFA6P9YK2
for <>
Fl: 1 Jun 2010 10:42:20 -0700 (PT)
Received: from outbound-mail.vga.mil.com [smtpout06.vga.mil.com] [10.181.42.55]
by mail3.vga.mil.com with SMTP id AASGEBEFA6BGFUJ
for <>
Fl: 1 Jun 2010 10:42:20 -0700 (PT)
DKIM-Signature: v=1; s=sas; t=20100601T060000Z; c=relaxed/simple; d=gma.com; h=subject;
i=1270229732; m=0UECqHdH8Mw/TWtW4S0QzQFm3NpWVZG8SuFU; b=;
butFromDataToOutboundMessage-toContent-Type;
b=1d9jCS93nnm0UUA0JTQ482X1g5PcF6bnRn5f5P6PcPas5Gm+V+eCUv
o5183r+VWwpOVRZu5eDEBNWpsKRlUnRYLALAPzDvWYw8smnm9jG57C
H+ReednV8L541YAABSS6EDPzhmPzA2ND
X-UCI-TAGLINE: true
Received: from outbound-burl.vga.mil.com [webmail14.vga.mil.com] [10.181.12.154]
by smtpout03.vga.mil.com with SMTP id AASGEBE62ASINSH2
```

Juno Email on the Web

6/17/14 1:24 PM

for

Fri, 18 Jul 2010 10:01:44 -0700 (PDT)

X-UNTD-OrigStamp: A.F.40393111zQw.FP12mD4HNGmY.Lfho0eQyC6mCAcildpmb==

Received:

by webmail4.vgs.untd.com (qpsasmas) id QJY88JNY; Fri, 18 Jul 2010 10:01:27 PDT

Received from [63.204.131.57] by webmail4.vgs.untd.com with HTTP:

Fri, 18 Jul 2010 17:01:04 GMT

X-Originating-IP: [63.204.131.57]

X-Mailer: Version: 1.0

From: "Lisa Handwerker"

Date: Fri, 18 Jul 2010 17:01:04 GMT

To:

Cc:

Subject: RE: CAPERS

X-Mailer: Webmail Version 4.0

Message-id: <20100718.100104.839.1

Content-Transfer-Encoding: quoted-printable

Content-Disposition: inline

Content-Type: text/plain; charset=ISO-8859-1

X-UNTD-BodySize: 3077

X-ContentStamp: 157:1103165059

X-MAIL-

INFO:26074439311d35359d3e1d391d150d405031439ed31170a43454044150d1d534e555418da4ed449d41c9ed5030319d5611190149

X-UNTD-Pass-Info: 10.181.12.194webmail4.vgs.untd.comlinbound-burl.vgs.untd.comlisa.hand@juno.com

X-UNTD-USE-1

Hi Lisa, I have not heard back from the final decision about my Capers starting date and I raised this issue more than one year ago. Again, I need to make decisions about retirement including a possible retirement date of July and I am still waiting to hear from you. Can you please calculate if I retire this month July 2010 what my retirement benefits would be (starting retirement August 1) since I may need to do that and am waiting to hear back from CSUEB? Thank you.

Lisa Handwerker, Ph.D., M.P.H.

Email:

----- Original Message -----

From: "DeFlores, Emily"

To: Lisa Handwerker

Subject: RE: CAPERS

Date: Tue, 19 Apr 2010 18:04:10 -0700

Hi Lisa

We continue to review the membership eligibility. Staff is working with our MERSO staff to provide you the correct years of service credit as the figure you were previously provided via email were incorrect. It appears after reviewing your account, the way in which your payroll is reported and credited you are earning more service credit than you were given in the email from Chastara. This information should be forthcoming.

----- Original Message -----

From: Lisa Handwerker

Sent: Wednesday, April 07, 2010 6:43 PM

To: DeFlores, Emily

Cc:

Subject RE: CAPERS

I just received it on Tuesday. Thank you. I am still unclear about some of the things you write in it. I would like to know what my total credit is right now (including the credit I bought back and since I have become a member). Also, I would like to know when this issue is going to be resolved. I have waited a very long time and I am trying to make certain decisions each and every quarter based on this and cannot. Thank you.

Lisa Handwerker, Ph.D., M.P.H.

Email:

----- Original Message -----

From: "DeFlores, Emily"

To: Lisa Handwerker

Subject: RE: CAPERS

Date: Wed, 7 Apr 2010 18:09:37 -0700

Hi Lisa,

Sorry for the delay in responding. I've attached a copy of the letter that was sent and that you should have received, please let me know if it has not yet reached you. I need to determine if there are any issues with our mailroom and delays in sending correspondence. Thank you.

... ..

6/17/14 1:24 PM

From: "DeFlame, Emily"
To:
Subject: CalPERS
Date: Mon, 22 Mar 2010 10:21:31 -0700

Gun Control?
Should The Federal Government Regulate Guns? Vote Here Now.
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[Local.com/New Cars Purchase](http://Local.com/New-Cars-Purchase)

Судебный акт:

Jonathan Karpf
To: "Mark Karpf"
Cc: "Lisa Handwerker"
Re: CalPERS question

"George Dish"
"Lawrence Hoffman"

January 12, 2010 6:13 PM

Hi Mark and George,

First Mark: I'm really sorry; I thought I had already responded to your question.

Like you, I can find no mention of a "duration of membership" requirement in order to purchase the 1-5 years of additional service credit (APSC, aka "air time"). There is specific language on the purchase of air time, found on page 8 and page 9 of Publication 12, but all that is specified is that one needs to be a CalPERS member and one needs to already possess at least 5 years of earned service credit. It also specifies that one can not use unearned service credit to become vested.

Like Lisa Handwerker told me that she was informed that she needed to be an active CalPERS member for 5 years before becoming eligible to purchase air time, I never imagined it would be the case, given what I know.

Now George: I just got off the phone with CalPERS. I was first on hold for 22 minutes, then got a guy to whom I explained the apparent inconsistency (explained in detail below). He understood the problem and put me on hold for 3 minutes while he researched the issue. After 3 minutes, the hold music was replaced by ringing, and a new staff member answered to whom I had to re-explain the issue and my question once again. She put me on hold 5 more times to research my two questions, finally verified one of them as being correct (that service prior to membership can be used to become vested) but told me that the question of service prior to membership counting towards the 5 years required to purchase air time was an unanswered issue. In the same breath that she told me the question was "under review" she also told me that I should write the Member Services pointing out the apparent inconsistency. Total time on the phone with CalPERS while at the Santa train station leaving a MDCS meeting at the GPO: 70 minutes.

Now for the glaring inconsistency.

1) Service Prior to Membership can indeed be used to become vested. If one becomes a member at age 50, say, and earns 2 years of service credit (SC) as a member, one can combine those 2 years with 3 years of purchased Service Prior to Membership to become fully vested, and be able to retire with a pension as well as life-long medical and dental benefits.

2) There are fundamentally two categories of SC: earned SC and unearned SC. The latter consists of air time, buying back SC from DIPs, full year partially-funded contributions, and any unpaid leave. No unearned SC can be used to meet the minimum of 5 years to become vested.

3) Service Prior to Membership can be used to become vested, and hence is considered to be earned SC.

4) Nowhere in Publication 12 does it say anything about having to be a member for 5 years in order to purchase air time.

I was able to get the second CalPERS staff person - who is a senior manager - to agree that all of the above is accurate.

5) So given the above, how does it make sense that Service Prior to Membership cannot be used to purchase air time? It's considered earned SC such that it can be used to become fully vested but it's not considered earned SC in terms of purchasing air time? Correct me if I'm wrong, George, but this makes no sense whatsoever. It's internally inconsistent and it should be a no-brainer.

Given that there are hundreds - if not thousands - of Lecturers facing loss of work, and who are up against the 120-day window between separation date and retirement date in order to retire with health benefits, some of whom (like Lisa) who would like to be able to purchase air time to take out a quasi-lifetime pension, this is a huge issue and one that needs to be resolved and clarified as soon as possible.

I'm happy to write a letter to CalPERS Member Services pointing out all of this, but something tells me that one letter isn't going to expedite a review of this inconsistency - an inconsistency that is adversely affecting hundreds of Lecturer faculty. So if there's anything you can do George to fast-track an administrative review of this issue, I and many Lecturers would be eternally grateful.

my best regards,
Jonathan

Sent from my iPhone

On Jan 12, 2010, at 1:31 PM, "Mark Karpf"

wrote:

Hi Jonathan,

Thank you for your workshop yesterday and continuing to work on Lisa's issue.

I haven't a response to my email below. Can you respond? It's an important element that is contributing to the problems and needs to be cleared up. Thanks.

Mark

Exhibit H + F

Jonathan Knapf
To: "Lisa Handwerker"
Cc:
Re: Lumpsum Calculation

January 15, 2010 2:32 PM

This distinction that Propp draws between being vested for pension vs. being vested for full employer portion of post-retirement health benefits does not apply to CSU employees. 5 years of earned service credit gets you both. Another vivid example supporting George's suggestion that CalPERS train a small cadre of staff to handle the idiosyncrasies of CSU employees.

Jonathan

Sent from my iPhone

On Jan 15, 2010, at 10:35 AM, "Lisa Handwerker"

Sent by Steven Propp:

The Contact Center is our general phone center (1-888-225-7377; make sure that you press the button for "member" rather than "employer"), who are great at handling "basic" questions in areas that I know less about.

There is a difference between being "vested" in the sense of being eligible to RETIRE with five years of service (Gov. Code 21060), and being vested in the sense of being eligible to receive the full "employer" portion of health premiums after retirement (see Gov. Code 22823.2 and 22823.3). The Contact Center will know much more "details" than I do.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker

Sent: Friday, January 01, 2010 8:01 PM

To: Propp, Steven

Cc: Lisa, Shirley

Subject: RE: IMPORTANT: HANDWORKER PMS REPORT UPDATED?

What is the contact center and why would they not pay premiums for health if I am vested?

Sent from my iPhone

On Dec 31, 2009, at 8:50 AM, "Propp, Steven"
wrote:

Ah! This is becoming clearer, now.

Shirley: Can you answer her question about eligibility for Additional Retirement Service Credit (ARSC, aka "Air Time")? Would either of these scenarios qualify:

1. She has the CALENDAR years of service in membership (e.g., from September 2004-September 2009), but less than five years of SERVICE CREDIT.

2. She has less than five years of service credit in MEMBERSHIP, but when her 2,550 years of GPM are considered, she has more than five years of TOTAL SERVICE CREDIT.

Ms. Handwerker: Eligibility for health benefits I'm not qualified to handle, so I would call our Contact Center about that; since you started working after 1980, however, there will be an additional question you need to have answered about whether your employer will pay any portion of the premiums after you retire.

<http://www.fishbase.org/summary/TG1214147top-AEL-TGS-10W-BHV-v4-7p-AANDq.d.d.zZF3u4v9Dn-63AAAY7AAAAAAAAAAAAAAAAAATNAAAAAAAAAAAAAAAAAAYOAAAAAA>

Jonathan Karpf
To: "George Dihr"
Cc: "Lisa Handwerker"
Re: Calpers

January 14, 2010 3:32 PM

Thank you George; this is welcome news.
best,
Jonathan

Sent from my iPhone

On Jan 14, 2010, at 2:42 PM, "George Dihr"

wrote:

I had a good TALK with Lisa today and while it took a while to cut thru misunderstandings to the core issue, I think we now both understand her concerns. Someone at PERS told her that you must have been a member for 5 calendar years to be eligible to buy additional service credit (air time). Clearly, that is not correct. The PERS website says:

"How do I determine if I'm eligible? You must be a CalPERS member in compensated employment with a CalPERS-covered employer and have at least five years of earned service credit (emphasis added) when you make the election. The purchase of other types of service credit may not be used to meet this five-year earned service credit requirement."

Applicable regulation is 20906. And, as you note, service time prior to membership in PERS is "earned" service credit.

She is going to send me her records on service credit as computed by PERS. I am increasingly convinced that they are not treating part-time service correctly for CSU faculty in computing service credit. They should be using WTUs, not months or days worked, to determine service credit (20906(b), not b, c, or d). In a quarter system, each WTU should be 1/12th of a year. Instead, Lisa says they are counting months and partial months and, apparently, using the "10 months = one year" rule."

Please give me a call for additional issues.

George Dihr
Professor of Management Science, CSU San Marcos
Member, Board of Administration, CalPERS

From: Jonathan Karpf
Sent: Thursday, January 14, 2010 12:57 AM
To: George Dihr
Subject: Re: Calpers

As you saw in the long email I sent from the Sacramento train station on Tuesday, Service Prior to Membership does count towards vesting for both the pension and the health benefits. It's earned service credit.

J

Sent from my iPhone

On Jan 12, 2010, at 10:42 AM, "George Dihr"

wrote:

- > Jonathan must know the answer to this: if Lisa has to buy the part-time service, does that count towards meeting the 5-year requirement
- > both for future health benefits and eligibility for purchase of air
- > time? It is "real" service time so seems it should count.
- >
- > If so, the only downside for Lisa if they don't credit her member
- > date to 2004 would be the added cost (interest) for purchase of the
- > part-time service credit. While that is unfortunate, it is a

> relatively modest income versus eligibility for retiree health
> benefits and the right to buy air time.

>

> George Dietz

> Professor of Management Science, CSU San Marcos

> Member, Board of Administration, CalPERS

>

> From: Lisa Handwerker

> Sent: Tuesday, January 12, 2010 10:17 AM

> To: George Dietz

> Cc: Jonathan Kiept; Mark Morpheus Morpheus; Maureen Laughon

> Subject: Calpers

>

> No sorry I realize now you don't know my entire situation. I am in

> Calpers now. I was originally told I was a member last year but when

> they started to do calculations I felt something was wrong. I always

> thought I should be in Calpers center. After many phone calls

> thinking that something was wrong and asking them to recheck they did

> decide a mistake was made and I should have been in 2003. But I thought

> it should be earlier and started investigating and asking for my files

> report etc. Guess they made a mistake that was corrected. But I am not

> yet vested even with service credit but back. If I got them to credit

> me back to winter 2004 it would solve two problems. One I would be

> vested and two I would be in Calpers for 5 years and if I wanted to

> could buy back the one time

>

> Sent from my iPhone

>

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From Mark Hopkins
Sent: Thu 12/31/2009 8:05 AM
To:
Subject: Loretta's question

Jonathan,

Back in October Lita Handwerker received a letter from CalPERS stating that in order to purchase air time she needed at least five calendar years as a CalPERS member, not just five years service credit. Is that correct? I haven't seen that anywhere else. Thanks.

Mark

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Jonathan Karpf -
To: "Lisa Handwerker" -
Cc: emarkkarpin
Re: Caspers pending

January 2, 2010 9:10 PM

Hi Lisa,
That is how I understood the email below, but I am not familiar with the concept of prorating. Mark and I still feel that summer session at COLLEGE should not factor in to Caspers's eligibility requirements, so we're hopeful that this view will prevail.
Jonathan

Sent from my iPhone

On Dec 30, 2009, at 9:39 PM, "Lisa Handwerker" wrote:

write:

Jonathan, So as I to understand that Caspers pre-rates according to the date the quarter began... see below?

Lisa Handwerker, Ph.D., M.P.H.
Email

Please note: forwarded message attached

From: "Patton, Chardene"
To: "Lisa Handwerker"
Cc: "Lisa, Shirley"
Subject: FW: Scan from a Xerox WorkCentre
Date: Tue, 10 Nov 2009 09:53:17 -0500

Lisa,

Here is the information you requested from our office. This document shows the service credit of all your positions combined. You also questioned why you received 0.249 in service for January 2003, and .237 in service for February 2003. This is due to the quarter starting on January 2, 2003. Therefore, the .237 was prorated to .249. The enclosed document shows you received more service credit for these months due to you working multiple positions.

Chardene

-----Original Message-----

From:
Sent: Tuesday, November 10, 2009 1:29 AM
To: Patton, Chardene
Subject: Scan from a Xerox WorkCentre

Please open the attached document. It was scanned and sent to you using a Xerox WorkCentre.

Attachment File Type: PDF

WorkCentre Location: machine location not set
Device Name: MBSDF02

For more information on Xerox products and solutions, please visit <http://www.xerox.com>

Save \$19 on Flowers and Gifts!
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<http://tiny.cc/meydica> June.com/7G12141b7cp:Rh51H3r0um8C1S1mAAAHJdG1dLk2FY3Av6On-
B3AAIAAAAIAAAVERAAAAABe0PhC9v3d3LnZ0ZCsp2D4MTY3MTQ=

<Scan001.PDF>

FURLOUGH'S IMPACT ON CALPERS SERVICE CREDIT FOR PART TIME LECTURERS

http://www.pandora.com/TGL214147ep-VVXmElyarJhK30C6AAH1BqFX0dcCU-7c3bQm9K3GARDAAAAFAAAAAADVTZAAAAKAAAAAAAAAAAAAAAAABDUPRz-M_Jk

Karen Reynolds
To: Lisa Handwerker
Cc: Terry Tjane
RE: Calpers Last year

March 7, 2013 8:43 AM

, joanna.hil

Hello,
I have submitted your information to CalPERS, and they are working to correct all service credit errors. The corrections may take 10 to 12 months to complete. CalPERS is backlogged on their processing at this time.

Employees will not be notified when the corrections are completed. You may log onto your myCalPERS account at:

<https://my.calpers.ca.gov/web/portal/public/systemaccess/selectLoginType.html>
or at www.calpers.ca.gov, later on this year, to review your service credit accrual.

CalPERS will escalate service credit corrections for employees who submit their retirement application this year.

Karen Reynolds

Karen Reynolds
Benefit Programs Specialist
Human Resources
Student Administration building, room 2800
direct
office
fax: 510-885-2651

-----Original Message-----

From: Lisa Handwerker
Sent: Wednesday, March 06, 2013 7:20 PM
To:
Cc:
Subject: Calpers Last year

Were records ever corrected? Mine were completely wrong for last year. I taught a full Load and got very little Calpers credit. My understanding was that it was campus wide and the chancellor, provost and Calpers were being notified and would make the correction But I have not heard anything.

Sent from my iPhone

NetZero now offers 4G mobile broadband. Sign up now.
<http://www.netzero.net/?refid=NZINTSP0512T4GQU11>

Lisa Handwerker
To: Charlene_Patten
Cc:
Winter 2010 PBS REPORT FOR HANDWERKER

January 13, 2010 10:47 PM



I am checking on the accuracy of my Winter 2010 FIMS report. It should state 8/15 in Anthropology and 4/15 in HDEV. For a total of 12/15. Can you please confirm this? I will let you know the dates of winter quarter, as you requested earlier. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email

Weight Loss Program
Get Weight Loss Program - Click Here!
<http://tinyurl.com/TG12141>Top-7Zanw6z/TXm0z/F8gVAAAAJ1BzRXkdwGU-
InS:QandG2pAAAYAAAAAAAAAAAAAAAAADNAAAAAAAAAAAAAAAAAElm3QNS0-

Naren Reynolds
To: Maureen Loughran

Lisa Handwerker
Amy Tjorne

Jeanne Hill

March 18, 2013 12:58 PM

CC: Mark Nappin
RE: CalPERS

Hi Maureen,

We were informed that there are a number of CalPERS members, whose CalPERS service credit was listed incorrectly on their last CalPERS service credit statements for the 2011/2012 fiscal year.

I have notified CalPERS regarding those employees who have contacted me about their erroneous statements. CalPERS is working to correct all service credit errors. The corrections may take 10 to 12 months to complete, since CalPERS is backlogged on their processing at this time.

In addition, CalPERS has created a report, which identifies all affected employees. For those employees who submit their retirement application this year, CalPERS will correct their service credit first. Once those are completed, employees who are age 50 or older will be corrected, then any remaining corrections will be completed.

Let me know if you have any questions.
Best regards,

Naren Reynolds
Benefit Programs Specialist -
Human Resources
Student Administration building, room 2500
direct:
office:
fax: 910-688-2351

-----Original Message-----

From: Maureen Loughran
Sent: Monday, March 18, 2013 11:09 AM
To: Lisa Handwerker; naren.reynolds-jeanne.hill
Cc: Mark Nappin
Subject: RE: CalPERS

CFA is getting inquiries about this from other faculty too now. Please let us know what is being done about this and how soon it will be fixed, if you know.

Thanks,
Maureen Loughran
CFA Field Representative

www.cfa2010.org
twitter.com/CFA_News
youtube.com/CFALocal1000

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-----Original Message-----

From: Lisa Henderson

Sent: Friday, March 15, 2013 9:40 PM

To: karen@ynabla

; joanna.ha

tny@fart

Subject: Carvats

Hope you are all well. I have sent several emails regarding the mistake that was made about Calpers service credit last year and which I was told to HPI was questionable. I was told the protocol was told and they were "locking into it". but I am not seeing any corrections on my records. When is it being corrected? I worked 100 percent and got very little credit. Thank you.

Sent from my phone

Mom is 60 But Looks 26

Mom Finds Simple Skin Cream That Took off 35 Years of Her Life!

<http://tinyurl.com/jma.com/76L314151437588b69a778a7183a0b0a>

November 11, 2013 6:54 PM

Begin forwarded message:

"Patton, Chestnut"

Saturday

From: Lisa Handwerker [mailto:lisahandwerker@att.net]
Sent: Monday, October 12, 2009 10:13 PM
To: Liz, Shifoy
Subject: Credit

Sent from my iPhone

**3X34! How To Get More Muscle & Fat;
Spiking Muscle Growth 6% in 10 Days – But Is It an Unfair Advantage?
<http://www.muscleandfat.com/TB1-3169512449.html>**

Lisa Handwerker
To: Mark Marquis
From: URGENT FRIDAY DEADLINE: MY CALPERS RECORD

November 11, 2013 6:55 PM



This shows my buy back service credit info but they also may have changed some of that later. I think they did as this was before some errors were discovered.

Begin forwarded message:

From: "Patton, Charlene"
Subject: RE: URGENT FRIDAY DEADLINE: MY CALPERS RECORD
Date: October 21, 2009 11:27:58 AM PDT
To:
Cc: "Lin, Shirley"

The following is a breakdown of your CalPERS service credit:

06/07 - 0 - Reported to CalPERS by CSU
07/09 - 0.228 - Reported to CalPERS by CSU (06/08)
08/09 - 0.880 - Reported to CalPERS by CSU (08/08 - 06/09)
0.880 - Posted to your account, and paid for by CSU according to GC 20283 (6/19/06 - 6/17/09)
09/10 - 0.133 - Reported to CalPERS by CSU (07/09 - 09/09)
0.210 - Posted to your account at no cost for employment with
Oakland Unified School District (9/1/05 - 6/30/07)
2.251 - Total Service Posted To Your Account
2.499 - SPM Service Credit with CSU that will be posted to your account once check is received (1/21/98 - 6/18/06)

Currently CSU has you reported under the following positions:
229-069-2358-001 01/05 Time Base
229-019-2358-002 04/05 Time Base

Between these 2 positions you are working full time. Therefore, if the current quarter runs from 09/22/09 - 12/16/09, and your time base does not change, you should receive approximately 0.283 years of service for this quarter.

2.251 - Total Service Posted to your Account
2.499 - SPM Service Credit with CSU that will be posted to your account once check is received
0.283 - Approximation of Service Credit for the current quarter 09/22/09 - 12/16/2009, Assuming Full time service will be worked the entire quarter
5.033 - Total approximation of Service Credit

-----Original Message-----

From: Lin, Shirley
Sent: Wednesday, October 21, 2009 9:28 AM
To: Patton, Charlene
Subject: RE: URGENT FRIDAY DEADLINE: MY CALPERS RECORD
Importance: High

Hi Charlene:

Please email Lisa back today to answer her questions? Thank you.

Shirley

-----Original Message-----

From: Lisa Handwerker [mailto:
Sent: Wednesday, October 21, 2009 9:11 AM
To: Lin, Shirley
Cc:
Subject: URGENT FRIDAY DEADLINE: MY CALPERS RECORD

Shirley,

You have requested me to be patient and I have been trying very hard to be patient. I have been waiting for different information and while I realize that furlough is putting a strain on people, please I do need some information immediately. You now have my money (and requested me to send it in as early as possible and I did based on the information that I was at a minimum of 4.8 years credit without the fall 2009 credit) and I really do need the information about my Calpers record. I would like to know how much total record I have and if you can separate out:

my buy back years

2006-7

2007-9

2008-9

and this fall how much credit I will receive. Clearly, I am trying to teach my 5 years of vestment and I was told information that led me to believe it would happen by the end of this quarter !!!!! so I bought back service credit now. I am now being told some different information about my Oakland job and that is disturbing to me.

I also need to know about my credit for my position at Oakland. I was told that I would get service credit for this but never received a letter.

I do need this information by FRIDAY as I have a VERY important meeting with CSUEB administrators to discuss past and ongoing problems with Calpers.

I will need to contact your supervisor if I can not get this information by Friday.

Lisa Handwerker, Ph.D., M.P.H.

Email:

New FBI Burns Files
Famous doctor discusses the shocking weight loss method
Copyright © 2010 by [illegible]

"Caffrey, Joseph" -
To: "Lisa Handwerker"
Cc: "DeFiora, Emily"

"Janzombek, Robert"
"Palma, Charles"

January 20, 2012 3:18 PM

"Eubanks, Matthew"

RE: CalPERS credit

Hello Ms. Handwerker,

Unfortunately we were not able to complete your service credit breakdown this week, but we will be able to finish it by the end of next week. Please contact me directly if you have any additional questions.

Thank you,
Joe

-----Original Message-----
From: Caffrey, Joseph
Sent: Friday, January 13, 2012 9:55 AM
To: "Lisa Handwerker"; Janzombek, Robert
Cc: DeFiora, Emily; Eubanks, Matthew
Subject: RE: CalPERS credit

Hello Ms. Handwerker,

We will analyze your account and respond to your request next week. Would you like to receive this information via e-mail as well?

Thank you,
Joe Caffrey

-----Original Message-----
From: Lisa Handwerker
Sent: Thursday, January 12, 2012 3:23 PM
To: Janzombek, Robert
Cc: DeFiora, Emily; Caffrey, Joseph; Eubanks, Matthew
Subject: RE: CalPERS credit

Can you please tell me how much CALPERS credit I have at this point (December 2011) and how much is earned service credit versus service credit that I bought back? I am assuming this takes into account all the corrections that happened (2004, 2010). If this is not the appropriate department to give me that information, can you please put me in touch with the correct department. I appreciate the information as soon as possible. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Emil

-----Original Message-----
Return-Path
Received: from mail1.sga.unid.com (mail1.sga.unid.com [10.181.44.41])
by mail1.sga.unid.com with SMTP id AABG6SC8AVKYP6
for
Thu, 17 Feb 2011 12:42:17 -0800 (PST)
Received: from smtp2.calpers.ca.gov (smtp2.calpers.ca.gov [10.164.57.50])
by mail1.sga.unid.com with SMTP id AABG6SC7AUV3M33
for
Thu, 17 Feb 2011 12:42:17 -0800 (PST)
Received: from unknown (HELO HCPWP603.calpers.ca.gov) (10.1.1.163)
by smtp2.calpers.ca.gov with ESMTP/TLIAES120-GHA; 17 Feb 2011 12:42:17 -0800
Received: from BCC14133E.calpers.ca.gov (63.90.243.7:1003:88328250) by HCPWP603.calpers.ca.gov (1) with map; Thu, 17 Feb 2011 12:42:17 -0800
From: "Janzombek, Robert"
To: "Lisa Handwerker"
Cc: "DeFiora, Emily"

Date: Thu, 17 Feb 2011 12:42:17 -0800
Subject: RE: CalPERS
Thread-Topic: CalPERS

Thread-Index: Acv020Nls33kgvucM+53NzhVhSuAACUE00
 Message-ID: <487EC4AEB6868940891368F865C78AEB165D6E1687@EXCHANGE.cafpers.ca.gov>
 References: <20110217.112544.6508.6@webmail03.vqa.undd.com>
 In-Reply-To: <20110217.112544.6508.6@webmail03.vqa.undd.com>
 Accept-Language: en-US
 Content-Language: en-US
 X-MS-Has-Attach: yes
 X-MS-THREX-Computer: acceptlanguage: en-US
 Content-Type: multipart/mixed;
 boundary="_002_487EC4AEB6868940891368F865C78AEB165D6E1687@EXCHANGE.cafpers.ca.gov_"
 MIME-Version: 1.0
 X-UNTD-BodySize: 193697
 X-UNTD-Post-Info: 193.194.57.50smtp2.cafpers.ca.govsmtp2.cafpers.ca.gov/Robert_Jarambel@CafPERS.ca.gov
 X-UNTD-UID: 1

Good afternoon-

Matt Edwards, ctd above, from CafPERS' Member Services Division, and his staff will be able to provide specific information on your overpayment and amount due to you.

As stated in our letter dated 2/14/11, (attached) the overpayment occurred from your purchase of Service Prior to Membership (SPM) for the period of 5/27/09 to 6/18/09, which we found to be in arrears, thus not eligible to be purchased as SPM.
 Thank you,

Rob Jarambel, Manager
 Membership Analysis and Design Unit
 CafPERS Employer Services Division

-----Original Message-----

From: Lisa Handwerker
 Sent: Thursday, February 17, 2011 11:28 AM

To: Jarambel, Robert

Cc:

DePena, Emily; Calkins, Joseph

Subject: RE: CafPERS

I received a call yesterday from CafPERS that I had overpaid on service credit and asking me to call. Please send me an email regarding this issue. What did I overpay on and how much refund will I receive? Will I also receive interest on the overpayment? Thank you. I can provide you with the information you need as soon as possible.

Lisa Handwerker, Ph.D., M.P.H.
 Email: lhandw@pms.com

-----Original Message-----

Return Path:

Received: from mail1.dca.undd.com (mail1.dca.undd.com [10.171.44.41])
 by mailin001.vqa.undd.com with SMTP ID AAB6XVXAFAYVAF03
 for Robert_Jarambel

Mon, 14 Feb 2011 17:18:34 -0500 (PST)
 Received: from smtp2.cafpers.ca.gov (smtp2.cafpers.ca.gov [193.194.57.50])
 by mail1.dca.undd.com with SMTP ID AAB6XVXACAP25FH3

to
 Mon, 14 Feb 2011 17:16:50 -0500

Received: from unknown ([193.194.57.50])
 by smtp2.cafpers.ca.gov with ESMTP/TLS/SSL/SHA; 14 Feb 2011 17:16:24 -0500

Received: from

17:16:24 -0500

From: "Jarambel, Robert"

To: Lisa Handwerker

Cc: "Anna Stambol@CafPERS CA GOV"

"DePena, Emily"

"Calkins, Joseph"

Date: Mon, 14 Feb 2011 17:16:50 -0500

Subject: RE: CafPERS

Thread-Topic: CafPERS

Thread-Index: Acv020Nls33kgvucM+53NzhVhSuAACUE00

Message-ID:

References: <20110203.175109.1

In-Reply-To: <20110203.175109.1

Accept-Language: en-US

Content-Language: en-US

X-MS-Has-Attach: yes

provide more service credit toward your eligibility to the purchase APSC. However, we are currently validating the total years of service with our Member Services Division. Once we obtain that information we can send you our letter that provides the explanation to the change in your membership data.

I will have staff validate that the change to your time base for Spring 2010 has been reflected in your years of service. We will be able to see when the change occurred and that your service credit reflects this change. Let me know if you have any further questions. Thank you.

Emily de Flores, Membership Reporting Section, ERSD

-----Original Message-----

From: Lisa Handwerker
Sent: Wednesday, February 09, 2011 4:58 PM
To: DeFlores, Emily; Anna Stambol
Cc: Jarambet, Robert
Subject: RE: CalPERS

I am checking in, as I have not heard anything yet again.

Also, I want to make sure this update is now reflected in my CalPERS membership.

This was sent to me by CBLAB HR department:

"Also, Payroll entered a timebase increase for Spring 2010 from 4/15 (2007) to 2/5 (4) in Anthropology. Please be advised that Payroll can only verify that the transaction was entered into the payroll system. The State Controller's Office sends a payroll report to CalPERS. The information contained in that report is used to update your CalPERS service credit." Is this change reflected yet in my CalPERS report for 2009/2010 year.

Lisa Handwerker, Ph.D., M.P.H.
Email:

-----Original Message-----

Return-Path
Received: from mx02.spa.untel.com (mx02.spa.untel.com [10.191.44.32])
by mx02.spa.untel.com with SMTP (M AABGWINGQARYJCC)
to
Tue, 1 Feb 2011 19:22:28 -0800 (PST)
Received: from smtpd.calpers.ca.gov (smtpd.calpers.ca.gov [193.194.57.51])
by mx02.spa.untel.com with SMTP (M AABGWINGQARYJLLS)
in
Tue, 1 Feb 2011 19:22:28 -0800 (PST)

Received: from
by
----- (710.19.193)

From: Lisa Handwerker
193.194.57.51

From: "DeFlores, Emily"

To: Lisa Handwerker

CC: "Jarambet, Robert"

Date: Tue, 1 Feb 2011 19:22:28 -0800

Subject: RE: CalPERS

Thread-Topic: CalPERS

Thread-Index: /

Message-ID: <

Return-Path: <0110119.002>

In-Reply-To: <0110119>

Accept-Language: en-US

Content-Language: en-US

X-MS-Has-Attach:

X-MS-THST-Converter:

Content-Language: en-US

Content-Type: text/plain; charset="iso-8859-1"

Content-Transfer-Encoding: quoted-printable

SMTP-Version: 1.0

X-UNTD-BodySize: 7442

X-UNTD-PostInfo: 193.194.57.51handw

X-UNTD-User:

Hi Lisa

I just wanted to provide you an update regarding your membership eligibility. We have a few more things to discuss, but hope to issue a decision within the next week as well as coordinate our determination with the Member Services Division for any remaining outstanding issues that need resolved. Again, I apologize for the delay, but as previously indicated I would provide you a status update. Thank you for your continued patience.

-----Original Message-----

From: Lisa Handwerker

Sent: Thursday, January 13, 2011 8:25 AM

To: DePina, Emily

Cc: Dahir, George

Subject: RE: CalPERS

Emily,

Sorry to learn that you are sick. I hope you feel better. I am confirming that I reached your phone call this morning telling me that as of today, January 13, 2011, CALPERS has still not made a decision about whether to grant me the earlier CALPERS start date (Winter 2004), of which I believe I am eligible. Furthermore, you said that there is no deadline for when CALPERS will make the decision. At this point, no decision is a decision. As a lecturer at CSU East Bay, in a vulnerable position this is causing additional emotional stress. This question about my earlier eligibility was raised more than one year ago and now close to two years. I believe this is an unreasonable amount of time to take to make a decision.

Also, (in per your July 2010 email) can you please let me know if all the mistakes in my service credit been corrected? Additionally, did CALPERS add service credit for Spring 2010, an extra 2 units awarded by CSUEB? Can you please send me a new statement of how much service credit I currently have since my annual statement from CALPERS was incorrect. In Feb 2010 I taught 100% or 18 units (paid 15 units) and Winter 2011 I am teaching 18 units (paid 15 units credit) or 100% time. Thank you.

Lisa Handwerker, Ph.D., M.P.H.

Email:

-----Original Message-----

Return-Path:

Received: from mail03.vga.unl.edu (mail03.vga.unl.edu [10.191.44.33])

by mail03.vga.unl.edu with SMTP id AAG8E8E9EAC9YK2

for

Fri, 18 Jul 2010 10:02:28 -0700 (PDT)

Received: from outbound-mail.vga.unl.edu (outbound-mail.vga.unl.edu [10.191.42.33])

by mail03.vga.unl.edu with SMTP id AAG8E8E9EAC9YK2

for

Fri, 18 Jul 2010 10:02:28 -0700 (PDT)

Content-Transfer-Encoding: base64

Content-Type: text/plain; charset="utf-8"

Content-Disposition: inline; filename="Screenshot of CALPERS website"

Content-Id:

Content-Id:

X-URL-TAG: true

Received: from outbound-mail.vga.unl.edu (outbound-mail.vga.unl.edu [10.191.42.33])

by mail03.vga.unl.edu

for

Fri, 18 Jul 2010 10:01:54 -0700 (PDT)

X-UNIT

Received: from

by webmail14.vga.unl.edu

QJVB8WY; Fri, 18 Jul 2010 10:01:27 PDT

Received: from [10.191.44.33] by webmail14.vga.unl.edu with HTTP:

Fri, 18 Jul 2010 17:01:24 GMT

X-Originating-IP: [10.191.44.33]

X-Mailer: 1.0

From: "Lisa Handwerker"

Date: Fri, 18 Jul 2010 17:01:24 GMT

To: Emily, DePina

Cc:

Subject: RE: CalPERS

X-Mailer: Windows 4.0

Message-Id: <20100718.100104.533.1>

Content-Transfer-Encoding: quoted-printable

Content-Disposition: inline

Content-Type: text/plain; charset="ISO-8859-1"

X-UNIT-Body-Size: 5077

X-UNIT-Stamp: 1027:1100:1000:00

X-MAIL-INFO: 29

X-UNIT-From:

X-UNIT-User:

Hi, I have not heard back from the final decision about my Calpers starting date and I raised this issue more than one year ago. Again, I need to make decision about retirement including a possible retirement date of July and I am still waiting to hear from you. Can you please calculate if I retire this month July 2010 what my retirement benefits would be (starting retirement August 1) since I may need to do that and am waiting to hear

back from CSUED? Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email

----- Original Message -----
From: "DeFlora, Emily"
To: Lisa Handwerker
Subject: RE: CuPERS
Date: Tue, 19 Apr 2010 18:04:10 -0700

Hi Lisa
We continue to review the membership eligibility. Staff is working with our MISD staff to provide you the correct years of service credit as the figures you were previously provided via email were incorrect. It appears after reviewing your account, the way in which your payroll is reported and credited you are earning more service credit than you were given in the email from Charlene. This information should be forthcoming.

----- Original Message -----
From: Lisa Handwerker
Sent: Wednesday, April 07, 2010 8:43 PM
To: DeFlora, Emily
Cc:
Subject: RE: CuPERS

I just reached it on Tuesday. Thank you. I am still unclear about some of the things you write in it. I would like to know what my total credit is right now (including the credit I bought back and since I have become a member). Also, I would like to know when this issue is going to be resolved. I have waited a very long time and I am trying to make certain decisions each and every quarter based on this and cannot. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email

----- Original Message -----
From: "DeFlora, Emily"
To: Lisa Handwerker
Subject: RE: CuPERS
Date: Wed, 7 Apr 2010 18:08:27 -0700

Hi Lisa,
Sorry for the delay in responding. I've attached a copy of the letter that was sent and that you should have received, please let me know if it has not yet reached you. I need to determine if there are any issues with our mailroom and delays in sending correspondence. Thank you.

----- Original Message -----
From: Lisa Handwerker
Sent: Sunday, April 04, 2010 8:17 PM
To: DeFlora, Emily
Cc:
Subject: RE: CuPERS

Hi Lisa, I was out of the country and was unable to return your call until now. I understand that you left a voice mail and wanted to talk to me. I prefer if you send me an email. You said I would receive a letter but I have not received that letter. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email

Please note: message attached

From: "DeFlora, Emily"
To:
Subject: CuPERS
Date: Mon, 22 Mar 2010 10:21:51 -0700

✓ Lynn_Food

http://ftp.yodanis.com/TG121417wp-F_VjALCEqW6toTsfPaAJtBzP0kdcGU-8oR9dKcSggyVAAAAAAAAAAAAAAAAAAGNAAAAAAAAAAAAAAAAAGIGMx0U

"Eubanks, Matthew"
 To: Lisa Handwerker
 Cc: "Janzembek, Robert"

March 22, 2011 4:37 PM

, "DeFlores, Emily" <

"Caffrey, Joseph"

RE: CalPERS Second Overpayment for Service Prior to Membership

Good afternoon Dr. Handwerker,

I believe you are referring to the letter from our Refunds Unit. Box #3 was checked, which states you are receiving partial refund. This is correct, you are receiving only a portion of the money you paid to us for your SPM purchase for this refund. As stated in my email below:

"The original cost for the SPM was \$4,084.58, and now that the period of 03/27/2008 to 08/18/2008 has been removed from the SPM calculation, the new cost for the SPM is \$3,900.48. This caused an overpayment of \$184.10, which is being refunded to you."

1. The enclosed warrant is payment to you in accordance with the California Public Employees' Retirement Law. Any interest shown was earned from date of membership through the date of refund. The taxable contributions and interest may be reportable on your Federal or State income tax return. For tax information contact the United States Internal Revenue Service or the State Franchise Tax Board.

CONTRIBUTIONS +		INTEREST -	TAX WITHHOLDING =		NET
Non-Taxable	Taxable	Taxable	State	Federal	REFUND

2. The enclosed warrant represents payment of your total accumulated retirement contributions. Your membership in California Public Employees' Retirement System (CalPERS) is terminated. **YOU ARE NO LONGER ELIGIBLE FOR RETIREMENT BENEFITS UNLESS YOU RETURN TO CALPERS COVERED EMPLOYMENT.**

3. The enclosed warrant represents a partial refund of your accumulated retirement contributions.

—Original Message—

From: Lisa Handwerker

Sent: Saturday, March 19, 2011 3:01 PM

To: Eubanks, Matthew

Cc: Janzembek, Robert; DeFlores, Emily; Caffrey, Joseph

Subject: RE: CalPERS Second Overpayment for Service Prior to Membership

But the letter dated March 14 states this is a partial refund and also shows it as taxable. Why was it not directly rolled over back into my account? This is all new to me and I still need more clarification of what you are doing here.

Lisa Handwerker, Ph.D., M.P.H.
 Email

Good afternoon Dr. Handwerker,

The two letters I believe you referred to are from February 11th and 15th. Below are two excerpts that I hope I can clarify for you. Both letters speak to the period for which you are receiving a single refund of \$184.10. This

refund amount should have been included in both letters so that it was clear that both letters speak about the same refund.

The \$414.09 stated in the February 16th letter is the amount transferred from your employer's account into your account, which is why you are receiving a refund of \$184.10. This refund is to reimburse you for payment you previously made on a Service Prior to Membership purchase, which has now been determined to be time your employer should have paid for.

The original cost for the SPM was \$4,084.59, and now that the period of 03/27/2008 to 08/18/2008 has been removed from the SPM calculation, the new cost for the SPM is \$3,900.48. This caused an overpayment of \$184.10, which is being refunded to you.

I apologize for this confusion and hope this provides the clarification you were seeking.

Letters:

February 16, 2011

Verification of your employment from 03/27/2008 to 08/18/2008 has been received. CalPERS has posted 0.138 years of service credit and \$414.09 in retirement contributions for the employee and employer contributions at no cost to you. CalPERS will transfer these funds out of the employer's reserve account to the member account as pre-tax contributions whether or not the employer reports tax deferred contributions. This period of employment was originally purchased as part of your Service Prior to Membership election. Because you purchased this service credit with a rollover, CalPERS will refund you these funds, with a rollover, back to the account from which it was sent. We have also removed 0.113 years of service credit from your Service Prior to Membership election, and will be replacing it with 0.138 years of service credit, due to your change in membership date.

February 11, 2011

CalPERS finds the period of March 27, 2008 through June 18, 2008 to be in arrears under G.C. section 20283, requiring the employer to be charged for this arrears period. Since you have already purchased this time as Service Prior to Membership (SPM), a refund for that period will be issued to your financial institution. No action on your part is required for this to happen.

-----Original Message-----

From: Lisa Handwerker

Sent: Wednesday, March 16, 2011 8:49 AM

To: Eubanks, Matthew

Cc: Jazombek, Robert; DePoma, Emily; Caffrey, Joseph

Subject: RE: CalPERS Second Overpayment for Service Prior to Membership

Yes, please do and the two different letters with two different amounts.

Lisa Handwerker, Ph.D., M.P.H.

Email:

-----Original Message-----

Return-Path: <

Received: from mx15.dca.unid.com (mx15.dca.unid.com [10.171.44.45])

by maildelv07.vga.unid.com with SMTP id AABG2BYRGAACKD5A

for < >
Wed, 16 Mar 2011 08:40:22 -0700 (PST)

Lisa Handwerker, Ph.D., M.P.H.

Cal State Hayward, Department of Public Administration

Summer 2003, Contra Costa Campus, CCLB 250

Best way to reach me: " " or leave message at office (925) 602-6775

Lizzie Mayo Faculty Support (Public Safety X6737)

PuAd 6831.99: RESEARCH METHODS IN PUBLIC ADMINISTRATION I
(INTERPRETIVE RESEARCH METHODS)

COURSE DESCRIPTION: This course focuses on interpretive methodology and methods. We go beyond collecting statistics and conducting surveys and will explore many other forms of interpretive research or "qualitative" research including focus groups, interviews, collaborative inquiry and participant-observation. As such, this course is a compliment to PuAD 6832 which focuses on statistical analyses of data produced through survey design.

The learning experience will be bimodal. It will stress both theory and practice; we will read about theoretical issues and concerns and then we will immerse ourselves in direct practice. The class will begin with an overview of the historical and epistemological debates in social science about research, researcher objectivity, and ethics. We will explore gaining entry, collecting and analyzing data. We will also discuss what an administrator or analysis needs to understand and each of you will conduct an interpretive research project.

In general, research needs to be driven by what the researcher wants to know—the research question—rather than the choice of method. Some methods are more appropriate to some questions than others. However, in this course the exercises in specific methods will often influence the choice of the research topic.

COURSE GOALS: At the completion of this course, students will be able to:

- 1) Understand different research methodology and methods that include meaning making or interpretive research.**
- 2) Develop skills that will be useful to policy analysts, agency administrators, and those in other roles.**
- 3) Learn through lecture, videos and experiential learning.**

COURSE REQUIREMENTS AND EVALUATION:

1. Attendance/Participation

25 points

Students are expected to attend lectures, to keep up with assigned readings, and to participate actively in the discussions. Regular Attendance and participation is necessary to receive a passing grade. Each class meeting (5) is worth 5 points including attendance and participation. Any student who misses more than one of the 5 class meetings is subject to a failed grade and must have a written medical excuse. You must notify both the department and instructor in advance if you will miss a class. Lateness and early departure will result in a 2.5 point deduction for each class. Since the course relies on a combination of teaching methods such as discussions/films/lecture, success depends on your consistent attendance, preparation, and participation. Students may be asked to lead discussions on readings. Please

be on time and courteous to each other to create an optimal atmosphere for learning. Differences of opinion are fine as long as people listen and differ in a respectful manner. Please turn off all electronic devices.

Course Meeting Times: 6/28, 7/12, 8/16, 8/23 – 9:30-5:00 and 9/6 – 9:30-1:00 p.m.).

2. Three Exercises (each worth 10 pts) 30 points
There will be a separate descriptive hand-out for each exercise.

3. Final Presentation/Paper 45 points
Students will write a final paper based on your observation. **DETAILS TO FOLLOW.**
On the third class students will present their work in progress and on the final day of class students will present their completed material to the class and hand in paper. The final paper is 10-12 pages, both double-spaced and typed. Students have the option to work collaboratively (but each person must hand in their own unique paper for grading purposes) and/or create a visual project (video, slides, or photographs) with a 6-page paper accompanying it. I encourage you to be creative and work on a project that is personally relevant and significant to you. Due final day of class 9/6. No exceptions.

Late Paper Policy

Please treat coursework due dates seriously as you would your work deadlines. Papers are due on time. Only in a medical emergency, can exercises be handed in late. Unexcused late exercises will lose ½ grade immediately and can earn no more than a “B”. Please contact the professor and the department in advance. For each subsequent day the grade is late it will lose a complete grade (B to C) and (C to D). Sorry, no late final papers will be accepted.

EVALUATION AND GRADING SYSTEM

On the first day of class, I will have students write out what you expect of yourself in the class: what do you hope to accomplish, what will you contribute and put into it, and how will you do that? Please keep this. At the end of the quarter and as part of the final paper, you will evaluate your performance in this course. A “B” grade requires mastery of the material, with clear and logical thinking, introduction and conclusion, correct grammar and punctuation. Work that does not demonstrate that receives a lower grade. An “A” grade requires reflection, insight and analysis that is original and beyond mastery of the subject matter.

Grading is done on a point system as follows:

Class Participation/Attendance	25 points
3 Exercises	30 points
Final Paper	45 points
Total:	100 points

Grades will then be awarded on the basis of points earned as follows: If you take the class pass/no pass you must get a C or better to pass.

A 94-105	D+ 67-69
A- 90-93	D 63-66
B+ 87-89	F 0-62
B 84-86	
B- 80-83	
C+ 77-79	
C 74-76	
C- 70-73	

PLAGIARISM AND CHEATING ARE BOTH UNACCEPTABLE AND EITHER RESULTS IN AN AUTOMATIC F IN THE COURSE. It is your responsibility to conduct yourself with academic integrity and honesty. Any questions or doubts about plagiarism, paraphrasing, quoting or collaborating, please consult me. Academic Honesty is integral to this class. If you do not understand what constitutes plagiarism it is your responsibility to find out.

OFFICE HOURS: You are welcome to meet with me after class. I will be happy to discuss any problems, questions, or concerns that you have about the course. Also, feel free to discuss your progress in class and how well this class meets your needs and interests. Feel free to contact me by email at: lisa.hend@juno.com.

ADA: Any student who has a special need as addressed by the Americans with Disabilities Act (ADA) and needs assistance, please notify both the Student Disability Resource Center and me on the first day of class. This is very important. If I do not know about your disability, I can not anticipate or make special arrangements. It is your responsibility to provide me with the forms from the Center at the beginning of this class. I will work with the Center and reasonable efforts will be made to accommodate your special needs.

REQUIRED BOOKS AND ARTICLES:

- 1) *Conducting Interpretive Policy Analysis*. Dora Yanow. Sage Press, 2000. (paperback)
- 2) *Methods, Sex and Madness* by Julia O'Connell Davidson and Derek Layder. New York: Routledge Press (29 East 35th Street, NY, NY), 1994. ISBN 0415-09764-9
- 3) *Between Craft and Science: Technical Work in the U.S.* By Stephen Barley and Julian Orr, eds. Ithaca: Cornell University Press. 1997 (paperback)
- 4) Articles TBA

Recommended Reading:

Talking About Machines: An Ethnography of A Modern Job. By Julian Orr. Ithaca: Cornell University Press, 1996.

REQUIRED READING LIST (to be handed out on first day of class along with syllabi and exercise one)

Due Second Meeting

1. Yanow, complete readings p. 1-41.
2. Davidson and Layder p. 1-147 (recommended only p. 83-115)
3. Barley and Orr - TBA

Due Third Meeting

1. Yanow p. 42-93 (complete book)
2. Davidson and Layder p. 147-224 (complete book)
3. Barley and Orr - TBA

Due Fourth Meeting

1. Barley and Orr - TBA
2. Catch up on all readings.

Attachment I
Documents Marked for Identification and Included in the Record but Not Considered by the ALJ
87 of 122

Faculty Center

Search

View FERPA Statement

Select Term

CONTINUE

Term	Institution
Fall Quarter 2014	CSU East Bay 2 ANTHRO 1 HOEV, 1 PA 16 UNITS WAIVE 1
Spring Quarter 2014	CSU East Bay 2 ANTHRO 2 HOEV (4) 16 UNITS WAIVE 1 UNITS
Winter Quarter 2014	CSU East Bay 2 ANTHRO 2 HOEV (4) 16 UNITS WAIVE 1 UNITS
Fall Quarter 2013	CSU East Bay 2 ANTHRO 1 HOEV (3)
Spring Quarter 2013	CSU East Bay 2 ANTHRO, 2 HOEV (4) 16 UNITS WAIVE 1 UNITS
Winter Quarter 2013	CSU East Bay 2 ANTHRO, 2 HOEV (2)
Fall Quarter 2012	CSU East Bay 1 ANTHRO, 1 HOEV (2)
Summer Quarter 2012	CSU East Bay 1 ANTHRO
Spring Quarter 2012	CSU East Bay 1 ANTHRO, 2 HOEV (3)
Winter Quarter 2012	CSU East Bay 2 ANTHRO, 1 HOEV (3) 7
Fall Quarter 2011	CSU East Bay 2 HOEV, 1 HSC (6)
Spring Quarter 2011	CSU East Bay 2 ANTHRO, 1 HOEV (3)
Winter Quarter 2011	CSU East Bay 2 ANTHRO, 2 HOEV (4) 16 UNITS WAIVE 1 UNITS
Fall Quarter 2010	CSU East Bay 2 ANTHRO, 1 HOEV, 1 HSC (4)
Spring Quarter 2010	CSU East Bay 1 ANTHRO, 2 HSC (3)
Winter Quarter 2010	CSU East Bay 2 ANTHRO, 1 HOEV (3)
Fall Quarter 2009	CSU East Bay 3 ANTHRO, 1 HOEV (3)
Spring Quarter 2009	CSU East Bay 1 ANTHRO, 2 HOEV (3)
Winter Quarter 2009	CSU East Bay 1 ANTHRO, 2 HOEV (3)
Fall Quarter 2008	CSU East Bay 1 ANTHRO, 1 HOEV, 1 HSC (3)
Spring Quarter 2008	CSU East Bay 1 ANTHRO, 2 HOEV (3)
Winter Quarter 2008	CSU East Bay 1 ANTHRO, 1 HOEV (2) ? 1
Fall Quarter 2007	CSU East Bay 1 CHINA ANTHRO, 1 HOEV (2)
Spring Quarter 2007	CSU East Bay 2 HOEV, 2 ANTHRO (2)

CONTINUE

Fullough? check salary

George Elmer <
To: Lisa Handwerker <
Cc:
RE: CalPERS q's

cc: "Mark Loughran"
cc: "mark.loughran"

October 25, 2009 12:12 PM

Life should be simpler. But here is my understanding:

Unless the summer work was to fulfil an entitlement due to lower-than-entitlement during non-summer terms, then summer does not count towards service credit or eligibility for membership in PERS. If the summer term was simply an "extra," then if she were in CalPERS it would not count towards service credit and if she were not in CalPERS it should not interrupt her "march" towards eligibility.

Do I understand that Lisa is NOT in PERS? Seems to me she should be and if the <50% time-base in summer has interrupted her eligibility, then she should appeal.

George Elmer
Professor of Management Science, CSU San Marcos
Member, Board of Administration, CalPERS

From: Lisa Handwerker
Sent: Thursday, October 22, 2009 12:41 PM
To: Mark Loughran
Cc: George Elmer
Subject: RE: CalPERS q's

In addition, there is another issue not mentioned here about quarter systems which is when you do not have a year contract and work quarter to quarter CalPERS expiring you after each quarter and you get less service credit, as a result. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
End

-----Original Message-----
From: "Mark Loughran"
To: "George Elmer"
Cc: "Lisa Handwerker"
Subject: RE: CalPERS q's
Date: Thu, 22 Oct 2009 12:37:44 -0700

Thanks George for your answer on the Loughran. That makes sense.

I think the summer question is a bit more complicated. East Bay is a quarter campus, so Lisa worked Fall, Winter & Spring quarters at over a 50% timebase and then worked that following summer at under a 50% timebase. Then she worked again the following Fall at over 50%. Does working that 4th consecutive quarter (summer) at under 50% make her have to start all over in accruing 3 consecutive quarters at over 50% timebase the following Fall? If so, she would have been better off not working at all that summer, right? And she would have been in PERS simply because she worked Fall, Winter, Spring, Fall, right? I am confused about when summer counts and when it doesn't if you are trying to get into PERS and haven't qualified to become a member yet.

Thanks,
Mark Loughran
CFA Field Representative
510-608-1233
mloughran@cfaia.org
www.cfaia.org <http://www.cfaia.org>

www.cfaia.org <http://www.cfaia.org>
twitter.com/CFA_News
youtube.com/CFA1989

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George DiMar
To: Lisa Handwerker
RE: CALPER LETTER TO HANDWERKER

January 15, 2010 3:19 PM

And, the correct service credit for Winter quarter will be 0.533, not 0.253. Correcting all of your service time records—using the proper CSU method, not the 10-month method—should put you well over 5 years.

George

From: Lisa Handwerker
Sent: Friday, January 15, 2010 9:49 AM
To: George DiMar
Subject: CALPER LETTER TO HANDWERKER

This letter was sent in October but then they told me the calculations were wrong based on an error of reporting by CSUEB (see Chantane Patton's long letter) and reduced it. I thought I had 5 years but then was told nope sorry you don't. But my credit still seemed odd and I could not understand how they are calculating it. She sent me a long explanation letter and now I would like to know if the way they are calculating my credit is accurate or not.

The following is a breakdown of your CalPERS service credit:

03/07 - 0 - Reported to CalPERS by CSU

07/03 - 0.253 - Reported to CalPERS by CSU (03/03)

03/09 - 0.650 - Reported to CalPERS by CSU (03/03 - 03/09)

0.650 - Posted to your account, and paid for by CSU according to GC 20233 (07/03 - 07/09)

03/10 - 0.133 - Reported to CalPERS by CSU (07/09 - 03/10)

0.133 - Posted to your account at no cost for employment with

Goldman United School District (07/03 - 03/09)

2.251 - Total Service Posted To Your Account

2.439 - SFM Service Credit with CSU that will be posted to your account once check is received (1/21/09 - 07/10/09)

Currently CSU has you reported under the following positions:

229-063-0300-001 01/05 Time Base

229-013-0300-002 04/05 Time Base

Between these 2 positions you are working full time. Therefore, if the current quarter runs from 03/22/09 - 12/15/09, and your time base does not change, you should receive approximately 0.253 years of service for this quarter.

2.251 - Total Service Posted to your Account

2.439 - SFM Service Credit with CSU that will be posted to your account once check is received

0.253 - Approximation of Service Credit for the current quarter 03/22/09 - 12/15/2009, Assuming full time service will be worked the entire quarter

5.033 - Total Approximation of Service Credit

**George Dish
To: Lisa Handwerker
Cc: "M Dougherty"
RE: CALPERS Calculation**

January 15, 2010 3:28 PM

I think the PERL, section 20956(d) is clear, how clear? Crystal. CSU academic employees are not employed on a monthly basis; they are employed for academic terms. (An exception might be faculty employed on a 12-month basis, such as department chairs. But it is most for most of them because they will usually qualify for full time.)

Do not use net rates should be used. Service credit should be based on time-base for each academic term; not time-base AND fractions of months.

George

From: Lisa Henderson
Sent: Friday, January 15, 2010 10:22 AM
To:
Cc:
Subject: CALPERS Contribution

This was recently sent to me in terms of how they calculate. My observation is that they are calculating it differently when you are full-time/part-time as a one year contract and as a quarter by quarter campus. Is that a correct observation? In my gender records I was not always full time and had some quarter to quarter appointments and seemed to get very little service credit for breaks between quarters etc. Also, another interesting thing I observed is that CSUEB reports the starting and ending dates and the ending date they report are even before your grades are handed in.

Paper Chesting Pattern:

For the period of 03/01/2009 thru 11/20/2009 your employer reported you FULL TIME for 9 months, which gives you 0.500 years of service credit. If you work 12/15 time base for the winter of 2010, you will receive 0.500 months, or 0.050 of a year of service credit for each month you work.

**Lisa Henderson, Ph.D. MPH
Epid.**

[illegible]

George Ehrh

January 15, 2010 3:31 PM

To:

cc: Lisa Handwerker-Additional Issue #1

A copy for you, also. Previously sent to Lisa and Jonathan.

George

From: George Ehrh
Sent: Friday, January 15, 2010 2:21 PM
To: Lisa Handwerker, Jonathan King
Subject: Re: Lisa Handwerker-Additional Issue #1

Here is my current timeline on the issue of eligibility for ARSO (air time) purchase.

George

From: George Ehrh
Sent: Friday, January 15, 2010 11:02 AM
To: Hamilton, Matthew
Subject: Lisa Handwerker-Additional Issue #1

Hi Matthew,

(What a mess!)

First, let's cut aside for now the issue of when Lisa gained membership in PERB—the issue of interpretation of “consecutive quarter.” For now, that issue is secondary and not relevant to two larger issues. The first is eligibility to purchase “air time” which I address here. I will address the second in a subsequent email.

There are 3 emails copied below, each incorporating other emails, many of which are not relevant but included for the sake of completeness. I have underlined relevant comments in each letter.

1. From Shirley Liu, Dec. 31.

2. Lisa to Steven Propp, Dec. 31.

3. From Charlotte Patton, Oct. 22.

I am quite certain Shirley Liu is incorrect in her statement: “To be eligible to purchase ARSO, the member must have at least two years of earned service credit. SPW purchased time can not be used to meet this two year requirement. Therefore, you will not be eligible to make the ARSO purchase until you have two years of earned service credit.” SPW purchased time is earned service credit and therefore qualifies towards the requirement for 2 years of earned service credit.

The email from Steven Propp seems correct and seems to allow purchase of air time.

Charlotte Patton adds a requirement for: “At least five calendar years as a CalPERS member by the time the election is reached.” And notes: “Through your membership data with CalPERS in June 19, 2009, you have not been in CalPERS membership for 5 years.” I can find no requirement in the PERB that you have to have been a member for 5 calendar years. I conclude that assuming Lisa has 5 years of service credit—as represented by purchase of prior part-time service (SPW) and service credit time she became a member—she is eligible to purchase air time.

Thank you,

George Ehrh
Professor of Management Science, CSU San Marcos
Member, Board of Administration, CalPERS

----- Forwarded Message -----

From: “Liu, Shirley”
To: “Lisa Handwerker”
On: “Propp, Steven”

“Patton, Charlotte”

“Hamilton, Matthew”

Subject: RE: IMPORTANT: HANDWORKER PMS REPORT UPDATED?
Date: Thu, 31 Dec 2009 09:34:39 -0500

Hi Lisa:

To be eligible to purchase ARSO, the member must have at least five years of earned service credit. SPM purchased time can not be used to meet this five year requirement. Therefore, you will not be eligible to make the ARSO purchase until you have five years of earned service credit.

Thank you,

Shirley

-----Original Message-----

From: Propp, Steven
Sent: Thursday, December 31, 2009 8:50 AM
To: Lisa Handwerker; Lisa, Shirley
Subject: RE: IMPORTANT: HANDWORKER PMS REPORT UPDATED?

Abs! This is becoming clearer, now.

Shirley: Can you answer her question about eligibility for Additional Retirement Service Credit (ARSO, aka "Air Time")? Would either of these scenarios qualify:

1. She has five CALENDAR years of service in membership (e.g., from September 2004-September 2009), but has less than five years of SERVICE CREDIT.

2. She has less than five years of service credit in MEMBERSHIP, but when her 2,500 years of SPM are considered, she has more than five years of TOTAL SERVICE CREDIT.

Ms. Handwerker: Eligibility for health benefits I'm not qualified to handle, so I would call our Contact Center about that; since you started working after 1999, however, there will be an additional question you need to have answered about whether your employer will pay any portion of the premiums after you retire.

Steve Propp, Manager ()
Membership Analysis & Upgrade Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker
Sent: Thursday, December 31, 2009 7:48 AM
To: Propp, Steven
Cc:
Subject: RE: IMPORTANT: HANDWORKER PMS REPORT UPDATED?

Thank you for this information. I had bought back service credit from CALPERS from Shirley Lira's office but was not told about that. This is a bit different information than has been explained to me. I may have some additional questions about this. First, I don't know if Shirley Lira told you I already bought back 2,489 years of service credit (I did not know about any other options) from Shirley Lira's office with the understanding that if mistakes were made I would be reimbursed. Second, there is one VERY important aspect you are not mentioning here which is health insurance for myself and my daughter. My understanding after much research, is that in order to be vested for health insurance in CALPERS you need to have a minimum of two decades (over 20) when you decide to retire and a minimum of five years of credit from Calpers (through both buy back service credit and Calpers membership). Since I do not yet have that, there is a lot at stake here for me. Also, if I am in CALPERS starting in Winter 2004 would also put me in Calpers for five years and I would have a one time chance to buy back the additional years of Calpers credit when I did retire. Without my Calpers doing buy back to winter 2004 I cannot have that opportunity. Is my understanding correct? Thank you again for your time. Have a wonderful and healthy New Year to you and your family.

Lisa Handwerker, Ph.D., M.P.H.
Email

RE: IMPORTANT: HANDWORKER PMS REPORT UPDATED?
Propp, Steven
Sent: Thursday, December 31, 2009 7:22 AM
To: Lisa Handwerker

Let me answer the second question first; if you are trying to reach 5,000 years in order to qualify to retire, for example, you probably don't need to have 5,000 years of credited service; since you have had regular part-time work, you might qualify to retire with what's known as a "five-year conversion" (based on Government Code 20370), which states that, for qualification purposes, "a year of service shall be credited for each year during which the member was employed throughout the year on a part-time basis and was engaged in his or her duties the full amount of time he or she was required by his or her employment to be so engaged."

To oversimplify, let's say that a member has worked for 6 calendar years at 1/2 time, and therefore has 3,000 years of actual service credit. For purposes of qualification to retire, however, this member would have six years, since she has worked the full amount of time her position required. (Her actual pension would be based only on credited service, of course; but the point is that she could retire without having 5,000 years of actual credited service.) So if you are trying to decide by next Monday if you need to, say, teach two classes instead of one, because you currently have 4,500 years of service credit, you may not need to teach the two classes in order to retire. (Our Customer Contact Center or a Field Office can explain in more detail about a five-year conversion, if you wish.)

For the first question, *Annuity* is where a person worked enough hours to qualify for PERS membership, but the employer failed to enroll the person into membership; in such a case, the member is required to pay the retirement contributions she should have paid (normally 6% of actual earnings over \$615 per month); no interest is charged, however. We do need to obtain the actual earnings information to do such a calculation, which may be a hassle; although PERS has been corrected to reflect an 8/15 time base, my analyst is checking with SCO to see whether they are changing your reported EARNINGS as well. (If they just changed the time base to 8/15, but left your actual EARNINGS the same, it won't work.)

Service Prior to Membership (SPM), is where the person didn't work enough hours to qualify to retire, but has subsequently qualified for membership, and wants to pay to receive service credit for the SPM period. For SPM, all we need is your Pay Rate at time of membership (which we already know), and your time base (e.g., 8/15, 4/15, etc.), which we also know. Two factors can make SPM costs slightly higher than *Annuity*: One, if your pay rate was higher at time of membership than during your SPM period; Two, interest (6% compounded annually) is charged on SPM, from your date of membership until the date the calculation is done. So if your membership was, say, in 2004 rather than in 2003, that would be two years less interest (at 6%) you would pay. So if, hypothetically, a member's *Annuity* cost was \$2000, the SPM cost might be \$2200, or something along those lines.

We'll get back to you as soon as we hear from the Chancellor's Office and SCO next week.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker

Sent: Wednesday, December 30, 2003 9:15 PM

To: Propp, Steve

Cc:

Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

Can you please explain more clearly what you mean by *Annuity* vs. *Service Prior to Membership*. I want to make sure I fully understand what you are asking.

Currently, I have several concerns including but not limited to: 1) making sure my Calpers records are correct 2) Getting the correct credit for my CALPER teaching and 3) reaching a certain threshold of service credit. Why would this make a difference? I am unclear.

Lisa Handwerker, Ph.D., M.P.H.
Enroll

-----Original Message-----

From: Propp, Steve

To: Lisa Handwerker

Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

Date: Wed, 30 Dec 2003 12:23:13 -0800

I've had calling Pam Chapin from the Chancellor's Office, but their office is closed until next week.

However, my analyst who reviewed your case has spoken with Ms. Chapin, who agreed with the principle that "for an employee who works during the summer, the time base IS counted toward eligibility."

For my own information, is the focus of your concern purchasing credit for your pre-2003 service as "*Annuity*" rather than as "*Service Prior to Membership*"? (Since no interest is charged on *Annuity*, the cost would be somewhat lower than for *Service Prior to Membership*.) Or do you have some other primary concern (e.g., reaching a certain threshold of service credit, etc.)?

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker

Sent: Wednesday, December 30, 2009 10:21 AM
To: Propp, Steven
Cc:
Subject: RE: IMPORTANT: HANDWORKER PMS REPORT UPDATED?

Hi, My understanding according to CalPERS Board Director George Dohr is that summer does not interrupt my march toward eligibility. It is an extra term. Could you please check on this. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email: lhandw@sjuno.com

----- Original Message -----
From: "Propp, Steven"
To: Lisa Handwerker
Subject: RE: IMPORTANT: HANDWORKER PMS REPORT UPDATED?
Date: Wed, 30 Dec 2009 08:00:00 -0800

I've given the package back to my analyst; perhaps she was including the 4/15/03-6/15/03 period (which presumably was the summer session) as interrupting the 50% time.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

----- Original Message -----
From: Lisa Handwerker
Sent: Wednesday, December 30, 2009 7:49 AM
To: Propp, Steven
Cc:
Subject: RE: IMPORTANT: HANDWORKER PMS REPORT UPDATED?

Thank you. I reached the fax but unfortunately errors to left me out of it. Thank you. Again, I have reviewed the PMS report many times and with the change (all 2003 from 4/15 to 6/15) I should have a minimum of 50% in the following four quarters:

Winter 2003 1/1/03 HDEV 4/15 and Active 4/15 total 6/15

Spring 2003 4/1/03 HDEV 4/15 and Active 4/15 total 8/15

Fall 2003 8/23/03 HDEV 4/15 and with new PMS report change to 6/15

Winter 2004 1/1/04 6/15 and 4/15= 12/15

THIS IS THE FOURTH CONSECUTIVE QUARTER EMPLOYED BY MORE THAN 50%.

Can you please tell me specifically which of those quarters you are NOT seeing over 50% or if your records are showing something different for those specific FOUR consecutive quarters.

Lisa Handwerker, Ph.D., M.P.H.
Email:

----- Original Message -----
From: "Propp, Steven"
To: Lisa Handwerker
Subject: RE: IMPORTANT: HANDWORKER PMS REPORT UPDATED?
Date: Wed, 30 Dec 2009 08:51:53 -0800

I'll be glad to fax printed copies to you, if you'll give me your fax number.

Concerning your 823 note, are you able to read the spreadsheet (with four columns for your separate positions) I posted into my note? If not, I'll fax that as well (although the colors won't show up in the fax, obviously).

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

----- Original Message -----
From: Lisa Handwerker
Sent: Tuesday, December 29, 2009 8:43 PM
To: Propp, Steven

Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

Steven,

Abs, I just occurred to me... I have my PMS record as well and I am wondering if we are looking at the same PMS record. What is the date on your PMS record? Can you fax me a copy of the PMS record you are looking at. If so I can send you my fax number.
Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Envt

Please note message attached

From: "Popp, Steven"
To: Lisa Handwerker
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?
Date: Tue, 29 Dec 2009 13:20:17 -0500

-----Original Message-----
From: Lisa Handwerker
Sent: Tuesday, December 29, 2009 8:23 PM
To: Popp, Steven
Cc:
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

I just realized you sent me something in red below which I cannot read.

Lisa Handwerker, Ph.D., M.P.H.
Envt

-----Original Message-----
From: Lisa Handwerker
Sent: Tuesday, December 29, 2009 8:31 PM
To: Popp, Steven
Cc:
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

As I mentioned in the previous email, I am on a quarter basis and according to my PMS record I worked more than 50% for four quarters. Winter 2003, Spring 2003, Fall 2003 and Winter 2004. I do not understand your calculations. Please explain. Send me the information on a quarter by quarter basis. According to my calculations and others that have looked at it, I should qualify in Winter 2004. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Envt

From: Popp, Steven
Sent: Thursday, October 22, 2009 1:53 PM
To:
Cc: Lisa, Steven
Subject: Additional Retirement Service Credit Eligibility

Additional Retirement Service Credit (ARSC) provides for 1 to 5 years of additional retirement service credit at a present value cost. General eligibility requirements are as follows:

In compensated employment with a CalPERS-covered employer on the date the request is received by CalPERS;
At least two years of CalPERS earned service credit; and
At least two calendar years as a CalPERS member by the date the request is received.

An active member is a CalPERS member who is on active payroll the day the ARSC request is received by CalPERS.

An inactive member is a CalPERS member who has credit posted in CalPERS, but is not on payroll the day the ARSC request is received by CalPERS.

Earned service credit is service credit that is posted through reported employment rather than a service credit purchase (exceptions: Mandatory Arizona 20255 Arizona Public Service and the Redesign of previously posted earned service credit).

Additional Retirement Service Credit can be found in the Public Employees' Retirement Law under Section 20309.

George Elmer
To: Lisa Handwerker
From: Lisa Handwerker, Additional Issue #2
Jonathan Kerp

January 15, 2010 2:27 PM

2 Attachments, 435 KB

And here is my email to Hamilton on computation of service credit.

Here is her response following my first email:

Staff is still reviewing this matter. I have requested a continuing senior level review, including confirmation of all related issues. Will try to resolve as quickly as possible.

I also suggested that having a couple of people trained as CSU academic employee benefits experts might be a good idea. Hate to make a message, but this has been going on for some time.

George

From: George Elmer
Sent: Friday, January 15, 2010 2:30 PM
To: Hamilton, Jonathan
Subject: Lisa Handwerker, Additional Issue #2

Hi Jonathan,

This issue involves how service credit is computed for part-time faculty in the CSU. You will see from the attached that the approach CalPERS used in its measure fraction of credits worked at part time, add up those values, and compute the sum to 12 months. This approach is appropriate for employment "rendered on a monthly basis", as set out in 200303b however, 200303b specifies the approach to be used for members of the California State University. That approach is also simpler since it requires only computation of the average time base over the term (semester or quarter) in each academic year; there are no partial months involved.

Three examples:

1. The file, "Computation of Service Credit..." starts towards bottom of first page:

"Currently CSU has you reported under the following positions:

220-035-0350-001 0100 Time Base [3 weighted teaching units out of 15 WUs full time]
220-015-0350-002 0400 Time Base [12 WUs out of 15]

Between these two positions you are currently working full time (i.e., 15 WUs or one full quarter out of an academic year of 3 quarters). Therefore, if the current quarter runs from Sept 22, 2009 to Dec 10, 2009, ... you should receive approx 0.333 years of service for this quarter."

Between full-time summer and fall of an academic year, however, the service credit should be 0.333 years of service.

The latter two goes on to state (page 2):

"A member can accrue a maximum 1,000 service credit in twelve months, or 0.1000 of a year of service credit each month."

Again, this is correct for an employee working on a monthly basis, but is not correct for an academic employee of the CSU.

(Note that this letter also repeats the claim that eligibility for ARDC requires "14 full-time calendar years as a CalPERS member by the time the election is received." See page 3.)

2. The second file, "Worksheet calculation of..." computes monthly service credit for 100303 through 200303. Consider academic year 200304. The sum of the monthly service credits is 0.2, which, using the "10 credits equals one year method", results in credit of 0.02 service years.

The CSU academic year approach computes service credit as follows:

Fall quarter 0.100 (3 WUs out of 15 WUs at full time)
Winter 0.100 (10 WUs)
Spring 0.100 (10 WUs)

Total 1.034 quarters (30.43 WUs) = 0.344 service years (as they all have by sum the 10-month method)

3. The same worksheet for 100303 shows a total of 2.7 months, or 0.227 service years; however, the appointment was 9 WUs at a summer campus, or 1/10th of a semester, 0.027 of an AY = 0.027 service years.

Thank you,

George

George Elmer
Professor of Management Science, CSU San Marcos
Member, Board of Administration, CalPERS

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Worksheet 5.pdf (47 KB)



Compendium.pdf (443 KB)

Lisa Handwerker

December 31, 2009 1:27 PM

To:

mark.karpus

Cc:

For RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Lisa Handwerker, Ph.D., M.P.H.
Email:

----- Forwarded Message -----

From: "Lisa Handwerker"

To: Shirley Lib

Cc: Steven Propp

Trudana_Patten@

W, Matthew_Eubanks

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Date: Thu, 31 Dec 2009 21:24:31 GMT

So if I had waited to buy my service credit it would have been cheaper? I am unclear what is being said here.

Lisa Handwerker, Ph.D., M.P.H.
Email:

----- Original Message -----

From: "Shirley Lib"

To: Lisa Handwerker

Cc: "Steven Propp"

"Patten, Trudana"

"Eubanks, Matthew"

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Date: Thu, 31 Dec 2009 09:24:39 -0500

Hi Lisa:

To be eligible to purchase ARSC, the member must have at least five years of earned service credit. SPM purchased time can not be used to meet this five year requirement. Therefore, you will not be eligible to make the ARSC purchase until you have five years of earned service credit.

Thank you,

Shirley

----- Original Message -----

From: Propp, Steven

Sent: Thursday, December 31, 2009 8:50 AM

To: Lisa Handwerker; Lib, Shirley

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Aha! This is becoming clearer, now.

Shirley: Can you answer her question about eligibility for Additional Retirement Service Credit (ARSC, aka "Air Time")? Would either of these scenarios qualify:

1. She has five CALENDAR years of service in membership (e.g., from September 2004-September 2009), but less than five years of SERVICE CREDIT.

2. She has less than five years of service credit in MEMBERSHIP, but when her 2,500 years of SPM are considered, she has more than five years of TOTAL SERVICE CREDIT.

Ms. Handwerker: Eligibility for health benefits I'm not qualified to handle, so I would call our Contact Center about that; since you started working after 1993, however, there will be an additional question you need to have answered about whether your employer will pay any portion of the premiums after you retire.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

—Original Message—

From: Lisa Handwerker

Sent: Thursday, December 31, 2009 7:43 AM

To: Propp, Steven

Cc:

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Thank you for this information. I had bought back service credit from CALPERS from Shirley Lira's office but was not told about that. This is a bit different information than has been explained to me. I may have some additional questions about this. First, I don't know if Shirley Lira told you I already bought back 2489 years of service credit (I did not know about any other options) from Shirley Lira's office with the understanding that if mistakes were made I would be reimbursed. Second, there is one VERY important aspect you are not mentioning here which is health vestment for myself and my daughter. My understanding after much research, is that in order to be vested for health insurance in CGLUES you need to have a minimum of two classes (over .50) when you decide to retire and a minimum of five years of credit from Calpers (through both buy back service credit and Calpers membership). Since I do not yet have that, there is a lot at stake here for me. Also, if I am in CALPERS starting in Winter 2004 would also put me in Calpers for five years and I would have a one time chance to buyback five additional years of Calpers credit when I did retire. Without my Calpers doing back to winter 2004 I cannot have that opportunity. Is my understanding correct? Thank you again for your time. Have a wonderful and healthy New Year to you and your family.

Lisa Handwerker, Ph.D., M.P.H.

Email

Please note message attached

From: "Propp, Steven"

To: Lisa Handwerker

Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Date: Thu, 31 Dec 2009 07:22:02 -0800

Out Map

Check Out Map Tip. Click here.

<http://dhs.dhs.gov/press/20091231/01.htm>

Lisa Handwerker
To: carl.karpis
Cc:
Re: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

December 31, 2009 1:27 PM



Lisa Handwerker, Ph.D., M.P.H.
Encl

----- Forwarded Message -----

From: "Lisa Handwerker"
To: Shirley Lind
Cc: Steven Papp, Charlene Patton, V. Matthew Edwards
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?
Date: Thu, 31 Dec 2009 21:24:51 GMT

So if I had waited to buy my service credit it would have been cheaper? I am unclear what is being said here.

Lisa Handwerker, Ph.D., M.P.H.
Encl

----- Original Message -----

From: "Lisa Handwerker"
To: "Lisa Handwerker"
Cc: "Steven Papp", "Patton, Charlene", "Edwards, Matthew"

Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?
Date: Thu, 31 Dec 2009 09:34:39 -0800

Hi Lisa:

To be eligible to purchase ARSC, the member must have at least five years of earned service credit. SPM purchased time can not be used to meet this five years requirement. Therefore, you will not be eligible to make the ARSC purchase until you have five years of earned service credit.

Thank you,

Shirley

----- Original Message -----

From: Papp, Steven
Sent: Thursday, December 31, 2009 8:50 AM
To: "Lisa Handwerker"; Lisa, Shirley
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

Abs! This is becoming clearer, now.

Shirley: Can you answer her question about eligibility for Additional Retirement Service Credit (ARSC, aka "Air Time")? Would either of these scenarios qualify:

1. She has the CALENDAR years of service in membership (e.g., from September 2004-September 2009), but less than five years of SERVICE CREDIT.
2. She has less than five years of service credit in MEMBERSHIP, but when her 2,500 years of SPM are considered, she has more than five years of TOTAL SERVICE CREDIT.

Ms. Handwerker: Eligibility for health benefits I'm not qualified to handle, so I would call our Contact Center about that; since you started working after 1988, however, there will be an additional question you need to have answered about whether your employer will pay any portion of the premiums after you retire.

Steve Papp, Manager
Membership Analysis & Design Unit
Employer Services Division

Subject RE: IMPORTANT: HANDHEIMER PMS REPORT UPDATED?

Thank you for this information. I had bought back service credit from CALPERS from Shirley Lirio office but was not told about that. This is a bit different information than has been explained to me. I may have some additional questions about this. First, I don't know if Shirley Lirio told you I already bought back 2,499 years of service credit (I did not know about any other options) from Shirley Lirio office with the understanding that if reimbursements were made I would be reimbursed. Second, there is one VERY important aspect you are not mentioning here which is health vestment for myself and my daughter. My understanding after much research, is that in order to be vested for health insurance in CALPERS you need to have a minimum of two choices (over .5%) when you decide to retire and a minimum of five years of credit from Calpers (through both buy back service credit and Calpers membership). Since I do not yet know that, there is a lot at stake here for me. Also, if I am in CALPERS starting in Winter 2004 would also put me in Calpers for five years and I would have a one time chance to buy back five additional years of Calpers credit when I did retire. Without my Calpers during back to winter 2004 I cannot have that opportunity. Is my understanding correct? Thank you again for your time. Have a wonderful and healthy New Year to you and your family.

English

Please note: message attached

Data: Thu, 31 Dec 2003 07:22:02 -0800

[http://http://www.buraco.com/TEL21415http://www722p522NusON04msAAH8E0Udc:CU-
b38bDmnc12200AY7AAAAAAAAAAAAAAAAAAAAAAANAAAAAAAAAAAAAAAAAAAAAYDEmsm](http://http://www.buraco.com/TEL21415http://www722p522NusON04msAAH8E0Udc:CU-
b38bDmnc12200AY7AAAAAAAAAAAAAAAAAAAAAAANAAAAAAAAAAAAAAAAAAAAAYDEmsm)

Lisa Handwerker
To: mark.karpis
Cc:
Pw: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

December 31, 2009 1:27 PM



Lisa Handwerker, Ph.D., M.P.H.
Email:

----- Forwarded Message -----
From: "Lisa Handwerker"
To: Shirley_LA
Cc: Steven_Propp N, Charlene_Patten Matthew_Ebanks
Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?
Date: Thu, 31 Dec 2009 21:24:51 GMT

So if I had waited to buy my service credit it would have been cheaper? I am unclear what is being said here.

Lisa Handwerker, Ph.D., M.P.H.
Email:

----- Original Message -----
From: "Lisa Shirley"
To: Lisa Handwerker
Cc: "Steven Propp" "Patten, Charlene" "Ebanks, Matthew"
Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?
Date: Thu, 31 Dec 2009 09:24:59 -0500

Hi Lisa:

To be eligible to purchase ARSC, the member must have at least five years of earned service credit. SPM purchased time can not be used to meet this five years requirement. Therefore, you will not be eligible to make the ARSC purchase until you have five years of earned service credit.

Thank you,

Shirley

----- Original Message -----
From: Propp, Steven
Sent: Thursday, December 31, 2009 8:50 AM
To: Lisa Handwerker; Lisa, Shirley
Subject: RE: IMPORTANT: HANDWERKER PIMS REPORT UPDATED?

Ah! This is becoming clearer, now.

Shirley: Can you answer her question about eligibility for Additional Retirement Service Credit (ARSC, aka "Air Time")? Would either of those scenarios qualify:

1. She has five CALENDAR years of service in membership (e.g., from September 2004-September 2009), but less than five years of SERVICE CREDIT.

2. She has less than five years of service credit in MEMBERSHIP, but when her 2,500 years of SPM are considered, she has more than five years of TOTAL SERVICE CREDIT.

Ms. Handwerker: Eligibility for health benefits I'm not qualified to handle, so I would call our Contact Center about that; since you started working after 1983, however, there will be an additional question you need to have answered about whether your employer will pay any portion of the premiums after you retire.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

Dist Help
Cheap Dist Help Tps. Click here.
<http://www.cheapdisthelp.com/76121414top-guns725yofind040ND04AAJNB04000CU>
 76121414top-guns725yofind040ND04AAJNB04000CU



FR RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

1 Attachment 82103

Do you think it is appropriate to get George Distr, Culpers board member involved yet?

Please note: forwarded message attached

From: 'Propp, Steven'
To: 'Lisa Handwerker'
Subject: RE: IMPORTANT: HANDWERKER FILMS REPORT UPDATED?
Date: Thu, 29 Dec 2009 18:28:17 -0800

Weight Loss Program
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<http://tinyurl.com/6juna> **http://tinyurl.com/6juna**
From: "Propp, Steven"
Subject: RE: IMPORTANT: HANDWERKER FIRM REPORT UPDATED?
Date: December 23, 2003 4:32:17 PM PST
To: Lisa Handwerker

Here's what my staff is seeing: Although between 1/6/03 and 3/22/05 you were working at least half-time on several occasions, you had three periods (indicated in RED below; 6/23/03-9/10/03, 3/29/04-8/31/04, and 3/28/05-6/14/05) during which your time base dropped below half-time, which prevented you from getting the four consecutive quarters needed to qualify for membership.

You did begin to work half-time for four consecutive quarters beginning 6/20/05, and our original determination was that you qualified for membership effective 6/19/06.

So (unless some additional employment is missing from the chart below, that was extracted from FIMS), you would not have qualified for membership in 2013.

```

229-089-2293-001      229-018-2293-225      229-018-2293-002      229-380-2293-003
09/21/09 SCR 03 01/05
09/21/09 40SC 03 01/05 09/29/09 531C 03 04/15
09/21/09 CRO 03 03/15
03/03/09 40S 03 03/15
09/22/09 ASD 03 04/15
09/21/09 S31 03 03/15
09/21/09 SCRC 03 02/15
09/23/09 505E 03 03/15
09/27/09 S31V TM 03/15
04/01/09 40SC 03 03/15
09/24/07 AS2C 03 04/15
09/19/07 531C 03 04/15
04/02/07 AS2C 03 04/15
09/27/07 531C 03 04/15

```

Now, I'm not sure why our staff person who made the original determination didn't determine that you were eligible for membership at the start of your fourth qualifying quarter, rather than after the fourth qualifying quarter. She's out of the office this week, so I won't be able to speak to her until next Monday.

I would greatly appreciate anything you could do to expedite this. I had let you know over a month ago that this would be happening and you were just waiting to see the actual FIMS change. I actually would have thought the calculations would have already been done. Thank you again for anything you can do to expedite this. As I said I need to make some important decisions about my teaching based on this.

Subject: RE: IMPORTANT: HANDWERKER PDAS REPORT UPDATED?

Date: Tue, 29 Dec 2009 07:27:07 -0800

It will be done on a priority basis, but having it done BEFORE January 4th is probably not possible.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division
steven_propp@calpers.ca.gov

-----Original Message-----

From: Lisa Handwerker
Sent: Tuesday, December 29, 2009 7:21 AM
To: Propp, Steven
Cc: Lisa, Shirley
Subject: RE: IMPORTANT: HANDWERKER FIMS REPORT UPDATED?

Dear Steven,

Thank you for letting me know. I would very much appreciate if the calculations could be done before January 4 which is when CSUEB winter quarter starts? I would like to know so I can make a decision about my course load for this quarter. I very much appreciate if you could rush this, given all my unusual circumstances. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email: "

----- Original Message -----

From: "Propp, Steven"
To: "Lisa Handwerker"
Cc: "Lisa, Shirley"
Subject: RE: IMPORTANT: HANDWERKER FIMS REPORT UPDATED?
Date: Tue, 29 Dec 2009 07:01:41 -0800

A correction was made to the FIMS database on December 21, 2009, changing your time base from 4/15 to 8/15, effective 9/23/09.

Therefore, I will have a member of my staff do a reevaluation of your membership effective date; you should hear from us next week about this.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division
steven_propp@calpers.ca.gov

-----Original Message-----

From: Lisa Handwerker
Sent: Monday, December 28, 2009 7:41 PM
To: Propp, Steven; Lisa, Shirley
Cc:
Subject: IMPORTANT: HANDWERKER FIMS REPORT UPDATED?

Hello Steven,

I am following up and checking in to see if my CSUEB FIMS report has been corrected and now reflects the change in my teaching records. The correction is from 4/15 to 8/15 for fall quarter 2009. Please let me know as soon as possible if the FIMS report has been corrected. If this has not yet happened, can you please let me know where the hold up process is. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email:

From: Propp, Steven
Sent: Thursday, December 03, 2003 4:06 PM
To: Propp, Steven; 'Lisa Handwerker'
Cc: Lin, Shihing; DeFries, Emily
Subject: RE: Handwerker IMPORTANT RUSH Follow-up

Just to clarify the issue; if you *didn't* work "half-time or more" for three consecutive quarters, and then receive an appointment in the fourth quarter for "half-time or more," you would not be eligible to have your membership date changed.

However (and this may be the subject of your meeting next Monday), if there are additional positions that are not showing on the FIMS database that need to be corrected (such as will presumably take place with your 9/23/03 appointment), this could change this status.

I will be here until 3:00 this afternoon, and be in at 7:00 Monday morning.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

From: Propp, Steven
Sent: Thursday, December 03, 2003 2:52 PM
To: 'Lisa Handwerker'
Cc: Lin, Shihing; DeFries, Emily
Subject: RE: Handwerker IMPORTANT RUSH Follow-up

I was able to get in touch with Linda Debb (510-731-7519), we discussed the matter, and she confirmed that they had forwarded the letter dated November 16th reflecting the corrected time base for 9/23/03 to 8/15.

However, they have apparently not worked with the Human Resources Department at CSUEB to have the necessary corrections made to the FIMS database; she said that she would contact the HR department today, and see what was required to have this correction made. In the meantime, I have a question.

The requirement for CalPERS membership in Government Code section 20305 for CSU temporary faculty appointments is as follows:

- 4) He or she is a temporary faculty member of the California State University and meets one of the following conditions:
(A) He or she works two consecutive semesters or three consecutive quarters at half-time or more, and is not otherwise excluded pursuant to this article, in which case, membership shall be effective with the start of the next consecutive semester or quarter if the appointment requires service of half-time or more.

Here is an excerpt from the history on FIMS for your positions around this time:

03/22/03 S31 229-065-2358-001 EASTBAY	03/26/03 TM 04/15
01/03/05 AS2 229-065-2358-001 HAYWARD	01/11/05 TM 04/15
09/07/04 S31V 229-065-2358-001 HAYWARD	03/23/04 TM 07/15
09/31/04 S31 229-065-2358-001 HAYWARD	03/11/05 TM 07/15
03/29/04 AS2 229-065-2358-001 HAYWARD	04/16/04 TM 07/15
01/03/04 AS2 229-065-2358-001 HAYWARD	01/21/04 TM 03/15
09/23/03 AS2 229-065-2358-001 HAYWARD	09/18/03 TM 04/15
09/10/03 S31 229-090-2358-221 HAYWARD	09/09/03 TM 04/15 (This is the position that Ms. Debb said should be 8/15, not 4/15).
06/23/03 AS2 229-090-2358-221 HAYWARD	06/13/03 TM 04/15

Therefore, you were working 8/15 on a quarterly basis from 9/23/03, as well as on 1/5/04; however, the CSU FIMS database currently shows you as having been reduced to a 7/15 time base (i.e., less than half-time) as of the 3/29/04 quarter.

For temporary faculty employed on a quarterly basis (Ms. Debb confirmed to me on the phone that you were employed on a

quarterly basis), the third consecutive quarter must also be at "half-time or more" in order to qualify for membership. Was there also a similar error made (e.g., a second position left off), that would have shown you as working 8/15 or greater for that third quarter?

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker
Sent: Thursday, December 03, 2009 11:44 AM
To: Propp, Steven
Cc: Lila, Shirley; DeFlores, Emily
Subject: RE: Handwerker IMPORTANT RUSH Follow-up

We are playing phone tag. I just called you back and discussed the importance of why I needed something in writing by end of today (my fax is especially if your office is closed tomorrow. Thank you.

Lila Handwerker, Ph.D., M.P.H.
Email:

-----Original Message-----

From: 'Propp, Steven'
To: 'Lisa Handwerker'
Cc: 'Lila, Shirley' 'DeFlores, Emily'.
Subject: RE: Handwerker IMPORTANT RUSH Follow-up
Date: Thu, 3 Dec 2009 11:29:14 -0800

I just called, but got your Voicemail message; please call me back at your earliest opportunity to discuss your concerns.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----

From: Lisa Handwerker [mailto:
Sent: Thursday, December 03, 2009 11:23 AM
To: Propp, Steven
Cc: Lila, Shirley;
Subject: RE: Handwerker IMPORTANT RUSH Follow-up

Dear Steven Propp,

I am very surprised that you did not address any of my concerns from my last email and in fact, ignored them. My concerns were about my interaction with Janella. To ignore my concerns, is a strange way for a manager to address them. While I understand she may be your most experienced analyst, if she is rude to a client (which I feel she was to me) or does not provide the information that I client asks (I asked for the raw data when she makes her calculations) that is a problem that needs to be resolved. As the manager of that department you need to address that, as well and not just her calculations. She also asked me to come to Sacramento to meet with her in person - until I told her I lived in Berkeley. It is very uncomfortable now for me to deal with her - especially since she knows I have complained about her. I am requesting that whoever contact me does so by written form and I believe it is my right to ask for the "raw data". If there is a problem asking for raw data, please let me know what it is. Mistakes have been made by both CSUEB and Calpers with respect to my account and I am trying to prevent a similar problem from happening. Also you did not mention when I would hear back from your department. I had requested a response by December 1 and clearly that did not happen since no one emailed me that they fax was lost in Calpers maze. I appreciate you following up with me. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email:

Please note: message attached

From: "Propp, Steven"

To:

Cc: "Ponday, Janila"

"DeFlores, Emily"

Subject: RE: Handwerker Follow-up

Date: Wed, 2 Dec 2009 14:56:30 -0800

"Paulk-Damiano, Lynn"

Lisa Handwerker
 To: Mark Karpus
 From: Lisa Handwerker
 Pw: Additional Retirement Service Credit Eligibility

November 14, 2013 8:41 PM



Begin forwarded message:

From: "Lisa Handwerker"
 Subject: Pw: Additional Retirement Service Credit Eligibility
 Date: October 22, 2009 7:49:58 PM PDT
 To:
 Cc:

She is stating that even if I make 5 years I can not buy back 1-5 years.
 When I went into calpers without crack office they made it sound like I could. Which is correct?

Lisa Handwerker, Ph.D., M.P.H.
 Email:

Please note: forwarded message attached

From: "Patton, Chastine"
 To:
 Cc: "LH, Sherry"
 Subject: Additional Retirement Service Credit Eligibility
 Date: Thu, 22 Oct 2009 13:57:32 -0700

House Rescue Bill Passed
 \$193,000 mortgage under \$693mo. Compare rates and cancel

From: "Patton, Chastine"
 Subject: Additional Retirement Service Credit Eligibility
 Date: October 22, 2009 1:47:39 PM PDT
 To:
 Cc: "LH, Sherry"

Additional Retirement Service Credit (ARSC) provides for 1 to 5 years of additional retirement service credit at a pro-rated value cost. General eligibility requirements are as follows:

- In compensated employment with a CalPERS-covered employer on the date the request is received by CalPERS;
- At least two years of CalPERS earned service credit; and
- At least two calendar years as a CalPERS member by the time the request is received.

An active member is a CalPERS member who is on active payroll the day the ARSC request is received by CalPERS.

An inactive member is a CalPERS member who has credit posted in CalPERS, but is not on payroll the day the ARSC request is received by CalPERS.

Earned service credit is service credit that is posted through reported employment rather than a service credit purchase (exceptions: Mandatory Annuity, 2009 Annuity, Prior Service and the Redemption of previously posted earned service credit).

Additional Retirement Service Credit can be found in the Public Employees' Retirement Law under Section 20603.

Our records show that when you spoke to Michelle Green on May 21, 2009, she informed you that you could not purchase ARSC because you have to be in CalPERS membership 5 Years and have active payroll. Because your membership date with CalPERS is June 13, 2009, you have not been in CalPERS membership for 5 years.

Mark Murphy
To: Lisa Handwerker
RE: Lisa Handwerker-additional issue #1

June 17, 2014 10:57 AM

From Lisa Handwerker [lhandw@juno.com]
Sent Monday, June 16, 2014 2:26 PM
To: Mark Murphy
Subject: Re: Lisa Handwerker-additional issue #1

Begin forwarded message:

From Lisa Handwerker
Subject: Re: Lisa Handwerker-additional issue #1
Date: November 14, 2013 5:59:20 PM PST
To: Mark Murphy

Begin forwarded message:

From George Dietz
Subject: RE: Lisa Handwerker-additional issue #1
Date: January 13, 2010 2:21:57 PM PST
To: Lisa Handwerker, Jonathan Murphy.

Here is my email to Hamilton on the issue of eligibility for AFSC (at that) purchase.

George

From George Dietz
Sent Friday, January 15, 2010 11:02 AM
To: Hamilton, Jonathan
Subject: Lisa Handwerker-additional issue #1

Hi Jonathan,

(What a mess!)

First, let's cut aside for now the issue of when Lisa gained membership in PERL—the issue of interpretation of “consecutive quarter.” For now, that issue is secondary and not relevant to two larger issues. The first is eligibility to purchase “air time” which I address here. I will address the second in a subsequent email.

There are 3 emails copied below, each incorporates other emails, many of which are not relevant but included for the sake of completeness. I have underlined relevant comments in each letter.

1. From Sherry Liu, Dec. 31.

2. Lisa to Steven Propp, Dec. 31.

3. From Chelene Patten, Oct. 22.

I am quite certain Sherry Liu is incorrect in her statement: “To be eligible to purchase AFSC, the member must have at least two years of earned service credit. GPM purchased time can not be used to meet this two year requirement. Therefore, you will not be eligible to make the AFSC purchase until you have two years of earned service credit.” GPM purchased time is earned service credit and therefore qualifies towards the requirement for 8 years of earned service credit.

The email from Steven Propp seems correct and seems to allow purchase of air time.

Chelene Patten adds a requirement for: “At least five calendar years as a CoPERL member by the time the election is reached.” And notes: “Because your membership date with CoPERL is June 18, 2008, you have not been in CoPERL membership for 5 years.” I can find no requirement in the PERL that you have to have been a member for 5 calendar years.

I conclude that assuming Lisa has 5 years of service credit—as represented by purchase of prior part-time service (SPM) and service credit since she became a member—she is eligible to purchase air time.

Thank you,

George Dieler
Professor of Management Science, CSU San Marcos
Member, Board of Administration, CalPERS

----- Forwarded Message -----

From: "Lisa Shitky"
To: "Lisa Handwerker"
Cc: "Procn. Steven"

Patton, Chantel

"Eckhardt, Matthew"

Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?
Date: Thu, 31 Dec 2009 08:34:39 -0800

Hi Lisa:

To be eligible to purchase ARSO, the member must have at least two years of earned service credit. SPM purchased time can not be used to meet this two year requirement. Therefore, you will not be eligible to make the ARSO purchase until you have two years of earned service credit.

Thank you,

Shitky

----- Original Message -----

From: Procn, Steven
Sent: Thursday, December 31, 2009 8:50 AM
To: "Lisa Handwerker"; Lisa, Shitky
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

Aha! This is becoming clearer, now.

Shitky: Can you answer her question about eligibility for Additional Retirement Service Credit (ARSO, aka "Air Time")? Would either of these scenarios qualify:

1. She has two CALENDAR years of service in membership (e.g., from September 2004-September 2005), but less than five years of SERVICE CREDIT.
2. She has less than five years of service credit in MEMBERSHIP, but when her 2,500 years of SPM are considered, she has more than five years of TOTAL SERVICE CREDIT.

Ms. Handwerker: Eligibility for health benefits I'm not qualified to handle, so I would call our Contact Center about that; since you started working after 1990, however, there will be an additional question you need to have answered about whether your employer will pay any portion of the premiums after you retire.

Steven Procn, Manager
Membership Analysis & Design Unit
Employer Services Division

----- Original Message -----

From: Lisa Handwerker
Sent: Thursday, December 31, 2009 7:45 AM
To: Procn, Steven
Cc:
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

Thank you for this information. I had bought back service credit from CALPERS from Shitky Lisa's office but was not told about that. This is a bit different information than has been explained to me. I may have some additional questions about this. First, I don't know if Shitky Lisa told me I already bought back 2,499 years of service credit (I did not know about any other options) from Shitky Lisa's office with the understanding that if mistakes were made I would be reimbursed. Second, there is one VERY important aspect you are not mentioning here which is health insurance for myself and my daughter. My understanding after much research, is that in order to be vested for health insurance in

CSUEB you need to have a minimum of two classes (over .50) when you decide to retire and a minimum of five years of credit from Calpers (through both buy back service credit and Calpers membership). Since I do not yet have that, there is a lot at stake here for me. Also, if I am in CALPERS starting in Winter 2004 would also put me in Calpers for five years and I would have a one time chance to buy back five additional years of Calpers credit when I did retire. Without my Calpers dating back to winter 2004 I cannot have that opportunity. Is my understanding correct? Thank you again for your time. Have a wonderful and healthy New Year to you and your family.

Lisa Handwerker, Ph.D., M.P.H.
Email:

RE: IMPORTANT: HANDWERKER PERS REPORT UPDATED?

Propp, Steven.

Sent: Thursday, December 31, 2003 7:22 AM

To: Lisa Handwerker

Let me answer the second question first: If you are trying to reach 8,000 years in order to qualify to retire, for example, you probably don't need to have 8,000 years of credited service; since you have had regular part-time work, you might qualify to retire with what's known as a "two-year commutation" (based on Government Code 20070), which states that, for qualification purposes, "a year of service shall be credited for each year during which the member was employed throughout the year on a part-time basis and was engaged in his or her duties the full amount of time he or she was required by his or her employment to be so engaged."

To oversimplify, lets say that a member has worked for 8 calendar years at full time, and therefore has 8,000 years of actual service credit. For purposes of qualification to retire, however, this member would have six years, since she has worked the full amount of time for position required. (Her actual pension would be based only on credited service, of course; but the point is that she could retire without having 8,000 years of actual credited service.) So if you are trying to decide by next Monday if you need to, say, teach two classes instead of one, because you currently have 4,800 years of service credit, you may not need to teach the two classes in order to retire. (Our Customer Contact Center or a Field Office can explain in more detail about a five-year commutation, if you wish.)

For the first question, Annuity is where a person worked enough hours to qualify for PERS membership, but the employer failed to enroll the person into membership; in such a case, the member is required to pay the retirement contributions she should have paid (normally 5% of actual earnings over \$543 per month; no interest is charged, however). We do need to obtain the actual earnings information to do such a calculation, which may be a hassle, although PERS has been directed to contact an EPLS time base, my analyst is checking with SOC to see whether they are changing your reported EPLS info as well. (If they just changed the time base to EPLS, but left your actual EPLS info the same, it won't work.

Service Prior to Membership (SPM), is where the person didn't work enough hours to qualify to retire, but has subsequently qualified for membership, and wants to pay to receive service credit for the SPM period. For SPM, all we need is your Pay Rate at time of membership (which we already know), and your time base (e.g., 8/15, 4/15, etc.), which we also know. Two factors can make SPM costs slightly higher than Annuity: One, if your pay rate was higher at time of membership than during your SPM period; Two, interest (5% compounded annually) is charged on SPM, from your date of membership until the date the calculation is done. So if your membership was, say, in 2004 rather than in 2003, that would be two years less interest (at 5%) you would pay. So if, hypothetically, a member's Annuity cost was \$2000, the SPM cost might be \$2500, or something along those lines.

We'll get back to you as soon as we hear from the Chancellor's Office and SOC next week.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

----- Original Message -----

From: Lisa Handwerker

Sent: Wednesday, December 30, 2003 9:15 PM

To: Propp, Steven

Cc:

Subject: RE: IMPORTANT: HANDWERKER PERS REPORT UPDATED?

Can you please explain more clearly what you mean by Annuity vs. Service Prior to Membership. I want to make sure I fully understand what you are asking.

Currently, I have several concerns including but not limited to: 1) making sure my Calpers records are correct 2) Getting the correct credit for my CSUEB teaching and 3) reaching a certain threshold of service credit. Why would this make a difference? I am unclear.

Lisa Handwerker, Ph.D., M.P.H.
Email:

----- Original Message -----

From: "Propp, Steven".

To: Lisa Handwerker

Subject: RE: IMPORTANT: HANDWERKER PERS REPORT UPDATED?

Date: Wed, 30 Dec 2009 10:29:13 -0800

I've tried calling Pam Chapin from the Chancellor's Office, but their office is closed until next week.

However, my analyst who reviewed your case has spoken with Ms. Chapin, who agreed with the principle that "for an employee who works during the summer, the time base IS counted toward eligibility."

For my own information, is the focus of your concern purchasing credit for your pre-2008 service as "Ancient" rather than as "Service Prior to Membership"? (Since no interest is charged on Ancient, the cost would be somewhat lower than for Service Prior to Membership.) Or do you have some other primary concern (e.g., reaching a certain threshold of service credit, etc.)?

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

----- Original Message -----

From: Lisa Handwerker
Sent: Wednesday, December 30, 2009 10:21 AM
To: Propp, Steven
Cc:
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

Hello. My understanding according to CalPERS Board Director George Blair is that summer does not interrupt my march toward eligibility. It is an extra term. Could you please check on this. Thank you.

Lisa Handwerker, Ph.D. M.P.H.
Email:

----- Original Message -----

From: "Propp, Steven"
To: "Lisa Handwerker"
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?
Date: Wed, 30 Dec 2009 09:00:09 -0800

I've given the package back to my analyst; perhaps she was including the 4/15 6/23/03-6/15/03 period (which presumably was the summer season) as interrupting the 50% time.

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

----- Original Message -----

From: Lisa Handwerker
Sent: Wednesday, December 30, 2009 7:43 AM
To: Propp, Steven
Cc:
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

Thank you. I received the fax but unfortunately forgot to tell me out of. Thank you. Again, I have reviewed the PMS report many times and with the change (all 2009 from 4/15 to 6/15) I should have a minimum of 50% in the following four quarters:

Winter 2009 1/3/09 HDEV 4/15 and Andre 4/15 total 6/15

Spring 2009 4/1/09 HDEV 4/15 and Andre 4/15 total 6/15

Fall 2009 6/23/09 HDEV 4/15 and with new PMS report change is 6/15

Winter 2004 1/3/04 6/15 and 4/15= 12/15

THIS IS THE FOURTH CONSECUTIVE QUARTER EMPLOYED BY MORE THAN 50%.

Can you please tell me specifically which of these quarters you are NOT seeing over 50% or if your records are showing something different for these specific FOUR consecutive quarters.

Lisa Handwerker, Ph.D., M.P.H.
Email:

----- Original Message -----

From: "Propp, Steven"

To: 'Lisa Handwerker'
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?
Date: Wed, 30 Dec 2009 09:51:59 -0800

I'll be glad to fax printed copies to you, if you'll give me your fax number.

Concerning your 8:33 note, are you able to read the spreadsheet (with four columns for your separate positions) I posted into my note? If not, I'll fax that as well (although the colors won't show up in the fax, obviously).

Steve Propp, Manager
Membership Analysis & Design Unit
Employer Services Division

-----Original Message-----
From: Lisa Handwerker
Sent: Tuesday, December 29, 2009 8:49 PM
To: Propp, Steven
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

Steven,

Also, it just occurred to me....I have my PMS record as well and I am wondering if we are looking at the same PMS record. What is the date on your PMS record? Can you fax me a copy of the PMS record you are looking at. If so I can send you my fax number.
Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email:

Please note: message attached

From: "Propp, Steven"
To: 'Lisa Handwerker'
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?
Date: Tue, 29 Dec 2009 18:39:17 -0800

-----Original Message-----
From: Lisa Handwerker
Sent: Tuesday, December 29, 2009 8:49 PM
To: Propp, Steven
Cc:
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

I just realized you sent me something in red below which I cannot read.

Lisa Handwerker, Ph.D., M.P.H.
Email:

-----Original Message-----
From: Lisa Handwerker
Sent: Tuesday, December 29, 2009 8:51 PM
To: Propp, Steven
Cc:
Subject: RE: IMPORTANT: HANDWERKER PMS REPORT UPDATED?

As I mentioned in the previous email, I am on a quarter basis and according to my PMS record I worked more than 50% for four quarters: Winter 2003, Spring 2003, Fall 2003 and Winter 2004. I do not understand your calculations. Please explain. Send me the information on a quarter by quarter basis. According to my calculations and others that have looked at it, I should qualify in Winter 2004. Thank you.

Lisa Handwerker, Ph.D., M.P.H.
Email:

From: Patton, Christine
Sent: Thursday, October 22, 2009 1:53 PM
To:
Cc: Lisa, Shelly
Subject: Additional Retirement Service Credit Eligibility

Additional Retirement Service Credit (ARSC) provides for 1 to 5 years of additional retirement service credit at a present value cost. General eligibility requirements are as follows:

In compensated employment with a CalPERS-covered employer on the date the request is received in CalPERS;

At least five years of CalPERS earned service credit; and

At least two calendar years as a CalPERS member by the time the election is received.

An active member is a CalPERS member who is on active payroll the day the ARSC request is received by CalPERS.

An inactive member is a CalPERS member who has credit posted in CalPERS, but is not on payroll the day the ARSC request is received by CalPERS.

Earned service credit is service credit that is posted through reported employment rather than a service credit purchase (exceptions: Mandatory Amount, 2023 Amount, Prior Service, and the Redeposit of previously posted earned service credit).

Additional Retirement Service Credit can be found in the Public Employees' Retirement Law under Section 20903.

Our records show that when you spoke to Michelle Gann on May 22, 2003, she informed you that you could not purchase ARSC because you have to be in CalPERS membership 5 Years and have active payroll. Because your membership date with CalPERS is June 10, 2003, you have not been in CalPERS membership for 5 years.

SafeAuto Car Insurance
Get a car insurance quote in 3 steps & pay only state minimum coverage
SafeAuto.com

WENQ Hair Care

No more sulfates. No more detergents. Join the revolution.
www.Wen.com

George Dietz
Re:
Cc:

January 18, 2010 8:53 AM

RE: CALPERS EMAILS

I agree. We have plenty of information to make the case with CalPERS that a thorough review of your record and PERS' method of computing service credit is in order.

George Dietz
Professor of Management Science, CSU San Marcos
Member, Board of Administration, CalPERS

From: Jonathan Knapf
Sent: Friday, January 15, 2010 10:45 PM
To: Lisa Handwerker
Cc: George Dietz; mark.knapf
Subject: Re: CALPERS EMAILS

No need to rush Lisa; whenever you can get to it will be fine.
Jonathan

Sent from my iPhone

On Jan 15, 2010, at 8:13 PM, "Lisa Handwerker"
wrote:

OKAY BUT IT MIGHT NOT HAPPEN UNTIL NEXT WEEK WHEN I HAVE SOME MORE
TIME. IS THAT OKAY OR IS THIS SOMETHING THAT YOU NEED ME TO RUSH?

Lisa Handwerker, Ph.D., M.P.H.
Email:

----- Original Message -----
From: "Jonathan Knapf"
To: "Lisa Handwerker"
Cc:
Subject: Re: CALPERS EMAILS
Date: Fri, 15 Jan 2010 14:58:08 -0800

Hi Lisa,
I, for one, would appreciate if you did just that: print them out and
fax them to me at:

Please put my name on the cover sheet, as this is the departmental fax
machine, so they'll know whose mailbox to put them in.
Jonathan

Sent from my iPhone

On Jan 15, 2010, at 10:40 AM, "Lisa Handwerker"
wrote:

I am sending I have LOTS of emails here and I am wondering if it
would make more sense to print them all out and then fax them to you
in chronological order. I picked several of the key ones but there
are more. These are emails about:

- 1) clarifications
- 2) service credit concerns
- 3) starting date concerns
- 4) service credit prior to membership issues and mistakes that were
made with the check etc

HP Officejet Pro 8600 N911g Series

Fax Log for
Handwerker

Jun 17 2014 2:36PM

Last Transaction

Date	Time	Type	Station ID	Duration	Pages	Result
<hr/>						
				Digital Fax		
<hr/>						
Jun 17	2:34PM	Fax Sent	19107953869	1:15 NA	2	OK

HP Officejet Pro 8600 N911g Series

Fax Log for
Handwerker

Jun 17 2014 2:34PM

Last Transaction

Date	Time	Type	Station ID	Duration	Pages	Result
<hr/>						
Digital Fax						
<hr/>						
Jun 17	2:33PM	Fax Sent	19167853659	0:43 NA	1	OK

HP Officejet Pro 8600 N911g Series

**Fax Log for
Handwerker**

Jun 17 2014 2:22PM

Last Transaction

Date	Time	Type	Station ID	Duration	Pages	Result
<hr/>						
				Digital Fax		
<hr/>						
Jun 17	2:08PM	Fax Sent	10167853859	16:17 N/A	38	OK

751.39 hours
sick leave

Tony Tijero
To: Lisa Handwerker

June 17, 2014 3:45 PM

Cc:

Lisa Handwerker

"Lisa Handwerker"

(PhD)

Re: Please respond: second attempt to get information

Hi Lisa,

1. Our records show your sick leave balance as of 5/1/2014 is 751.39 hours. My records have not posted to give you through June 1st.

I'll have to get back to you on questions 2 through 4. I anticipate no later than the end of this week.

Thanks,

Tony Tijero
Director, Payroll Services

On Wed, Jun 11, 2014 at 8:40 PM, Lisa Handwerker

wrote:

• Hello Tony,

• Congratulations! I heard you had a new baby and were out on paternity leave, which may explain your inability to get back to me. I am hoping if you can't get back to me someone else in the Payroll Office can.

• I sent an email to you a number of weeks ago, regarding a number of payroll issues and have not heard back. This is my second email follow-up. Can you please:

• 1) update my sick leave and let me know how many hours I now have based on my work in all my departments through June 2014.

• 2) Let me know when I received my general salary adjustment in the AGES Department (formerly Anthropology) and HDEV and Women's Studies Department.

• 3) I recently found two contract errors in my PAF for HDEV that showed my salary was the same in 2008 and 2011 and I am concerned that there has been some error. I need an explanation for this.

• 4) CuPERIS has made many mistakes in giving me my service credit but in particular my service credit in 2010-2011. I had pointed this out to HR and Karen Flanagan stated it was an error of the CSU and and

it was being fixed. This past week I looked again at my CuPERIS annual reports and this year is still showing incorrect information on my annual report. Although I taught 10 courses which should be 1.0 credit for CuPERIS I received much less (about 1/4 of a year credit). This is clearly incorrect and I want this credited asap. Also, the year we had to reduce our work load due to the economic crisis but were told it would not impact our CuPERIS records may also be incorrect and in addition, other years. I was told that you are handling this and that there have been many people impacted by this.

• I want to know when this will be corrected. Can you please let me know if this error has been corrected and when?

• I appreciate if I receive a response no later than June 18, 2014.

• Thank you.



Human Resources, Safety
and Risk Management
1600 Holloway Avenue
San Francisco, CA 94132-4252
Phone: 415/338-1873
Fax: 415/338-0521

August 13, 2008

To Whom It May Concern

This letter is to verify employment of Lisa Handwerker. Ms. Handwerker began her employment, January 21, 1998, in the department of Anthropology at San Francisco State University for the following semesters (16-week terms):

Spring 1998 27 4.00 WTU's (Weighted Teaching Units)

Fall 1998 60 9.00 WTU's

Ms. Handwerker's position title is "Lecturer", which is used to cover a temporary academic assignment. Lecturers are appointed on a semester-by-semester basis, determined by the hiring department.

If you have further questions please feel free to contact me at (415) 338-1508

Sincerely,

S. Henry McCoy
Director, Academic Personnel & HR Management Systems

cc: Lisa Handwerker