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Home Participant Business Partner Benefits Benefit Admin Admin Workflow my Toolbox

Summary Benefit Estimate Payment Profile Applications

Common Tasks **Participant Name:** Richard J Lewis II **CalPERS ID:** 7

Menu **Notes Summary**

- Warrant Browser
- View Tax Statement
- Payment Inquiry
- Manual Tax Statement

Creation Date: 07/02/2004
Category: Conversion
Type: Participant
Program:
Security Status: Unrestricted

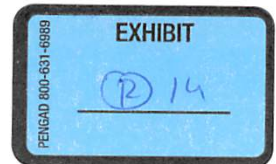
Note Detail

Date	Note	Updated By
09/19/2011	Customer Touch Point	CONV_SMT_USER / S
05/27/2011	Date/Time: 05/27/2011 09:39:49 Process Category Type: Retirement Estimate DivP Analyst Name: Noss,Kenneth E Note Text: Limited special compensation to \$9,000.00 per estimate guidelines and forwarded estimate to compensation review. Attached compensation review cover letter and stamped estimate unofficial.	CONV_SMT_USER / S
05/06/2011	Date/Time: 05/06/2011 12:21:32 Process Category Type: Retirement Planning DivP Analyst Name: Talamantez,Andrea Note Text: Member requested estimates for 12/31/11. Provided pub 35. Explained options to member using an online estimate. Reviewed final comp and what employer was currently reporting. Discussed time frames for submitting .	CONV_SMT_USER / S
09/16/2004	Date/Time: 09/16/2004 10:39:00 Process Category Type: Service Credits DivP Analyst Name: Cardeno,Christlan G. Note Text: Responding to outstanding IE... I contacted the member to advise him that the check was received/accepted. Also that he will be receiving a letter from us within a couple of weeks to confirm our acceptance.	CONV_SMT_USER / S
07/06/2004	Date/Time: 07/06/2004 09:38:29 Process Category Type: Service Credits DivP Analyst Name: Penwell,Sinda Note Text: ARSC special comp completed. Pay rate 7,301.00, special comp 25,427.58 divided by 36 = 706.32. pay rate used 8,007.32. out guide to Leo.	CONV_SMT_USER / S
07/02/2004	Date/Time: 07/02/2004 14:04:30 Process Category Type: Service Credits DivP Analyst Name: Penwell,Sinda Note Text: ARSC special comp	CONV_SMT_USER / S

Update Note

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Build: v3.9.1.b Baseline: 130517_114312_v3.9.1_Int.2825 UID: 601 Browser: IE 8.0
Username: epacheco DataSource: env98ds Schema owner: null Server: ENV98_node3
Action class : psr.web.mvc.general.cases.ViewNoteAction
JSP : /int/general/cases/viewNote.jsp
SQL query executed by this page: 9 in 0.153 seconds with 14 rows received.
Duplicate queries executed by this page: 5 in 0.005 seconds with 5 rows received.
Action execution time: 0.220 seconds

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Summary Benefit Estimate Payment Profile Applications

Participant Name: Richard J Lewis II

CalPERS ID:

Notes Summary

Creation Date: 04/20/2004
Category: Conversion
Type: Participant
Program:

Security Status: Unrestricted

Note Detail

Date	Note	Updated By
09/19/2011	Customer Contact	CONV_SMT_USER / S
06/23/2011	Date/Time: 06/23/2011 15:15:58 Process Category Type: No Category DivP Analyst Name: Zimmerman, Karin M Inquiry Category: Compensation Review Inquiry Subject: Compensation Issues Person Contacting: Lewis, Richard J Caller Contact: 6331297 Contacting About: Richard Lewis Note Text: Spoke to Member and assured him that all of his special compensation is allowed to be used in his retirement calculation.	CONV_SMT_USER / S
06/06/2011	Date/Time: 06/06/2011 10:22:45 Process Category Type: No Category DivP Analyst Name: Perez, Stevens R Inquiry Category: Compensation Review Inquiry Subject: Compensation Issues Person Contacting: Lewis, Richard J Caller Contact: 6331297 Contacting About: Richard Lewis Note Text: IAAL: mbr recv'd SR est w/\$9757 listed as FC...mbr states his ER has history of misreporting pay rate and spec comp info and requesting a return call to clarify pay rate and spec comp as reported by ER-mbr is paid biweekly; 15th and 31st of each month and wants to confirm correct ER reporting. Please call and advise, thanks.	CONV_SMT_USER / S
06/06/2011	Date/Time: 06/06/2011 10:05:32 Process Category Type: No Category DivP Analyst Name: Marquardt, Tom R Inquiry Category: Retirement Adjustment Processing Inquiry Subject: Benefit Adjustment Inquiry Person Contacting: Lewis, Richard J Caller Contact: 5360512 Contacting About: Richard Lewis Note Text: inquiry on final comp used by our estimate and sent call to IAA for further assistance. thanks	CONV_SMT_USER / S
08/06/2010	Date/Time: 08/06/2010 12:09:02 Process Category Type: No Category DivP Analyst Name: Davis, Veronica Inquiry Category: General Items Inquiry Subject: PIN Request/Changes Person Contacting: Lewis, Richard J Caller Contact: 6331297 Contacting About: Richard Lewis Note Text: reset pin.	CONV_SMT_USER / S
04/05/2010	Date/Time: 04/05/2010 08:50:56 Process Category Type: No Category DivP Analyst Name: Van Buren, Zoraya Inquiry Category: Member Education Inquiry Subject: On-Site Education Request Contacting About: Richard Lewis Note Text: Mbr faxed in registration form and enrolled in May 4th afternoon PYR in SBRO.	CONV_SMT_USER / S
06/11/2007	Date/Time: 06/11/2007 13:03:13 Process Category Type: No Category DivP Analyst Name: Johnson, Carlous Inquiry Category: Compensation Review	CONV_SMT_USER / S

Date	Note	Updated By
	<p>Inquiry Subject: Compensation Issues Person Contacting: Laura King Caller Contact: 3845344 Contacting About: Richard Lewis Note Text: Left message with Laura that we would have to review agreement in order to make a determination as to whether or not it qualifies as reportable compensation.</p>	
06/08/2007	<p>Date/Time: 06/08/2007 11:00:08 Process Category Type: No Category DivP Analyst Name: Jones,Velina Inquiry Category: Compensation Review Inquiry Subject: Compensation Issues Person Contacting: Laura King Caller Contact: 3845344 Contacting About: Richard Lewis Note Text: per ER.....this member won a settlement....per ER there is a retro lump sum and an ongoing payrate increase for a promotion that the member will not be working in.....ER wants to know if this settlement is persable and how to report it.....please call and advise...thank you</p>	CONV_SMT_USER / S
02/07/2005	<p>Date/Time: 02/07/2005 15:13:30 Process Category Type: No Category DivP Analyst Name: Michel,Pamela J Inquiry Category: General Items Inquiry Subject: 1099R Person Contacting: Lewis, Richard J Contacting About: Richard Lewis Note Text: Sent the member a duplicate 1099R form for the 2004 Tax Year for the member's "02" account; also, gave the member the amounts in Box 1 (Gross Dist), Box 2a (Taxable amount), and Box 5 (Tax Free amount).</p>	CONV_SMT_USER / S
09/08/2004	<p>Date/Time: 09/08/2004 15:13:51 Process Category Type: No Category DivP Analyst Name: Durfee,Lori L Inquiry Category: Service Credit Inquiry Subject: Rollovers/Plan to Plan Transfers Person Contacting: Lewis, Richard J Caller Contact: 8828148 Contacting About: Richard Lewis Note Text: On 8/26/04 we recd mbr's Employment Certification and Your Payment Options, Front page of costing packet, Election to Purchase ARSC, and a Certification Form: Plan to Plan Transfer and Direct Rollover Form, mbr stated the rollover check was sent separately and he wanted to confirm receipt, per CTP notes looks like check was recd on 8/16/04 but not sure, please confirm and e-mail mbr</p>	CONV_SMT_USER / S
09/01/2004	<p>Date/Time: 09/01/2004 07:40:29 Process Category Type: No Category DivP Analyst Name: Veitenhans,Nancy Inquiry Category: Service Credit Inquiry Subject: Rollovers/Plan to Plan Transfers Person Contacting: LEWIS, RICHARD Contacting About: Richard Lewis Note Text: workflow inquiry - letter from member advising rollover check and forms mailed separately. check on rollover log pending review - received 8-16-04. docs are already on dms. completing this workflow item. no response needed.</p>	CONV_SMT_USER / S
08/13/2004	<p>Date/Time: 08/13/2004 15:07:58 Process Category Type: No Category DivP Analyst Name: Stroupe,Phyllis Inquiry Category: Service Credit Inquiry Subject: Active Member Buyback/Payment Person Contacting: Lewis, Richard J Contacting About: Richard Lewis Note Text: Called to verify receipt of rollover check. Unable to verify. States was mailed 7/30/04. Will send election and certification forms or wait till return from vacation to verify receipt.</p>	CONV_SMT_USER / S
04/20/2004	<p>Date/Time: 04/20/2004 15:40:26 Process Category Type: No Category DivP Analyst Name: Aguilar,Donna Inquiry Category: Service Credit Inquiry Subject: Inquiry Regarding Purchase of Service Credit Person Contacting: Lewis, Richard J Contacting About: Richard Lewis Note Text: arsc</p>	CONV_SMT_USER / S

Update Note

Common Tasks 

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Warrant Browser

View Tax Statement

Payment Inquiry

Manual Tax

Statement

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Build: v3.9.1.b Baseline: 130517_114312_v3.9.1_int.2013 UID: 601 Browser: IE 8.0
Username: esacheco DataSource: env98ts Schema owner: null Server: ENV98_node3
Action class : psr.web.mvc.general.cases.ViewNoteAction
JSP : /int/general/cases/viewNote.jsp
SQL query executed by this page: 16 in 0.049 seconds with 28 rows received.
Duplicate queries executed by this page: 12 in 0.017 seconds with 12 rows received.
Action execution time: 0.103 seconds

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Common Tasks Participant Name: Richard J Lewis II CalPERS ID: :

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Notes Summary

Creation Date: 06/20/2011
Category: Unknown
Type: Participant
Program:

Security Status: Unrestricted

Note Detail

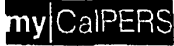
Date	Note	Updated By
06/20/2011	Reviewed payroll reported through 05/11-1 service period. S/C is FLSA, Chief Officer Pay, EPMC, and temporary upgrade. Okay to calc from transcripts.	CONV_SMT_USER / S

[Update Note](#)

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Build: v3.9.1.0 Baseline: 130517_114312_v3.9.1_int.2825 UID: 601 Browser: IE 8.0
Username: epacheco Datasource: env98ds Schema owner: null Server: ENV98_node3
Action class : psr.web.mvc.general.cases.ViewNoteAction
JSP : /int/param/cases/viewNote.jsp
SQL query executed by this page: 4 in 0.183 seconds with 4 rows received.
Duplicate queries executed by this page: 0 in 0.000 seconds with 0 rows received.
Action execution time: 0.259 seconds

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Common Tasks Participant Name: Richard J Lewis II CalPERS ID: 7

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Notes Summary

Creation Date: 10/25/2012
Category: Benefit Estimates
Type: Participant
Program: California Public Employees' Retirement System Security Status: Unrestricted

Note Detail

Date	Note	Updated By
10/25/2012	Received estimate for R/D 11/30/2012. Member already received two estimates for the calendar year. Denial letter and estimate guidelines were mailed out to participant. Estimate request and denial letter were sent to DMC to be imaged.	M. Estrada / 1

[Update Note](#)

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Build: v3.9.1.0 Baseline: 130517_114312_v3.9.1_int.3223 UID: 601 Browser: IE 8.0
Username: epacheco DataSource: env98da Schema owner: null Server: ENV98_rod3
Action class : psr.web.mvc.general.cases.ViewNoteAction
JSP : /int/general/cases/ViewNote.jsp
SQL query executed by this page: 4 in 0.017 seconds with 4 rows received.
Duplicate queries executed by this page: 0 in 0.000 seconds with 0 rows received.
Action execution time: 0.086 seconds

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Common Tasks Participant Name: Richard J Lewis II CalPERS ID: ;

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Notes Summary
Creation Date: 10/26/2012
Category: Benefit Payments
Type: Workflow
Process Name: Customer Inquiry
Program: California Public Employees' Retirement System
Security Status: Unrestricted

Note Detail		Updated By
Date	Note	
10/26/2012	Sent benefit estimate to participant. SR and IDR. Part is SR payable. Disregard denial letter as additional estimates we only duplicates.	K. Chikawa / I
10/26/2012	Mbr received estimate denial letter but Mbr has only requested one estimate in the past 12 months. Please call and assist.	D. Carmona / I

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Build: v3.9.1.5 Baseline: 130517_114312_v3.9.1_int.2B25 UID: 603 Browser: IE 8.0
Username: epacheo DataSource: env984s Schema owner: ntd Server: ENV98_noda3
Action class : psr.web.mvc.general.cases.ViewNoteAction
JSP : /int/general/cases/viewNote.jsp
SQL query executed by this page: 6 in 0.024 seconds with 7 rows received.
Duplicate queries executed by this page: 0 in 0.000 seconds with 0 rows received.
Action execution time: 0.098 seconds

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Common Tasks **Participant Name:** Richard J Lewis II **CalPERS ID:**

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Notes Summary

Creation Date: 01/19/2013
Category: Compensation Review
Type: Participant
Program:

Security Status: Unrestricted

Note Detail

Date	Note	Updated By
01/19/2013	Compensation review pending BP response to inquiry sent 1/19/13 requesting documentation for temporary upgrade pay.	L. Lueras / 1

[Update Note](#)

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Build: v3.9.1.b Baseline: 130517_114312_v3.9_L_Int.2825 UID: 601 Browser: IE 8.0
Username: epacheco Datasource: env98ds Schema owner: null Server: ENV98_node3
Action class : psr.web.mvc.general.cases.ViewNoteAction
JSP : /int/general/cases/viewNote.jsp
SQL query executed by this page: 4 in 0.054 seconds with 4 rows received.
Duplicate queries executed by this page: 0 in 0.000 seconds with 0 rows received.
Action execution time: 0.143 seconds

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Summary Benefit Estimate Payment Profile Applications

Common Tasks Participant Name: Richard J Lewis II CalPERS ID: :

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Notes Summary

Creation Date: 02/08/2013
Category: Unknown
Type: Workflow
Process Name: Disability Retirement Benefit Exception
Program:

Security Status: Unrestricted

Note Detail

Date	Note	Updated By
02/08/2013	Comp review complete.	C. Willis / I

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Build: v3.9.1.b Baseline: 130517_114312_v3.9.1_Int.2825 UID: 601 Browser: IE 8.0
Username: epacheco DataSource: env9961 Schema owner: null Server: ENV99_node3
Action class : psr.web.mvc.general.cases.ViewNoteAction
JSP : /int/general/cases/viewNote.jsp
SQL query executed by this page: 5 in 0.027 seconds with 5 rows received.
Duplicate queries executed by this page: 0 in 0.000 seconds with 0 rows received.
Action execution time: 0.091 seconds

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Common Tasks Participant Name: Richard J Lewis II CalPERS ID: 7

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Notes Summary

Creation Date: 02/13/2013

Category: Compensation Review

Type: Participant

Program: California Public Employees' Retirement System

Security Status: Unrestricted

Note Detail

Date	Note	Updated By
02/13/2013	ER provided incorrect information. DO NOT USE any special comp in the amount of \$1560.50 for Temporary Upgrade pay. This compensation is for a settlement and is not reportable. Payrate and other special compensation ok to calc as earned.	C. Willis / I

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Build: v3.9.1.b Baseline: 130517_114312_v3.9.1_int.2825 UID: 601 Browser: IE 8.0.
Username: epacheco Database: env9806 Schema owner: null Server: ENV98_node3
Action class : psr.web.mvc.general.cases.ViewNoteAction
JSP : /Int/General/cases/viewNote.jsp
SQL query executed by this page: 4 in 0.020 seconds with 4 rows received.
Duplicate queries executed by this page: 0 in 0.000 seconds with 0 rows received.
Action execution time: 0.095 seconds