



my|CalPERS
System Conversion Impacts
for
Employers

Version 2.0

my|CalPERS System Conversion Impacts for Employers

Introduction

PERT is dedicated to helping employers prepare for that critical time just before the launch of my|CalPERS called **System Conversion**. This *my|CalPERS System Conversion Impacts for Employers* document is intended to serve as a tool to prepare your organization for the critical dates of key business activities leading up to, during and immediately after the launch of the new my|CalPERS system in September 2011.

PERT strongly encourages all employers to carefully review this document to become familiar with the business activities and key dates that may impact your agency as you get ready for my|CalPERS. If a business activity is not specifically identified, please assume business as usual and process the activity as you do today. For all dates referenced in this document, processing will end upon CalPERS close of business (e.g. 5:00 p.m.), unless stated otherwise in the document. A checkbox column has been added to assist employers in identifying and tracking those activities that impact your agency. In addition, a calendar of important dates to remember has been developed to assist you and begins on page 10.

The activities outlined in this document are intended for a broad audience of employer types. For clarity, in the column heading “Applies To” of the charts beginning on page 2, an employer distinction is made to indicate whether or not an activity has a limited application. Information about the system conversion impacts to State Controller’s Office (SCO), Judges’ and Legislators’ Retirement Systems (JLRS) and Direct Authorization Vendors (DAV) will be communicated separately and are excluded from this document.

System Conversion Resources

Additional information regarding system conversion is available on our web site at www.calpers.ca.gov/pert by selecting the **System Conversion** link. PERT will continue to publish additional materials containing key information that employers will need to know regarding the conversion to my|CalPERS and will notify employers when these materials become available.

Examples of additional materials include, but are not limited to:

- A **Remittance Advice Form**, which can be used to report payroll contribution payments by rate plan for July and August 2011 payroll, and must be submitted with the payroll contribution checks and Electronic Funds Transfer (EFT) payments ([Circular Letter 200-026-11](#))
- **System Conversion Frequently Asked Questions** (FAQs)
- A **Getting Started with my|CalPERS Checklist**, which provides guidance on how to begin conducting activities in my|CalPERS after the launch of the new system ([Circular Letter 200-060-11](#)).

PERT is committed to working with employers throughout this process and addressing your questions and concerns about the system conversion period. If you have questions, please call the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

The following charts identify the business activities and key dates that may impact your agency during the System Conversion period.

RETIREMENT CONTRACTS AND ENROLLMENT		Applies To	Comments
Retirement Contracts			
<input type="checkbox"/>	July 1, 2011 – Last day to inform CalPERS that employer intends to amend retirement plan contract (those that require an actuarial valuation).	Public Agency Employers contracting for retirement benefits	See CalPERS Circular Letter No: 200-020-11 for additional information.
Two Years Additional Service Credit (Golden Handshake)			
<input type="checkbox"/>	June 30, 2011 – All Golden Handshake open window periods must close.	All Employers contracting for Two Years Additional Service Credit	See CalPERS Circular Letter No: 200-075-10 for additional information.
<input type="checkbox"/>	July 1 - September 18, 2011 – No Golden Handshake open window periods.	All Employers contracting for Two Years Additional Service Credit	See CalPERS Circular Letter No: 200-075-10 for additional information.
<input type="checkbox"/>	September 19, 2011 – First day to enter resolution for an open window period. Open window period beginning date must be prospective (i.e., begin on or after September 19).	All Employers contracting for Two Years Additional Service Credit	See CalPERS Circular Letter No: 200-075-10 for additional information.
Retirement Enrollment			
<input type="checkbox"/>	August 30, 2011 – Last day to submit membership enrollments and enrollment changes in ACES.	Employers contracting for retirement benefits – ACES and Non-ACES Users	Includes both ACES enrollment and manual enrollment via AESD-1 form.
<input type="checkbox"/>	September 3 - October 31, 2011 – View-only access to ACES will be available. However, the data in ACES will be frozen as of September 2, 2011. After October 31, ACES will no longer be available.	Employers contracting for retirement benefits – ACES Users	
<input type="checkbox"/>	August 31 - September 18, 2011 – Hold all membership enrollments and enrollment changes.	Employers contracting for retirement benefits – ACES and Non-ACES Users	
<input type="checkbox"/>	September 19, 2011 – Begin processing membership enrollments and enrollment changes in my CalPERS.	Employers contracting for retirement benefits – ACES and Non-ACES Users	

RETIREMENT CONTRACTS AND ENROLLMENT		Applies To	Comments
	Participant Demographic Data		
<input type="checkbox"/>	August 30, 2011 – Last day to submit participant demographic data and updates in ACES.	Employers contracting for retirement benefits – ACES and Non-ACES Users	Examples include changes to: addresses, names, social security numbers and birth dates.
<input type="checkbox"/>	August 31 - September 18, 2011 – Hold participant demographic data submissions and updates.	All Employers except those reporting through State Controller's Office	
<input type="checkbox"/>	September 19, 2011 – Begin processing participant demographic data submissions and updates.	All Employers except those reporting through State Controller's Office	

PAYROLL CONTRIBUTIONS		Applies To	Comments
	Payroll Contribution Reporting		
<input type="checkbox"/>	July 31, 2011 – Last day to submit June payroll contribution reporting.	All Employers except those reporting through State Controller's Office	
<input type="checkbox"/>	August 1 - September 17, 2011 – Employers reporting through ACES will be able to log into ACES to upload payroll contribution files to identify errors and totals, but no files will be processed during this window.	Employers under contract for retirement, reporting through ACES	Loading files into ACES to view errors and totals is optional . It is available only to assist you with preparing your contribution payment remittance as well as preparing your payroll contribution data for submission into my CalPERS.
<input type="checkbox"/>	August 1 - September 18, 2011 – Hold July and August payroll contribution reporting and corrections.	All Employers except those reporting through State Controller's Office	
<input type="checkbox"/>	After July 31, 2011 – Do not submit payroll contribution reporting to CalPERS via tape, diskette or hard copy. Payroll contribution reporting received after this date will be destroyed on site just as the processed records are currently destroyed. These payroll contribution reporting records cannot be processed by CalPERS and pose a security risk should CalPERS attempt to return them.	All Employers except those reporting through State Controller's Office	
<input type="checkbox"/>	September 19, 2011 – Online reporters can begin processing July, August, and September payroll contribution reporting and corrections online in my CalPERS (using copy forward functionality).	All Employers except those reporting through State Controller's Office	Use the fiscal year 2011/2012 employer contribution rates when processing payroll contribution reporting.
<input type="checkbox"/>	September 19, 2011 – XML file reporters can begin processing July, August, and September payroll contribution reporting files (using either File Upload or FTP reporting method) and corrections in my CalPERS.	All Employers except those reporting through State Controller's Office	Use the fiscal year 2011/2012 employer contribution rates when processing payroll contribution reporting.


PAYROLL CONTRIBUTIONS		Applies To	Comments
Payroll Contribution Payments			
<input type="checkbox"/>	Effective July 1, 2011 – Continue submitting payroll contribution payments for July and August payroll contribution reporting on the normal deadline that corresponds with the ending date of your respective payroll schedule. Discontinue reporting contribution payments using the AESB-626 form or reporting contributions by coverage group. Contribution payments for July and August payroll contribution reporting should be submitted using the new Remittance Advice Form (form # PERS01F0037) that is available online.	All Employers except those reporting through State Controller's Office	See CalPERS Circular Letter No: 200-026-11 for additional information. Use the fiscal year 2011/2012 employer contribution rates when calculating payroll contribution payments.
<input type="checkbox"/>	Effective July 1, 2011 – Employers submitting payroll contribution payments via Electronic Funds Transfer (EFT) may need to submit more than one EFT for the July and August payrolls.	All Employers except those reporting through State Controller's Office	See CalPERS Circular Letter No: 200-026-11 for additional information. Use the fiscal year 2011/2012 employer contribution rates when calculating payroll contribution payments.
<input type="checkbox"/>	September 19, 2011 – Begin processing payroll contribution payments in my CalPERS.	All Employers except those reporting through State Controller's Office	See CalPERS Circular Letter No: 200-026-11 for additional information. Use the fiscal year 2011/2012 employer contribution rates when calculating payroll contribution payments.



HEALTH CONTRACTS AND ENROLLMENT		Applies To	Comments										
Health Contract Updates													
<input type="checkbox"/>	Existing Health Contracts (does not include terminating agencies)	Employers contracting for health benefits	Resolutions with changes received after these dates have a high probability of retroactivity.										
	<table border="1"> <tr> <td>For an effective date of</td> <td>The resolution with changes needs to be received by CalPERS no later than</td> </tr> <tr> <td>September 1, 2011</td> <td>July 29, 2011</td> </tr> <tr> <td>October 1, 2011</td> <td>August 15, 2011</td> </tr> <tr> <td>November 1, 2011</td> <td>August 15, 2011</td> </tr> </table>			For an effective date of	The resolution with changes needs to be received by CalPERS no later than	September 1, 2011	July 29, 2011	October 1, 2011	August 15, 2011	November 1, 2011	August 15, 2011		
For an effective date of	The resolution with changes needs to be received by CalPERS no later than												
September 1, 2011	July 29, 2011												
October 1, 2011	August 15, 2011												
November 1, 2011	August 15, 2011												
New Health Contracts													
<input type="checkbox"/>	New Agency Contracts (includes new group contracts)	Employers wanting to contract for health benefits	Resolutions and enrollment forms received and processed after these dates have a high probability of retroactivity and a delay in health coverage.										
	<table border="1"> <tr> <td>For an effective date of</td> <td>The employer must process active enrollments by</td> </tr> <tr> <td>September 1, 2011</td> <td>July 1, 2011</td> </tr> <tr> <td>October 1, 2011</td> <td>July 15, 2011</td> </tr> <tr> <td>November 1, 2011</td> <td>July 15, 2011</td> </tr> <tr> <td>December 1, 2011</td> <td>November 1, 2011</td> </tr> </table>			For an effective date of	The employer must process active enrollments by	September 1, 2011	July 1, 2011	October 1, 2011	July 15, 2011	November 1, 2011	July 15, 2011	December 1, 2011	November 1, 2011
For an effective date of	The employer must process active enrollments by												
September 1, 2011	July 1, 2011												
October 1, 2011	July 15, 2011												
November 1, 2011	July 15, 2011												
December 1, 2011	November 1, 2011												
Health Enrollment													
<input type="checkbox"/>	August 12, 2011 – Last day to send Health Benefits forms for processing via U.S. mail. August 13-25, 2011 – Fax Health Benefits forms to CalPERS for processing.	Employers contracting for health benefits – Non-ACES Users											
<input type="checkbox"/>	August 26 - September 18, 2011 – Hold all Health Benefits enrollment documents.	Employers contracting for health benefits – Non-ACES Users											
<input type="checkbox"/>	September 19, 2011 – Begin processing Health Benefits enrollment documents in my CalPERS.	Employers contracting for health benefits – Non-ACES Users											

HEALTH CONTRACTS AND ENROLLMENT		Applies To	Comments
Health Enrollment (continued)			
<input type="checkbox"/>	August 30, 2011, 3:00 p.m. – Deadline to submit new employee Health Benefits enrollment transactions, via Internet forms and file transfer.	Employers contracting for health benefits – ACES Users	
<input type="checkbox"/>	September 2, 2011 – Last day to submit any other Health Benefits enrollment transactions through Internet forms and file transfer, and last day to correct all Health Benefits agency errors.	Employers contracting for health benefits – ACES Users	Transactions with errors left uncorrected will not transition to my CalPERS and must be re-processed via my CalPERS after Launch.
<input type="checkbox"/>	September 3 - October 31, 2011 – View-only access to ACES will be available. However, the data in ACES will be frozen as of September 2, 2011. After October 31, ACES will no longer be available.	Employers contracting for health benefits – ACES Users	
<input type="checkbox"/>	September 3-18, 2011 – Hold all Health Benefits enrollment documents.	Employers contracting for health benefits – ACES Users	
<input type="checkbox"/>	September 19, 2011 – Begin processing Health Benefits enrollment documents in my CalPERS.	Employers contracting for health benefits – ACES Users	
Health Payments			
<input type="checkbox"/>	August 15, 2011 – Health Premium invoice will be mailed as scheduled for September coverage period. August 25, 2011 – Advance billing of Health Premium invoice will be mailed for October coverage period.	Public Agencies and Schools contracting for health benefits	Discrepancies from October 2011 billing will be adjusted in the November 2011 invoice.
DENTAL ENROLLMENT		Applies To	Comments
Dental Enrollment Updates			
<input type="checkbox"/>	August 15, 2011 – Last day to send new retiree dental documents for processing via U.S. mail. August 16-25, 2011 – Fax new retiree dental documents to CalPERS for processing.	State Agencies Only	
<input type="checkbox"/>	August 26 - September 18, 2011 – Hold all new retiree dental documents.	State Agencies Only	
<input type="checkbox"/>	September 19, 2011 – Begin processing new retiree dental documents in my CalPERS.	State Agencies Only	

SUPPLEMENTAL INCOME 457 PLAN		Applies To	Comments
Adoption Agreements, Loan Provisions and Self-Managed Accounts (SMA) Provisions			
<input type="checkbox"/>	August 31, 2011 – Last day to submit Supplemental Income Plan (SIP) adoption agreements, loan provisions and Self-Managed Accounts (SMA) provisions for approval.	Employers who participate in the Supplemental Income 457 Plan	
<input type="checkbox"/>	September 1 - October 31, 2011 – Contact CalPERS SIP 457 Plan at 1-800-696-3907 for instructions related to submitting adoption agreements, loan provisions and Self-Managed Accounts (SMA) provisions.	Employers who participate in the Supplemental Income 457 Plan	The launch of the SIP 457 Plan self-service portal in my CalPERS occurs on November 1, 2011.
<input type="checkbox"/>	November 1, 2011 – A CalPERS SIP 457 Account Manager will contact agencies that submitted adoption agreements, loan provisions and Self-Managed Accounts (SMA) provisions and work with the agencies to enter the information into my CalPERS.	Employers who participate in the Supplemental Income 457 Plan	
Payroll Contribution Submission			
<input type="checkbox"/>	For pay periods that end on or before November 30, 2011 – Submit payroll contribution reporting and payments to ING.	Employers who participate in the Supplemental Income 457 Plan	
<input type="checkbox"/>	For pay periods that begin on or after December 1, 2011 – Submit payroll contribution reporting and payments in my CalPERS.	Employers who participate in the Supplemental Income 457 Plan	If your pay period starts in November but ends on or after December 1, 2011, you will begin submitting payroll contribution reporting and payments in my CalPERS.

GENERAL BUSINESS ACTIVITIES		Applies To	Comments
Employer Inquiries			
<input type="checkbox"/>	September 2-18, 2011 – CalPERS staff will have limited access to systems during the system conversion window, which may impact response times for employer inquiries.	All Employers	
Employer Listing Requests			
<input type="checkbox"/>	August 29, 2011 at 2:00 p.m. – Deadline to submit Employer Listing Requests (special request for listing of employees from your agency that fall into specified criteria).	All Employers	
<input type="checkbox"/>	After August 29, 2011 at 2:00 p.m. - September 18, 2011 – Hold Employer Listing Requests.	All Employers	
<input type="checkbox"/>	September 19, 2011 – Employers can utilize the self-service functionality in my CalPERS to obtain Employer Listings.	All Employers	
Customer Education Center (CEC)			
<input type="checkbox"/>	September 1, 2011 – Last day to view or enroll employees in CEC classes.	All Employers	
<input type="checkbox"/>	September 2-18, 2011 – Employers (and CalPERS staff) will not be able to view or enroll employees in CEC classes.	All Employers	
<input type="checkbox"/>	September 19, 2011 – Employers may resume using the CEC to view or enroll employees in training classes.	All Employers	

SYSTEM CONVERSION IMPACTS			Important Dates to Remember			
June & July	June 30, 2011 All Golden Handshake open window periods must close.	July 1, 2011 Last day to inform CalPERS that employer intends to amend retirement plan contract (those that require an actuarial valuation).	July 1, 2011 Process active enrollments for new Agency Health Contracts, for an effective date of September 1, 2011.	July 15, 2011 Process active enrollments for new Agency Health Contracts, for an effective date of October 1 and November 1, 2011.	July 29, 2011 Submit resolutions for changes to Health Contracts, for an effective date of September 1, 2011.	July 31, 2011 Last day to submit June payroll contribution reporting. Note: See Payroll Contributions section about holding July & August payroll contribution reporting and submitting July & August contribution payments.
	August 12, 2011 Last day to send Health Benefits forms for processing via U.S. mail. Forms to be processed between August 13-25 should be sent via fax.	August 15, 2011 Last day to send new retiree dental documents for processing via U.S. mail. Forms to be processed between August 16-25 should be sent via fax.	August 15, 2011 Submit resolutions for changes to Health Contracts, for an effective date of October 1 and November 1, 2011.	August 15, 2011 Advanced billing to Public Agencies and Schools for Health Payments will be generated for the September coverage period.	August 25, 2011 Advanced billing to Public Agencies and Schools for Health Payments will be generated for the October coverage period.	August 25, 2011 Last day to submit new retiree dental documents for processing via fax to CalPERS; any received after today must be processed in my CalPERS.
August	August 25, 2011 Last day to submit Health Benefits forms for processing via fax to CalPERS; any received after today must be processed in my CalPERS.	August 29, 2011 Deadline to submit Employer Listing Requests by 2:00 p.m.	August 30, 2011 Deadline to submit new employee Health Benefits enrollment transactions, via Internet forms and file transfer via ACES by 3:00 p.m.	August 30, 2011 Last day to submit membership enrollments & enrollment changes in ACES.	August 30, 2011 Last day to submit participant demographic data & updates in ACES.	
	September 1, 2011 Last day to view or enroll employees in Customer Education Center (CEC) classes.	September 2, 2011 Last day to submit any other Health Benefits enrollment transactions through Internet forms and file transfer and the last day to correct all Health Benefits agency errors.	September 19, 2011 my CalPERS Launches 	September 19, 2011 Begin processing transactions in my CalPERS: membership enrollments; enrollment changes; participant demographic data submissions and updates; payroll contribution reporting and contribution payments; Health Benefits enrollment documents; new retiree dental documents; utilize self-service functionality to obtain Employer Listings; and resume using the CEC to view or enroll their employees in training classes.	September 19, 2011 First day to enter resolution for a Golden Handshake open window period.	
October & November	November 1, 2011 Process active enrollments for new Agency Health Contracts, for an effective date of December 1, 2011.					

SYSTEM CONVERSION IMPACTS – SIP 457 Plan		Important Dates to Remember	
August	<p>August 31, 2011</p> <p>Last day to submit SIP adoption agreements, loan provisions and Self-Managed Accounts (SMA) provisions for approval. Note: Contact CalPERS for instructions for activity between September 1 – October 31, 2011.</p>		
	September	<p>September 19, 2011</p> <p>my CalPERS Launches</p> 	
November		<p>November 1, 2011</p> <p>SIP 457 Plan Launches in my CalPERS</p> 	<p>November 1, 2011</p> <p>First day to submit SIP adoption agreements, loan provisions and Self-Managed Accounts (SMA) provisions in my CalPERS.</p>