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Announcements

Circular Letter

January 26, 2022

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Distribution: IV, V, VI, X, XII, XVI

To: All CalPERS Employers
Subject: New Service Prior to Membership Automation and Certification Features

Purpose

The purpose of this Circular Letter is to inform you of recent system enhancements to the Service Prior to Membership (SPM) automation and certification process.

SPM Request & Election Process

Based on feedback from our members and employers, we continue to make improvements to the online service credit purchase process. This includes adding automation for the SPM cost type and improving the employer certification process.

When an employee requests to purchase SPM, the primary payroll contact will receive an email notification to complete the employer certification in [myCalPERS](#). Once the certification is complete, the employee will receive an email to review their SPM cost and can electronically elect to purchase the service credit. These automated processes for a member to request, elect, and pay for a service credit purchase are secure, convenient, and entirely paperless through their myCalPERS account.

Enhanced Employer Certification Features

Employee Contact Information

The employee's name and phone number will now display in the **Employment Information** panel, so you can reach out directly if you have questions regarding the request.

Employer '**Withdraw Certification Request**' Button

A new feature has been added to allow you to withdraw a certification. This only applies if the certifying officer initiated the request (i.e., not initiated by the employee via myCalPERS), and it is in the **Requested or In Progress** status. A withdrawal can be made by selecting the **Withdraw Certification Request** button in the **Certification** panel. Once the button is selected, the request will be canceled. The same employer contact who created the certification must withdraw it.

Employer Reject

A new panel has been added that requires you to select the reason for rejection of an employee's request. This allows the employee to view a detailed description of the reason for the rejection in their myCalPERS account. The rejection reasons include:

- No employment records; Employee never worked for the agency
- Incorrect service credit purchase request type
- No payroll records, purged records, records unavailable, damaged, or destroyed
- Duplicate request; Same period already requested or submitted for review
- Requested SPM service period previously purchased
- Member withdrew the service credit purchase request

New Error Message

An error message will display if the service period reported is outside the employment period dates. The certification cannot be submitted unless the service period dates and employment period dates match.

Collective Bargaining Unit (CBU)/Class Codes

For state and CSU employers, the CBU and class code fields are now required. If you enter a class code that is excluded, an error message will appear.

Reminders & Resources

When reporting employer certification and payroll details, ensure that:

- Payroll after any retroactive salary adjustments is reported separately to avoid overstating the service credit available to purchase
- Overtime hours are reported on the same line as the regular payroll in the overtime box (earnings do not need to be reported for overtime)
- Pay rate, earnings, and hours are reported as zero (0) if the participant didn't work during a pay period that falls within the service period requested
- Certification is completed timely, within 30-days of the member's request date

Refer to [myCalPERS Student Guides](#), which have been updated with this new functionality. Encourage your employees to [register for](#) and/or log in to [myCalPERS](#). Benefits of service credit purchases and other resources are available on our [website](#).

Questions

If you have any questions about the information provided in this Circular Letter, contact the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

Donald R. Martinez, Chief
Member Account Management Division