



my|CalPERS Course 103
Retirement Enrollment Basics for Public
Agencies, Schools & Non-Central State
Agencies

Student Guide

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my|CalPERS Retirement Enrollment Basics

Overview

Class Description

This class is designed to prepare you to:

- Navigate my|CalPERS
 - Understand retirement enrollment transactions
 - Generate reports
-

Introduction

Welcome to my|CalPERS Retirement Enrollment Basics training! We thank you for taking advantage of this training opportunity. We are committed to providing assistance and support for both new and experienced my|CalPERS users.

This user-friendly student guide is a resource to assist with my|CalPERS navigation. The soft copy of this guide is easily accessible on the CalPERS website. Simply navigate to the [my|CalPERS Student Guides](#) page by using this **Pathway**: [CalPERS website](#) > Employers > I Want To...: Find my|CalPERS Student Guides.

In addition to the student guide, there is a [my|CalPERS Quick Reference Guide for Employers](#) online to assist users on getting started on performing common my|CalPERS functions.

To take advantage of valuable online my|CalPERS resources, visit the [my|CalPERS Technical Requirements](#) area of the CalPERS website.

Disclaimer: No actual employer or member information was compromised in the making of this my|CalPERS student guide.

Contents

This student guide contains the following:

Topic	See Page
Basic Navigation	3
Unit 1: my CalPERS Query Feature	9
Unit 2: Retirement Enrollment	19
Unit 3: Reports	65
Appendix: Retirement Enrollment Basics Resources	83

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Basic Navigation

Overview

Introduction

This section was created to help first time users with basic navigation tools such as the following:

- Learn my|CalPERS and Windows tips
 - Understand the different global navigation tabs
 - Use the Common Tasks tools
 - Know all communication Resources
 - Locate the Online Help tool
-

Contents

Topic	See Page
my CalPERS and Windows Tips	4
Global Navigation Tabs	5
Common Tasks Tools	6
Communication Resources	7
Online Help Tool	8

my|CalPERS and Windows Tips

Introduction Listed are tips to make using my|CalPERS easier and more efficiently.

Windows Font Size

- Press and hold the “**Ctrl**” key and scroll up and down with your mouse wheel
- Press and hold the “**Ctrl**” key and use the “+” or “-” key

Open a New Tab in Windows Open multiple my|CalPERS tabs to multi-task. On any tab or link, right click and select “Open in new tab” or click the mouse wheel to open item in a new tab.

Open Multiple Windows Open multiple my|CalPERS windows to multi-task. Right click on any tab or link select “Open in new window.”

To evenly split the multiple windows, use the “**Windows**” key (between Ctrl & Alt keys) and select the “left or right” arrow key.

Or, grab the top of the window with your cursor and drag the window to the side of the screen. Let go when window shaded area is in the desired position.

Quick Keyboard Entry

- **Tab** to move forward, **Shift+Tab** to go back
- Dates and phone number can be entered without / - (or)
- If the cursor is on a button on the page, press the **Enter** key
- If the cursor is on a radio button, press the **spacebar**
- The dropdown fields are letter sensitive, if you type the first letter or number, it will populate that item e.g., “f” for female, “h” for hourly, etc.

Refresh my|CalPERS Selecting  at the top left is a refresh option and returns you to the Home page.

If you receive an error page and you no longer see the global navigation tabs, select the my|CalPERS logo to refresh.

Also, refresh between queries.

Go Back Avoid using the Internet “back” arrow or Backspace key, unless you’re using Cognos (reports).

Use the navigation tabs and links to return to the previous page.

See **Defect/Enhancement Instructions** in the appendix to request for Return links.

Global Navigation Tabs

Introduction my|CalPERS global navigation tabs do not change. Knowing what each tab is used for can help you navigate through my|CalPERS more easily.



Each tab populates different local navigation links located directly below the tabs and also populates different left-side navigation links located under the Menu left-side column.

For more details about these links, please see **Navigating my|CalPERS** in the appendix.

Home Refresh the query page to search for another employee or retiree with the agency.

Tip! On the Home page is the left side Contact Personal Security Settings link that will allow users to change their password, challenge questions, or security image and message.

Profile Displays an agency's Business Partner Summary page which lists employer address, communication information, contacts, business partner relationships, and retirement contract/agreements.

Reporting Process a new retirement enrollment, health enrollments, and report payroll.

Person Information Verify membership status.
Query and maintain employee and retiree profile pages.

Education Sign up for employer instructor-led or online classes.

Other Organizations View other employer contact information e.g., addresses, email, name and phone numbers if the employer opted to make it viewable to other organizations

Common Tasks Tools

Introduction Common Tasks on the left side includes additional tools and is available on the Home, Profile, Reporting, and Education global navigation tabs.

Select the **Common Tasks** title or the carrot to expand the menu.



Reports Run reports via the Cognos application.

Document History View documents that your agency sent or those CalPERS provided for the agency.

Inquiry List View your communication and inquiry/response history with CalPERS

Submit Inquiry This tool allows you to securely request information, submit a question, or clarify a particular issue regarding your CalPERS record. The inquiry may include confidential data, such as an SSN.

After a CalPERS representative replies, you can view the response to your inquiry.

For step actions on how to submit an inquiry through my|CalPERS, please see **my|CalPERS Submit Inquiry** in the appendix.

Communication Resources

Introduction

Listed below are various methods to communicate with CalPERS:

- Submit Inquiry
 - Employer system educators
 - Employer Response Team
 - Contact center
 - CalPERS website contact link
-

Submit Inquiry

This tool allows you to securely request information, submit a question, or clarify a particular issue regarding your CalPERS record.

Employer System Educators

Email CalPERS_Employer_Communications@CalPERS.CA.GOV to connect with training staff.

Contact Center

Employer Contact Center at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

Employer Response Team

Email Employer.Response.Team@CalPERS.CA.GOV for when you need more specialized or escalated assistance, or contact them at (800) 253-4594.

CalPERS Website Contact Link

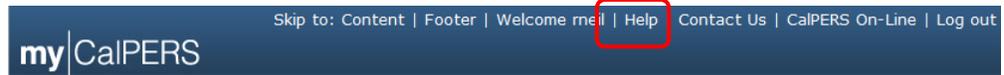
Submit anonymous questions, comments or complaints via the CalPERS website at [Questions, Comments, & Complaints](#)

Pathway: CalPERS website > Contact > Questions, Comments & Complaints

Online Help Tool

Introduction

Access the my|CalPERS **Online Help** tool by selecting the Help link in the header of any page in my|CalPERS.



The intuitive **Online Help** tool opens a new window and refers to the my|CalPERS page you are currently viewing.

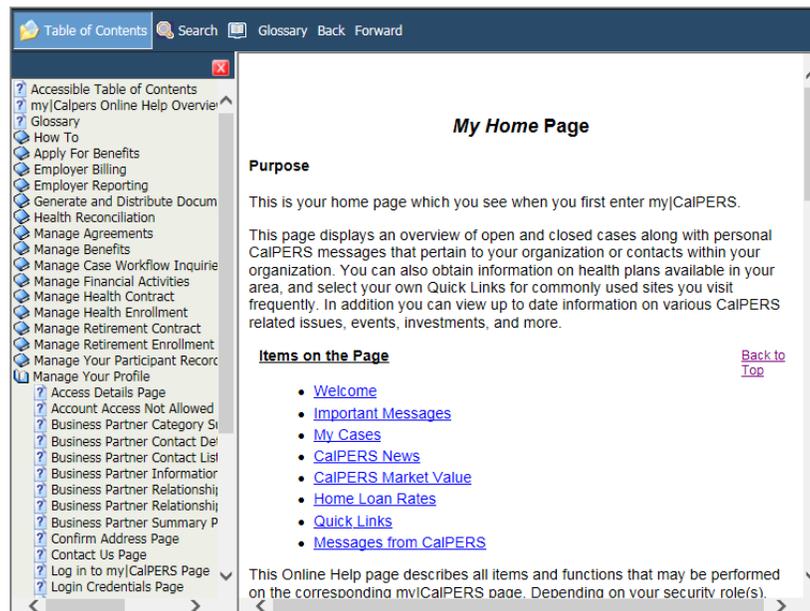


Table of Contents

The **Table of Contents** is organized by business processes or common functionality.

Search

The **Search** button allows users to search for and view keywords or phrases within all online help and “How To...” pages.

Glossary

The Online Help glossary contains key acronyms and common terms that appear throughout online help and displays alphabetical links along the top.

Back and Forward

The **Back** and **Forward** buttons only work in the **Online Help** tool.

Unit 1: my|CalPERS Query Feature

Overview

Introduction When performing a my|CalPERS query, there is important membership and enrollment information to take into consideration when hiring both active employees and retired annuitants.

Contents This unit contains the following scenarios:

Topic	See Page
Scenario 1: Verify CalPERS Membership	10
Scenario 2: Query an Active Employee's Appointment Details within Your Agency	12
Scenario 3: Query a Retiree – Retired from Your Agency	14
Scenario 4: Query a Retiree – Retired from a Different Agency	16

Scenario 1: Verify CalPERS Membership



This scenario provides an example of a query or search of two prospective employees, one who does not have CalPERS membership and one who has CalPERS membership, but not at your agency.

Scenario: You are hiring a part-time employee. You need to verify if they are an existing CalPERS member.

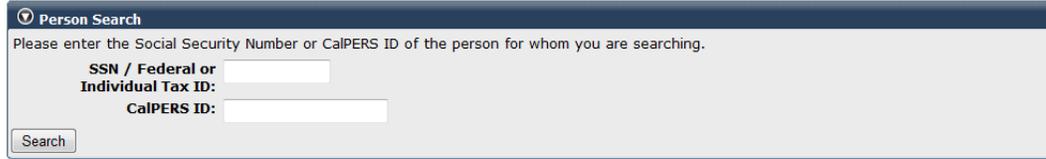
Step-by-Step Follow the steps below to query a prospective employee.

Step	Action	Result
Verify No Membership		
1	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.
2	Enter the employee's CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	See Figure 1-1. Person Search section My Profile page displays
3	If the employee has no membership, the Search for a Person page displays indicating " No results found " in the Search Results section. The prospective employee is not a CalPERS member and does not have CalPERS history.	See Figure 1-2. No results found in Search Results section
	You have completed this scenario.	
Verify Membership		
4	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.
5	Enter the employee's CalPERS ID into the CalPERS ID field in the Person Search section, then select the Search button.	See Figure 1-1. Person Search section My Profile page displays.
6	Within the Hire Date section, enter the appropriate date into the Anticipated or Actual Hire Date field, then select the Continue button. If the employee is a member but worked for a different agency you will see limited information.	See Figure 1-3. Hire Date section See Figure 1-4. Summary section
	You have completed this scenario.	

Continued on next page

Scenario 1: Verify CalPERS Membership, Continued

Figure 1-1. Person Search section



Person Search
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:
CalPERS ID:

Figure 1-2. No results found in Search Results section

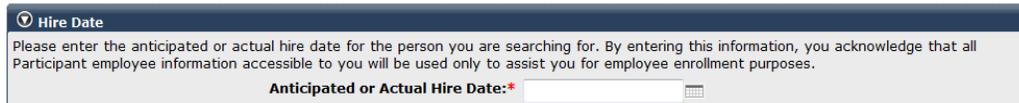


Search Results

CalPERS ID	Name	Date of Birth
No results found.		

No CalPERS membership for either retirement or health

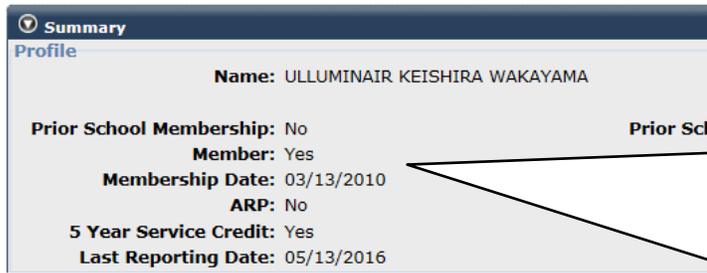
Figure 1-3. Hire Date section



Hire Date
Please enter the anticipated or actual hire date for the person you are searching for. By entering this information, you acknowledge that all Participant employee information accessible to you will be used only to assist you for employee enrollment purposes.

Anticipated or Actual Hire Date: *

Figure 1-4. Summary section



Summary
Profile

Name: ULLUMINAIR KEISHIRA WAKAYAMA

Prior School Membership: No **Prior School Member:** Yes

Membership Date: 03/13/2010 **ARP:** No

5 Year Service Credit: Yes **Last Reporting Date:** 05/13/2016

If determined to be a non-member, print query results page with date, and place in employee file along with the Notice of Exclusion from CalPERS Membership AESD-139 form. This will provide documentation in the event your employee becomes a CalPERS member before becoming eligible for membership in your agency.



Membership status will read Yes if:

- Member is currently active
- Member is inactive but has contributions on file

Membership status will read No if:

- They refunded their contributions
- Currently or previously listed as a dependent on a health plan or enrolled as a subscriber for health only
- Profile was created by staff due to an inquiry

Scenario 2: Query an Active Employee's Appointment Details within Your Agency



Scenario: An active employee would like to verify service credit and member contributions. You would also like to verify their appointment history. You will only be able to view appointment information specific to your agency.

Step-by-Step Follow the steps below to query a current employee.

Step	Action	Result
Verify Service Credit and Contributions		
1	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.
2	Enter the employee's CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	My Profile page displays.
3	Within the Pre-Retirement Benefit Information section, verify the service credit and contributions earned. The posting date will always reflect today's date. For updated information verify last reporting date with payroll.	
Verify Appointment History		
4	Within the Appointment History section, select the appropriate active Employer link to view your employee's current appointment and event details.	See Figure 1-5. Summary section See Figure 1-6. Active Employer link in Appointment History section Appointment Details and Events page displays.
	You have completed this scenario.	

Continued on next page

Scenario 2: Query an Active Employee's Appointment Details within Your Agency, Continued

Figure 1-5. Summary section

Summary
Update Personal Information

Profile

<p>SSN: xxx-xx-3927</p> <p>Name: SUSAN DARLENE EVELMA GELLA</p> <p>Date of Birth: 06/24/1944</p> <p>Prior School Membership: No</p> <p>Membership Date: 05/23/2005</p> <p>Restrictions: No</p> <p>Last Reporting Date: 06/03/2016</p>	<p>CalPERS ID: 1777778476</p> <p>Optional Member: No</p> <p>Date of Death:</p> <p>Prior School Membership Date:</p> <p>Retirement Date:</p>
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Communication

<p>Preferred Communication: Mail</p> <p>Primary Phone Number:</p> <p>Primary Email Address:</p> <p>Mailing Address: 1124 MOORING WALK OAKLAND, CA 94619</p> <p>Physical Address:</p>	<p>Und</p> <p>Update</p> <p>Update</p> <p>Update</p> <p>Update</p>
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Update communication details by selecting any of the update links

Figure 1-6. Active Employer link in Appointment History section

Appointment History [Add New](#)
View More Actions >>

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City of Oakland		Regular		Miscellaneous	Active	05/23/2005	

Active employer link

This employee has an active appointment with your agency

Scenario 3: Query a Retiree – Retired from Your Agency



Public agencies and schools who hire a CalPERS retiree as a retired annuitant (RA) are required to process an enrollment appointment and report retired annuitant payroll i.e., total hours worked and earnings per pay period in my|CalPERS. Prior to hiring a CalPERS retiree, you and the retiree must ensure the employment meets all of the applicable statutory restrictions for working after retirement. The consequences of unlawful employment include (1) termination of the retiree’s retirement benefits, (2) reimbursement by the retiree to CalPERS of all retirement benefits received during the period of unlawful employment and, (3) payment of retroactive employer and member contributions, plus interest.

Circular Letter [200-002-14](#) provides the requirements for lawful post-retirement employment and includes an [Employer Checklist for Hiring CalPERS Retirees](#) as an attachment.

Pathway: CalPERS website > Employers > Resources: [Circular Letters](#) > Enter 200-002-14 in the Search Letter No. field

Scenario: A CalPERS retiree is seeking employment in your agency. You will query my|CalPERS to confirm the retired status and the status of the 180 day wait period.

Step-by-Step Follow the steps below to query a retiree who retired from your agency.

Step	Action	Result
1	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.
2	Enter the employee’s CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	See Figure 1-7. Person Search section
3	In the Summary section, the retiree’s address won’t display. Retiree addresses are available in the Benefit Recipients by Employer report.	See Figure 1-8. Summary section My Profile page displays.
	You have completed this scenario.	

Continued on next page

Scenario 3: Query a Retiree – Retired from Your Agency, Continued

Figure 1-7. Person Search section

Person Search

Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

Figure 1-8. Summary section

Summary

Profile

Name: FEROLY EVELMA MEDINA-PEREZ	Separation Date: 10/23/2012
Prior School Membership: No	Prior School Membership Date:
Date of Birth: 03/01/1957	Date of Death:
Member: Yes	Retired: Yes
Membership Date: 02/15/1986	Retirement Date: 10/22/2012
Last Reporting Date: 10/21/2012	

Post-Retirement Benefit Information

CalPERS - Retired

Account Type: Member	Last Pay Period: 10/13/2012 - 10/21/2012
Option: Unmodified Allowance	Current Fiscal Year: 0.00
Direct Deposit: Yes	Hours Reported:
Retirement Date: 10/22/2012	Retirement Type: Service Retirement

Health Benefit Information

Medical - Enrolled

Account Type: Subscriber	
Qualifying Participant: MEDINA-PEREZ, FEROLY E.	
Plan Name: Kaiser Permanente California Bay Area	Coverage Type: Basic

Appointment History **View More Actions >>**

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City of Oakland		Regular		Safety - Fire	Perm Sep	02/15/1986	10/23/2012

Retired status will be "Yes" if retired. Retirement Date is provided to verify the retiree has been retired for at least 180 days before hiring.

If retiree is from a different agency, their former employer information will not display

Scenario 4: Query a Retiree – Retired from a Different Agency



Public agencies and schools who hire a CalPERS retiree as a retired annuitant (RA) are required to process an enrollment appointment for them and report retired annuitant payroll, i.e., their total hours worked and earnings per pay period in my|CalPERS.

There is critical information regarding post-retirement employment in unit 1, scenario 3, as well as in the appendix.

Scenario: A CalPERS retiree is seeking employment in your agency as a retired annuitant (RA). The retiree has informed you they retired from a different CalPERS agency. You will query my|CalPERS to confirm the retired status and the status of the 180 day wait period.

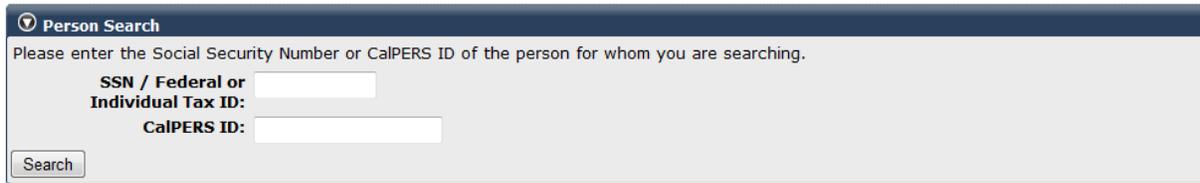
Step-by-Step Follow the steps below to query a retiree who retired from a different agency.

Step	Action	Result
1	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.
2	Enter the employee's CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button. If the employee has no membership, the Search for a Person page displays indicating " No Results found " in the Search Results section. The prospective employee is not a CalPERS member and does not have CalPERS history.	See Figure 1-9. Person Search section See Figure 1-10. No Results found in Search Results section
3	Within the Hire Date section, enter the appropriate date into the Anticipated or Actual Hire Date field, then select the Continue button.	See Figure 1-11. Hire Date section See Figure 1-12. Summary section
	You have completed this scenario.	

Continued on next page

Scenario 4: Query a Retiree – Retired from a Different Agency, Continued

Figure 1-9. Person Search section



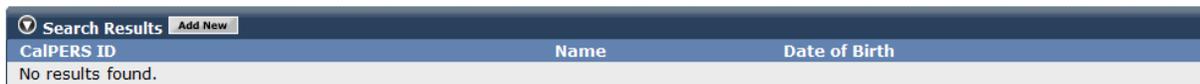
Person Search

Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

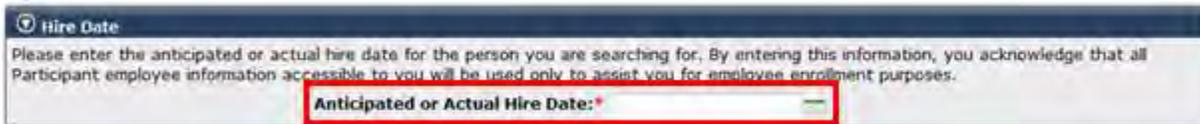
Figure 1-10. No results found in Search Results section



Search Results

CalPERS ID	Name	Date of Birth
No results found.		

Figure 1-11. Hire Date section



Hire Date

Please enter the anticipated or actual hire date for the person you are searching for. By entering this information, you acknowledge that all Participant employee information accessible to you will be used only to assist you for employee enrollment purposes.

Anticipated or Actual Hire Date:

Figure 1-12. Summary section



Summary

Profile

Name: TERRY MANRIQUE BARKEE	CalPERS ID: 2451529863
Prior School Membership: No	Optional Member: No
Member: Yes	Prior School Membership Date:
Membership Date: 03/12/2007	Retired: Yes
ARP: No	Retirement Date: 05/04/2013
5 Year Service Credit: Yes	ARP Effective Date:
Last Reporting Date: 05/03/2013	

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Unit 2: Retirement Enrollment

Overview

Introduction The retirement enrollment process enables you to enroll employees into retirement and make changes to existing employees' accounts using my|CalPERS.

Government Code 20283 states “Any employer that fails to enroll an employee into membership when he or she becomes eligible, or within 90 days thereof, when the employer knows or can reasonably be expected to have known of that eligibility, shall be required to pay all arrears costs for member contributions and administrative costs of five hundred dollars (\$500) per member as a reimbursement to this system's current year budget.”

For more information: [Public Agency and Schools Reference Guide Pathway](#): CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide

Contents This unit contains the following scenarios:

Topic	See Page
Scenario 1: Add a New Retirement Enrollment	20
Scenario 2: Correct Appointment and Demographic Information	32
Scenario 3: Process a Leave of Absence	38
Scenario 4: Change Member Category	42
Scenario 5: Permanent Separation from an Appointment	46
Scenario 6: Update Unused Sick Leave Days on a Permanent Separation	50
Scenario 7: Add a Retired Annuitant Appointment – Retired from Your Agency	54
Scenario 8: Add a Retired Annuitant Appointment – Retired from Different Agency	58

Scenario 1: Add a New Retirement Enrollment

Introduction

Employers must report all eligible PERS employees to CalPERS. Once in membership, a person remains a member until (1) the employee takes a refund of contributions after permanently separating from all CalPERS covered employment, or (2) they retire. If you have questions regarding enrolling an employee, please contact CalPERS at the following email address: Membership_Reporting@calpers.ca.gov

Important! Employers must provide the Member Reciprocal Self-Certification Form to all new employees upon membership eligibility and must retain a copy of this form in the individual's employment records for audit purposes.

[Member Reciprocal Self-Certification Form](#)

Pathway: CalPERS website > Employers > Forms & [Forms & Publications](#), View All > Enter Member Reciprocal in the Search field



Scenario: Your agency is hiring a new permanent full-time employee who has never worked for your agency. Until the appointment information is entered, your agency cannot report payroll or complete health enrollment for that employee.

Step-by-Step

Follow the steps below to process a new retirement enrollment.

Step	Action	Result
Entering Demographic Details		
1	From the My Home page, select the Reporting global navigation tab.	Manage Reports page displays.
2	Within the Create or Edit Report section, select " Add Retirement Enrollment " from the Method drop-down list, then select the Continue button.	Add Person Details page displays. See Figure 2-1. Method drop-down list

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Figure 2-1. Method drop-down list

The screenshot shows a web application interface for CalPERS. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Member Requests, and Health Reconciliation. The main content area displays the user's name as 'City of Oakland' and their CalPERS ID as '4015143822'. A red arrow points to the 'Method' dropdown menu, which is currently set to 'Add Retirement Enrollment'. The 'Program' dropdown menu is set to 'CalPERS'. There are 'Continue' and 'Display' buttons. A '*Required Fields' label is visible on the right side of the form.

Membership Business Rules

Overtime, permanent part-time, and seasonal/temporary employees:

Overtime positions:

CalPERS will determine what employment is considered overtime, meaning which positions should be contributory.

Permanent part-time positions:

Permanent part-time employees who are hired to work an average of 20 hours per week for one year or longer are required to be enrolled into CalPERS membership as of the first date of hire.

Seasonal/temporary* employees:

Enroll employees into my|CalPERS once they meet 1000 hours within a fiscal year (July 1- June 30).

*This includes those paid through a temporary agency. Some public agencies hire workers through temporary agencies. This practice does not exclude the employee from membership. Therefore, all of the eligibility rules apply to these workers.

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Step	Action	Result
3	Populate the following in the Person Details section: <ul style="list-style-type: none"> ● Prefix ● First Name ● Middle Name ● Last Name ● Suffix ● SSN ● Date of Birth ● Gender 	See Figure 2-2. Person, Address, and Communication Details sections
4	Populate the following in the Address Details section: <ul style="list-style-type: none"> ● Address Type ● Address ● Country ● City ● State ● Zip Code 	See Figure 2-2. Person, Address, and Communication Details sections
5	Populate the following in the Communication Details section: <ul style="list-style-type: none"> ● Phone Type ● Phone Number and Extension (if applicable) ● Email Select the Primary radio button to indicate which phone number and email address are the primary ones.	See Figure 2-2. Person, Address, and Communication Details sections
6	Select the Save & Continue button.	Confirm Address section displays.

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Figure 2-2. Person, Address, and Communication Details sections

▼ **Person Details**

Prefix:

First Name:*

Suffix:

SSN:*

Middle Name:

Date of Birth:*

Last Name:*

Gender:*

▼ **Address Details**

Address Type:

Address:

Country:

City:

State:

Zip Code:

▼ **Communication Details**

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Fax	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Office	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary **Email**

When entering Person Details for a participant with previous CalPERS history, name, SSN, date of birth, and gender must match with what's already in my|CalPERS

Continued on next page

23

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Scenario 1: Add a New Retirement Enrollment, Continued

Step	Action	Result
7	<p>Within the Confirm Address section, select the appropriate radio button for U.S. Postal Service Matches, then select the Confirm button.</p> <p>The entered address may be correct in the event that the U.S. Postal Service database may not have current/new address listed. In that situation, confirm the entered address.</p>	<p>See Figure 2-3. Confirm Address section</p> <p>Person Details, Address Details, and Communication Details display.</p>
8	<p>At the bottom of the page, select the Save & Continue button.</p> <p>The employee's demographic information is saved in my CalPERS.</p> <p>A unique 10-digit CalPERS ID is created for the new employee.</p>	<p>Appointment Details page displays.</p> <p>See Figure 2-4. Member Details section</p>
Entering Appointment Details		
9	<p>Populate the following in the Appointment Details section:</p> <ul style="list-style-type: none"> • Program • Enrollment Eligibility Date • Division (if necessary) • Original Hire Date • Member Category • Position Title • Work Calendar • Retired Annuitant? "No" • CBU (if necessary) • Temporary Position?* <p>*Temporary positions can be used when the permanent separation date is known in advance. Selecting yes will require entering the end date and will automatically create a permanent separation on the date entered field within the Appointment History section.</p>	<div data-bbox="820 1003 1507 1228" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>This is the date the employee first became eligible for CalPERS membership, which may be different from the first day of hire if they didn't originally qualify. If already a member, this date will be the date they were hired with your agency.</p> </div> <div data-bbox="799 1318 1377 1381" style="border: 1px solid black; padding: 5px;"> <p>This is the date first hired at your agency</p> </div>

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Figure 2-3. Confirm Address section

Confirm Address

We have validated your address against U.S. postal records and have provided an alternate choice according to these results. Please select the correct address and click Confirm to return to the address page.

Entered Address: 988 broadway, oakland, CA 94607

U.S. Postal Service Matches: 988 BROADWAY, OAKLAND, CA 94607-4064

Figure 2-4. Member Details section

Member Details

Name: Lucy Balle	CalPERS ID: 5136356638
Gender: Female	Date of Birth: 12/25/1969

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Step	Action	Result
Adding Additional Position Titles		
10	Select the Update link next to the position title.	See Figure 2-5. Appointment Details section
11	Within the Positions section, select the Add new button to create a new position title or search current position by name or category in the Search Positions section.	See Figure 2-6. Position Details section
12	Populate the following in the Maintain Position Details section: <ul style="list-style-type: none"> ● Position Code (determined by employer) ● Position (determined by employer) ● Member Category(determined by contract) ● Excluded from Retirement Contract (determined by contract) 	See Figure 2-7. Maintain Position Details section
13	Select the Save button.	See Figure 2-7. Maintain Position Details section
14	Select the Return link on the bottom left side corner.	Manage Positions page displays.
Excluded from Retirement Contract		
15	If excluded from the retirement contract, select the “Yes” radio button in the Excluded from Retirement Contract and populate the Retirement Exclusion Reason .	See Figure 2-7. Maintain Position Details section

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Figure 2-5. Appointment Details section

Appointment Details

Program
Program: CalPERS Enrollment Eligibility Date: CPE*

Position Information
Employer: City of Oakland CalPERS ID (Employer): 4015143822
Division: [dropdown]
Original Hire Date: * [calendar]
Member Category: * [dropdown]
Position Title: [dropdown] [Update](#)
Work Calendar: * Work 12 Months/Paid 12 Months [dropdown]
Retired Annuitant? * Yes No
CBU: [dropdown]
Refunded Appointment * Yes No

California Public Employer (CPE)

It is encouraged that employers create and assign position titles when processing new retirement enrollments.

Position titles are required for certain contract provisions, such as a Golden Handshake and exclusions.

Figure 2.6. Position Details section

Search Positions
Position Name: [text input]
Member Category: [dropdown]
Search [button]

Positions [Add New](#)

Figure 2.7. Maintain Position Details section

Maintain Position Details
Position Code: * [text input]
Position: * [text input]
Member Category: * [dropdown]
Excluded from Retirement Contract? * Yes No

[Save](#) [Save & Add Another](#) [Clear](#)

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Step	Action	Result						
16	<p>Within the Membership Information section, select the appropriate radio buttons for the following:</p> <ul style="list-style-type: none"> ● Is member subject to local Alternate Retirement Plan? ● Is the member subject to Social Security? ● Is the member participating in '59 survivor benefits? ● Optional Member? ● Is this a CalPERS covered Position for which the member elects State Teachers Retirement System (STRS) enrollment? <p>Specific member election questions depend on your agency's contract with CalPERS.</p>	<p>See Figure 2-8. Member Information section</p>						
17	<p>Does the employee have reciprocity with another retirement system?</p> <table border="1" data-bbox="297 869 938 1123"> <thead> <tr> <th data-bbox="297 869 498 911">If ...</th> <th data-bbox="498 869 938 911">Then ...</th> </tr> </thead> <tbody> <tr> <td data-bbox="297 911 498 1024">Yes</td> <td data-bbox="498 911 938 1024">Select the “Yes” radio button and continue to step 18.</td> </tr> <tr> <td data-bbox="297 1024 498 1123">No</td> <td data-bbox="498 1024 938 1123">Select the “No” radio button and continue to step 19.</td> </tr> </tbody> </table>	If ...	Then ...	Yes	Select the “ Yes ” radio button and continue to step 18.	No	Select the “ No ” radio button and continue to step 19.	<p>See Figure 2-9. Reciprocity section</p>
If ...	Then ...							
Yes	Select the “ Yes ” radio button and continue to step 18.							
No	Select the “ No ” radio button and continue to step 19.							
18	<p>Within the Reciprocity section, populate the following:</p> <ul style="list-style-type: none"> ● Reciprocal Agency ● Reciprocal Membership Date ● Retired Reciprocal Member Indicator ● Reciprocal Permanent Separation Date 	<p>See Figure 2-9. Reciprocity section</p>						

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Figure 2-8. Member Information section

Membership Information

Member Information

Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?*

Yes
 No

Is the member subject to Social Security?*

Yes
 No

Is the member participating in '59 Survivor benefits? *

Yes
 Declined
 Declined (No Ballot)

Optional Member Election

Optional Member?*

Yes
 No

CalPERS/CalSTRS Election

Is this a CalPERS covered Position for which the member elects State Teachers Retirement System(STRS) enrollment?*

Yes
 No

CalPERS/CalSTRS Election

Is this a CalPERS covered Position for which the member elects State Teachers Retirement System(STRS) enrollment?*

Yes
 No

CalPERS/CalSTRS Documentation:* [Provide Document](#)
[Download Coversheet](#)

Callout 1: Optional members are elected or appointed officials who have the option to enroll in to CalPERS membership

Callout 2: If your employee elects CalSTRS enrollment, you will be prompted to upload the completed CalSTRS ES 0372 Retirement System Election Form

Figure 2-9. Reciprocity section

Reciprocity

Reciprocal Member Indicator: Yes
 No

Reciprocal Agency:

Reciprocal Membership Date:

Retired Reciprocal Member Indicator: Yes
 No

Reciprocal Permanent Separation Date:

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Step	Action	Result
19	Select the Save button.	<p>Appointment Details and Events page displays.</p> <p>See Figure 2-10. Appointment Event History and Appointment Details sections</p> <ul style="list-style-type: none"> ● The new employee is now enrolled in CalPERS ● Advise employees to go to www.calpers.ca.gov to review general retirement benefit information as it relates to their employment.
You have completed this scenario.		

Enrolling an Employee Who Has Prior or Concurrent Employment in Your Agency

To enroll an employee who has prior or concurrent service in your agency:

1. Select the **Person Information** global navigation tab
2. Enter **SSN** or **CalPERS ID**, then select the **Search** button
3. Within the Appointment History section, select the **Add New** button
4. Enter Appointment Details, Membership Information, and Reciprocity (see steps 9 through 19 in this scenario)

Continued on next page

Scenario 1: Add a New Retirement Enrollment, Continued

Figure 2-10. Appointment Event History and Appointment Details sections

Member Details		
Name: Lucy Balle	CalPERS ID: 5136356638	
Gender: Female	Date of Birth: 12/25/1969	

Appointment Event History Add New		
<input type="button" value="Correct Event"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> View All Site Events <input type="button" value="Display"/>
Event Date	Event	Event Details
<input type="radio"/> 09/12/2016	New Appointment	View Event Details
<input type="button" value="Correct Event"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> View All Site Events <input type="button" value="Display"/>

Appointment Details	
Programs	
Program: CalPERS	Membership Date: 09/12/2016
Membership Status: Active	Enrollment Eligibility Date: 09/12/2016
Position Information	
Employer: City of Oakland	CalPERS ID (Employer): 4015143822
Original Hire Date: 09/12/2016	
Member Category: Miscellaneous	Work Calendar: Work 12 Months/Paid 12 Months
Transit Worker: No	Temporary Position: No
Position Title: Office Clerk	Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)? No
CBU: -	Appointment ID: 92334712
Retired Annuitant: No	Contributing Appointment Date: 09/12/2016
Contributing Appointment: Yes	Leave Type:
Appointment Status: Active	Formula Name: 2% @ 62 Formula for Miscellaneous/Industrial Members
Years Prior Service:	Cost Share: 0.0
Enrollment Level: PEPPRA New	
Member Base Rate: 6.75	
Contribution Modification:	
Created by User: Employer	
Created on: 09/21/2016 09:35 AM	
Appointment Profile Last Refreshed: 09/21/2016 09:35 AM	Refunded Appointment: No

Membership Information	
Is the member subject to Social Security? Yes	
CalPERS/CalSTRS Election	
Is this a CalPERS covered Position for which the member elects State Teachers Retirement System (STRS) enrollment? No	
CalSTRS/CalPERS Election	
Is this a State Teachers Retirement System (STRS) covered position for which the member elects CalPERS enrollment? No	
Optional Member	
Optional Member? No	

Reciprocity
Reciprocal Member Indicator: No

Scenario 2: Correct Demographic and Appointment Information



Scenario: You discover that a recently hired employee's appointment information was entered incorrectly upon enrollment.

Step-by-Step Follow the steps below to correct an employee's appointment.

Step	Action	Result						
Correct Demographic Information								
1	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.						
2	Enter the employee's CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	My Profile page displays.						
3	Do you need to correct or update the employee's Profile and Communication details? <table border="1" data-bbox="313 888 972 1129"> <thead> <tr> <th>If ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Select the appropriate Update link(s) in the Summary section. Make the appropriate corrections, then select the Save button and continue to step 4.</td> </tr> <tr> <td>No</td> <td>Continue to step 4.</td> </tr> </tbody> </table>	If ...	Then ...	Yes	Select the appropriate Update link(s) in the Summary section. Make the appropriate corrections, then select the Save button and continue to step 4.	No	Continue to step 4.	See Figure 2-11. Summary section to verify what documentation is needed to update demographic information.
If ...	Then ...							
Yes	Select the appropriate Update link(s) in the Summary section. Make the appropriate corrections, then select the Save button and continue to step 4.							
No	Continue to step 4.							
Correct Appointment Details								
4	Within the Appointment History section select the appropriate "Active" employer name.	Appointment Details and Event page displays.						
5	Select the radio button of the appointment you wish to correct, then select the Correct Event button. New Appointments entered in error cannot be deleted from this page. Refer to the last two pages of this scenario for instructions on deleting a new appointment.	See Figure 2-12. Appointment Event History section Appointment Change page displays.						

Continued on next page

Scenario 2: Correct Demographic and Appointment Information, Continued

See Figure 2-11. Summary section

Summary

Profile

[Update Personal Information](#)

SSN: xxx-xx-4444 **CalPERS ID:** 5136356638

Name: Lucy Ball **Optional Member:** No

Date of Birth: 12/25/1969 **Date of Death:**

Prior School Membership: No **Prior School Membership Date:**

Membership Date: 09/01/2016 **Retirement Date:**

Restrictions: No

Last Reporting Date:

Communication

Undeliverable Date

Preferred Communication:

Primary Phone Number: (510) 555-7890 [Update](#)

Primary Email Address: lucyb@oaklandcity.gov [Update](#)

Mailing Address: 988 BROADWAY [Update](#)
OAKLAND, CA 94607-4064

Physical Address: [Update](#)

Keep copies of documentation in your file. Do not send to CalPERS.

Documentation	Demographic Change			
	Participant Name	Participant SSN	Participant Date of Birth	Participant Gender
Birth Certificate	X		X	X
Hospital Birth Record			X	X
Driver's License	X		X	X
Naturalization/Passport	X		X	X
Foreign Passport with I 94	X		X	X
Border Crossing Card with I 94			X	X
Church Baptismal/Cradle/ Blessing Record			X	
School Records			X	X
Pre-21 Record			X	X
Delayed Birth Certificate			X	X
Census Records			X	
Family Bible			X	
Social Security Card	X	X		

Figure 2-12. Appointment Event History section

Appointment Event History [Add New](#)

View All Site Events

Event Date	Event	Event Details
09/12/2016	New Appointment	View Event Details

View All Site Events

Continued on next page

Scenario 2: Correct Demographic and Appointment Information, Continued

Step	Action	Result
6	<p>Within the Appointment Details section, correct or update as necessary:</p> <ul style="list-style-type: none"> ● Enrollment Eligibility Date ● Division ● Original Hire Date ● Member Category ● Position Title ● Work Calendar ● Retired Annuitant ● CBU ● Temporary Position 	<p>See Figure 2-13. Appointment Details section</p>
7	<p>Within the Membership Information section, correct or update as necessary:</p> <ul style="list-style-type: none"> ● Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)? ● Is the member subject to Social Security? ● Is the member participating in '59 Survivor benefits? ● Optional Member? ● Is this a CalPERS covered Position for which the member elects State Teachers Retirement System (STRS) enrollment? <p>The above member election information is visible depending on the agency's contract with CalPERS.</p>	<p>See Figure 2-14. Membership Information section</p>
8	<p>Within the Reciprocity section, select the “Yes” radio button, then update the reciprocity details if necessary. Otherwise ensure the “No” radio button is selected.</p>	
9	<p>Select the Save button.</p>	<p>Appointment Details and Events page displays.</p>
	<p>You have completed this scenario.</p>	

Continued on next page

Scenario 2: Correct Demographic and Appointment Information, Continued

Figure 2-13. Appointment Details section

Appointment Details

Program
Program: CalPERS Enrollment Eligibility Date: CPE * 09/01/2016

Position Information
Employer: City of Oakland CalPERS ID (Employer): 4015143822
Division: CalPERS ID (Division): 0
Original Hire Date: * 09/01/2016
Member Category: * Miscellaneous
Position Title: Office Clerk [Update](#)
Work Calendar: * Work 12 Months/Paid 12 Months

Retired Annuitant? * Yes No Temporary Position? * Yes No

CBU:

Refunded Appointment * Yes No

Created by User: Employer
Created on: 09/21/2016 09:35 AM

Figure 2-14. Membership Information section

Membership Information

Member Information
Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)? *
 Yes No
Is the member subject to Social Security? *
 Yes No
Is the member participating in '59 Survivor benefits? *
 Yes Declined Declined (No Ballot)

Optional Member Election
Optional Member? *
 Yes No

CalPERS/CalSTRS Election
Is this a CalPERS covered Position for which the member elects State Teachers Retirement System(STRS) enrollment? *
 Yes No

Continued on next page

Scenario 2: Correct Demographic and Appointment Information, Continued

Deleting the Original Appointment

An original appointment entered in error may be deleted if no health or payroll is associated to it. To delete the original appointment, follow the steps below.

Step	Action	Result
Delete Original Appointment		
1	From the My Home page, select the Person Information global navigation tab or the Person Search left-side navigation link.	Person Search page displays.
2	Enter the employee's CalPERS ID in the CalPERS ID field, then select the Search button. You may also search for an employee using their SSN / Federal or Individual Tax ID number.	My Profile page displays.
3	Select the View More Actions link in the Appointment History section or Appointment History left-side navigation link.	See Figure 2-15. Appointment History section
4	Select the radio button for the appointment, then select the Delete button.	See Figure 2-16. Appointment History section
	You have completed this scenario.	

Continued on next page

Scenario 2: Correct Demographic and Appointment Information,
Continued

Figure 2-15. Appointment History section

Appointment History Add New View More Actions»							
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City of Oakland		Regular	Office Clerk	Miscellaneous	Active	09/01/2016	

Figure 2-16. Delete Appointment History

Appointment History Add New							
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
<input type="radio"/> City of Oakland		Regular	Office Clerk	Miscellaneous	Active	09/01/2016	

Scenario 3: Process a Leave of Absence



A leave of absence (LOA) is when an employee is temporarily off pay status with your agency but is still employed with your agency.

The **Begin Leave** date must be entered as **at least one day after** the last paid day at your agency, even if it is a weekend or holiday. Upon the employee's return from the leave of absence you again must update my|CalPERS with an **End Leave** event.

If the employee does not return to work from a leave of absence, you must permanently separate them in order for them to receive the **Options at Separation** letter.

Circular Letter [200-002-13](#), Reporting Permanent Separation Dates And Validating Participant Appointment Details In my|CalPERS.
Pathway: CalPERS website > Employers > Resources: [Circular Letters](#) > Enter 200-002-13 in the Search letter No. field

Scenario: An employee in your agency informs you that their Leave of Absence (LOA) has been approved.

Step-by-Step Follow the steps below to process a leave of absence.

Step	Action	Result
1	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.
2	Enter the employee's CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	See Figure 2-16. Summary Section My Profile page displays.
3	Within the Appointment History section select the link for the employer that has an "Active" Appointment.	Appointment Details and Events page displays.
4	Within the Appointment Event History section, select the Add New button.	Appointment Change page displays.

Continued on next page

Scenario 3: Process a Leave of Absence, Continued

Figure 2-16. Summary Section



SSN: xxx-xx-8180		CalPERS ID: 7805731363
Name: GERHARDT MALLAVII CASTLEBERRY		Optional Member: No
Date of Birth: 01/28/1964	Date of Death:	
Prior School Membership: No	Prior School Membership Date:	
Membership Date: 04/14/1990	Retirement Date:	
Restrictions: No		
Last Reporting Date: 06/03/2016		

[Update Personal Information](#)



If your employee is enrolled in health and you put them on a leave of absence (LOA) with any **Leave Type** other than “**Family Medical Leave (FML)**” or “**Maternity/Paternity Leave,**” the my|CalPERS system automatically cancels their health coverage.

An unpaid leave event may affect health benefits, it is important to notify your Health Benefits Officer (HBO) when an employee is placed on an unpaid leave.

Continued on next page

Scenario 3: Process a Leave of Absence, Continued

Step	Action	Result
5	Within Appointment Event Details section, select “Begin Leave” from the Event drop-down list.	Appointment Event Details section expands.
6	Enter the date the leave begins into the Event Date field. The leave begin date must be at least one day after last day on paid status.	
7	Select the employee’s type of leave from the Leave Type drop-down list.	See Figure 2-17. Leave Type drop-down list in Appointment Event Details section
8	Select the Save button. Important! When the employee returns from leave, add a new appointment event indicating “End Leave” with an event date of the first day the employee returns to work.	See Figure 2-18. Appointment Event History section with “Begin Leave” Appointment Details and Events page displays. See Figure 2-19. Appointment Event History section with “End Leave”
	You have completed this scenario.	

Other Updates to Retirement Enrollment

You can submit retirement enrollment changes directly into my|CalPERS. Some common updates include:

- **Other types of leaves**
- **Member category changes**
- **Temporary and permanent separations**
- **Demographic changes (name, address, date of birth, SSN)**
- **Corrections to appointment information**
- **Deletions of appointment information**

Continued on next page

Scenario 3: Process a Leave of Absence, Continued

Figure 2-17. Leave Type drop-down list in Appointment Event Details section

Appointment Event Details

Event:* Begin Leave

Event Date:*

Leave Type:*

Save Clear

Build: 110707_185634

Site Student003

Educational Leave
 Family Medical Leave
 Industrial Disability Leave
 Military Leave
 Maternity/Paternity Leave
 Non-Industrial DL
 Other Leave
 State Disability Leave
 Service Leave
 Sabbatical – Full Pay
 Sabbatical – Partial Pay
 Unpaid Leave
 Workers Comp

If the LOA is for a short time it does not need to be entered. However, if it is for a longer time period where they will **not** be getting paid and it may qualify the employee for future service credit purchase, the LOA should be entered.

If contributions are not being reported, then place the employee on leave.

Figure 2-18. Appointment Event History section with “Begin Leave”

Appointment Event History Add New

Correct Event Delete View All Site Events Display

Event Date	Event	Event Details
09/01/2016	Begin Leave	Unpaid Leave
04/14/1990	New Appointment	View Event Details

Correct Event Delete View All Site Events Display

Figure 2-19. Appointment Event History section with “End Leave”

Appointment Event History Add New

Correct Event Delete View All Site Events Display

Event Date	Event	Event Details
11/01/2016	End Leave	
09/01/2016	Begin Leave	Unpaid Leave
04/14/1990	New Appointment	View Event Details

Correct Event Delete View All Site Events Display

Scenario 4: Change Member Category



Employees may experience appointment changes during their employment at your agency. An appointment change can apply to the following:

- Position Title
- Member Category
- Work Calendar

Scenario: A miscellaneous employee at your agency has graduated from the police academy and is now a safety member.

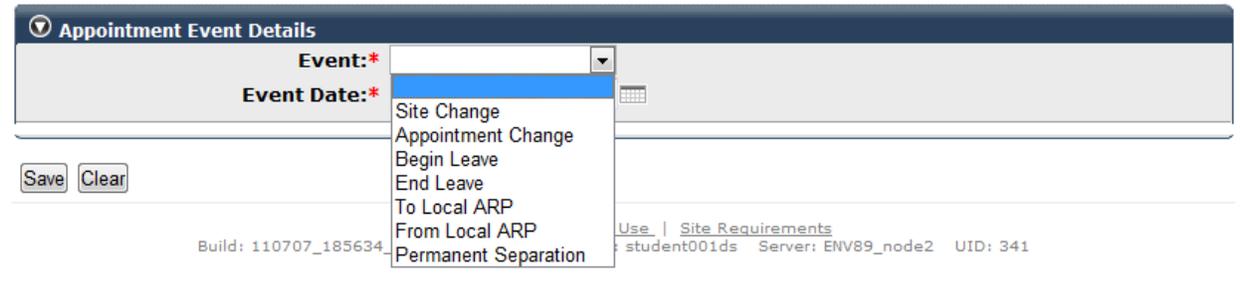
Step-by-Step Follow the steps below to change an employee’s member category.

Step	Action	Result
1	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.
2	Enter the employee’s CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	My Profile page display.
3	Within the Appointment History section select the Employer Name link that is an active Appointment.	Appointment Details and Events page displays.
4	Within the Appointment Event History section, select the Add New button.	Appointment Change page displays.
5	Within Appointment Event Details section, select “Appointment Change” from the Event drop-down list.	See Figure 2-20. Event drop-down list in Appointment Event Details section
	The bottom of the Appointment Event Details section displays additional questions.	See Figure 2-21. Appointment Event Details section
6	Enter the date of the appointment change into the Event Date field.	See Figure 2-22. Event Date field in Appointment Event Details section

Continued on next page

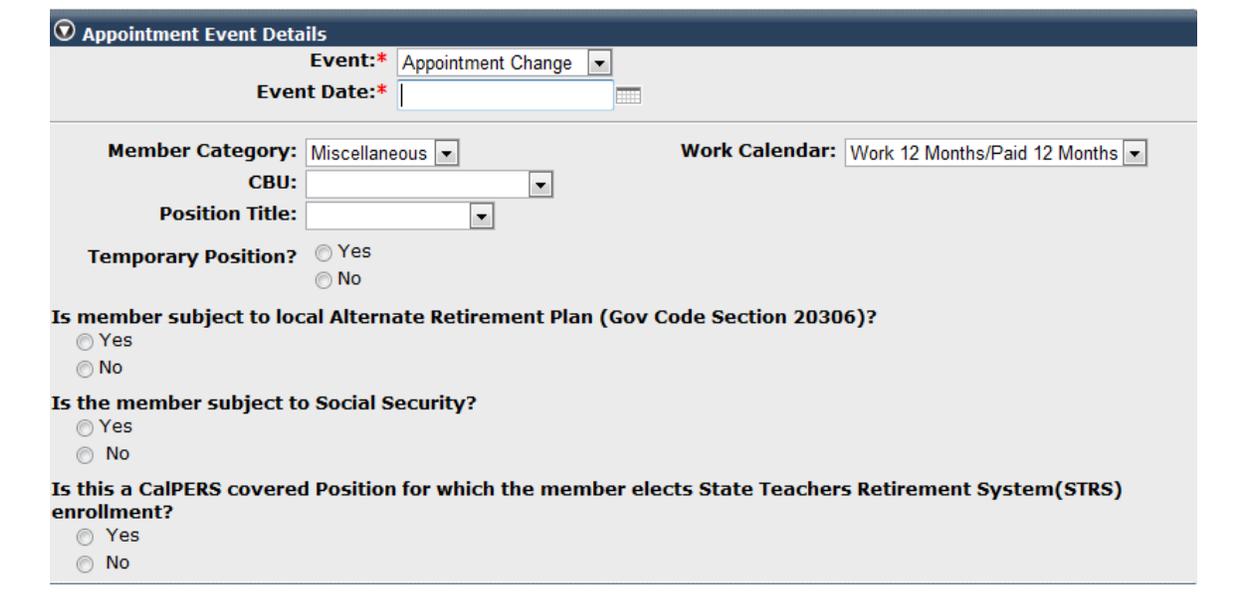
Scenario 4: Change Member Category, Continued

Figure 2-20. Event drop-down list in Appointment Event Details section



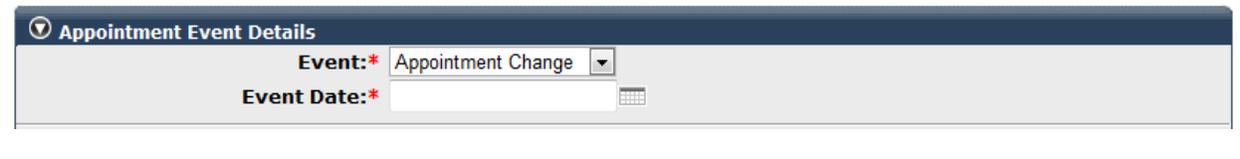
The screenshot shows the "Appointment Event Details" section. The "Event:" field is open, displaying a list of options: Site Change, Appointment Change, Begin Leave, End Leave, To Local ARP, From Local ARP, and Permanent Separation. The "Event Date:" field is empty. Below the form are "Save" and "Clear" buttons. At the bottom, there is a footer with the text: "Build: 110707_185634 Use | Site Requirements student001ds Server: ENV89_node2 UID: 341".

Figure 2-21. Appointment Event Details section



The screenshot shows the "Appointment Event Details" section. The "Event:" field is set to "Appointment Change". The "Event Date:" field is empty. Below the form are several fields: "Member Category:" (Miscellaneous), "Work Calendar:" (Work 12 Months/Paid 12 Months), "CBU:" (empty), "Position Title:" (empty), "Temporary Position?" (radio buttons for Yes and No), "Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?" (radio buttons for Yes and No), "Is the member subject to Social Security?" (radio buttons for Yes and No), and "Is this a CalPERS covered Position for which the member elects State Teachers Retirement System (STRS) enrollment?" (radio buttons for Yes and No).

Figure 2-22. Event Date field in Appointment Event Details section



The screenshot shows the "Appointment Event Details" section. The "Event:" field is set to "Appointment Change". The "Event Date:" field is empty. Below the form are "Save" and "Clear" buttons.

Continued on next page

Scenario 4: Change Member Category, Continued

Step	Action	Result
7	Within Appointment Event Details section, select the employee's new member category from the Member Category drop-down list.	See Figure 2-23. Appointment Event Details section
8	Update as necessary: <ul style="list-style-type: none"> ● Work Calendar ● CBU ● Position Title 	See Figure 2-23. Appointment Event Details section
9	Within Appointment Event Details section, select the appropriate radio buttons for the following: <ul style="list-style-type: none"> ● Temporary Position?* ● Is Member subject to local Alternate Retirement Program (Gov Code Section 20306)? ● Is the member subject to Social Security? ● Is this a CalPERS covered Position for which the member elects State Teachers Retirement System (STRS) enrollment? <p>* Temporary positions can be used when the permanent separation date is known in advance. Selecting yes will require entering the end date and will automatically create a permanent separation on the date entered field within the Appointment History section.</p>	See Figure 2-23. Appointment Event Details section
10	Select the Save button. The employee's member category now reflects the change. A new line item indicating "Appointment Change" displays in the Event column.	See Figure 2-24. Appointment Event History section Appointment Details and Events page displays.
	You have completed this scenario.	

Continued on next page

Scenario 4: Change Member Category, Continued

Figure 2-23. Appointment Event Details section

Appointment Event Details

Event:* Appointment Change ▼

Event Date:* 09/01/2016 📅

Member Category: Safety - Police ▼

Work Calendar: Work 12 Months/Paid 12 Months ▼

CBU: ▼

Position Title: ▼

Temporary Position? Yes
 No

Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?
 Yes
 No

Is the member subject to Social Security?
 Yes
 No

Is this a CalPERS covered Position for which the member elects State Teachers Retirement System(STRS) enrollment?
 Yes
 No

Figure 2-24. Appointment Event History section

Appointment Event History Add New

Correct Event Delete View All Site Events Display

Event Date ▼	Event	Event Details
<input type="radio"/> 09/01/2016	Appointment Change	View Event Details
<input type="radio"/> 04/28/2003	New Appointment	View Event Details

Correct Event Delete View All Site Events Display

Appointment Details

Programs

Program: CalPERS **Membership Date:** 04/28/2003

Membership Status: Active **Enrollment Eligibility Date:** 04/28/2003

Position Information

Employer: City of Oakland **CalPERS ID (Employer):** 4015143822

Original Hire Date: 04/28/2003

Member Category: Safety - Police **Work Calendar:** Work 12 Months/Paid 12 Months

New line item showing appointment change

New member category shown in Appointment Details section

Scenario 5: Permanent Separation from an Appointment



A permanent separation date must be reported for all employees who end employment with your agency, regardless of the reason. This is required in my|CalPERS to ensure benefits are administered timely and accurately, especially for those employees nearing retirement. All transactions within my|CalPERS, including health and retirement, rely on the permanent separation date to be reported in this manner.

The permanent separation date must be entered as **at least one day after** the last day on payroll at your agency, even if the date falls on a weekend or a holiday.

If your agency contracts to provide service credit for unused sick leave, you must report unused sick leave for all permanent separations, regardless of the reason for the separation.

Scenario: An employee informs you they are retiring.

Step-by-Step Follow the steps below to process a permanent separation.

Step	Action	Result
1	From the My Home page, select the Person Information global navigation tab.	Manage Reports page displays.
2	Enter the employee's CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	Person Search page displays.
3	Within the Appointment History section select the Employer name link for the "Active" appointment.	Appointment Details and Events page displays.
4	Within the Appointment Event History section, select the Add New button.	Appointment Change page displays.
5	Populate the following fields: <ul style="list-style-type: none"> ● Event "Permanent Separation" ● Event Date ● Separation Reason ● Unused Sick Leave ● Unused Education Leave 	See Figure 2-25. Appointment Event Details section

Continued on next page

Scenario 5: Permanent Separation from an Appointment, Continued

Figure 2-25. Appointment Event Details section

The screenshot shows a form titled "Appointment Event Details". It contains the following fields:

- Event:** A dropdown menu with "Permanent Separation" selected.
- Event Date:** A date input field with a calendar icon.
- Separation Reason:** A dropdown menu.
- Unused Sick Leave:** An input field containing "0.000" followed by the text "Days".
- Unused Education Leave:** An input field containing "0.000" followed by the text "Days".

Reporting Permanent Separation

Circular Letter [200-015-16](#), Reporting Permanent Separation Dates in my|CalPERS.
Pathway: [CalPERS website](#) > Employers > Resources: [Circular Letters](#)

Unused Sick or Education Leave

The **Unused Sick Leave** field is available only if your agency contracts to convert unused sick leave to service credit. If your agency contracts to provide service credit for unused sick leave, you must report unused sick leave for all permanent separations, regardless of the reason for the separation.

Divide total hours by eight for **Unused Sick Leave** days.

Education Leave should always be "0.000" for Public Agencies and Schools.

Continued on next page

Scenario 5: Permanent Separation from an Appointment, Continued

Step	Action	Result
6	Select the Save button.	<p>See Figure 2-26. Appointment Event History and Appointment Details sections</p> <p>Appointment Details and Events page displays.</p>
You have completed this scenario.		



Agencies should monitor the status of any employee on a long term absence. The employee must be separated in my|CalPERS when their employment is terminated. Use the Cognos **Participant Appointment Details Report** to help you reconcile active and separated employees.

Continued on next page

Scenario 5: Permanent Separation from an Appointment, Continued

Figure 2-26. Appointment Event History and Appointment Details sections

The screenshot displays two main sections: 'Appointment Event History' and 'Appointment Details'.

Appointment Event History:

Event Date	Event	Event Details
09/01/2016	Permanent Separation	Retirement
08/27/2001	New Appointment	View Event Details

Appointment Details:

Programs
Program: CalPERS
Membership Status: Inactive
Membership Date: 05/24/1993
Enrollment Eligibility Date: 08/27/2001

Position Information
Employer: City of Oakland
Original Hire Date: 01/11/1999
Member Category: Miscellaneous
Work Calendar: Work 12 Months/Paid 12 Months
Transit Worker: No
Position Title:
CBU: -

Alternate Retirement Plan (Gov Code Section 20306)?
Appointment ID: 25855460

Retired Annuitant: No
Contributing Appointment: No
Appointment Status: Perm Sep
Years Prior Service:
Enrollment Level: Classic
Member Base Rate: 8.0
Contribution Modification:

Leave Type:
Formula Name: 2.7% @ 55 Formula for Local Miscellaneous Members
Cost Share: 0.0

Created by User: CalPERS
Created on: 09/05/2011 05:50 AM
Updated by User: CalPERS
Updated on: 11/02/2012 11:05 AM

Appointment Profile Last Refreshed: 09/21/2016 10:40 AM
Refunded Appointment: No

Scenario 6: Update Unused Sick Leave Days on a Permanent Separation



If your agency contracts to provide service credit for unused sick leave, you must report unused sick leave for all permanent separations, regardless of the reason for the separation.

Scenario: After permanently separating an employee, you discover that you need to update their unused sick leave days.

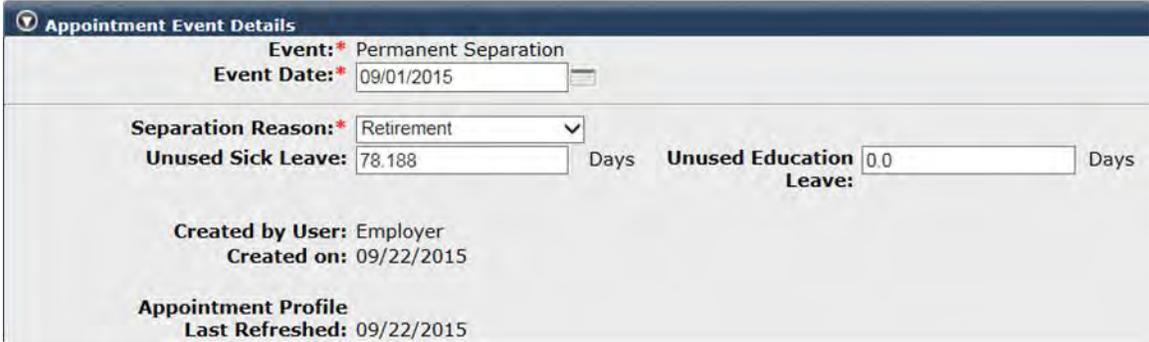
Step-by-Step Follow the steps below to update the unused sick leave.

Step	Action	Result
1	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.
2	Enter the employee's CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	Participant Summary page displays.
3	Within the Appointment History section, select the employer name link that has a "Permanent Separation" Appointment Status.	Appointment Details and Events page displays.
4	Within the Appointment Event History section, select the radio button for the permanent separation, then select the Correct Event button.	Appointment Change page displays.
5	Update the following fields as needed: <ul style="list-style-type: none"> ● Unused Sick Leave ● Unused Education Leave Report Unused Sick in days by dividing total hours by eight.	See Figure 2-27. Appointment Event Details section
6	Update Event Date and Separation Reason fields if necessary.	See Figure 2-27. Appointment Event Details section

Continued on next page

Scenario 6: Update Unused Sick Leave Days on a Permanent Separation, Continued

Figure 2-27. Appointment Event Details section



The screenshot shows a web-based form titled "Appointment Event Details". The form contains the following fields and values:

- Event:** Permanent Separation
- Event Date:** 09/01/2015
- Separation Reason:** Retirement
- Unused Sick Leave:** 78.188 Days
- Unused Education Leave:** 0.0 Days
- Created by User:** Employer
- Created on:** 09/22/2015
- Appointment Profile:** Last Refreshed: 09/22/2015

Unused Sick or Education Leave

The **Unused Sick Leave** field is available only if your agency contracts to convert unused sick leave to service credit. If your agency contracts to provide service credit for unused sick leave, you must report unused sick leave for all permanent separations, regardless of the reason for the separation.

Divide total hours by eight for **Unused Sick Leave** days.

Education Leave should always be "0.000" for Public Agencies and Schools.

Continued on next page

Scenario 6: Update Unused Sick Leave Days on a Permanent Separation, Continued

Step	Action	Result
7	Select the Save button. The permanent separation now has the correct number of Unused Sick Leave days. Click on the Membership Information Section title bar to view the sick leave amount entered.	See Figure 2-28. Appointment Event History section Appointment Details and Events page displays.
	You have completed this scenario.	



The following warning may appear if the **Unused Sick Leave** exceeds what my|CalPERS considers normal leave accrual. The warning message will allow employers to continue with the entered unused sick leave amount.

WARNING - The sick leave entered exceeds the average 8 hrs per month based on the employee's total earned service credit. Incorrect reporting may cause an overpayment in retirement benefit.

The warning message may be triggered if your agency contracts for more than 8 hours per month of sick leave.

my|CalPERS tolerances are calculated as follows:
8 hours per month x 12 (months per year) x number of years worked.

Continued on next page

Scenario 6: Update Unused Sick Leave Days on a Permanent Separation, Continued

Figure 2-28. Appointment Event History section

Appointment Event History [Add New](#)

View All Site Events

Event Date	Event	Event Details
<input type="radio"/> 09/01/2016	Permanent Separation	Retirement
<input type="radio"/> 08/27/2001	New Appointment	View Event Details

View All Site Events

Appointment Details

Programs

Program: CalPERS **Membership Date:** 05/24/1993
Membership Status: Inactive **Enrollment Eligibility Date:** 08/27/2001

Position Information

Employer: City of Oakland **CalPERS ID (Employer):** 4015143822
Original Hire Date: 01/11/1999
Member Category: Miscellaneous **Work Calendar:** Work 12 Months/Paid 12 Months

Transit Worker: No
Position Title:
CBU: -

Temporary Position: No
Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?
Appointment ID: 25855460

Retired Annuitant: No
Contributing Appointment: No
Appointment Status: Perm Sep **Leave Type:**
Years Prior Service:
Enrollment Level: Classic **Formula Name:** 2.7% @ 55 Formula for Local Miscellaneous Members
Member Base Rate: 8.0 **Cost Share:** 0.0

Contribution Modification:

Created by User: CalPERS **Updated by User:** CalPERS
Created on: 09/05/2011 05:50 AM **Updated on:** 09/05/2011 05:50 AM

Appointment Profile Last Refreshed: 09/21/2016 10:47 AM **Refunded Appointment:** No

Membership Information



Note the following when updating the unused sick leave days on a permanent separation:

If the employer reports the sick leave via myCalPERS...	Then...
Prior to the member's retirement date	In most cases, the sick leave will be included in the first calculation and the first retirement check
After the member's retirement date	An adjustment will be processed

Scenario 7: Add a Retired Annuitant Appointment – Retired from Your Agency



California retirement law and federal tax law provide specific employment restrictions for CalPERS retirees who return to work with a CalPERS covered agency. Ensure prospective retired annuitant is retired and has been retired for 180 days before adding the retired annuitant appointment.

There is critical information regarding post-retirement employment in unit 1, scenario 3, as well as in the appendix.

Scenario: You hired a CalPERS retiree as a retired annuitant. The retiree retired from your agency..

Step-by-Step Follow the steps below to add a retired annuitant appointment for a retiree who retired from your agency.

Step	Action	Result
Verifying Retired Status		
1	From the My Home page, select the Person Information global navigation tab.	Search for a Person page displays.
2	Enter the employee's CalPERS ID in the CaIPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	My Profile page displays.
3	Within the Appointment History section, select the Employer link with the earliest start date.	Appointment Details and Event page displays. See Figure 2-29. Appointment Details section
4	Within the Appointment Details section, capture the Original Hire Date .	My Profile page displays.
5	Select the Person Information global navigation tab to return back to the profile page.	

Continued on next page

Scenario 7: Add a Retired Annuitant Appointment – Retired from Your Agency, Continued

See Figure 2-29. Appointment Details section

▼ **Member Details**

Name: FEROLY EVELMA MEDINA-PEREZ **CalPERS ID:** 2790928163
Gender: Male **Date of Birth:** 03/01/1957

▼ **Appointment Event History** Add New

Correct Event Delete View All Site Events Display

Event Date	Event	Event Details
<input type="radio"/> 10/23/2012	Permanent Separation	Retirement
<input type="radio"/> 02/15/1986	New Appointment	View Event Details

Correct Event Delete View All Site Events Display

▼ **Appointment Details**

Programs
Program: CalPERS **Membership Date:** 02/15/1986
Membership Status: Retired **Enrollment Eligibility Date:** 02/15/1986

Position Information
Employer: City of Oakland **CalPERS ID (Employer):** 4015143822
Original Hire Date: 02/15/1986 **Work Calendar:** Work 12 Months/Paid 12 Months
Member Category: Safety - Fire

Transit Worker: No **Temporary Position:** No
Position Title: **Is member subject to local** No
CBU: - **Alternate Retirement Plan**

Gov Code Section
20306)?
Appointment ID: 1936990

Retired Annuitant: No **Leave Type:**
Contributing Appointment: No **Formula Name:** 3% @ 50 Patrol or Local
Appointment Status: Perm Sep **Safety Member**
Years Prior Service: **Cost Share:** 4.0
Enrollment Level: Classic

Member Base Rate: 9.0
Contribution Modification:

Created by User: Employer **Updated by User:** Employer
Created on: 11/06/2012 **Updated on:** 02/03/2015

Appointment Profile Last **Refunded Appointment:** No
Refreshed: 01/26/2016 12:34 PM

▲ **Membership Information**

Ensure member is retired

Capture the Original Hire Date

Continued on next page

Scenario 7: Add a Retired Annuitant Appointment – Retired from Your Agency, Continued

Step	Action	Result
5	Within the Appointment History section, select the Add New button.	See Figure 2-30. Appointment History section Appointment Details page displays.
Entering Appointment Details		
6	Populate the following in the Appointment Details section: <ul style="list-style-type: none"> • Program • Enrollment Eligibility Date (Date the employee is first hired as a retired annuitant.) • Original Hire Date (Date the employee was first hired by your agency.) • Member Category • Position Title • Work Calendar • Retired Annuitant? “Yes” • Temporary Position? “No” • CBU 	See Figure 2-31. Appointment Details section Even though a retired annuitant is a temporary position, “ Yes ” is only used in a few instances, such as for the CSUs or if the permanent separation date is known when enrolling
7	Within the Reciprocity section, do not select either radio button. If you do, ensure the “ No ” radio button is selected.	
8	Select the Save button.	See Figure 2-32. Appointment Details section
	You have completed this scenario.	



A notification will be sent to the retired annuitant and the employer upon reaching 700 & 800 hours within the fiscal year. A retired annuitant may be employed up to a **maximum of 960 hours** per fiscal year. Retired annuitants who work more than the 960 hour maximum per fiscal year under any circumstances are out of compliance with statute and subject to mandatory reinstatement. After you enroll a retired annuitant and process their payroll, you can run the Cognos **Retired Annuitant Hours Worked Report** to view their hours worked (including those with another agency) within the fiscal year.

Continued on next page

Scenario 7: Add a Retired Annuitant Appointment – Retired from Your Agency, Continued

Figure 2-30. Appointment History section

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City of Oakland		Regular		Safety - Fire	Perm Sep	02/15/1986	10/23/2012

Figure 2-31. Appointment Details section

Appointment Details

Program: CalPERS Enrollment Eligibility Date: CPE *

Position Information

Employer: City of Oakland
 Division:
 Original Hire Date: *
 Member Category: *
 Position Title:
 Work Calendar: * Work 12 Months/Paid 12 Months

Retired Annuitant? * Yes No
 Temporary Position? * Yes No
 CBU:
 Refunded Appointment * Yes No

Enrollment Eligibility Date is the date the RA is first hired as a *retired annuitant* at your agency

Original Hire Date is the date the RA was first hired at your agency. Since the employee retired from your agency, this date may be several years in the past.

Select **“No”** for retired annuitant enrollment

Figure 2-32. Appointment Details section

Appointment Details

Programs

Program: CalPERS Membership Date: 02/15/1986
 Membership Status: Retired Enrollment Eligibility Date: 09/01/2016

Position Information

Employer: City of Oakland CalPERS ID (Employer): 4015143822
 Original Hire Date: 02/15/1986
 Member Category: Miscellaneous Work Calendar: Work 12 Months/Paid 12 Months
 Transit Worker: No
 Position Title: Office Clerk
 CBU: -
 Temporary Position: No
 Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?
 Appointment ID: 92334713
 Retired Annuitant: Yes
 Contributing Appointment: No
 Appointment Status: Active
 Leave Type:
 Years Prior Service:
 Enrollment Level: Classic
 Formula Name: 2.5% @ 55 Formula for Local Miscellaneous Members
 Member Base Rate: 8.0
 Cost Share: 0.0
 Contribution Modification:
 Created by User: Employer
 Created on: 09/21/2016 11:11 AM
 Appointment Profile Last Refreshed: 09/21/2016 11:11 AM
 Refunded Appointment: No

Scenario 8: Add a Retired Annuitant Appointment – Retired from Different Agency



California retirement law and federal tax law provide specific employment restrictions for CalPERS retirees who return to work with a CalPERS covered agency. Ensure prospective retired annuitant is retired and has been retired for 180 days before adding the retired annuitant appointment.

There is critical information regarding post-retirement employment in unit 1, scenario 3, as well as in the appendix.

Scenario: You just hired a CalPERS retiree who retired from a different agency.

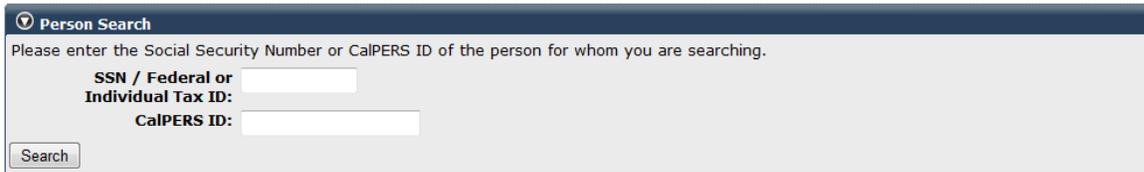
Step-by-Step Follow the steps below to add a retired annuitant from a different agency.

Step	Action	Result						
Verifying Retired Status								
1	From the My Home page, select the Person Information global navigation tab.	Person Search page displays.						
2	Enter the employee's CalPERS ID in the CalPERS ID field or the SSN in the SSN/Federal or Individual Tax ID field, then select the Search button.	See Figure 2-33. Person Search section						
3	Does the Search for a Person page display Anticipated or Actual Hire Date in the Hire Date section? <table border="1" data-bbox="315 1230 951 1541"> <thead> <tr> <th>If ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>The prospective employee has a my CalPERS history, but not at your agency. Continue to step 4.</td> </tr> <tr> <td>No</td> <td>The retiree's appointment details at your agency displays OR the Search for a Person page displays indicating "No results found" in the Search Results section.</td> </tr> </tbody> </table>	If ...	Then ...	Yes	The prospective employee has a my CalPERS history, but not at your agency. Continue to step 4.	No	The retiree's appointment details at your agency displays OR the Search for a Person page displays indicating " No results found " in the Search Results section.	See Figure 2-34. Hire Date section
If ...	Then ...							
Yes	The prospective employee has a my CalPERS history, but not at your agency. Continue to step 4.							
No	The retiree's appointment details at your agency displays OR the Search for a Person page displays indicating " No results found " in the Search Results section.							
4	Within the Hire Date section, enter the appropriate date into the Anticipated or Actual Hire Date field, then select the Continue button.	See Figure 2-35. Summary section My Profile page displays.						

Continued on next page

Scenario 8: Add a Retired Annuitant Appointment – Retired from Different Agency, Continued

Figure 2-33. Person Search section



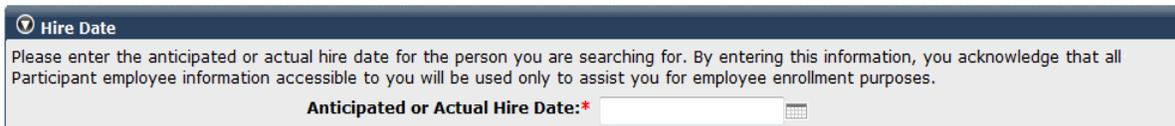
Person Search

Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

Figure 2-34. Hire Date section



Hire Date

Please enter the anticipated or actual hire date for the person you are searching for. By entering this information, you acknowledge that all Participant employee information accessible to you will be used only to assist you for employee enrollment purposes.

Anticipated or Actual Hire Date:*

Figure 2-35. Summary page



Summary

Profile

Name: TERRY MANRIQUE BARKEE	CalPERS ID: 2451529863
Prior School Membership: No	Optional Member: No
Member: Yes	Prior School Membership Date:
Membership Date: 03/12/2007	Retired: Yes
ARP: No	Retirement Date: 05/04/2013
5 Year Service Credit: Yes	ARP Effective Date:
Last Reporting Date: 05/03/2013	

Ensure member is retired and verify 180 day wait period has been met

Continued on next page

Scenario 8: Add a Retired Annuitant Appointment – Retired from Different Agency, Continued

Step	Action	Result
Entering Demographics Details		
5	Select the Reporting global navigation tab.	Manage Reports page displays.
6	Within the Create or Edit Report section, select “Add Retirement Enrollment” from the Method drop-down list, then select the Continue button.	Add Person page displays.
7	Populate the following in the Person Details section: <ul style="list-style-type: none"> ● First Name ● Last Name ● SSN ● Date of Birth ● Gender 	See Figure 2-36. Person Details and Address Details section
8	Skip the Address Details and the Communication Details sections, because even if the retiree gives you a new address, it won't override what's in the system. A retired annuitant's address and communication details are updated by the retiree via my CalPERS Member Self Service or by calling the CalPERS contact center.	See Figure 2-36. Person Details and Address Details sections
9	Select the Save & Continue button.	Appointment Details page displays.

Continued on next page

Scenario 8: Add a Retired Annuitant Appointment – Retired from Different Agency, Continued

Step	Action	Result
Entering Appointment Details		
10	<p>Populate the following in the Appointment Details section:</p> <ul style="list-style-type: none"> ● Program ● Enrollment Eligibility Date (Date the employee is first hired as a retired annuitant.) ● Original Hire Date (Date the employee was first hired by your agency.) * ● Member Category ● Position Title ● Work Calendar ● Retired Annuitant? “Yes” ● Temporary Position? “No” ● CBU 	<p>See Figure 2-37. Appointment Details section</p> <p>Important! *If the retired annuitant never worked as an active employee for your agency, use the Original Hire Date as the Enrollment Eligibility Date.</p>
11	<p>Within the Reciprocity section, do not select either radio button. If you do, ensure the “No” radio button is selected.</p>	<p>Even though a retired annuitant is a temporary position, “Yes” is only used in a few instances or if the permanent separation date is known when enrolling</p>
12	<p>Select the Save button.</p> <p>The retired annuitant now has an active appointment in my CalPERS.</p>	
	You have completed this scenario.	Figure 2-38. Appointment Details section

Continued on next page

Scenario 8: Add a Retired Annuitant Appointment – Retired from Different Agency, Continued

Figure 2-37. Appointment Details section

Appointment Details

Program
 Program: CalPERS
 Enrollment Eligibility Date: CPE*

Position Information
 Employer: City of Oakland
 Division:
 Original Hire Date:*
 Member Category:*
 Position Title: Update
 Work Calendar:* Work 12 Months/Paid 12 Months

Retired Annuitant* Yes No
 Temporary Position?* Yes No
 CBU:
 Refunded Appointment* Yes No

Enrollment Eligibility Date is the date the RA is first hired as a retired annuitant at your agency

Original Hire Date is the date the RA was first hired at your agency. Since the RA in our scenario worked for and retired from a different agency, the Enrollment Eligibility Date and the Original Hire Date would be the same.

Figure 2-38. Appointment Details section

Appointment Details

Programs
 Program: CalPERS
 Membership Status: Retired
 Membership Date: 03/12/2007
 Enrollment Eligibility Date: 09/01/2016

Position Information
 Employer: City of Oakland
 Original Hire Date: 09/01/2016
 Member Category: Miscellaneous
 Work Calendar: Work 12 Months/Paid 12 Months
 CalPERS ID (Employer): 4015143822
 Transit Worker: No
 Position Title: Office Clerk
 CBU: -
 Temporary Position: No
 Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?
 Appointment ID: 92334714
 Retired Annuitant: Yes
 Contributing Appointment: No
 Appointment Status: Active
 Years Prior Service:
 Enrollment Level: Classic
 Member Base Rate: 8.0
 Contribution Modification:
 Leave Type:
 Formula Name: 2.5% @ 55 Formula for Local Miscellaneous Members
 Cost Share: 0.0

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Unit 3: Reports

Overview

Introduction

The IBM Cognos tool runs the reports within my|CalPERS. In this unit, you will learn how to access Cognos through the my|CalPERS Reports link and locate and download reports relevant to retirement enrollments.

Cognos online resources are also included in this unit such as:

- my|CalPERS report descriptions, user roles, and status
 - Web browser settings requirements
-

Contents

This unit contains the following scenario:

Topic	See Page
Scenario 1 : Generate a Participant Pension Enrollment Data Report	66
Scenario 2 : Generate a Benefit Recipients by Employer Report	74
Cognos Reports Online Resources	80

Scenario 1: Generate a Participant Pension Enrollment Data Report

Introduction

Participant Pension Enrollment Data Report provides a listing of an employer's active employees' pension plan enrollment information from their appointment profile. The report can be generated for either all employees or an individual employee. Data in the report will be displayed as of the input date entered by the user.



Scenario: You are reconciling employee appointment data using my|CalPERS and you don't want to enter each and every employee's CalPERS IDs one at a time.

Step-by-Step

Follow the steps below to generate a **Participant Pension Enrollment Data Report**.

Step	Action	Result
Open Cognos Application		
1	From the my CalPERS My Home page select the Common Tasks left-side navigation link.	Common Tasks expands to display additional left-side navigation selections.
2	Select the Reports left-side navigation link.	See Figure 3-1. Reports link under Common Tasks on left-side navigation menu New window opens featuring Cognos application.
3	Select the My home icon from the Cognos window.	See Figure 3-2. My home icon on Cognos window IBM Cognos Connection displays in separate window featuring report folders.

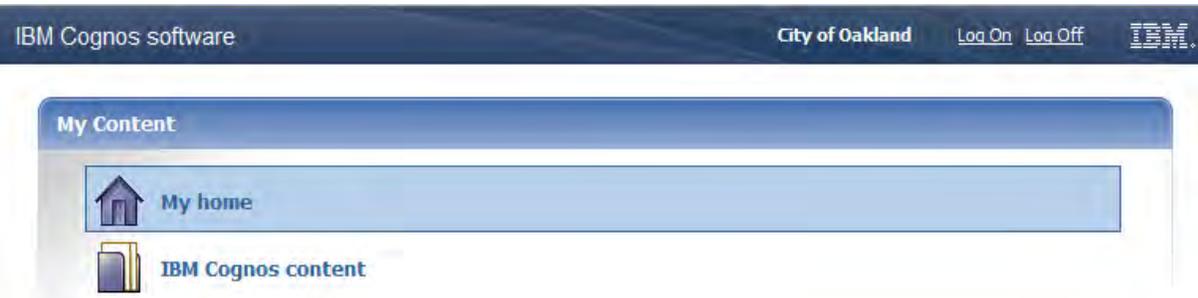
Continued on next page

Scenario 1: Generate a Participant Pension Enrollment Data Report, Continued

Figure 3-1. Reports link under **Common Tasks** on left-side navigation links



Figure 3-2. My home icon on Cognos window



Continued on next page

Scenario 1: Generate a Participant Pension Enrollment Data Report, Continued

Step	Action	Result
Navigate through Cognos® Window		
4	Select the PSR REPORTS ENV98 link located next to the (yellow) folder  .	See Figure 3-3. Public folders in Cognos Folder opens displaying reports contained inside.
5	Navigate through reports using the right hand   directional arrows, or enter a keyword from the name of the report in the search field,  then select the search icon. Note: Reports are listed alphabetically.	See Figure 3-4. Reports in Cognos window
6	Select the link for the Participant Pension Enrollment Data Report.	Report opens, prompting user to enter required information.

Continued on next page

Scenario 1: Generate a Participant Pension Enrollment Data Report, Continued

Figure 3-3. Public folders in Cognos

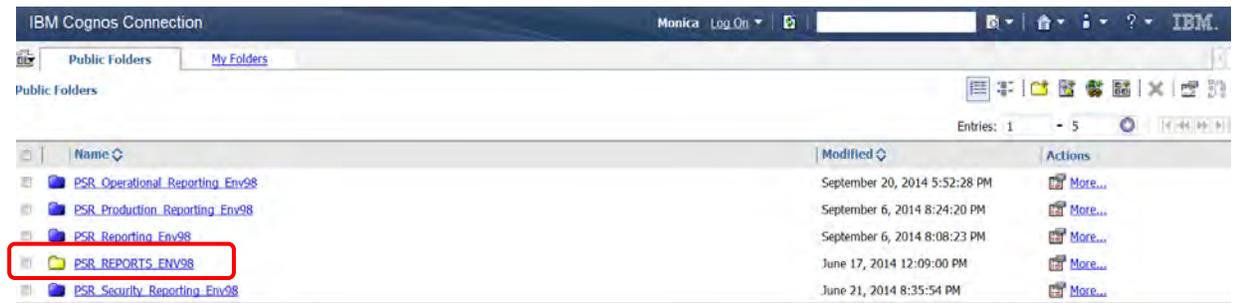
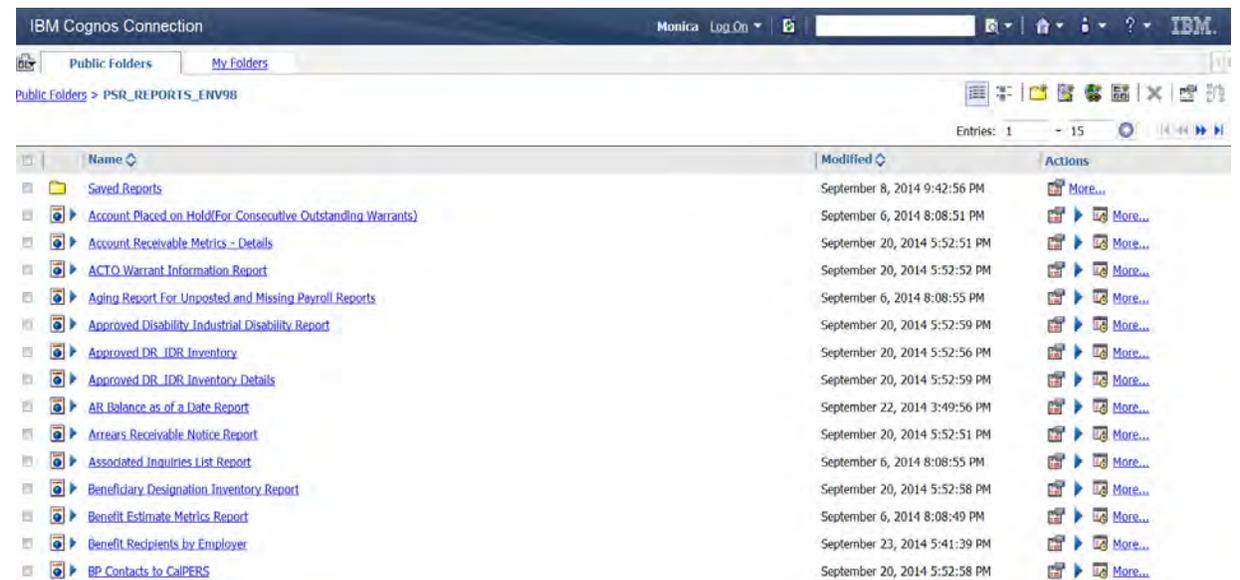


Figure 3-4. Reports in Cognos window



Continued on next page

Scenario 1: Generate a Participant Pension Enrollment Data Report, Continued

Step	Action	Result						
View and Save Report								
7	Select the appropriate CalPERS ID from the Enter Employer ID drop-down list.	See Figure 3-5. Participant Pension Enrollment Data Report in Cognos window						
8	Enter the Select As of Date in the Date field.							
9	Do you want to run the report for one individual employee? <table border="1" style="width: 100%;"> <thead> <tr> <th>If ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Enter the employee's CalPERS ID in the Enter Participant ID field, then continue to step 10.</td> </tr> <tr> <td>No</td> <td>Continue to the step 10 to generate the report for all employees in your agency.</td> </tr> </tbody> </table>	If ...	Then ...	Yes	Enter the employee's CalPERS ID in the Enter Participant ID field, then continue to step 10.	No	Continue to the step 10 to generate the report for all employees in your agency.	See Figure 3-6. Participant Pension Enrollment Data Report in Cognos window
If ...	Then ...							
Yes	Enter the employee's CalPERS ID in the Enter Participant ID field, then continue to step 10.							
No	Continue to the step 10 to generate the report for all employees in your agency.							
10	Select the Finish button. Report may take several minutes to run.	Participant Pension Enrollment Data Report details display in open Cognos window.						
11	Do you want to save a copy of this report? <table border="1" style="width: 100%;"> <thead> <tr> <th>If ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Continue to step 12</td> </tr> <tr> <td>No</td> <td>You have completed this scenario</td> </tr> </tbody> </table>	If ...	Then ...	Yes	Continue to step 12	No	You have completed this scenario	
If ...	Then ...							
Yes	Continue to step 12							
No	You have completed this scenario							

Continued on next page

Scenario 1: Generate a Participant Pension Enrollment Data Report, Continued

Figure 3-5. Participant Pension Enrollment Data Report in Cognos window

Figure 3-6. Participant Pension Enrollment Data Report in Cognos window

First Name	Middle Name	Last Name	CalPERS ID	Enrollment Level	Pension Formula	Member Base Rate	Cost Share	Contribution Modification
FREDAH		ADDISON-TERRY	5426238419	Classic	3% @ 50 Patrol or Local Safety Member	[Business Layer]. [Participant Pension Enrollment Data Report]. [Member Base Rate].0%	0.0%	
MAI LANI		AUG JR	1003140705	Classic	2.7% @ 55 Formula for Local Miscellaneous Members	[Business Layer]. [Participant Pension Enrollment Data Report]. [Member Base Rate].0%	0.0%	
MAI LANI	MA ERIKA	BAUTHEROT	2155609160	Classic	2.7% @ 55 Formula for Local Miscellaneous Members	[Business Layer]. [Participant Pension Enrollment Data Report]. [Member Base Rate].0%	0.0%	
MIKELYU	FLOREMC	BEFFEL	6675916406	Classic	2.7% @ 55 Formula for Local Miscellaneous Members	[Business Layer]. [Participant Pension Enrollment Data Report]. [Member Base Rate].0%	0.0%	
RUBERTA		BENZAKEN	1855919752	Classic	2.7% @ 55 Formula for Local Miscellaneous Members	[Business Layer]. [Participant Pension Enrollment Data Report]. [Member Base Rate].0%	0.0%	
LE'ARTHUR	YUEH-HSIA	BISHOP-DRESSEL	1839628941	Classic	3% @ 50 Patrol or Local Safety Member	[Business Layer]. [Participant Pension Enrollment Data Report]. [Member Base Rate].0%	[Business Layer]. [Participant Pension Enrollment Data Report]. [Cost Share]%	
ELONDRA	BONDY	BOLDT-LARUE	2227945040	Classic	2.7% @ 55 Formula for Local Miscellaneous Members	[Business Layer]. [Participant Pension Enrollment Data Report].	0.0%	

Continued on next page

Scenario 1: Generate a Participant Pension Enrollment Data Report, Continued

Step	Action	Result
Export to Excel		
12	<p>Select the View in HTML Format  drop-down list arrow to indicate saving selections.</p> <p>In selecting the View in Excel Options link, different versions and options are available:</p> <div data-bbox="297 636 732 858" style="border: 1px solid black; padding: 5px;"> <p> View in Excel 2007 Format</p> <p> View in Excel 2002 Format</p> <p> View in Excel 2000 Single Sheet Format</p> <p> View in Excel 2000 Format</p> <p> View in CSV Format</p> </div> <p>For best results, select the View in CSV Format link. You may save the CSV file in Excel to your computer.</p>	<p>See Figure 3-7. View in HTML Format drop-down list</p> <p>The HTML drop-down list arrow expands to display the following:</p> <div data-bbox="932 632 1224 812" style="border: 1px solid black; padding: 5px;"> <p> View in HTML Format</p> <p> View in PDF Format</p> <p> View in XML Format</p> <p> View in Excel Options ▶</p> </div>
13	Make selection to “Open,” “Save,” or “Save as” after dialogue box appears.	
14	Select the Yes button after the Microsoft Excel dialogue appears.	
You have completed this scenario.		

Continued on next page

Scenario 1: Generate a Participant Pension Enrollment Data Report, Continued

Use globe icon for viewing and saving options

Figure 3-7. View in HTML Format drop-down list

Participant Pension Enrollment Data Report

Date: Jun 6, 2016

Pension Formula	Member Base Rate	Cost Share	Contribution Modification
2% @ 62 Formula for Miscellaneous/Industrial Members	6.75%	0.0%	
2.7% @ 55 Formula for Local Miscellaneous Members	8.0%	0.0%	
2.7% @ 55 Formula for Local Miscellaneous Members	8.0%	0.0%	
2.7% @ 55 Formula for Local Miscellaneous Members	8.0%	0.0%	
3% @ 50 Patrol or Local Safety Member	9.0%	[Business Layer],[Participant Pension Enrollment Data Report].[Cost Share]%	
2.7% @ 55 Formula for Local Miscellaneous Members	8.0%	0.0%	
2.7% @ 55 Formula for Local Miscellaneous Members	8.0%	0.0%	

Scenario 2: Generate a Benefit Recipients by Employer Report

Introduction **Benefit Recipients by Employer Report** lists benefit recipients (CalPERS retirees/survivors) who have a benefit being paid for by an employer, basic information about recipients including addresses, and a breakdown of benefit types.



Scenario: Your agency would like to verify the addresses of all of their CalPERS benefit recipients.

Step-by-Step Follow the steps below to generate a **Benefit Recipients by Employer Report**.

Step	Action	Result
Open Cognos Application		
1	From the my CalPERS My Home page select the Common Tasks left-side navigation link.	Common Tasks expands to display additional left-side navigation selections.
2	Select the Reports left-side navigation link.	See Figure 3-8. Reports link under Common Tasks on left-side navigation menu New window opens featuring Cognos application.
3	Select the My home icon from the Cognos window.	See Figure 3-9. My home icon on Cognos window IBM Cognos Connection displays in separate window featuring report folders.

Continued on next page

Scenario 2: Generate a Benefit Recipients by Employer Report, Continued

Figure 3-8. Reports link under Common Tasks on left-side navigation links



Figure 3-9. My home icon on Cognos window



Continued on next page

Scenario 2: Generate a Benefit Recipients by Employer Report, Continued

Step	Action	Result
Navigate through Cognos® Window		
4	Select the PSR REPORTS ENV98 link located next to the (yellow) folder  .	See Figure 3-10. Public folders in Cognos Folder opens displaying reports contained inside.
5	Navigate through reports using the right hand   directional arrows, or enter a keyword from the name of the report in the search field,  then select the search icon. The reports are listed alphabetically.	See Figure 3-11. Reports in Cognos window
6	Select the link for the Benefit Recipients by Employer Report.	Report opens, prompting user to enter required information.

Run With Options

If you only want to view a report in another format like Excel or PDF, instead of selecting the report name link on step 6, run a report in a specific format using these steps and it will save time:

1. Select the **Run with Options** icon  to the right of the report name:

 [Benefit Recipients by Employer](#) July 1, 2015 9:50:46 AM   [More...](#)

2. Select the format you want the report to be run in the Format dropdown
[Select how you want to run and receive your report.](#)

Format:

list: 

3. Select the **Run** button at the bottom left.
4. Continue with steps 7-10.

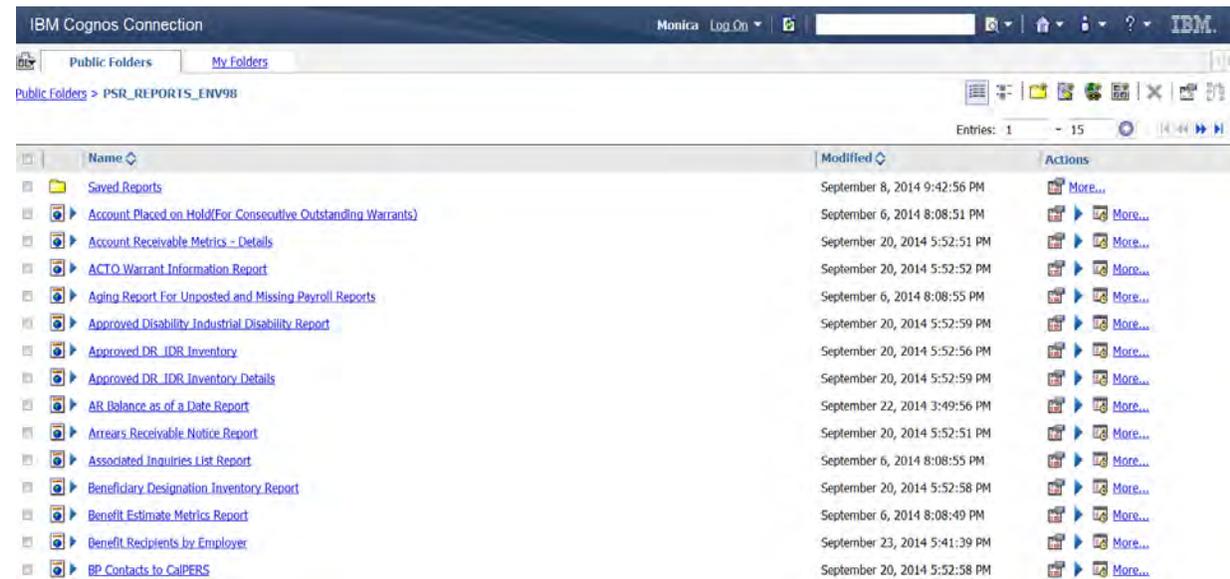
Continued on next page

Scenario 2: Generate a Benefit Recipients by Employer Report, Continued

Figure 3-10. Public folders in Cognos



Figure 3-11. Reports in Cognos window



Continued on next page

Scenario 2: Generate a Benefit Recipients by Employer Report, Continued

Step	Action	Result						
View and Save Report								
7	Select the appropriate Business Partner's CalPERS ID and name from the drop-down list. Dates are not required.	See Figure 3-12. Benefit Recipients by Employer Report in Cognos window						
8	Select the Finish button. Report may take several minutes to run.	Benefit Recipients by Employer Report details display in open Cognos window						
9	Do you want to save a copy of this report? <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">If ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Continue to step 10</td> </tr> <tr> <td>No</td> <td>You have completed this scenario</td> </tr> </tbody> </table>	If ...	Then ...	Yes	Continue to step 10	No	You have completed this scenario	
If ...	Then ...							
Yes	Continue to step 10							
No	You have completed this scenario							
10	Select the View in HTML Format  drop-down list arrow to indicate saving selections. In selecting the View in Excel Options link, different versions and options are available: <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <ul style="list-style-type: none">  View in Excel 2007 Format  View in Excel 2002 Format  View in Excel 2000 Single Sheet Format  View in Excel 2000 Format  View in CSV Format </div> For best results, select the View in CSV Format link. You may save the CSV file in Excel to your computer.	See Figure 3-13. View in HTML Format drop-down list The HTML drop-down list arrow expands to display the following: <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <ul style="list-style-type: none">  View in HTML Format  View in PDF Format  View in XML Format  View in Excel Options ▶ </div>						
	You have completed this scenario.							

Continued on next page

Scenario 2: Generate a Benefit Recipients by Employer Report, Continued

Figure 3-12. Benefit Recipients by Employer in Cognos window

Figure 3-13. View in HTML Format drop-down list

Benefit Recipient's CalPERS ID	Last Name	First Name	Middle Initial	Birthdate	Care Of	Address (1)	Address (2)	Address (3)	City	State	ZIP	Country	Member Category	Payee Type	Separation Date
3119800089	Arellano Jara	Thuytrang	A	9/23/1934		21230 LEWIS ST			FAIRFIELD	CA	94533-2335		Miscellaneous	Owner	12/1/1999
3050255985	Cantutay	Nina M	T	4/29/1940		1219 BOBOLINK DR.			LAFAYETTE	CA	94549-0000		Miscellaneous	Owner	6/30/2005
5900770697	Ciappa	Escano		8/12/1960		41211 GRANADA CIR			ORANGE	CA	92868-3461		Miscellaneous	Owner	9/12/2011
1680914016	Cocova	Skywalker Thomas		8/28/1967		919 RESERVE DR. STE 138			SAN LEANDRO	CA	94578		Safety - Police	Owner	1/23/2013

Benefit Effective Date	Benefit Type	Basic Employer Indicator	Benefit Option	Gross Benefit	COLA	CSP	CSA	PSP	SLP	AA	CSPTA	PSPTA	CSPC	PSPC	SLPC
12/1/1999	Service Retirement	Y	Unmodified Allowance	\$4,369.11	\$1,122.87	\$403.72	\$1,219.40						\$1,623.12		
6/30/2005	Service Retirement	Y	Unmodified Allowance	\$4,046.15	\$660.53	\$680.03	\$1,012.78						\$1,692.81		
9/13/2011	Service Retirement	Y	Unmodified Allowance	\$1,410.24	\$97.02	\$730.79	\$582.43								

Cognos Reports Online Resources

Introduction

The CalPERS website has a page where you can view reports descriptions; user roles needed, and web browser settings procedures.

my|CalPERS Reports Descriptions, User Roles, and Status

The my|CalPERS Employer Reports (Cognos) page includes a listing of the Cognos reports available to employers, a description of each report, the user roles* needed to run each report, and the status (if the report is available or unavailable) of the report. Each report name link includes a sample of the generated report.

[my|CalPERS Employer Reports \(Cognos\)](#)

Pathway: [CalPERS website](#) > Employers > my|CalPERS Technical Requirements > my|CalPERS Employer Reports (Cognos)

*If you don't have the user roles needed to run a report, your agency's system access administrator (SAA) can grant the roles to you. SAAs can select the [System Access Administrators](#) link on the my|CalPERS Technical Requirements page for some helpful resources.

See Figure 3-14. my|CalPERS Technical Requirements page

Web Browser Settings

A document outlining step-by-step procedures to update your web browser settings is located at:

[my|CalPERS Cognos Reports Browser Requirements](#)

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > my|CalPERS Employer Reports (Cognos) > my|CalPERS Cognos Reports Browser Requirements

See Figure 3-15. my|CalPERS Employer Reports (Cognos) page

Continued on next page

Cognos Reports Online Resources, Continued

Figure 3-14. my|CalPERS Technical Requirements page

Figure 3-15. my|CalPERS Employer Reports (Cognos) page

Within my|CalPERS, you can use the Cognos application to query your agency's data and generate reports in multiple formats using criteria you choose. Before generating Cognos reports, you'll want to:

- Confirm the report you want to generate is enabled and you have the system access to run it. Refer to the table below to see report descriptions, example PDFs, required user access roles, and status.
- Ensure your Web browser's security settings aren't too restrictive, which will prevent you from using Cognos' functionality. Refer to my|CalPERS Cognos Reports Browser Requirements (PDF).

For instructions on generating reports, view my|CalPERS Course 205: So You Want to Run a Cognos Report? (PDF, 4.29 MB).

To access Cognos reports, log in to my|CalPERS and select **Reports** under the **Common Tasks** menu in the left-side navigation area.

✔ Available
 ✘ Unavailable

Show entries

Report	Type	User Role	Status
Arrears Receivable Detail Report (PDF) Provides a detailed list of individual member receivables created for mandatory and 20283 arrears	Financials	<ul style="list-style-type: none"> • AR/Billing • Employer Maintenance • PA Billing • Payroll • Retirement Enrollment 	✔
Benefit Recipient by Employer Report (PDF) Lists benefit recipients (CalPERS retirees/survivors) who have a benefit being paid for by an employer, basic information about recipients, and a breakdown of benefit by disbursement (can filter by providing	Benefits	<ul style="list-style-type: none"> • Retirement Enrollment 	✔

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Appendix: Retirement Enrollment Basics Resources

Overview

Introduction An additional my|CalPERS instructional scenario and other resources are available within this appendix and may be beneficial to you.

Contents This section contains the following topics:

Topic	See Page
Retired Annuitant 180 Day Wait Period Exception Process	84
CalPERS Resources	86
Retirement Enrollment Online Resources	88
Navigating my CalPERS	89
my CalPERS Submit Inquiry	94
Defect Report Instructions	96
CalPERS Contacts	97

Retired Annuitant 180 Day Wait Period Exception Process

Introduction

It is the equal responsibility of the employer and retiree to ensure all retired annuitant requirements and restrictions are met. Violation of any post-retirement employment restriction can result in (1) reinstatement from retirement, i.e., termination of the retiree's retirement benefits, (2) reimbursement by the retiree to CalPERS, of the retirement benefits received during the period of unlawful employment and, (3) payment of retroactive employer and member contributions, plus interest.

180 Day Wait Period Exceptions

A retiree cannot be employed as a retired annuitant within 180 days of their retirement date unless an exception is either provided in law or is obtained by the employer. When an employer exception is required, the governing body of the employer must approve the exception by passing a resolution in a public meeting. If the employer is a school district, the governing body of the County Office of Education passes the resolutions to approve these exceptions.

Circular Letter [200-002-14](#) provides the requirements for lawful post-retirement employment and includes an [Employer Checklist for Hiring CalPERS Retirees](#) as an attachment.

[Sample 180-Day Wait Period Resolutions](#)

Pathway: CalPERS website > Employers > I Want To...: Read About Pension Reform > Resources: Sample 180-Wait Period Resolutions (box on right)

CalPERS requires the employer to submit a copy of the approved resolution with copies of the (1) employment agreement or personnel action form, (2) the publicly available salary or pay schedule for the position, (3) proof there is an open recruitment for the vacant position when the retiree will be employed as an interim appointment to a vacant position. **These documents should be received by CalPERS before the retiree begins working to ensure the retiree will not be unlawfully employed.**

These documents can be submitted by email to the following mailbox: BNSD_Post_Retirement_Administration@CalPERS.CA.GOV.

CalPERS will review the documents and advise the employer as to whether the exception resolution package is valid or invalid, and if invalid, the action(s) required to bring the employment into compliance.

Continued on next page

Retired Annuitant 180 Day Wait Period Exception Process, Continued

Other Post-Retirement Laws

Prior to hiring a retired annuitant, it is important to understand all of the laws governing post-retirement employment and the consequences of unlawful employment. Information about the requirements and restrictions for lawful post-retirement employment can be found in:

- Circular Letter [200-002-14](#), for employers.
Pathway: CalPERS website > Employers > Resources: [Circular Letters](#) > Enter 200-002-14 in the Search Letter No. field.
The Circular Letter includes an attachment [Employer Checklist for Hiring CalPERS Retirees](#).
 - [CalPERS Public Agency & Schools Reference Guide](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide
 - [Employment After Retirement \(PUB 33\)](#)
Pathway: CalPERS website > Employers > Forms & Publications, View All > Enter PUB 33 in the Search field.
-

CalPERS Resources

Information for Employers

Obtain information for employers on the CalPERS website at www.calpers.ca.gov, then select the **Employers** tab.



Forms & Publications Page

Obtain forms and publications by going to the CalPERS website at www.calpers.ca.gov, then select the [View All](#) link under Forms & Publications:



Forms & Publications

[Beneficiary Designation \(PDF\)](#)

[Facts at a Glance \(PDF\)](#)

[Health Benefit Summary \(PDF\)](#)

[Planning Your Service Retirement \(PUB 1\) \(PDF\)](#)

[Service Credit Purchase Options \(PUB 12\) \(PDF\)](#)

[Service Retirement Application \(PUB 43\) \(PDF\)](#)

[Tax Withholding Election \(PDF\)](#)

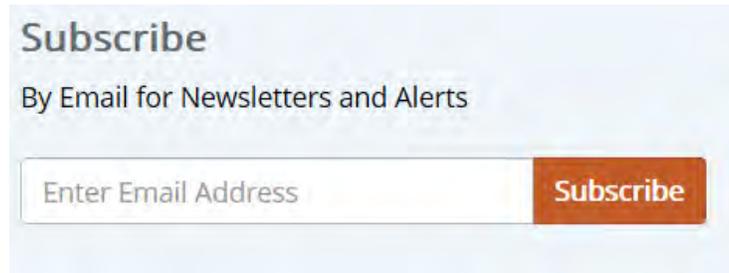
[View All →](#)

Continued on next page

CalPERS Resources, Continued

Subscribe to Employer Bulletins and Circular Letters

Subscribe to Employer Bulletins and receive Circular Letters via email by going to the CalPERS website at www.calpers.ca.gov, then enter your email address under Subscribe.



The image shows a light blue rectangular box containing a subscription form. At the top left of the box, the word "Subscribe" is written in a bold, dark blue font. Below it, the text "By Email for Newsletters and Alerts" is displayed in a smaller, dark grey font. At the bottom of the box, there is a white input field with the placeholder text "Enter Email Address" and a dark orange button with the word "Subscribe" written in white.

Note: You may also search for a previously published Circular Letters by subject or date.

Pathway: CalPERS website > Employers > Resources: [Circular Letters](#)

Retirement Enrollment Online Resources

Retirement Enrollment Resources on the CalPERS Website

The following links are valuable references to assist you in reporting your agency's retirement enrollments in my|CalPERS:

[my|CalPERS Student Guides](#)

Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides

[my|CalPERS Quick Reference Guide for Employers](#)

Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides> scroll down to the Supplemental Materials section

[Employer Education Schedule](#)

Pathway: CalPERS website > Employers > I Want To... : Find my|CalPERS Student Guides > Employer Education Schedule

[my|CalPERS Technical Requirements](#)

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements

[CalPERS Public Agency & Schools Reference Guide](#)

Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide

[my|CalPERS Technical Toolkits](#)

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > Technical Toolkits > + Employers

[Frequently Asked Questions \(FAQ\)](#)

Pathway: CalPERS website > About > Resources: Frequently Asked Questions

PEPRA Additional Resources

Implementation of Public Employees' Pension Reform Act of 2013 Circular Letter [200-055-12](#)

[Member Reciprocal Self-Certification Form](#)

Pathway: CalPERS website > Employers > Forms & Publications, View All > Enter Member Reciprocal in the Search field

Navigating my|CalPERS

my|CalPERS – My Home Page

The screenshot below shows the my|CalPERS – My Home page with a description of the main features. See the following pages for more details about:

- Global navigation tabs
- Local navigation links
- Left-side navigation links
- Help links

The screenshot shows the my|CalPERS My Home page with several callout boxes:

- Global navigation tabs:** Home, Profile, Reporting, Person Information, Education, Other Organizations
- Header links:** Content, Footer, Welcome Hillary, Help, Contact Us, CalPERS, Log out, January 12, 2016
- Local navigation links:** My Home, Requests
- Access the Forms and Publications page:** Forms and Publications Center
- Left-side navigation links:** Common Tasks, Menu, Person Search, Contact Personal Security Settings
- Check My Messages for important updates and upcoming training opportunities:** My Messages section with a table of messages.
- Box/area is called a section:** My Cases section.
- Employer News at the top:** Welcome Employer News section.
- CalPERS News at the bottom:** CalPERS News section.
- View More Actions expands section to show more items:** View More Actions link in the My Cases section.
- Health Plan Search by ZIP Code:** Search form for health plans.
- Don't Miss Out!** Access training via the Education tab.
- QUICK LINKS:** CalPERS Quick Picks, CalPERS On-Line, Edit Quick Links >>

Date	Message
01/11/2016	CalPERS Benefit Education Events - Rohnert Park (Jan 29-30) CalPERS is hosting the CalPERS Benefits Education Events to help your employees make informed decisions about their retirement. Get the word out by posting the attached flier at your workplace. View Document
01/07/2016	2016 Employer Education Classes (Jan 12-14, Jan 26-28) CalPERS offers both Business Rules and my CalPERS training to help you successfully conduct business with us. Register now for classes offered at the Walnut Creek Regional Office. View Document
12/30/2015	IRS Extension of Affordable Care Act Reporting for 2015 (Section 6055 & 6056) The IRS extended due dates for 2015 information reporting requirements under the Affordable Care Act. The extension applies to applicable larger employers and providers of minimum essential coverage. View Document

Case ID	Case Title	Case Type	Program	Status	View More Actions
2120725		Non-PERS Health Contract		Closed	
2083391		Amend Retirement Contract		Open	
2078300		Amend Retirement Contract		Closed	

Continued > next page

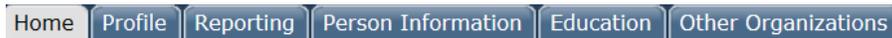
Navigating my|CalPERS, Continued

my|CalPERS – Global Navigation Tabs, Local Navigation Links, and Left-Side Links

Listed below are descriptions of the global navigation tabs and the commonly used local navigation links and left-side navigation links. Local and left-side navigation links change depending on the global navigation tab you selected.

Common Tasks items do not change.

Global Navigation Tabs



Home: Refresh the query page to search for another employee or retiree with the agency.

Profile: Displays an agency's Business Partner Summary page which lists employer address(s) & communication information, contacts & users for the agency, business partner relationships, and retirement contract/agreements. Refreshing by selecting the **Profile** tab will prevent the expiring password reminder from reoccurring.

Reporting: Process a new retirement enrollment, health enrollments, and payroll. See the Billing and Payments local link below for additional information.

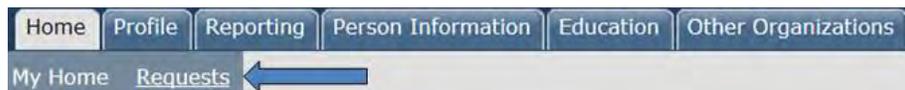
Person Information: Query employee and retiree health and retirement information; add, correct, and delete appointment information.

Education: Sign up for employer instructor-led or online classes.

Other Organizations: View other employer contact information e.g., addresses, email, name and phone numbers, if the employer opted to make it public to other employers.

Local Navigation Links

The first local links are not included in this list because they refresh the same page as the global tab.



- From the **Home** global navigation tab:
 - Requests: Request publications
-

Continued on next page

Navigating my|CalPERS, Continued

Local Navigation Links, continued

- From the **Profile** global navigation tab:
 - **Payments:** View the status of payments e.g., pending, posted, cancelled, etc.
 - **Receivables:** View open & closed receivables, due dates & amounts, receivable balance, and receivable description. You can also generate an employer receivable report.
 - **Retirement Contract:** View, add, or modify a resolution, submit a valuation request, request an amendment to an agency's CalPERS contract
 - **Health Contract:** View an agency's health contract(s) and their effective dates
- From the **Reporting** global navigation tab:
 - **Billing and Payments:** View year-to-date billing and payments for contributions and health, receivable history, health billing roster, and the option to quick pay a receivable or download a Remittance Advice Report to mail with a check to pay contributions
 - **Payroll Schedule:** Add a new schedule, request an extension or exemption
 - **Member Requests:** Update the status of an employment certification request, view historical certification information, provide employer certification for a period of service that is not listed, and add a new employment service period
 - **Health Reconciliation:** This is only used by health carriers

Left-Side Navigation Links

- From the **Common Tasks** folder left-side link:
 - **Reports:** Run reports via the Cognos application (See unit 4)
 - **Document History:** View documents that you sent or those CalPERS provided for the agency
 - **Inquiry List:** View communication and inquiry/response history. Refer to the Submit Inquiry steps 6 – 7 which are located after this information on Navigating my|CalPERS.
 - **Submit Inquiry:** Submit a question or information to CalPERS through a secure connection with my|CalPERS. You can include confidential data, such as an SSN. Refer to the Submit Inquiry details which are located after this information on Navigating my|CalPERS.



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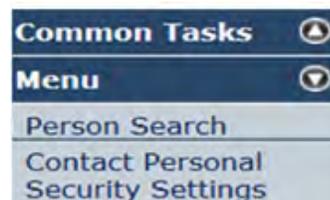
Navigating my|CalPERS, Continued

Left-Side Navigation Links, continued

The left-side links are dictated by the global navigation tabs, local navigation links, and some links within the body of the pages.

- From the **Home** global navigation tab:

- **Person Search:** Query employee/retiree information
- **Contact Personal Security Settings:** Change your password, challenge questions, or security image and message



- From the **Profile** global navigation tab:

- **Contacts:** Lists current and former my|CalPERS contacts
- **Relationships:** Lists any business partner relationships that you established to do business on behalf of your agency
- **Divisions:** Lists an agency under the umbrella of your agency e.g., a school district is a division of a county office
- **Findings:** Displays the findings after a CalPERS auditor has reviewed the agency

- From the **Profile** tab, Receivables local link:

- **Payments:** View payments e.g., pending, posted, cancelled etc.
- **Payment Accounts:** View, add, or delete banking accounts
- **Rate Plan Details:** View the year-to-date PERS contributions

- From the **Profile** tab, Retirement Contract local link:

- **View Benefits:** View benefit levels and provision
- **Maintain Positions:** Add or update positions. Each agency determines the codes and position names for each category.

- From the **Profile** tab, Health Contract local link, select a health contract link:

- **Group Summary:** View the medical groups
- **Contribution Preview:** View the agency's contribution toward enrollees' health premiums & vesting information
- **Subscriber List:** View all enrolled under the agency and the number covered
- **Contract History:** View the contract's state, type, status, etc.

Continued on next page

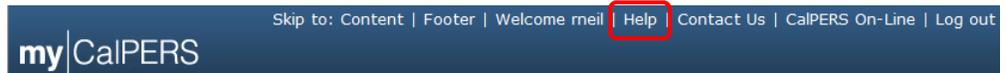
Navigating my|CalPERS, Continued

Left-Side Navigation Links, continued

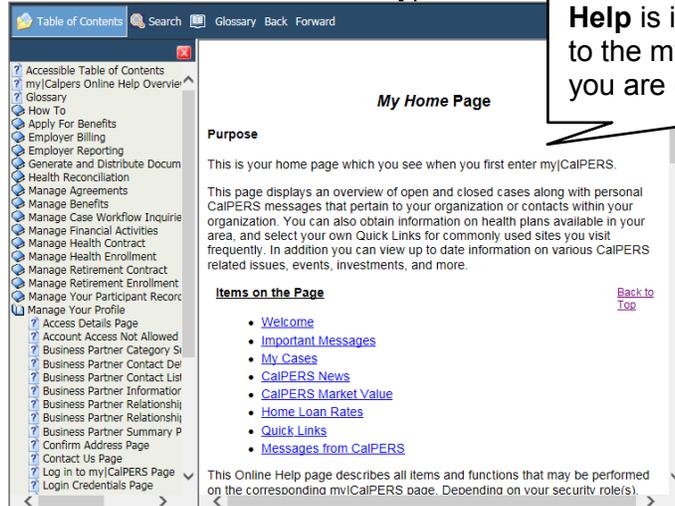
- From the **Reporting** global navigation tab:
 - **Adjustment Reports:** Create a payroll adjustment report to add adjustment records
 - **Search Payroll Records by Participant:** To search for posted or unposted payroll records for a specific employee
- From the **Reporting** tab, Billing and Payments local link:
 - **Super Funded Accounts:** View the details of rate plans for which you are super funded
 - **Payment Accounts:** Add or delete a banking account for online payments
- From the **Reporting** tab, Payroll Schedule local link:
 - **Fees List:** View a list of your assessed fees and waived fees, view the date, type, amount and status of all fees by program and fiscal year. You can change the displayed information by selecting a program and/or fiscal year and the **Display** button.

my|CalPERS Help Link

Access the my|CalPERS Help link in the header of any page in my|CalPERS:



The my|CalPERS Help link features information that will assist you with conducting business and transactions in my|CalPERS.

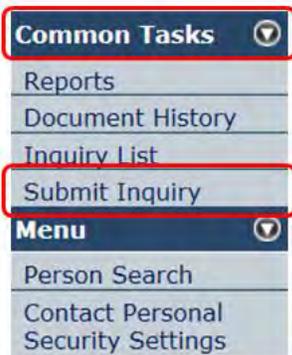
The image is a screenshot of the my|CalPERS Help page. On the left is a table of contents with various topics like "Accessible Table of Contents", "How To", "Apply For Benefits", etc. The main content area is titled "My Home Page" and includes a "Purpose" section explaining that this is the user's home page, an "Items on the Page" section with links to "Welcome", "Important Messages", "My Cases", "CalPERS News", "CalPERS Market Value", "Home Loan Rates", "Quick Links", and "Messages from CalPERS", and a "Back to Top" link. A callout box with a speech bubble points to the "Help" link in the header of the screenshot above, containing the text: "Help is intuitive and refers to the my|CalPERS page you are currently viewing".

my|CalPERS Submit Inquiry

my|CalPERS Submit Inquiry Access and use my|CalPERS Submit Inquiry by following the steps below.

Step	Action	Result
Submit Inquiry		
1	From any page in my CalPERS, select the Common Tasks menu left-side navigation link.	See Figure A-1. Common Tasks menu on left-side navigation links
2	Select the Submit Inquiry link from the left-side navigation menu.	See Figure A-1. Submit Inquiry left-side navigation link
3	Select or enter: <ul style="list-style-type: none"> • Category (Required field) • Associated Case (Select the case number from the dropdown list if there is one) • Program (Selecting one is encouraged) • Preferred Method of Response • Work/Daytime Phone Number (Ensure your contact phone number is populated) • Email (Ensure your email is populated) 	See Figure A-2. Contact Information section When your inquiry is answered, you will receive a system-generated email.
4	Type inquiry in Inquiry field.	See Figure A-2. Inquiry section
5	Select the Submit button.	Self-Serve Inquiry page displays.

Figure A-1. Common Tasks menu and Submit Inquiry left-side link



You may enter confidential information in the **Inquiry** textbox

Figure A-2. Contact Information and Inquiry sections

If reporting dependent demographic changes, state which type of documented proof you have e.g., driver license, birth certificate, Social Security card, etc.

Continued on next page

my|CalPERS Submit Inquiry, Continued

Step	Action	Result
View Response		
6	To view the details of your inquiry after receiving a system generated notification via email, select Inquiry List from Common Tasks from the left-side navigation links.	Inquiry List page displays.
7	Select Inquiry ID number. CalPERS does not send confidential information via email. The email that you receive is only to notify you that your inquiry has been worked and most likely completed.	See Figure A-3. Inquiries section Self -Serve Inquiry page displays.

Figure A-3. Inquiries section

▼ Inquiries					
Inquiry ID	Date Received	Category	Program	Status	Contacted About
0001884439	04/23/2013	Health Enrollment	Health - Medical	Closed	City of Oakland
0001413538	12/13/2012	Retirement Contract	CalPERS	Closed	City of Oakland
0000186068	11/22/2011	Payroll Reporting	CalPERS	Closed	City of Oakland
0000039389	09/29/2011	Service Credit Purchase	CalPERS	Closed	City of Oakland

Defect Report Instructions

Email Instructions

If you encounter any defect in my|CalPERS, please submit defect information by including a brief description of the issue in the Subject line of your email. Some examples would be: "Slow Page Load of UID #" or "Health Plan Enrollment Error Message." Include all the sections listed below, then email the Defect Report to: CalPERS_Employer_Communications@calpers.ca.gov A my|CalPERS employer educator will contact you after your Defect Report email has been received.

Sections & Instructions

Please include each section below in your email:

Section	Instructions
1. Date of Incident	Enter the date the incident occurred.
2. Time of Incident	Enter the time the incident occurred.
3. Agency CID #	Enter your agency CalPERS ID (CID) #.
4. Agency Name	Enter your agency name reporting the possible defect.
5. Person's Name	Enter the name of the person reporting the defect.
6. Employer Phone #	Enter phone number where the person can be reached. You can include more than one number.
7. UID Screen #	User Interface Design (UID) # is assigned to each individual Web page within my CalPERS. This is used to identify the page where the defect or issue occurred. You can locate the UID in the upper right hand corner by hovering over the date with your cursor.
8. Participant ID #	Enter the employee's CalPERS ID (CID) # if the defect/issue is on an employee's profile page.
9. Participant Name	Enter the employee's name if the defect/issue is on an employee's profile page.
10. Description	When describing the defect/issue, please include the following two pieces of information: <ul style="list-style-type: none"> ▪ What was the defect/issue (include error message # and language if applicable) ▪ What should have happened
11. Steps	Provide step-by-step detail on how to get to where the defect/issue occurred within the system; include data being used (drop-down selections, fields entered, links selected, etc.).
12. Screen Shot(s)	Include two screen shots of the UID page, one with the defect/issue and one of the UID page prior to that.
13. Comments	Add any additional information relevant to this issue not included above.

CalPERS Contacts

Contact CalPERS via Email

Email [CalPERS Employer Communications@calpers.ca.gov](mailto:CalPERS_Employer_Communications@calpers.ca.gov) to connect with training staff and CalPERS subject matter experts for questions and inquiries.

Email Employer.Response.Team@calpers.ca.gov for when you need more specialized assistance. The Employer Response Team (ERT) will help your executives to resolve time-critical, sensitive and complex issues quickly.

For more information on ERT, refer to the January 17, 2014 Circular Letter [200-005-14](#)

Pathway: CalPERS website > Employers > Resources: [Circular Letters](#) > Enter 200-005-14 in the Search letter No. field

Contact CalPERS by Phone or Fax

You can reach CalPERS at 888 CalPERS (or 888-225-7377), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
 - CalPERS centralized fax number: (800) 959-6545
 - Employer Response Team phone number: (800) 253-4594
-

Submit a Question, Comment, & Complaint

General [Questions, Comments, or Complaints](#) can be submitted to CalPERS thru the [CalPERS website](#). We'll respond to general inquiries within five business days. If you have a complaint, we may contact you within 30 days if further information is needed. This is not a secure method to contact CalPERS; therefore, confidential information should not be included.

Pathway: CalPERS website > Contact > Questions, Comments, & Complaints

To submit a secure online message, log in to your business partner my|CalPERS account to use the Submit Inquiry feature. For step actions on how to submit an inquiry through my|CalPERS, please see **my|CalPERS Submit Inquiry** in the appendix.

Membership and Enrollment Email Contact

If you have questions regarding membership eligibility and/or enrolling an employee, please contact CalPERS at the following email address: Membership_Reporting@calpers.ca.gov

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