

myCalPERS Employment Certification Functionality

Student Guide

September 26, 2020



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This guide provides detailed steps to help you electronically submit employment information for service credit purchases and membership reviews.

Service Credit Purchases

Service credit purchase requests outlining employer certification and payroll detail must now be submitted through myCalPERS. Employees who request to purchase service credit for prior employment periods will need to download and complete the applicable request form from the CalPERS website, and submit the form to the employer associated to the employment period. You must electronically complete the required certification questions, upload the employee’s request form, and provide the pay period details.

Membership Reviews

The system enhancements will allow you to submit employment information and payroll details for an employee whose membership status needs to be reviewed. To ensure accurate reflection of service credit to your employee’s account, your agency must submit this information through myCalPERS for review.

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

Training Opportunities

Prior to taking a myCalPERS System Training instructor-led class, new users should review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) guide and take a **Business Rules training class**. The business rules training (instructor-led or online) class covers the simplified explanation of laws defined by the California Public Employees’ Retirement Law (PERL).

Contents

Scenario 1: Create a CalPERS Review Report.....	2
Scenario 2: Submit an Employment Certification	6
Scenario 3: Reconcile Arrears Receivables	9
CalPERS Resources.....	11
CalPERS Contacts	12

Scenario 1: Create a CalPERS Review Report

System Logic

- Begin and end dates must be within the same fiscal year. If an earned period crosses fiscal years split it into two records.
- This scenario should only be used to report payroll for arrears and service credit purchase requests.
- For periods without reportable earnings report a zero payroll record. See the [myCalPERS Payroll Reporting](#) student guide for the proper reporting steps.
- After creating the CalPERS review report, submit an employment certification (see scenario 2).

Step Actions

Step 1 Select the **Reporting** global navigation tab.



Step 2 Within the Create or Edit Report section, select **Manually Create CalPERS Review Report** from the **Method** drop-down list.

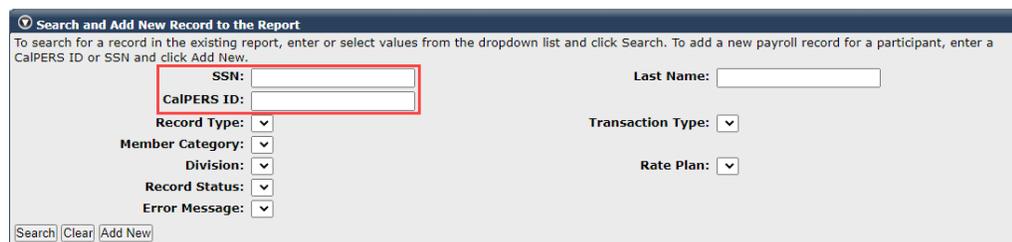


Step 3 Select the **Continue** button.

Step 4 Verify the Create Report section is complete and accurate.

Step 5 Select the **Save & Continue** button.

Step 6 Within the Search and Add New Record to the Report section, enter a full SSN or CalPERS ID.

A screenshot of the 'Search and Add New Record to the Report' section. The form contains several input fields and dropdown menus. The 'SSN' and 'CalPERS ID' fields are highlighted with a red rectangular box. Other fields include 'Last Name', 'Record Type', 'Member Category', 'Division', 'Record Status', 'Error Message', 'Transaction Type', and 'Rate Plan'. There are 'Search', 'Clear', and 'Add New' buttons at the bottom.

Step 7 Select the **Add New** button.

Step 8 Within the Maintain Record Details section, enter the begin and end dates of the period.

A screenshot of a web form section. It contains a 'Begin Date:' field with a calendar icon, an 'End Date:' field with a calendar icon and a 'Display' button, a 'Payroll Record Memo:' text input, a 'Payroll Schedule:' dropdown menu showing 'Approved : Bi-Weekly : 06/19/1982', and a 'Division:' dropdown menu.

Step 9 If necessary, select the correct **Payroll Schedule** and/or **Divison** from the drop down list.

A screenshot of a web form section. It shows a 'Payroll Record Memo:' text input, a 'Payroll Schedule:' dropdown menu showing 'Approved : Bi-Weekly : 06/19/1982', and a 'Division:' dropdown menu.

Step 10 Select from the **Member Catrgory** and **CBU** drop dow lists, and complete the **Position Title** field.

A screenshot of a web form section titled 'Earnings'. It contains a 'Member Category:' dropdown menu, a 'CBU:' dropdown menu, and a 'Position Title:' text input field.

Step 11 Select an appointment:

-If you are reporting payroll for an existing appointment in myCalPERS, select the appointment radio button.

A screenshot of a web form section titled 'Earnings'. It shows an 'Appointment:' dropdown menu with 'No Appointment' selected. Below it are two radio button options: '92139121 : City of Disneyland - Safety - County Peace Officer - 03/21/2015' and '92111572 : City of Disneyland - Safety - County Peace Officer - 01/10/2015 - 02/25/2015'.

-If you are reporting payroll for an appointment that isn't in myCalPERS, leave the **No Appointment** radio button selected.

A screenshot of a web form section titled 'Earnings'. It shows an 'Appointment:' dropdown menu with 'No Appointment' selected. Below it are two radio button options: '92139121 : City of Disneyland - Safety - County Peace Officer - 03/21/2015' and '92111572 : City of Disneyland - Safety - County Peace Officer - 01/10/2015 - 02/25/2015'.

Step 11 Within the Maintain Record Details section, complete the Pay Rate Type, Pay Rate, and Reportable earnings fields.

A screenshot of a web form section. It contains a 'Pay Rate Type:' dropdown menu, a 'Pay Rate:' field showing '\$ 0.00', and a 'Reportable Earnings:' field showing '\$ 0.00'.

Step 12 Complete either the **Scheduled Full Time Hours Per Week** or **Scheduled Full Time Days Per Week** fields.

Note: Report what is considered full time for the position whether or not the member works full time.

Scheduled Full Time Hours Per Week: <input type="text" value="0.0"/>	Scheduled Full Time Days Per Week: <input type="text" value="0.0"/>
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Step 13 Complete the **Total Hours Worked** field.

Note: Report only the hours for the period being reported in this record.

Total Hours Worked:* <input type="text" value="0.0"/>	Overtime Hours Worked: <input type="text" value="0.0"/>
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Step 14 Is there special compensation to be reported?

Yes: Continue to step 15

No: Skip to step 21

Step 15 Select the **View Special Compensation** link.

Special Compensation: \$0.00	View Special Compensation
------------------------------	---

Step 16 Within the View Special Compensation section, select the **Add New** button.

View Special Compensation

Select All Delete Add New

Category	Type	Amount
No results found.		

Select All Delete Add New

Step 17 Within the Maintain Special Compensation Details section, complete the Special Compensation Category, Special Compensation Type, and Amount fields.

Maintain Special Compensation Details

Special Compensation Category:*

Special Compensation Type:*

Amount:* \$0.00

Save Save and Add Another

Step 18 Is there additional special compensation to add to this record?

Yes: Select the **Save and Add Another** button and return to step 14

No: Continue to step 16

Step 19 Select the **Save** button.

Step 20 Select the **Return** link.

Step 21 If applicable, enter the contributions in the appropriate field.

Contributions	
Taxed Member Paid Contributions:	\$ 0.00 <input type="text"/>
Tax Deferred Member Paid Contributions:	\$ 0.00 <input type="text"/>
Tax Deferred Employer Paid Member Contributions:	\$ 0.00 <input type="text"/>

Step 22 Select the **Save & Continue** button.

Step 23 Do you have additional records to add to this report?

Yes: Return to step 6

No: Continue to step 25

Step 24 Continue to scenario 2 on the next page.

You have completed this scenario.

Scenario 2: Submit an Employer Certification

This process can be used to electronically submit the Pay Period Detail Form/Employment Certification Form (MEM-1344) data and service credit purchase requests.

System Logic

- The member is not required to have an appointment for the period you are certifying.
- CalPERS will send a Request for Employment Information letter to your agency/division requesting the employment certification.
- The employment certification must be completed within 30 days.

Step Actions

Step 1 Select the **Reporting** global navigation tab.

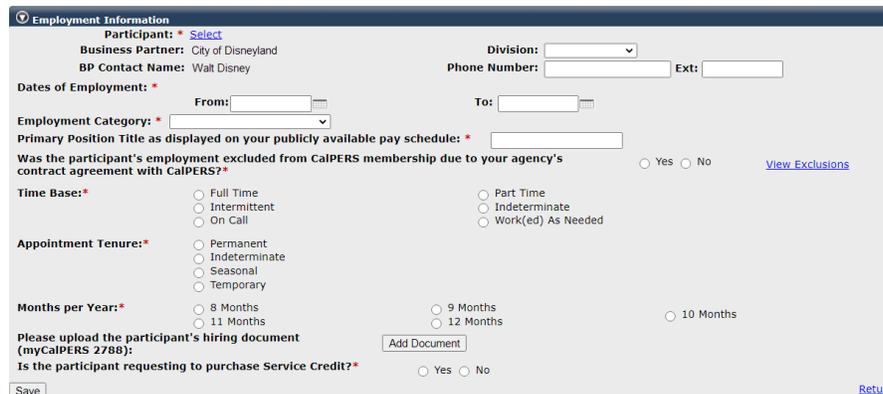


Step 2 Select the **Member Requests** local navigation link.

Step 3 Within the Employment and Service Period Certification List section, select the **Add New** button.



Step 4 Complete the Employer Information section.

The image shows the 'Employment Information' form. It includes fields for Participant (Select), Business Partner (City of Disneyland), BP Contact Name (Walt Disney), Division (dropdown), Phone Number, and Ext. There are also date pickers for 'From' and 'To' dates. The form has several radio button options for 'Employment Category', 'Time Base' (Full Time, Intermittent, On Call, Part Time, Indeterminate, Work(ed) As Needed), 'Appointment Tenure' (Permanent, Indeterminate, Seasonal, Temporary), and 'Months per Year' (8, 9, 11, 12, 10). There is a section for 'Please upload the participant's hiring document (myCalPERS 2788):' with an 'Add Document' button. At the bottom, there is a 'Save' button and a 'Return' link.

Step 5 Is the employee requesting to purchase service credit?

Yes: Select the **Yes** radio button and continue to step 6

No: Select the **No** radio button and skip to step 10

Is the participant requesting to purchase Service Credit? * Yes No

Step 6 Select the type of service credit the employee is requesting to purchase.

Service Credit Purchase Type Requested: * Service Prior to Membership
 Comprehensive Employment and Training Act (CETA)
 Fellowship
 Prior Service as Public Service
 Local System Redeposit
 Optional Arrears

Step 7 Upload the service credit purchase request document by selecting the **Add Document** button.

Please upload the participant's Service Prior to Membership related signed service credit purchase request form (myCalPERS 1168): *

Step 8 Locate the document and select the **Open** button.

Step 9 Complete the remaining questions.

Is the participant above a member of a reciprocal system? * Yes No
Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982? * Yes No
Was the service rendered under a fellowship program? * Yes No
Was this position filled by an election or appointment to a fixed term of office? * Yes No
Was the service rendered through an independent contractor or paid through a third party or temporary employment agency? * Yes No
For teacher's assistants in a credential program only:
Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period? * Yes No
Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? * Yes No

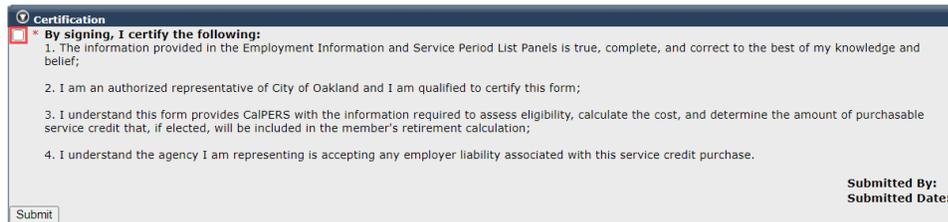
Step 10 Select the **Save** button.

Step 11 Do you have additional employment periods to add?

Yes: Within the Employment Periods section select the **Add New** button, then return to step 3

No: Continue to step 7

- Step 12 Within the Service Period List section, verify that all periods are listed.
-
- Step 13 Do you have additional service periods to add?
Yes: Return to Scenario 1, step 8. Return to this step once complete.
No: Continue to step 14
-
- Step 14 Do you need to edit any of the service periods?
Yes: Continue to step 15
No: Skip to step 19
-
- Step 15 Within the Service Period List section, select the **Reported** link for the period.
-
- Step 16 Make the necessary change(s).
-
- Step 17 Select the **Save** button.
-
- Step 18 Return to step 13.
-
- Step 19 Within the Certification section, select the certification check box.



Certification

By signing, I certify the following:

1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of City of Oakland and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

Submitted By:
Submitted Date:

Submit

- Step 20 Select the **Submit** button.
-
- You have completed this scenario.**
-

Scenario 3: Reconcile Arrears Receivables

Use this scenario to view details of your 20283 arrears and admin fee receivables.

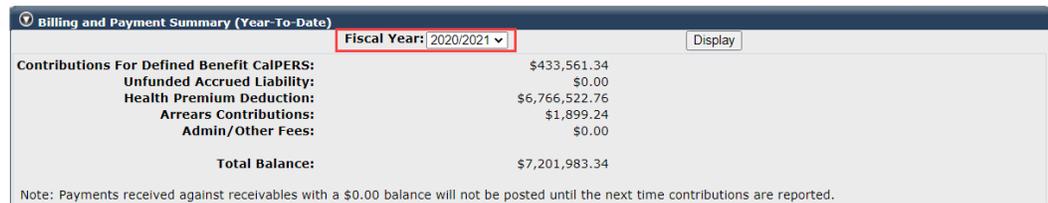
Step Actions

Step 1 Select the **Reporting** global navigation tab.



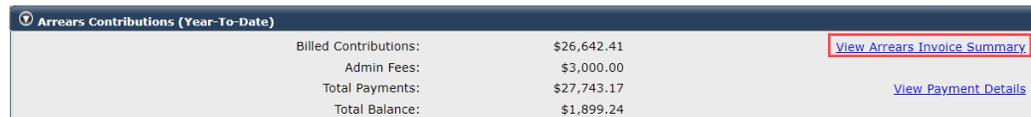
Step 2 Select the **Billing and Payments** local navigation link.

Step 3 Within the Billing and Payments Summary (Year-To-Date) section, select the correct **Fiscal Year**.



Step 4 Select the **Display** button.

Step 5 Within the Arrears Contributions (Year-To-Date) section, select the **View Arrears Invoice Summary** link.



Step 6 Optional: Use the Search Arrears Receivable History section to search for your receivables.



Step 7 Within the Arrears Receivable History section, locate the receivable.

Note: There will be two receivables; one for the admin fee and the other for the arrears contributions.

Step 8 Within the Arrears Receivable History Section, select the **Details** link in the right side.

Receivable ID	Balance	Due Date	Status	Type	Participant Name	
100000016147495	\$899.24	10/01/2020	Open	20283 Arrears, CalPERS	Mouse, Mickey	Details
100000016147494	\$500.00	10/01/2020	Open	Admin Fee - 20283 Arrears, CalPERS	Mouse, Mickey	Details
100000016157948	\$500.00	09/30/2020	Open	Admin Fee - 20283 Arrears, CalPERS	Duck, Donald	Details
100000016120207	\$0.00	09/01/2020	Closed	Admin Fee - 20283 Arrears, CalPERS	Disney, Walt	Details
100000016110660	\$0.00	09/01/2020	Closed	Admin Fee - 20283 Arrears, CalPERS	Mouse, Minnie	Details
100000016096055	\$0.00	09/01/2020	Closed	Admin Fee - 20283 Arrears, CalPERS	Duck, Daffy	Details
100000016096056	\$0.00	09/01/2020	Closed	20283 Arrears, CalPERS	Duck, Donald	Details
100000016110661	\$0.00	09/01/2020	Closed	20283 Arrears, CalPERS	Disney, Walt	Details
100000016120138	\$0.00	09/01/2020	Closed	20283 Arrears, CalPERS	Mouse, Minnie	Details
100000016120208	\$0.00	09/01/2020	Closed	20283 Arrears, CalPERS	Duck, Daffy	Details
100000016120137	\$0.00	09/01/2020	Closed	Admin Fee - 20283 Arrears, CalPERS	Duck, Daisy	Details

Step 9 Review the Arrears Receivable Detail section for details of the receivable type, dates, member and employer contributions, and balance due.

Arrears Receivable Detail	
Receivable ID: 100000016147495	Participant Name: Mouse, Mickey
Receivable Type: 20283 Arrears	CalPERS ID: 0123456789
Service Period Begin Date: 02/17/2001	Total Earnings for Request: \$12,346.30
Service Period End Date: 09/14/2001	Total Member Contributions Due: \$899.24
Payment Due Date: 10/01/2020	Total Employer Contributions Due: \$0.00
Balance: \$899.24	Total Due From Employer: \$899.24

Step 10 Review the Calculation Details section for the details about the reported service request periods, including pay rate, service credit, earnings, and member and employer contribution rates and amounts.

Calculation Details			
Service Request Periods			
Request Period Start	Request Period End	Member Contrib Per Period	Employer Contrib Per Period
02/17/2001	09/14/2001	\$899.24	\$0.00

Monthly Service Request Period Detail: 02/17/2001 - 09/14/2001									
Month Start Date	Month End Date	Pay Rate	Service Credit	Monthly Earnings	Exclusion Amount	Member Contrib Rate	Member Contrib Amount	Employer Contrib Rate	Employer Contrib Amount
02/17/2001	02/28/2001	\$13.63	0.066883	\$1,567.98	\$0.00	7.0000%	\$109.76	0.0000%	\$0.00
03/01/2001	03/31/2001	\$13.63	0.066883	\$1,567.98	\$0.00	7.0000%	\$109.76	0.0000%	\$0.00
04/01/2001	04/30/2001	\$13.63	0.066883	\$1,567.98	\$0.00	7.0000%	\$109.76	0.0000%	\$0.00
05/01/2001	05/31/2001	\$13.63	0.066883	\$1,567.98	\$0.00	7.0000%	\$109.76	0.0000%	\$0.00
06/01/2001	06/08/2001	\$13.63	0.066883	\$1,567.98	\$0.00	7.0000%	\$109.76	0.0000%	\$0.00
06/23/2001	06/30/2001	\$14.04	0.037074	\$895.30	\$0.00	7.0000%	\$62.67	0.0000%	\$0.00
07/01/2001	07/31/2001	\$14.04	0.037074	\$895.30	\$0.00	7.0000%	\$62.67	0.0000%	\$0.00
08/01/2001	08/31/2001	\$14.78	0.063249	\$1,607.90	\$0.00	7.0000%	\$112.55	0.0000%	\$0.00
09/01/2001	09/14/2001	\$14.78	0.063249	\$1,607.90	\$0.00	7.0000%	\$112.55	0.0000%	\$0.00

You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at www.calpers.ca.gov.

- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides
- [Employer Education Schedule \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides > Employer Education Schedule
- [Online Classes for Employers \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides > Online Classes for Employers
- [myCalPERS Technical Requirements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [Public Agency & Schools Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [State Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Reference Guide (PDF)
- [Circular Letters - CalPERS](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)
- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > Employer Reports (Cognos) Catalog

CalPERS Contacts

Email

- To contact [employer educators](#) for questions and requests, email CalPERS_Employer_Communications@CalPERS.CA.GOV
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email ERT@CalPERS.CA.GOV

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 Inquiry

You can send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation folder and select the **Submit Inquiry** link to submit a question or request.