

myCalPERS Employment Certification Functionality

Student Guide

June 15, 2024



myCalPERS Employment Certification Functionality

This guide provides detailed steps to help you electronically submit employment information for service credit purchases and membership review. For additional information, visit the [Employment Certification](#) page on the CalPERS website.

Service Credit Purchases

Employment certification and payroll details for service credit purchase requests must be submitted through myCalPERS. Employees who request to purchase service credit for prior employment periods will need to complete a service credit purchase request online via myCalPERS or by completing the applicable request form from the CalPERS website. They will submit the form to the employer associated to the employment period. You will complete and submit the certification in myCalPERS.

Membership Reviews

You may be required to submit employment information and service period (payroll) details for an employee whose membership status needs to be reviewed. This can be for any type of arrears driven by late enrollment or pre-review for service credit purchase. To ensure an accurate reflection of service credit to your employee's account, your agency must submit the requested information through myCalPERS for review.

System Access

To access the pages detailed in these scenarios, your assigned user roles must include:

- Business Partner Arrears

Along with one or more of the following roles:

- Business Partner Payroll
- Business Partner Payroll Limited
- Business Partner Retirement Enrollment
- Business Partner Retirement Enrollment Limited

If you are unable to view or process these scenarios, contact your agency's system access administrator to update your myCalPERS access. To locate a list of your agency's System Access Administrator(s), within myCalPERS select Profile > Contacts section > System Admin column displays Y.

If your agency does not have a system access administrator on file or they have left your agency, call the customer contact center at **888 CalPERS**.

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 training, new users should review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide and take a Business Rules class. Business rules summarizes the laws defined by the California Public Employees’ Retirement Law (PERL).

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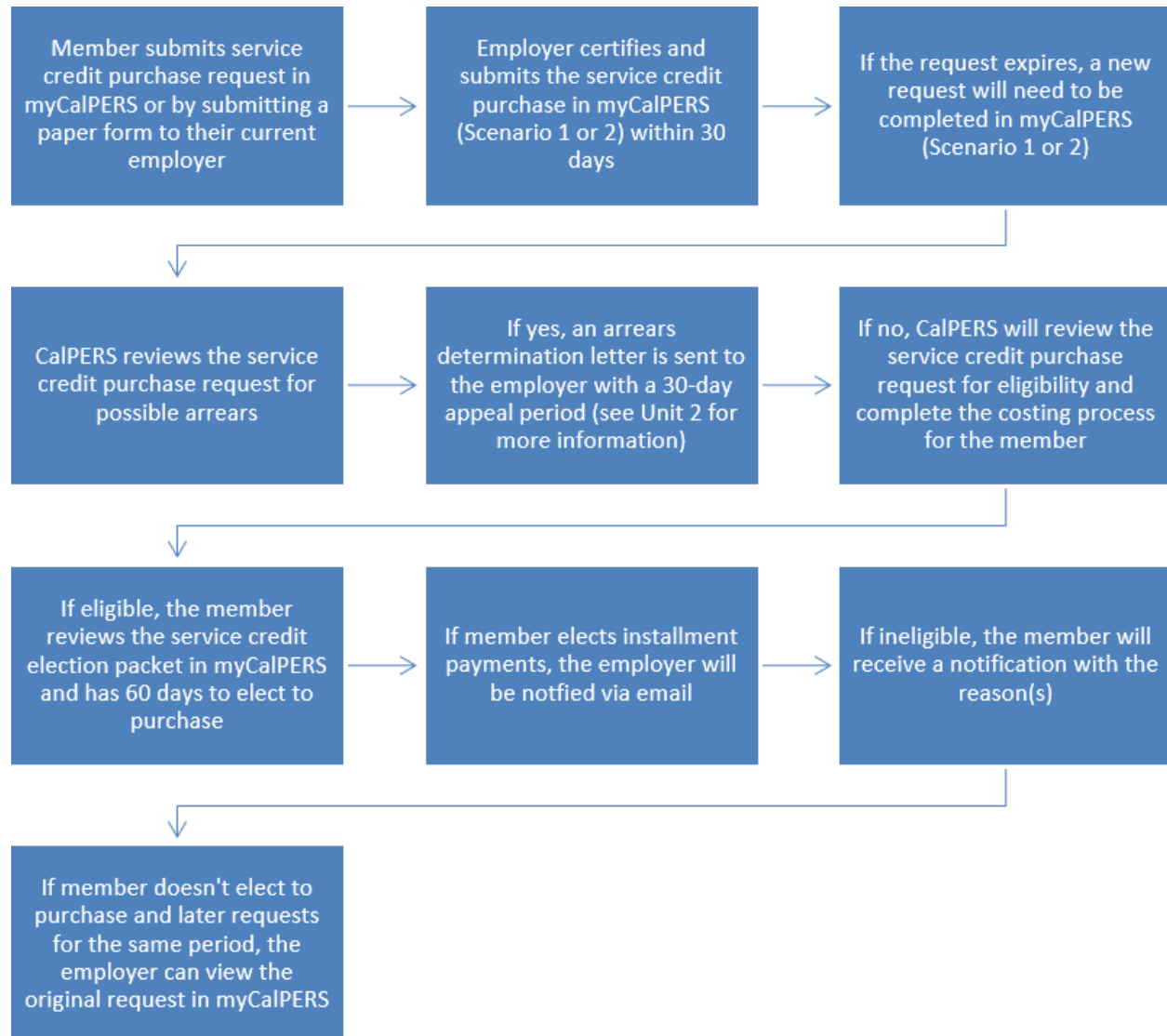
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Unit 1: Service Credit Purchase Certification

CalPERS offers a variety of service credit purchase options for eligible members. To learn more about the options and requirements, visit the [Service Credit](#) page on the CalPERS website.

Service Credit Purchase Process

The chart below details the service credit purchase process and the associated scenario to complete your employer responsibilities:



Employment and Service Period Certification Statuses

The following is a list of the service credit purchase request statuses:

- **Requested:** Employee has submitted the request to the employer, but the employer has not started or submitted the certification.
- **In-Progress:** Employer has started but has not submitted the certification.
- **Certification Expired:** Request has expired due to employer failing to complete and submit the request within 30 days. The member must resubmit their request. There may also be increased cost.
- **Submitted:** Employer has certified and submitted the request to CalPERS for review.
- **Complete:** CalPERS has completed the service credit purchase request process.
- **Rejected:** Employer has rejected the request
- **Employer Withdrawn:** Employer has withdrawn the request due to member requesting or employer opened in error

Correcting a Service Credit Purchase Certification

- **In-Process:** Corrections can be made by opening the request.
- **Submitted:** Corrections can be made by calling the contact center at **888 CalPERS**.
- **Completed:** Corrections cannot be made.

Notifications

For your agency to receive timely notifications of a member's service credit purchase deduction election, your system access administrator must designate a *primary* Payroll and Human Resources contact type. Your agency's system access administrator should follow the steps in the [myCalPERS System Access Administration \(PDF\)](#) student guide for establishing and maintaining agency contacts.

Documentation

To view documentation that has been sent regarding a service credit purchase request, review your agency's document history within myCalPERS > Common Tasks > Document History.

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Scenario 1: Certify a Service Credit Purchase Request

Members have two options for submitting a service credit purchase request:

myCalPERS

Members can request to purchase service credit by completing and submitting the service credit purchase request from their myCalPERS account. Once submitted, you will locate the request in myCalPERS, complete the employment certification portion, and submit the request by using this scenario starting with step 1.

Request Form

Members can submit their request using the applicable service credit purchase request form. It is critical that they submit the form to their employer at the time of the requested period, which may not always be their current employer. You will then follow the steps in this scenario to complete the employment certification portion and submit the request starting with step 8.

System Logic

- Create a separate request for each of the following if, during the requested period, the member:
 - Held more than one position/appointment
 - Had multiple time bases
 - Changed employers (including campus and department changes)
- For definitions of the fields, see the Appendix at the end of this guide.

Step Actions

myCalPERS

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, locate the member within the list.

Step 4 Select the **Status** link for the request you wish to complete. Only the requests in the status 'Requested' and 'In-Progress' will show on this page, if you need to go into another request that has been 'Submitted', 'Certification Expired', 'Rejected', or 'Employer Withdrawn' it will need to be selected in the Status filter.

Employment and Service Period Certification List Add New									
Excel		Search:							
Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		1200000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		2300000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		3400000076	08/18/1992	06/01/1994		
08/09/2023	Requested	Flower	Aileen		4400000066	04/18/1988	06/09/2023		
08/10/2023	In-Progress	Madrigal	Renato		4500000065	03/07/2007	06/15/2009		

Employment and Service Period Certification Filter			
CalPERS Id:	<input type="text"/>	SSN:	<input type="text"/>
Status:	<div>▼</div>	Division:	<div>▼</div>
Last Name:	<input type="text"/>	FirstName:	<input type="text"/>
Requested between:	<div>Complete Submitted Certification Expired Rejected Employer Withdrawn Requested</div>	and:	<input type="text"/>
Submitted By:	<input type="text"/>	<input type="button" value="Filter Data"/> <input type="button" value="Clear Filter"/>	

Step 5 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Employment Periods Add New						
Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.						
Participant	CalPERS Id	Division	Start Date - End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/01/2014 – 07/19/2014			Service Prior to Membership

Step 6 Review and complete the Employment Information section. The **CBU** and **Class Code** fields only display for state and CSU employers.

Employment Information

Participant: * Eric Sanchez
Participant's Email Address: ericSanchez@agencyname.com
Business Partner: Agency Name
Participant's Phone Number: (999) 888-7777
Division: Department Name

Dates of Employment: *
From: 10/20/2014 To: 06/30/2015

Employment Category: *

Primary Position Title as displayed on your publicly available pay schedule: *

Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS? * ☐ Yes ☒ No [View Exclusions](#)

Time Base: *
☐ Full Time ☐ Intermittent ☐ On Call ☐ Part Time ☐ Indeterminate ☐ Work(ed) As Needed

CBU: *
Class Code: *

Appointment Tenure: *
☐ Permanent ☐ Indeterminate ☐ Seasonal ☐ Temporary

Months per Year: *
☐ 8 Months ☐ 9 Months ☐ 10 Months ☐ 11 Months ☐ 12 Months

Please upload the participant's hiring document (myCalPERS 2788): [Add Document](#)

Service Credit Purchase Type Requested:
Is the participant above a member of a reciprocal system? * ☐ 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

[Save](#) [Return](#)

Note: You may need to correct the service period start and end dates to reflect all reportable employment prior to the membership date..

Step 7 Skip to step 17

Request Form

Step 8 Select the **Reporting** global navigation tab.

Step 9 Select the **Member Requests** local navigation link.

Step 10 Within the Employment and Service Period Certification List section, select the **Add New** button.

Employment and Service Period Certification List [Add New](#)

Excel Search:

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
02/22/2021	Requested	Sanchez	Eric		0123456789	03/01/2014	07/19/2014		
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	09/11/2006		
02/04/2021	Requested	Wolfgang	Steven		2345678901	03/06/1998	11/12/1998		
02/08/2021	Requested	French	Douglas		3456789012	03/31/2013	03/22/2019		
01/04/2021	Submitted	Matson	Oleg		4567890123	11/03/2018	06/28/2019	WALKER, L	
01/12/2021	In Progress	Chen	Roberta		5678901234	01/07/2012	07/26/2019		
01/14/2021	Submitted	Kinsler	Kirsti		6789012345	09/22/2014	01/10/2017	WALKER, L	

Showing 1 to 7 of 7 entries [Previous](#) 1 [Next](#)

Step 11 Complete the Employment Information section. The **CBU** and **Class Code** fields are only for state and CSU employers.

The screenshot shows the 'Employment Information' section of a web form. It includes fields for Participant (with a 'Select' link), Business Partner (Agency Name), BP Contact Name (Kasey Schuman), Division (Department Of Agency), Phone Number, and Ext. There are date pickers for 'From' and 'To' under 'Dates of Employment'. A dropdown for 'Employment Category' is present. A text field for 'Primary Position Title' is followed by a question: 'Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS?' with 'Yes' and 'No' radio buttons and a 'View Exclusions' link. The 'Time Base' section has radio buttons for Full Time, Intermittent, On Call, Part Time, Indeterminate, and Work(ed) As Needed. Below this are dropdowns for 'CBU' and 'Class Code'. The 'Appointment Tenure' section has radio buttons for Permanent, Indeterminate, Seasonal, and Temporary. The 'Months per Year' section has radio buttons for 8, 9, 10, 11, and 12 months. A text field for 'Please upload the participant's hiring document (myCalPERS 2788):' is followed by an 'Add Document' button. At the bottom, there is a question 'Is the participant requesting to purchase Service Credit?' with 'Yes' and 'No' radio buttons, a 'Save' button, and a 'Return' link.

Note: The myCalPERS 2788 is an optional field for submitting your agency's hiring documents.

Step 12 Select the **Yes** radio button.

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

Step 13 Select the type of service credit the member 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

Note: Each service credit purchase type must be requested separately.

Step 14 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 15 Locate the document, and then select the **Open** button.

Step 16 Complete the remaining questions.

Is the participant above a member of a reciprocal system? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under a fellowship program? *	<input type="radio"/> Yes <input type="radio"/> No
Was this position filled by an election or appointment to a fixed term of office? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered through an independent contractor or paid through a third party or temporary employment agency ? *	<input type="radio"/> Yes <input type="radio"/> 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 ? *	<input type="radio"/> Yes <input type="radio"/> No
Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? *	<input type="radio"/> Yes <input type="radio"/> No

Step 17 Select the **Save** button.

Step 18 Did the member hold multiple positions during the service credit purchase request period?

Yes: How did the member submit their request?

- **myCalPERS Request:** Within the Employment Periods section, select the **Add New** button and return to step 6
- **Request Form:** Return to step 10

No: Continue to the next page to submit payroll for the service credit purchase request period.

Submit Service Period Payroll Details

In addition to submitting employment details, payroll details for the service credit purchase request period must also be submitted. There are two options for submitting payroll:

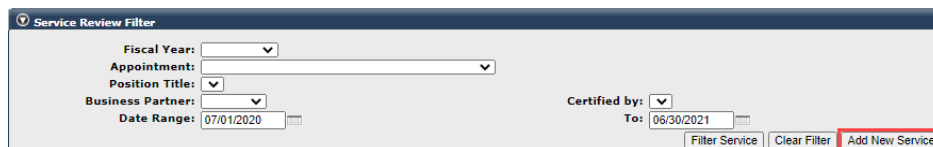
- **Manual entry:** Payroll is entered into myCalPERS manually for each earned period using the steps outlined in this scenario starting with step 19.
- **File upload:** Payroll for each earned period is uploaded into myCalPERS using a CSV or XML file using the steps outlined in this scenario starting with step 36.

System Logic

- You must report payroll for the entire service credit purchase period.
 - If an earned period does not have reportable earnings, report a zero-period record. See the [myCalPERS Payroll Reporting \(PDF\)](#) student guide (Unit 3, Scenario 4) for the proper reporting steps.
- Do not report payroll for dates outside of the requested service credit purchase period. You may need to adjust the begin/end dates of record(s) to correspond with the service credit purchase period dates.
- Earned periods cannot be lumped together. Report each earned period separately.
- All earnings should be reported in one record, including adjustments, unless:
 - The earned period crosses fiscal years.
 - There are multiple pay rates, positions, or time bases for the same earned period.
- Ensure the information is reported accurately as it will be used in the calculation of the service credit purchase and may impact membership date, member cost, and employer liability.
- If a payroll schedule causes an error to occur, contact CalPERS.

Manual Entry

Step 19 Within the Service Review Filter section, select the **Add New Service** button.



The screenshot shows the 'Service Review Filter' form. It contains several dropdown menus for 'Fiscal Year', 'Appointment', 'Position Title', and 'Business Partner'. There is a 'Date Range' field with '07/01/2020' entered. On the right, there is a 'Certified by' dropdown and a 'To' date field with '06/30/2021' entered. At the bottom right, there are three buttons: 'Filter Service', 'Clear Filter', and 'Add New Service'. The 'Add New Service' button is highlighted with a red border.

Step 20 Within the Maintain Record Details section, enter the begin and end dates of the earned period.

The screenshot shows a form with the following fields: **Begin Date:** (text input), **End Date:** (text input), **Payroll Record Memo:** (text input), **Payroll Schedule:** (dropdown menu), and **Division:** (dropdown menu). The **End Date** field is highlighted with a red box. A **Display** button is located to the right of the **End Date** field.

Note: The **Payroll Record Memo** field is optional.

Step 21 Select from the **Member Category** drop-down lists and complete the **Position Title** and **CBU** fields. These fields are required for state and CSU.

The screenshot shows the **Earnings** section with the following fields: **Member Category:** (dropdown menu), **Position Title:** (text input), and **Class Code:** (text input). The **Member Category** and **Position Title** fields are highlighted with red boxes.

Step 22 Select an appointment:

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

The screenshot shows the **Appointment** section with the following fields: **Appointment:** (radio buttons), **92139121 : Agency Name** (text input), **92111572 : Agency Name** (text input), **- Safety - County Peace Officer - 03/21/2015** (text input), and **- Safety - County Peace Officer - 01/10/2015 - 02/25/2015** (text input). The **Appointment** radio button is highlighted with a red box.

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

The screenshot shows the **Appointment** section with the following fields: **Appointment:** (radio buttons), **92139121 : Agency Name** (text input), **92111572 : Agency Name** (text input), **- Safety - County Peace Officer - 03/21/2015** (text input), and **- Safety - County Peace Officer - 01/10/2015 - 02/25/2015** (text input). The **No Appointment** radio button is highlighted with a red box.

Step 23 Select the correct **Payroll Schedule** from the drop-down list.

The screenshot shows the **Payroll Schedule:** (dropdown menu) field. The dropdown menu is highlighted with a red box.

Step 24 Complete the **Payroll Schedule**, **Pay Rate Type**, and **Pay Rate** fields. In the **Reportable Earnings** field, enter only earnings based on reportable hours. Do not include overtime earnings.

The screenshot shows the following fields: **Pay Rate Type:** (dropdown menu), **Pay Rate:** (text input), **Reportable Earnings:** (text input), and **\$ 0.00** (text input). The **Pay Rate Type** and **Reportable Earnings** fields are highlighted with red boxes.

Step 25 Complete either the **Scheduled Full Time Hours Per Week** or **Scheduled Full Time Days Per Week** field.

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

The screenshot shows the following fields: **Scheduled Full Time Hours Per Week:** (text input), **Scheduled Full Time Days Per Week:** (text input), and **0.0** (text input). The **Scheduled Full Time Hours Per Week** and **Scheduled Full Time Days Per Week** fields are highlighted with red boxes.

Step 26 Complete the **Total Hours Worked** field with only the regular (non-overtime) hours worked in the period. If they worked overtime in this period, enter the hours in the **Overtime Hours Worked** field.

Total Hours Worked:*	<input type="text" value="0.0"/>	Overtime Hours Worked:	<input type="text" value="0.0"/>
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Step 27 Is there special compensation to be reported?

Yes: Continue to step 28

No: Skip to step 34

Step 28 Select the **View Special Compensation** link.

Special Compensation: \$0.00	View Special Compensation
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Step 29 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 30 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:*	<input type="text"/>
Special Compensation Type:*	<input type="text"/>
Amount:*	<input type="text" value="\$0.00"/>
Save Save and Add Another	

Step 31 Is there additional special compensation to add to this record?

Yes: Select the **Save and Add Another** button and return to step 30

No: Continue to step 32

Step 32 Select the **Save** button.

Step 33 Select the **Return** link.

Step 34 If applicable, enter the contributions in the appropriate field.

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

Step 35 Do you have additional periods or report adjustments to report?

Yes: Select the **Save & Continue** button and return to step 20

No: Select the **Save & Return** button and skip to step 59

File Upload

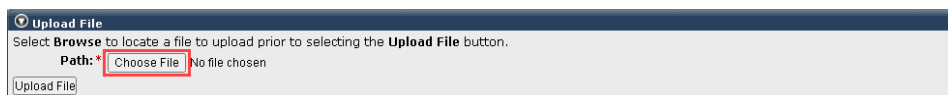
Step 36 Select the **Reporting** global navigation tab.

Step 37 Within the Create or Edit Report section, select **Upload File** from the Method drop-down list.



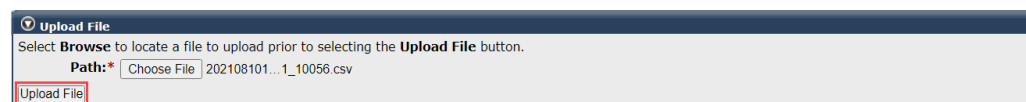
Step 38 Select the **Continue** button.

Step 39 Within the Upload File section, select the **Choose File** button.



Step 40 Locate the file, and then select the **Open** button.

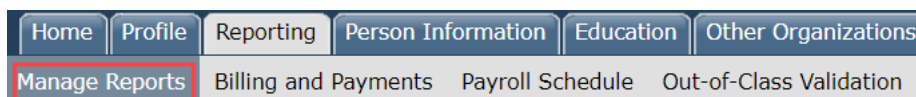
Step 41 Select the **Upload File** button.



Step 42 Within the File Upload History section, locate your report.

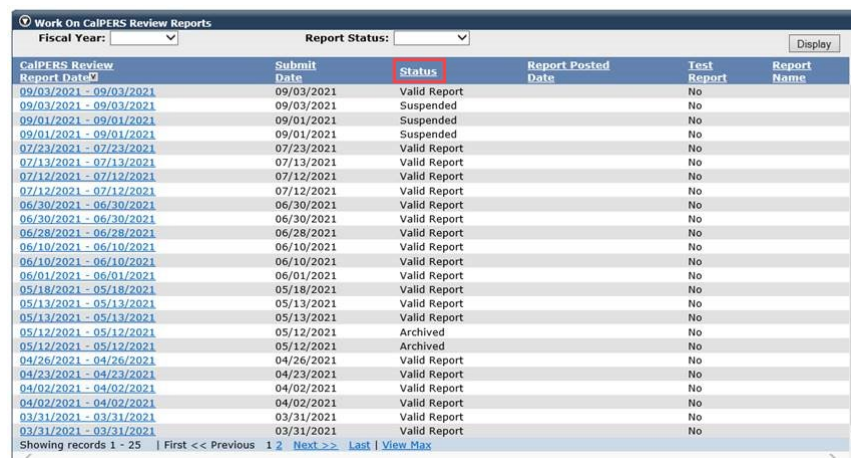
Step 43 Refresh the page until the File Status column of your report shows *Accepted*.

Step 44 Select the **Manage Reports** local navigation link.



Step 45 Scroll down to the Work on Existing CalPERS Review Reports section.

Step 46 Review the Status column.



CalPERS Review Report Date	Submit Date	Status	Report Posted Date	Test Report	Report Name
09/03/2021 - 09/03/2021	09/03/2021	Valid Report		No	
09/03/2021 - 09/03/2021	09/03/2021	Suspended		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
07/23/2021 - 07/23/2021	07/23/2021	Valid Report		No	
07/13/2021 - 07/13/2021	07/13/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/28/2021 - 06/28/2021	06/28/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/01/2021 - 06/01/2021	06/01/2021	Valid Report		No	
05/18/2021 - 05/18/2021	05/18/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
04/26/2021 - 04/26/2021	04/26/2021	Valid Report		No	
04/23/2021 - 04/23/2021	04/23/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	

Step 47 What is the status of the report?

Valid Report: Your report is valid. Skip to step 53.

Suspended: Your report has error(s) that must be corrected. Continue to step 48.

Step 48 Select the **CalPERS Review Report Date** link for the suspended report.

Work On CalPERS Review Reports					
Fiscal Year: <input type="text"/>		Report Status: <input type="text"/>		Display	
CalPERS Review Report Date	Submit Date	Status	Report Posted Date	Test Report	Report Name
09/03/2021 - 09/03/2021	09/03/2021	Valid Report		No	
09/03/2021 - 09/03/2021	09/03/2021	Suspended		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
07/23/2021 - 07/23/2021	07/23/2021	Valid Report		No	
07/13/2021 - 07/13/2021	07/13/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/28/2021 - 06/28/2021	06/28/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/01/2021 - 06/01/2021	06/01/2021	Valid Report		No	
05/18/2021 - 05/18/2021	05/18/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
04/26/2021 - 04/26/2021	04/26/2021	Valid Report		No	
04/23/2021 - 04/23/2021	04/23/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	
Showing records 1 - 25 First << Previous 1 2 Next >> Last View Max					

Step 49 Within the Record Present in the Report section, review the Status column for records with errors.

Records Present in the Report										
Select All		Delete								
SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
XX-1111	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/07/2020-03/20/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/21/2020-04/03/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/04/2020-04/17/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/18/2020-05/01/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/02/2020-05/15/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/16/2020-05/29/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
Select All		Delete								
Generate Report Summary						View Payroll Report Summary				

Step 50 Select the **SSN** link for the record that has an error.

Records Present in the Report										
Select All Delete										
SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
XX-1111	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/07/2020-03/20/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/21/2020-04/03/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/04/2020-04/17/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/18/2020-05/01/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/02/2020-05/15/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/16/2020-05/29/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
Select All Delete										
Generate Report Summary View Payroll Report Summary										

Step 51 Review the messages section to determine what requires correction.

Step 52 Select the **Save & Return** button.

Step 53 Are there additional records with errors?

Yes: Return to step 50

No: Continue to step 54

Step 54 Select the **Reporting** global navigation tab.

Step 55 Select the **Member Requests** local navigation link.

Step 56 Within the Employment and Service Period Certification List section, locate the member within the list. Only the requests in the status 'Requested' and 'In-Progress' will show on this page, if you need to go into another request that has been 'Submitted', 'Certification Expired', 'Rejected', or 'Employer Withdrawn' it will need to be selected in the Status filter.

Step 57 Select the **Status** link for the request you wish to complete.

Employment and Service Period Certification List Add New										
Excel Search: <input type="text"/>										
Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By	
04/05/2023	Requested	Hannah	Rachel		1200000089	06/25/2022	04/05/2023			
07/24/2023	Requested	Macabebe	Doritz		2300000078	10/07/2011	09/27/2015			
07/27/2023	Requested	Berry	Teddy		3400000076	08/18/1992	06/01/1994			
08/09/2023	Requested	Flower	Aileen		4400000066	04/18/1988	06/09/2023			
08/10/2023	In Progress	Madrigal	Renato		4500000065	03/07/2007	06/15/2009			

Step 58 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Employment Periods <small>Add New</small>						
Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.						
Participant	CalPERS Id	Division	Start Date – End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/01/2014 – 07/19/2014			Service Prior to Membership
						Return

Submit, Reject, or Withdraw a Service Credit Purchase Request

Step 59 What would you like to do with this request?

Submit: You've completed the certification and are ready to submit to CalPERS, continue to step 60.

Reject: The member submitted a request via myCalPERS and you wish to reject their request, skip to step 62.

Withdraw: The member submitted the request to you via paper form, you initiated it in myCalPERS, but now wish to withdraw the request, skip to step 65.

Submit

Step 60 Within the Certification section, select the **certification** check box.

Certification	
<input checked="" type="checkbox"/>	* 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 Department Of Motor Vehicles 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:
<input type="button" value="Submit"/>	<input type="button" value="Reject Member SCP Request"/>

Step 61 Select the **Submit** button.

You have completed this scenario.

Reject

Step 62 Expand the SCP Request Reject Reason section.

 SCP Request Rejection Reason
--

Step 63

Select the reason for rejecting the service credit purchase request.

SCP Request Rejection Reason
Please select a reason for rejecting the member's Service Credit Purchase request. Only required if certification request is being rejected.

Rejection Reason:

- ☐ No employment records. Employee never worked for the agency.
- ☐ Incorrect Service Credit Purchase request type.
- ☐ No payroll records. Purged records, records unavailable, damaged, or destroyed.
- ☐ Duplicate request. Same period already requested or submitted for review.
- ☐ Requested SPM service period previously purchased.
- ☐ Member withdrew the SCP request.

Rejected By:
Rejected Date:

Step 64

Within the Certification section, select the **Reject Member SCP Request** button.

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 Department Of Motor Vehicles 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:

You have completed this scenario.

Withdraw

Step 65

Within the Certification section, select the **Withdraw Certification Request** button.

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:

You have completed this scenario.

Scenario 2: Certify a Leave of Absence Service Credit Purchase Request

Members have two options for submitting a service credit purchase request for a leave of absence:

myCalPERS

Once logged into their myCalPERS account, members can request to purchase service credit by completing and submitted the service credit purchase request online. Once submitted, you will locate the request in myCalPERS, complete the employment certification portion, and submit the request by using this scenario.

Request Form

Members can submit their request using the applicable service credit purchase request form. Once completed, the member will submit the form to their current employer. You will then complete the employer certification portions and submit directly to CalPERS via fax or mail.

System Logic

- Each leave of absence period must be requested separately.
- For definitions of the fields, see the Appendix at the end of this guide.

Note:

These instructions for certifying a leave of absence service credit purchase do not apply to Temporary Disability Absence.

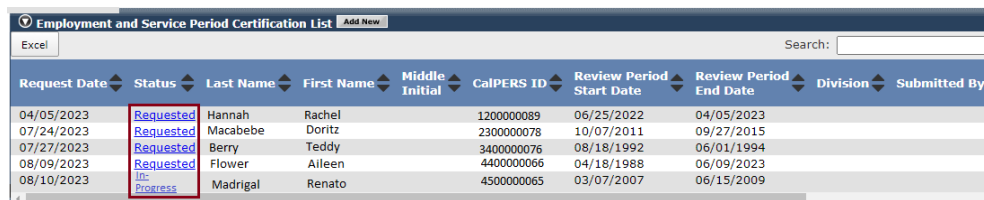
Step Actions

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, locate the member within the list.

Step 4 Select the **Status** link for the request you wish to complete. Only requests in the status 'Requested' and 'In-Progress' shows on this page, if you need to go into another request that has been 'Submitted', 'Certification Expired', 'Rejected', or 'Employer Withdrawn' it will need to be selected in the Status filter.



Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		1200000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		2300000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		3400000076	08/18/1992	06/01/1994		
08/09/2023	Requested	Flower	Aileen		4400000066	04/18/1988	06/09/2023		
08/10/2023	In-Progress	Madrigal	Renato		4500000065	03/07/2007	06/15/2009		

Step 5 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Participant	CalPERS Id	Division	Start Date - End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		11/06/2006 - 12/22/2006			Maternity/Paternity Leave of Absence

[Return](#)

Step 6 Review the **Dates of Employment** fields and update to reflect the dates of the leave of absence.

Note: If the approved leave dates are different from the dates requested, please correct the dates.

Employment Information

Participant: * 0123456789 - Eric Sanchez
Business Partner: Agency Name
Division:
Dates of Employment: *
From: 11/06/2006 To: 12/22/2006
Service Credit Purchase Type Requested: Maternity/Paternity Leave of Absence

Step 7 Select the **Save** button.

Submit, Reject, or Withdraw a Service Credit Purchase Request

Step 8 What would you like to do with this request?

Submit: You've completed the certification and are ready to submit to CalPERS, continue to step 9.


Reject: The member submitted the request via myCalPERS and you wish to reject their request, skip to step 11.

Withdraw: The member submitted the request to you via paper form, you initiated it in myCalPERS but now wish to withdraw the request, skip to step 14.

Submit

Step 9

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 Department Of Motor Vehicles 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

Reject Member SCP Request

Step 10

Select the **Submit** button.

You have completed this scenario.

Reject

Step 11

Expand the SCP Request Reject Reason section.

SCP Request Reject Reason

Step 12

Select the reason for rejecting the service credit purchase request.

SCP Request Rejection Reason
Please select a reason for rejecting the member's Service Credit Purchase request. Only required if certification request is being rejected.

Rejection Reason:

- ☐ No employment records. Employee never worked for the agency.
- ☐ Incorrect Service Credit Purchase request type.
- ☐ No payroll records. Purged records, records unavailable, damaged, or destroyed.
- ☐ Duplicate request. Same period already requested or submitted for review.
- ☐ Requested SPM service period previously purchased.
- ☐ Member withdrew the SCP request.

Rejected By:
Rejected Date:

Step 13

Within the Certification section, select the **Reject Member SCP Request** button.

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 Department Of Motor Vehicles 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 **Reject Member SCP Request**

You have completed this scenario.

Withdraw

Step 14

Within the Certification section, select the **Withdraw Certification Request** button.

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 **Withdraw Certification Request**

You have completed this scenario.

Scenario 3: Review a Service Credit Purchase Request

You will review or check the status of a submitted service credit purchase request.

System Logic

The following is a list of the service credit purchase request statuses:

- **Requested:** Employee has submitted the request, but the employer has not started or submitted the certification.
- **In-Progress:** Employer has started but has not submitted the certification.
- **Certification Expired:** Request has expired due to employer failing to complete and submit the request within 30 days. The member must resubmit their request. There may also be increased cost.
- **Submitted:** Employer has certified and submitted the request to CalPERS for review.
- **Complete:** CalPERS has completed the service credit purchase request process.
- **Rejected:** Employer has rejected the request
- **Employer Withdrawn:** Employer has withdrawn the request due to member requesting or employer opened in error
-

Correcting a Service Credit Purchase Certification

- **In-Process:** Corrections can be made by opening the request.
- **Submitted:** Corrections can be made by calling the contact center at **888 CalPERS**.
- **Completed:** Corrections cannot be made.

Step Actions

Check the Status

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, locate the member with the list.
Step 4	Within the Employment and Service Period Certification List section, review the status column to check the status of the request.

Review

- | | |
|--------|--|
| Step 5 | Select the Status link for the request you wish to complete. Only the requests in the status 'Requested' and 'In-Progress' will show on this page, if you need to go into another request that has been 'Submitted', 'Certification Expired', |
|--------|--|

'Rejected', or 'Employer Withdrawn' it will need to be selected in the Status filter.

Employment and Service Period Certification List Add New									
Excel	Search: <input type="text"/>								
Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		120000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		230000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		340000076	08/18/1992	06/01/1994		
08/09/2023	Requested	Flower	Aileen		440000066	04/18/1988	06/09/2023		
08/10/2023	Progress	Madrigal	Renato		450000065	03/07/2007	06/15/2009		

CalPERS ID:

Status:

Last Name:

Requested between:

Submitted By:

SSN:

Division:

FirstName:

and:

Complete

Submitted

Certification Expired

Rejected

Employer Withdrawn

Requested

Filter Data Clear Filter

Step 6 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Employment Periods Add New						
Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.						
Participant	CalPERS Id	Division	Start Date – End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/24/2014 – 07/18/2014	Miscellaneous	Fire Fighter Trainee	Service Prior to Membership

Step 7 Review the Employment Information section.

Participant: * Eric Sanchez

Participant's Email Address: ericSanchez@agencyname.com

Business Partner: Agency Name

Participant's Phone Number: (999) 888-7777

Division:

Dates of Employment: *

From: 02/06/2006 To: 08/11/2006

Employment Category: * Miscellaneous

Primary Position Title as displayed on your publicly available pay schedule: * Police Officer Trainee

Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS? * ☐ Yes ☒ No [View Exclusions](#)

Time Base: *

☐ Full Time
☒ Part Time
☐ Fractional Time Base: /

☐ Intermittent
☐ Indeterminate
☒ Scheduled hours per week: 40.0

☐ On Call
☐ Work(ed) As Needed

Appointment Tenure: *

☐ Permanent
☐ Indeterminate
☒ Temporary

Term End Date: 08/11/2006

Months per Year: *

☐ 8 Months
☐ 9 Months
☒ 12 Months
☐ 10 Months

Please upload the participant's hiring document (myCalPERS 2788):

Service Credit Purchase Type Requested:

Is the participant above a member of a reciprocal system? * ☐ 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

Did the Participant withdraw these funds? * ☐ Yes ☒ No

Plan Type: * ☐ Defined Benefit ☒ Defined Contribution

Plan Name: * ICMA-RC Deferred Comp PS

Step 8 Select the **Return** link at bottom right.

Step 9 Select the **Status** link for the request you wish to review.

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		1200000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		2300000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		3400000076	08/18/1992	06/01/1994		
08/09/2023	Requested	Flower	Aileen		4400000066	04/18/1988	06/09/2023		
08/10/2023	In Progress	Madrigal	Renato		4500000065	03/07/2007	06/15/2009		

Step 10 Within the Service Review Filter section, change the Date Range and To fields to match the period of the service credit purchase request.

Service Review Filter

Fiscal Year:

Appointment:

Division:

CBU:

Business Partner:

Position Title:

Class Code:

Certified by:

Date Range: 07/01/2013 To: 06/30/2015

Filter Service Clear Filter Add New Service

Step 11 Select the **Filter Service** button.

Step 12 Within the Service Period List section, view the reported payroll for the service credit purchase period.

Start Date	End Date	Appointment ID	Position Title	Full Time Pay Rate	Reportable Earnings	FT Hours per Week	Reportable Hours Worked	Overtime Hours Worked
07/05/2014	07/18/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
07/01/2014	07/04/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	32.0	0.0
06/21/2014	06/30/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	48.0	0.0
06/07/2014	06/20/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
05/24/2014	06/06/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
05/10/2014	05/23/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
04/26/2014	05/09/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
04/12/2014	04/25/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
03/29/2014	04/11/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
03/24/2014	03/28/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	40.0	0.0

You have completed this scenario.

Unit 2: Arrears

Arrears are the cost of retirement contributions from a member's earnings that were not previously reported and paid to CalPERS. An agency may be responsible for paying both the member and employer contributions along with an administrative cost associated with each arrears determination.

You are responsible for determining membership eligibility upon hire, including checking their CalPERS membership status in myCalPERS. If the employee is not eligible at date of hire, the employer must continue to monitor their eligibility throughout their employment.

Upon meeting the eligibility requirements, you must enroll the member into membership within 90 days of their eligibility date. Failure to enroll a member timely will result in an arrears determination.

Arrears Administrator

For your agency to receive timely notifications of arrears determinations, your system access administrator must designate a *primary* Arrears Administrator contact type. We recommend selecting email as the preferred method of communication. Your agency's system access administrator should follow the steps in the [myCalPERS System Access Administration \(PDF\)](#) student guide for establishing and maintaining agency contacts.

What Initiates an Arrears Review?

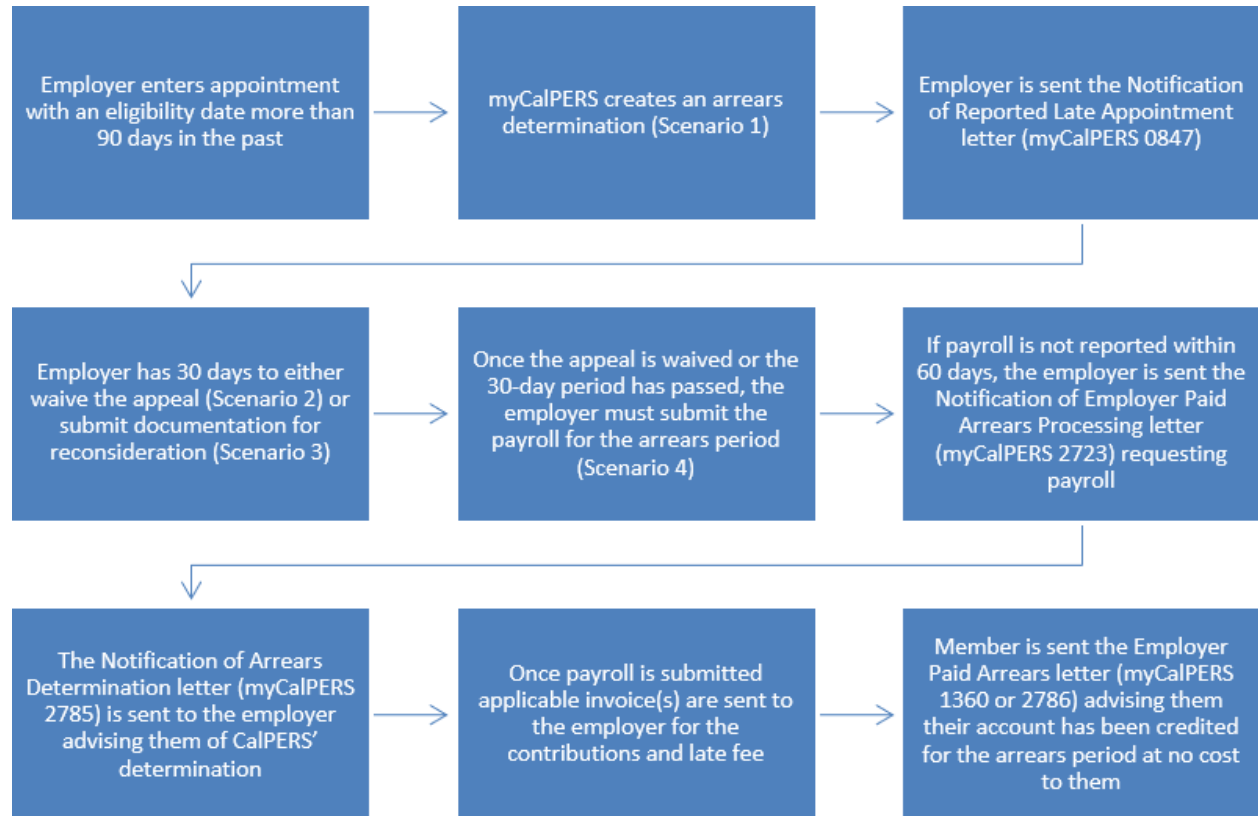
Below is a list of reasons that may cause an arrears determination:

- Member not enrolled into membership in myCalPERS timely (90-day violation)
- Membership date input error
- Missing payroll
- Employer updates/corrects an appointment
- Service Prior to Membership (SPM) request
- Retirement, death, and/or disability review
- Business partner/member calls the CalPERS Contact Center
- Member refunds or re-deposits

Arrears Determination Processes

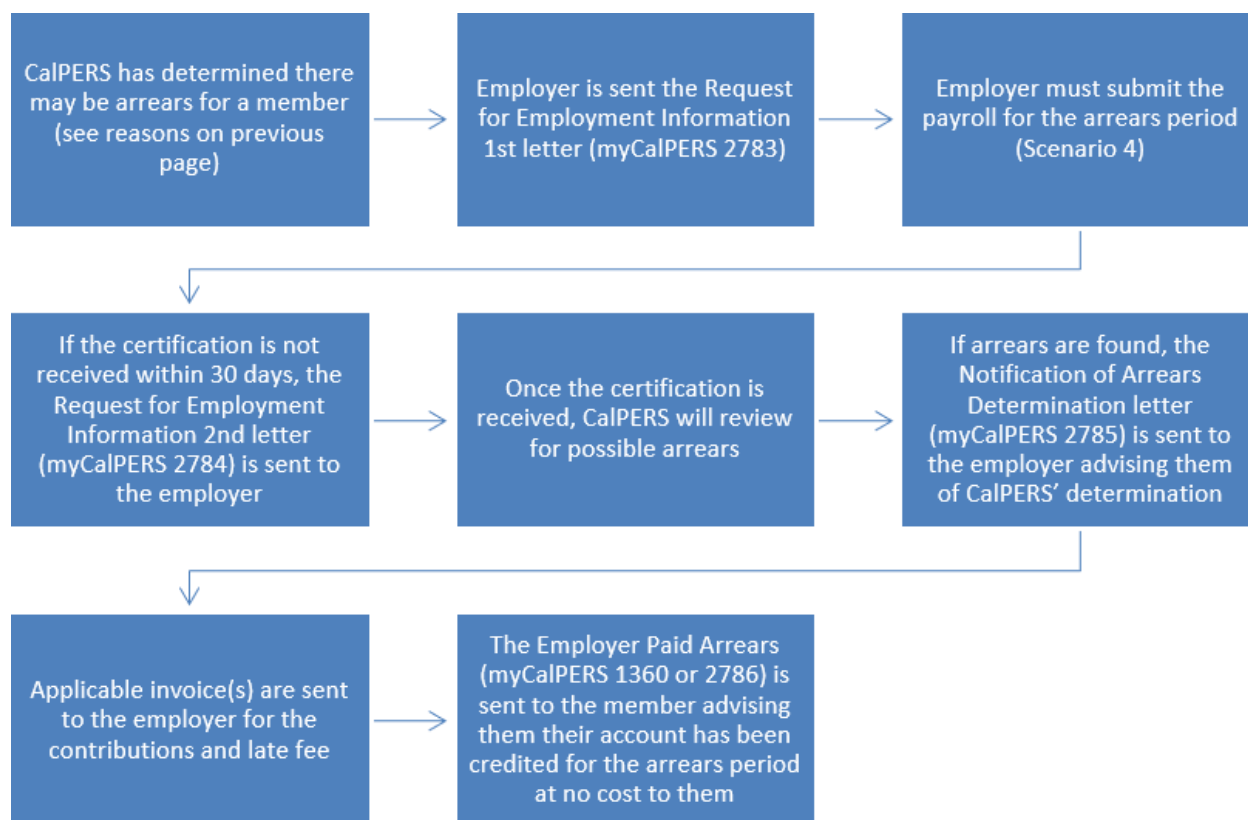
Late Appointments (90-day violation)

The chart below details the process and the associated scenarios related to 90-day violations:



All Other Reasons

The chart below details the process and the associated scenarios for all other arrears reasons (see the list on the previous page):



Documentation

To view documentation that has been sent regarding an arrears determination, review your agency's document history within myCalPERS > Common Tasks > Document History.

Contents

Scenario 1: View Arrears Determination	29
Scenario 2: Waive Appeal	30
Scenario 3: Submit Reconsideration	32
Scenario 4: Report Payroll.....	35

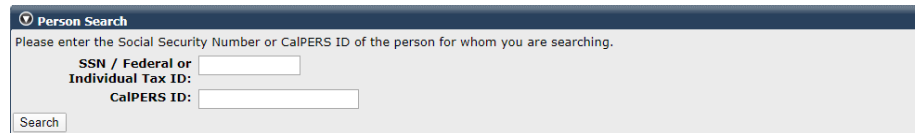
Scenario 1: View Arrears Determination

You want to view an arrears determination.

Step Actions

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



Person Search

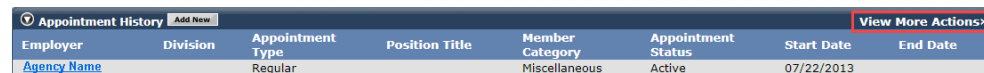
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link.



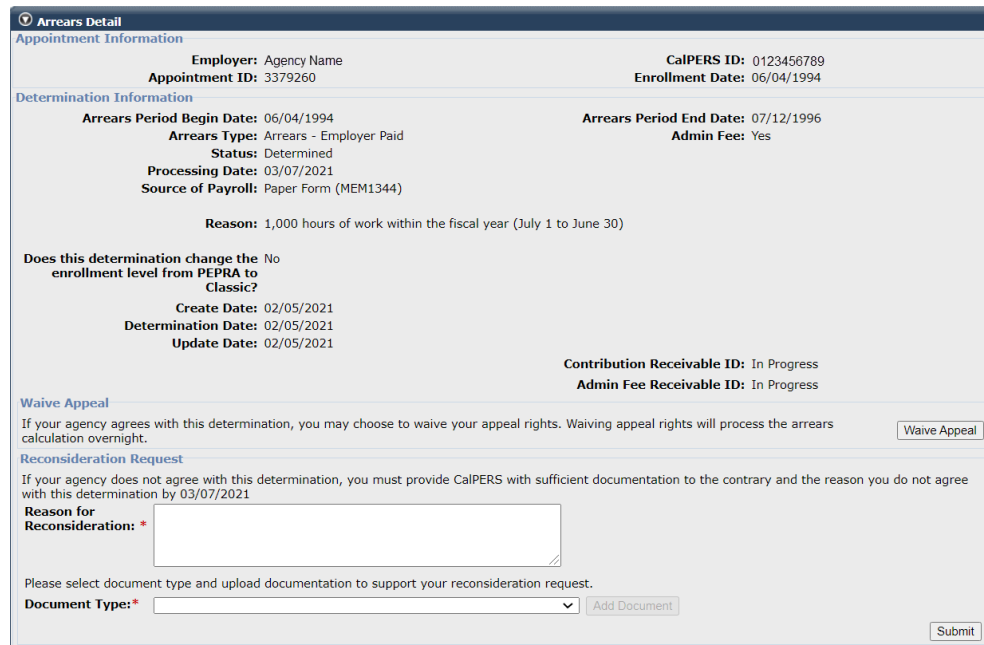
Appointment History <input type="button" value="Add New"/>								View More Actions*
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date	
Agency Name		Regular		Miscellaneous	Active	07/22/2013		

Step 5 Within the Arrears Determinations section, select the **Details** link.



Arrears Determinations								
Employer	BP ID	Appointment ID	Type	Begin Date	End Date	Determination Date	Status	Update Date
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020 Details

Step 6 Review the Arrears Detail section.



Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 3379260
CalPERS ID: 0123456789
Enrollment Date: 06/04/1994

Determination Information

Arrears Period Begin Date: 06/04/1994
Arrears Period End Date: 07/12/1996
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 03/07/2021
Admin Fee: Yes
Source of Payroll: Paper Form (MEM1344)

Reason: 1,000 hours of work within the fiscal year (July 1 to June 30)

Does this determination change the enrollment level from PEPRA to Classic? No

Create Date: 02/05/2021
Determination Date: 02/05/2021
Update Date: 02/05/2021

Contribution Receivable ID: In Progress
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.

Reconsideration Request

If your agency does not agree with this determination, you must provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 03/07/2021

Reason for Reconsideration: *

Please select document type and upload documentation to support your reconsideration request.

Document Type: *

You have completed this scenario.

Scenario 2: Waive Appeal

You agree with the arrears determination and elect to waive the appeal.

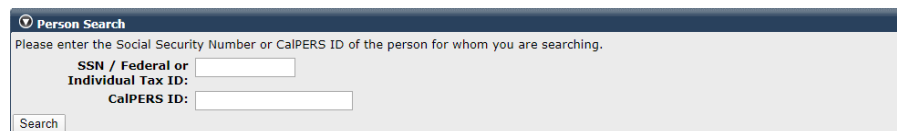
System Logic

- An appeal can only be waived within 30 days of when the arrears determination was created.
- Once an appeal is waived, payroll for the arrears period can be reported. See unit 2, scenario 4 of this student guide for reporting payroll.

Step Actions

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



Person Search

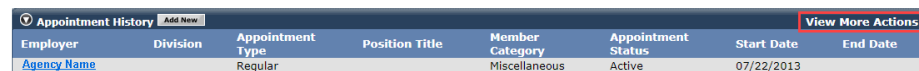
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

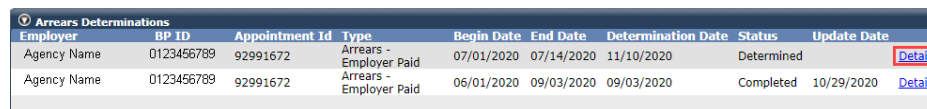
Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
Agency Name		Regular		Miscellaneous	Active	07/22/2013	

Step 5 Within the Arrears Determinations section, select the **Details** link.



Employer	BP ID	Appointment ID	Type	Begin Date	End Date	Determination Date	Status	Update Date
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020 Details

Step 6 Within the Arrears Detail section, select the **Waive Appeal** button.



Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPA to Classic?
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: *

Step 7

Within the Waive Appeal section, select the **Yes** button.

A dialog box titled "Waive Appeal" with a close button (X) in the top right corner. The main text asks, "Are you sure you want to waive your agency's appeal rights?". At the bottom, there are two buttons: "Yes" and "Cancel".

Waive Appeal

Are you sure you want to waive your agency's appeal rights?

Yes Cancel

You have completed this scenario.

Scenario 3: Submit Reconsideration

You want to submit additional information and documentation for reconsideration of an arrears determination.

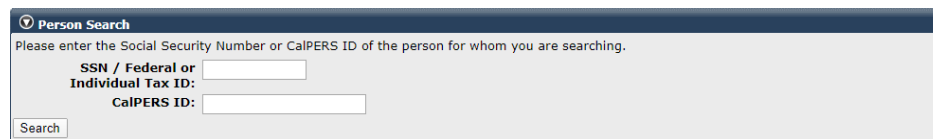
System Logic

- You have 30 days from when the arrears determination was created to submit documentation for reconsideration.
- Once the appeal period closes, if CalPERS determines the arrears stands, your agency will need to report payroll for the arrears period. See unit 2, scenario 4 for reporting payroll of this student guide.

Step Actions

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the 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:

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link.

Appointment History Add New								View More Actions
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date	
Agency Name		Regular		Miscellaneous	Active	07/22/2013		

Step 5 Within the Arrears Determinations section, select the **Details** link.

Arrears Determinations								
Employer	BP ID	Appointment Id	Type	Begin Date	End Date	Determination Date	Status	Update Date
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020 Details

Step 6 Within the Arrears Detail section, complete the **Reason for Reconsideration** field.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPPRA to Classic? No
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight. [Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: * [Add Document](#) [Submit](#)

Step 7 Within the Arrears Detail section, select from the **Document Type** drop-down list.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPPRA to Classic? No
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight. [Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: * [Add Document](#) [Submit](#)

Step 8 Within the Arrears Detail section, select the **Add Document** button.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPRA to Classic? No
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight. [Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: Election of Optional Membership - Part-Time Employee: myCalPERS 0843 [Add Document](#)

[Submit](#)

Step 9 Locate the document, and then select the **Open** button.

Step 10 Within the Arrears Detail section, select the **Submit** button.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPRA to Classic? No
Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight. [Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: Election of Optional Membership - Part-Time Employee: myCalPERS 0843 [View Document](#) [Replace](#)
Election of Optional Membership.docx is added.

[Submit](#)

You have completed this scenario.

Scenario 4: Report Payroll

CalPERS has requested that you report payroll for an arrears determination.

System Logic

- Only report payroll for the arrears period once the appeal has been waived (Unit 2, Scenario 1 of this student guide) or the 30-day appeal period has closed.
- Continue reporting the member's current payroll in your earned period reports.
- You must report payroll for the entire arrears period.
- Earned periods cannot be lumped together. Report each earned period separately.
- If an earned period does not have reportable earnings, report a zero-period record. See the [myCalPERS Payroll Reporting \(PDF\)](#) student guide (Unit 3, Scenario 4) for the proper reporting steps.
- Separate the payroll into two records if:
 - An earned period crosses fiscal years.
 - There are multiple pay rates or positions for the same earned period.
- Do not report payroll for dates outside of the requested service credit purchase period.
- Begin and end dates must be within the same fiscal year. If an earned period crosses fiscal years, separate the payroll into two records.
- Do not report payroll for dates outside of the requested arrears period using this scenario.

Step Actions

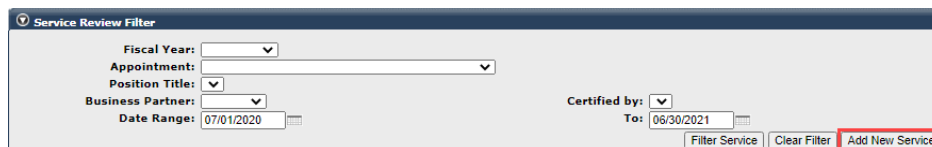
Step 1 How would you like to submit your payroll?

Manual entry: Continue to step 2

File upload: Skip to step 19

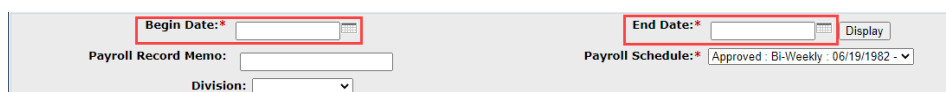
Manual Entry

Step 2 Within the Service Review Filter section, select the **Add New Service** button.



The screenshot shows the 'Service Review Filter' form. It contains several dropdown menus and text input fields. The 'Add New Service' button is located at the bottom right of the form and is highlighted with a red rectangular box.

Step 3 Within the Maintain Record Details section, enter the begin and end dates of the earned period.



The screenshot shows the 'Maintain Record Details' form. It includes fields for 'Begin Date', 'End Date', 'Payroll Record Memo', 'Division', and 'Payroll Schedule'. The 'Begin Date' and 'End Date' fields are highlighted with red rectangular boxes. The 'Payroll Schedule' is set to 'Approved - Bi-Weekly - 06/19/1982'.

Step 4 Select from the **Member Category** drop-down lists and complete the **Position Title** and **CBU** fields. These fields are required for state and CSU.

Earnings

Member Category:

Position Title:

Class Code:

Step 5 Select an appointment:

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

Earnings

Appointment: ☒ No Appointment ☐ 92139121 : Agency Name - Safety - County Peace Officer - 03/21/2015
☐ 92111572 : Agency Name - 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.

Earnings

Appointment: ☒ No Appointment ☐ 92139121 : Agency Name - Safety - County Peace Officer - 03/21/2015
☐ 92111572 : Agency Name - Safety - County Peace Officer - 01/10/2015 - 02/25/2015

Step 6 Select the correct **Payroll Schedule** from the drop-down list.

Payroll Schedule:*

Step 7 Within the Maintain Record Details section, complete the **Pay Rate Type**, **Pay Rate**, and **Reportable Earnings** fields. These fields are required.

Note: Do not include overtime earnings in the **Reportable earnings** field.

Pay Rate Type: Pay Rate: \$

Reportable Earnings: \$

Step 8 Complete either the **Scheduled Full Time Hours Per Week** or **Scheduled Full Time Days Per Week** field.

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

Scheduled Full Time Hours Per Week: Scheduled Full Time Days Per Week:

Step 9 Complete the **Total Hours Worked** field with the regular hours and the **Overtime Hours Worked** field with the overtime hours.

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

Total Hours Worked:* Overtime Hours Worked:

Step 10 Is there special compensation to be reported?

Yes: Continue to step 11

No: Skip to step 17

Step 11 Select the **View Special Compensation** link.

Special Compensation: \$0.00 [View Special Compensation](#)

Step 12 Within the View Special Compensation section, select the **Add New** button.



Step 13 Within the Maintain Special Compensation Details section, complete the **Special Compensation Category**, **Special Compensation Type**, and **Amount** fields.



Step 14 Is there additional special compensation to add to this record?

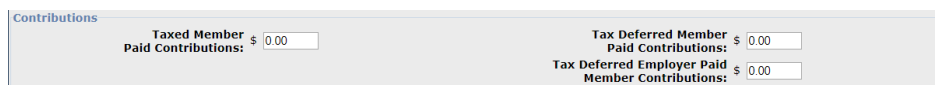
Yes: Select the **Save and Add Another** button, and then return to step 13

No: Continue to step 15

Step 15 Select the **Save** button.

Step 16 Select the **Return** link at bottom right.

Step 17 If applicable, enter the contributions in the appropriate field.



Step 18 Do you have additional periods or adjustments to report?

Yes: Select the **Save & Continue** button, and then return to step 3

No: Select the **Save & Return** button, and then skip to step 35

File Upload

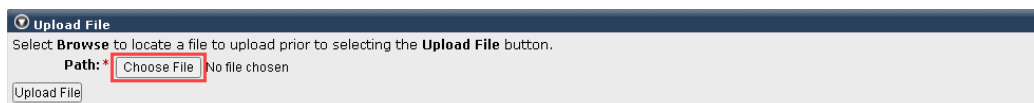
Step 19 Select the **Reporting** global navigation tab.

Step 20 Within the Create or Edit Report section, select **Upload File** from the Method drop-down list.



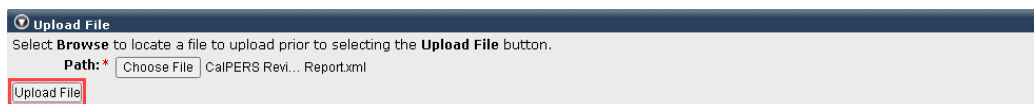
Step 21 Select the **Continue** button.

Step 22 Within the Upload File section, select the **Choose File** button.



Step 23 Locate the file, and then select the **Open** button.

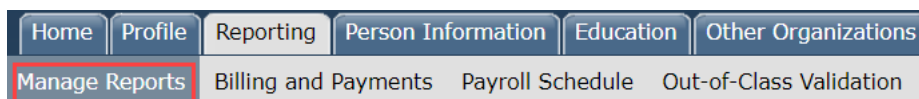
Step 24 Select the **Upload File** button.



Step 25 Within the File Upload History section, locate your report.

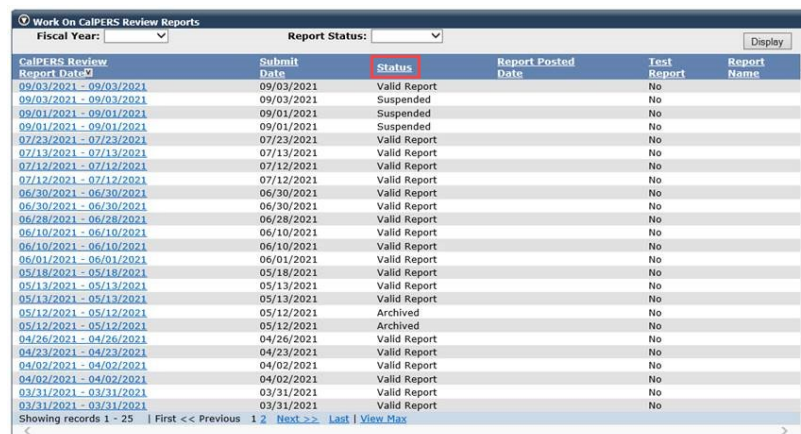
Step 26 Refresh the page until the File Status column of your report shows *Accepted*.

Step 27 Select the **Manage Reports** local navigation link.



Step 28 Scroll down to the Work on Existing CalPERS Review Reports section.

Step 29 Review the Status column.



CalPERS Review Report Date	Submit Date	Status	Report Posted Date	Test Report	Report Name
09/03/2021 - 09/03/2021	09/03/2021	Valid Report		No	
09/03/2021 - 09/03/2021	09/03/2021	Suspended		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
07/23/2021 - 07/23/2021	07/23/2021	Valid Report		No	
07/13/2021 - 07/13/2021	07/13/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/28/2021 - 06/28/2021	06/28/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/01/2021 - 06/01/2021	06/01/2021	Valid Report		No	
05/18/2021 - 05/18/2021	05/18/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
04/26/2021 - 04/26/2021	04/26/2021	Valid Report		No	
04/23/2021 - 04/23/2021	04/23/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	

Step 30

What is the status of the report?

Valid Report: Your report is valid. Skip to step 42.

Suspended: Your report has error(s) that must be corrected. Continue to step 31.

Step 31

Select the **CalPERS Review Report Date** link for the suspended report.

Work On CalPERS Review Reports					
Fiscal Year: <input type="text"/>		Report Status: <input type="text"/>		Display	
CalPERS Review Report Date	Submit Date	Status	Report Posted Date	Test Report	Report Name
09/03/2021 - 09/03/2021	09/03/2021	Valid Report		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
07/23/2021 - 07/23/2021	07/23/2021	Valid Report		No	
07/13/2021 - 07/13/2021	07/13/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/28/2021 - 06/28/2021	06/28/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/01/2021 - 06/01/2021	06/01/2021	Valid Report		No	
05/18/2021 - 05/18/2021	05/18/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
04/26/2021 - 04/26/2021	04/26/2021	Valid Report		No	
04/23/2021 - 04/23/2021	04/23/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	
Showing records 1 - 25 First << Previous 1 2 Next >> Last View Max					

Step 32

Within the Record Present in the Report section, review the Status column for records with errors.

Records Present in the Report										
Select All		Delete								
SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
XSC-1111	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/07/2020-03/20/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/21/2020-04/03/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/04/2020-04/17/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/18/2020-05/01/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/02/2020-05/15/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/16/2020-05/29/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
Select All		Delete								
Generate Report Summary						View Payroll Report Summary				

Step 33

Select the **SSN** link for the record that has an error.

Records Present in the Report										
Select All		Delete								
SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
XSC-1111	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/07/2020-03/20/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/21/2020-04/03/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/04/2020-04/17/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/18/2020-05/01/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/02/2020-05/15/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
XSC-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/16/2020-05/29/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
Select All		Delete								
Generate Report Summary						View Payroll Report Summary				

Step 34

Review the messages section to determine what requires correction.

Step 35 Select the **Save & Return** button.

Step 36 Are there additional records with errors?

Yes: Return to step 33

No: Continue to step 37

Step 37 Select the **Reporting** global navigation tab.

Step 38 Select the **Member Requests** local navigation link.

Step 39 Within the Employment and Service Period Certification List section, locate the member within the list.

Step 40 Select the **Status** link for the request you wish to complete.

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
02/22/2021	Requested	Sanchez	Eric		0123456789	03/01/2014	07/19/2014		
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	08/11/2006		
02/04/2021	Requested	Wolfgang	Steven		2345678901	03/06/1998	11/12/1998		
02/08/2021	Requested	French	Douglas		3456789012	03/31/2013	03/22/2019		
01/04/2021	Submitted	Matson	Oleg		4567890123	11/03/2018	06/28/2019		WALKER, L
01/12/2021	In-Progress	Chen	Roberta		5678901234	01/07/2012	07/26/2019		
01/14/2021	Submitted	Kinser	Kirsti		6789012345	09/22/2014	01/10/2017		WALKER, L

Step 41 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Participant	CalPERS Id	Division	Start Date - End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/01/2014 - 07/19/2014			Service Prior to Membership

Step 42 Within the Certification section, select the **certification** check box.

*** 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 Agency Name 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:

Step 43 Select the **Submit** button.

You have completed this scenario.

Appendix

For additional information, refer to the following resources:

- [Public Agency & Schools Reference Guide \(PDF\)](#)
- [State Reference Guide \(PDF\)](#)

Employment Certification

Appointment Tenure

Enter the tenure as of the begin date of the requested period.

Contract Exclusions

Confirm if the position is excluded by reviewing your agency's contract exclusions in myCalPERS.

- Schools: Position exclusions do not apply
- Public Agency: Review your agency's contract exclusions within myCalPERS > Profile > Retirement Contract > Exclusions
- State & CSU: The [State Reference Guide \(PDF\)](#) provides a complete list of positions excluded by law

Employment Category

This is entered based on what the category of the position would have been if the employee was brought into membership as of when they started in this position.

Hiring Document (myCalPERS 2788)

This field is optional. If you would like to provide additional information related to the time base and tenure of the appointment, upload it here.

Position Titles

This is the position that they were in at the time of their request. These must match in the Employment Information and Pay Period Detail sections.

Time Base

Enter the time base as of the begin date of the requested service credit purchase period.

Payroll

Begin/End Dates

Earned periods must be entered by pay period and separated by fiscal year. Multiple pay periods cannot be combined.

- For Public Agency and Schools: Enter your agency's earned period begin and end dates
- For State and CSU: Enter the pay period dates based on the State Controller's Office decentralized payroll calendars.

Division

Only displays for public agency and county office of education employers.

Overtime Hours

Enter the number of overtime hours for the period.

Pay Rate

Enter the full-time pay rate for the earned period even if the employee is part-time.

Pay Rate Type

Enter the pay rate type (Hourly, Monthly, or Daily) per your pay schedule.

Position Titles

This is the position that they were in at the time of the request. This must match in the Employment Information and Pay Period Detail sections.

Reportable Earnings

Enter the reportable gross earnings for the earned period when earned, not paid

Scheduled Full Time Hours Per Week

Complete only if the Pay Rate Type field is entered as Hourly. Enter the number of hours that are considered full time for the position.

Scheduled Full Time Days Per Week

Complete only if the Pay Rate Type field is entered as Daily. Enter the numbers of days that are considered full time for the position.

Special Compensation

Report only the reportable special compensation for the earned period per your agency's Memorandum of Understanding (MOU).

Total Hours Worked

Report only the regular hours worked in the earned period.

CalPERS Resources

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

- Take the online classes below available 24 hours a day. Sign up for classes via myCalPERS Education tab.
 - myCalPERS Employment Certification: Certify a Leave of Absence Service Credit Purchase Request
 - myCalPERS Employment Certification: Service Credit Purchase & Arrears
- [Employment Certification](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Employment Certification
- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > I Want To...: Access myCalPERS Student Guides
- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > I Want To... : Attend Training & Events > Business Rules & myCalPERS Classes
- [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**.
- To contact the [membership team](#) for assistance with the service credit purchase and employment certification processes, email **membership_reporting@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 then select the **Submit Inquiry** link to submit a question or request.