

School Employer Advisory Committee

February 1, 2023

Housekeeping (1 of 2)

Webinar is being recorded

Attendee mics are muted

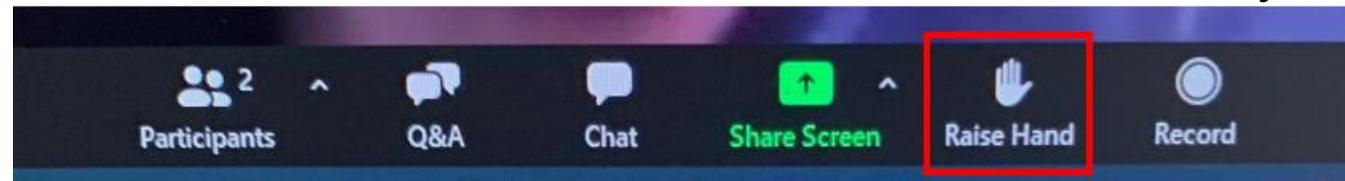
Meeting materials available on www.calpers.ca.gov

Email: CalPERS_SEAC@calpers.ca.gov

Housekeeping (2 of 2)

Options to submit a question for panelist(s):

- Q&A feature
- Raise Hand feature
 - Use raise hand feature to indicate you have a question. The host will call on you to unmute your mic and pose your question.
 - While unmuted, your profile picture and name will display to the host and panelists
 - Only your name will display to the other attendees
 - Select **Lower Hand** to lower, if needed. **Note:** this will not mute yourself if you're unmuted



Agenda (1 of 2)

State Social Security Administrator Update – Christina Rollins

Post-Retirement Employment Update – Christina Rollins

Automated Permanent Separation – Ryan Bieker

Cognos System Reports – Ryan Bieker

Break – 10 minutes

Agenda (2 of 2)

Compensation Update – Brad Hanson

Projected Contribution Rates – Paul Tschida

Invoice Billing – Jonathan Hensley

School Employer Training Opportunities – Stephanie Duncan

Questions and Answers – Renee Ostrander, Brad Hanson, and
Christina Rollins

State Social Security Administrator Update

Christina Rollins
Employer Account Management Division



State Social Security Administrator Questions



Post-Retirement Employment Update

Christina Rollins

Employer Account Management Division

Automated Permanent Separations

Ryan Bieker

Employer Account Management Division

Separation Criteria

No payroll ever

Retired members with active appointments

No payroll for six consecutive months

- Can be removed by employer
- One day after last day on pay
- Confirming unposted payroll does not stop process

Exclusions

- Leave of Absence (LOA)

Viewing Separations in myCalPERS

Retirement Account Summary

Appointment Details	
Programs	
Program: CalPERS	Membership Date: 11/13/2015
Membership Status: Inactive	Enrollment Eligibility Date: 02/24/2022
Position Information	
Employer: Ministry of Magic	CalPERS ID (Employer): 1234567890
Division: Hogwarts School	CalPERS ID (Division): 0987654321
Original Hire Date: 03/18/2014	
Member Category: Miscellaneous	Work Calendar: Work 10 Months/Paid 11 Months
Position Title:	Temporary Position: No
CBU: -	Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)? No
	Appointment ID: 93229672
Retired Annuitant: No	
Health Only: No	
Enrollment Reason: At least half time or more for 1 year or longer	
Contributing Appointment: No	
Appointment Status: Perm Sep	Leave Type:
Enrollment Level: PEPRA New	Formula Name: 2% @ 62 Formula for Miscellaneous/Industrial Members
Member Base Rate: 7.0	Cost Share: 0.0
Contribution Modification:	
Created by User: Dumbledore, Albus	
Created on: 03/14/2022 09:54 AM	
Appointment Profile Last Refreshed: 11/30/2022 08:03 AM	Refunded Appointment: No
Last Refreshed by: ENL-7030-DD-01 - Retirement Enrollment - Daily Processing	

Options at Separation Letter

Member receives letter

- First option is to receive refund of contributions
 - Possible illegal refund

Preventative steps

- Report zero payroll
 - Will also prevent need to confirm unposted payroll
 - Can still complete payroll adjustment
- Termed LOA

Resources

Existing Cognos reports

- Business Partner Info Report, Participant Appointment Details Report, Business Partner On Leave Report

Upcoming enhancements

- Employer will be notified, new Cognos report that shows monthly separations

Employer technical support

- Employer_technical_support@calpers.ca.gov

Employer Cognos Reports

Ryan Bieker

Employer Account Management Division

Employer Cognos Reports (1 of 1)

Updates to existing Payroll Cognos Reports

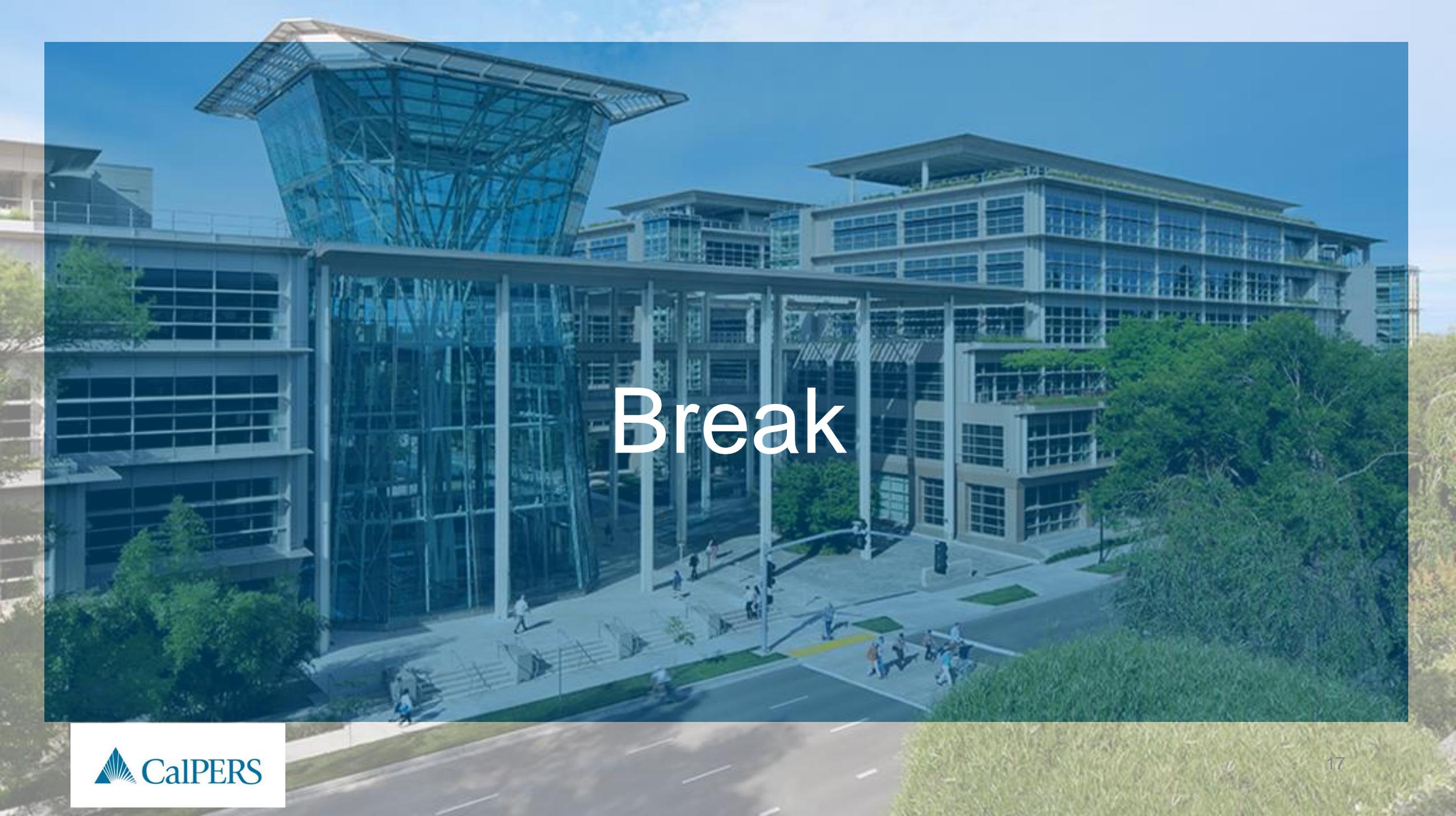
- Contribution Detail Report
- Contribution Posted Detail Report
- Payroll Summary Report

New Cognos Reports

- New Disability Determinations Report
- New IA7 Preprocessing Errors Report

Reminders

Questions

An aerial photograph of a modern university building. The building features a prominent glass tower with a complex, lattice-like structure. The main building has multiple stories with large windows and a green roof. The foreground shows a paved area with people walking and a road. The sky is clear and blue.

Break

Compensation Updates

Brad Hanson

Employer Account Management Division

Off Salary Schedule Pay (1 of 4)

California Code of Regulation 571

Compensation in addition to base salary paid in similar lump-sum amounts to a group or class of employees

These payments are routinely negotiated through collective bargaining in lieu of increases to the salary schedule

Off Salary Schedule Pay (2 of 4)

California Code of Regulation 571

These payments are based on a similar percent of scheduled salary not to exceed six percent (6%) per fiscal year

The contracting agency or school employer may adopt similar action for non-represented groups or classes of employment as were negotiated through collective bargaining

Off Salary Schedule Pay (3 of 4)

Reported in lieu of an increase to salary

Cannot exceed 6% of pay rate

- Flat amounts are ok if they do not exceed 6%

Off Salary Schedule Pay (4 of 4)

Cannot be reported:

- Lump sums
- As a COVID Pay or Stipend
- In addition to a salary increase

Compensation Reporting Web Page (1 of 3)



INVESTMENTS | NEWSROOM | CONTACT | ABOUT



Home | Active Members | Retirees | **Employers** | myCalPERS Log In

Actuarial Resources | Benefit Programs | Contracts | myCalPERS Technical Requirements | **Policies & Procedures**

Home > Employers > Policies & Procedures > Compliance in Compensation Reporting

Compliance in Compensation Reporting

It's important for employers to report accurate member information in compliance with the [Public Employees' Retirement Law \(PERL\)](#) Government (Gov.) Code and California Code of Regulations (CCR). This ensures accurate retirement benefits for our members and their beneficiaries. Retirement benefits are calculated based on a member's years of service credit, age at retirement, and final compensation (average salary for a defined period of employment). Inaccurate reporting of compensation can cause inaccurate calculation of retirement benefits that may result in underpayment or overpayment for both members and employers.

Policies & Procedures

- [Affordable Care Act \(ACA\) Guidance](#)
- [Circular Letters](#)
- [Compliance in Compensation Reporting](#)
- [Health Procedures](#)
- [Pension Reform Impacts](#)
- [Reference & Health Guides](#)

Compensation Reporting Web Page (2 of 3)

The CalPERS Audit Compliance & Resolution team assists employers to ensure compliant reporting. We provide direct service in reviewing labor policies, agreements, and pay schedules to determine if compensation can be reported for retirement benefits. Below are some helpful resources available to employers for various audit scenarios and resolutions, as well as references to applicable PERL, Gov. Codes, and CCRs:

-
- [+ Reporting Compensation](#)

 - [+ Pay Schedules](#)

 - [+ Sample Language](#)

 - [+ Resources for Compliance](#)

Compensation Reporting Web Page (3 of 3)

How to Use this Table

- Select the tab for the appropriate Special Compensation category
- Locate the desired Special Compensation type within that table
- The resulting information for the row will identify if the Special Compensation is reportable for the desired member category

Incentive	Educational	Premium	Special Assignment	Statutory		
Show	10 <input type="checkbox"/>	entries	Search:	<input type="text"/>		
Special Compensation Type	Misc.	Safety-Fire	Safety-Police	Classic	PEPRA	Notes
Bonus	Yes	Yes	Yes	Yes		Must have a system in place for evaluating a member for

Compensation Reporting Web Page Coming Soon!

School Full Time Pay Rate Calculator

Compensation Questions

Projected Contribution Rates

Paul Tschida
Actuarial Office

Projected Contribution Rates (1 of 2)

Updated five-year projection of employer contribution rates

- Incorporates investment loss from year ending June 30, 2022
- Loss first affects employer rates in fiscal year 2023-24
- Projected rates are estimates only; actual rates will be set by future actuarial valuations

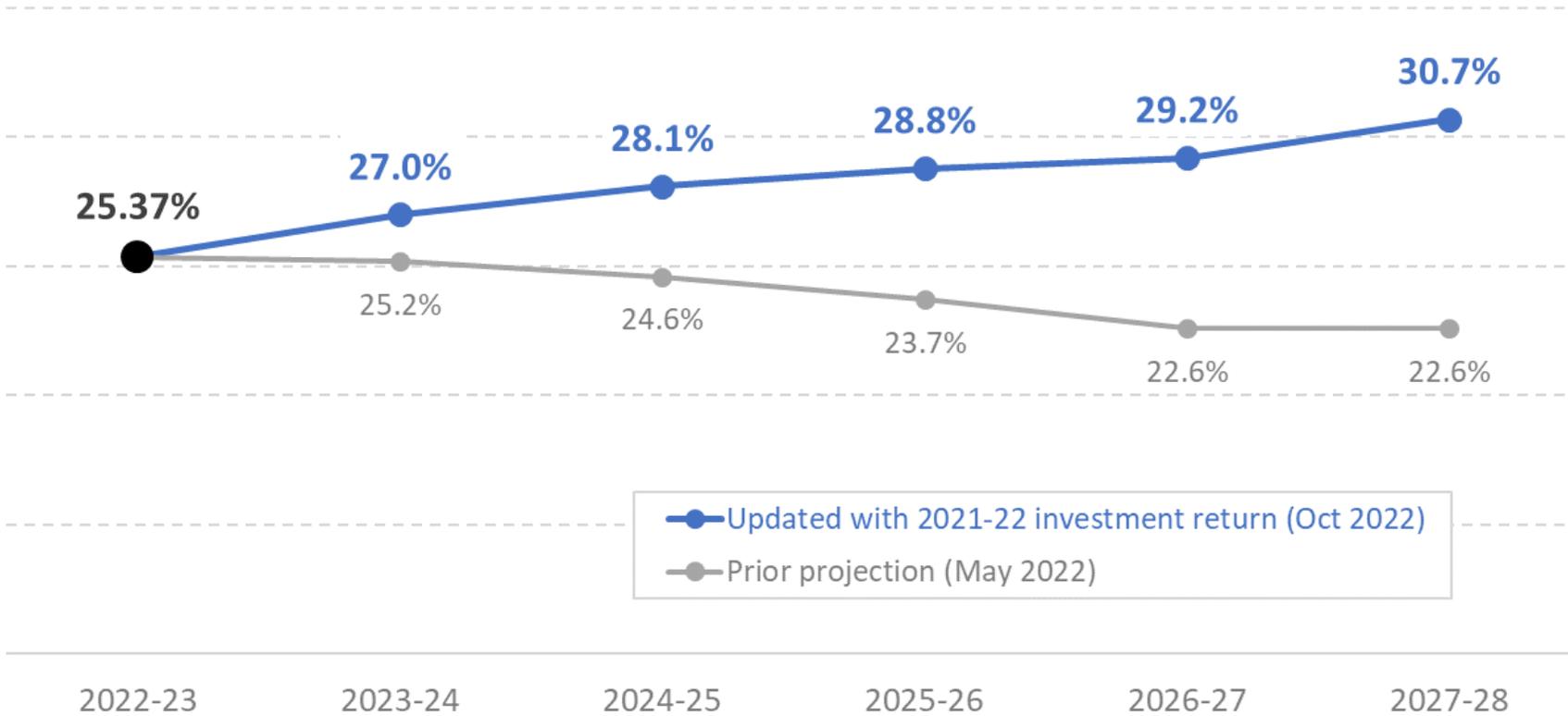
Member rates unaffected by investment return

- No changes to member rates expected in 2023-24

Rates for 2023-24 expected to be finalized in April 2023

Projected Contribution Rates (2 of 2)

Employer contribution (% of payroll)



- Updated projection includes estimated effect of actual 2021-22 investment return.
- These are estimates. Actual rates in future years will be based on actual future experience and could vary, potentially markedly, from projected rates shown here.

Contribution Rate Questions

Update Billing for Late Payroll and Correction Administrative Fees

Jonathan Hensley

Financial Reporting & Accounting Services Division

Change in Billing Process (1 of 2)

myCalPERS system is billing the County Office of Education (contract holder) for the late payroll reporting and the late payroll correction administrative fees

New functionality will bill the payroll data owners that report directly to CalPERS

Change in Billing Process (2 of 2)

This will be consistent with billing fees for AB1309 (Retired Annuitant Late Payroll Reporting)

For example, independent reporters, such as school districts, will receive these bills directly instead of billing the County Office of Education (contract holder)

Benefits

School districts who report directly to CalPERS will now be billed their own administrative fees

Reduction in billing questions and inquiries

Better alignment of payment ownership

Streamline business process to stay consistent with how myCalPERS bills other administrative fees, such as AB1309

Available Resources

Employer Technical Support team

- Email us at: employer_technical_support@calpers.ca.gov
- Email us at: FRAS_payroll@calpers.ca.gov

For additional questions, please contact our CalPERS Customer Contact Center at **(888) CalPERS** (or **888-225-7377**)

Invoice Billing Questions

Employer Education for Schools

Stephanie Duncan

Customer Education and Outreach Division

Educational Options for Schools

Online Classes

24/7 Access

Self-guided

Instructor-Led Classes

Virtual & In-person

Live & Interactive

Resources

Business Rules
Reference &
Health Guides

myCalPERS
Student Guides

Home Profile Reporting Person Information **Education** Pension Outlook Other Organizations

Education Resources **Classes** Consultations | Education Activity & History

Common Tasks Classes

Sign up for an instructor-led class at a location near you, or take an online class at your own pace. View your [Education Activity & History](#) to see classes you've enrolled in or completed.

Instructor-Led **Online**

[Hide class descriptions](#) | Show class description

Class	Duration	Action
myCalPERS Retirement Enrollment: Searching for a Participant This class provides an overview on the process of searching and adding information for a participant. In this lesson you will learn to search for a participant and retrieve their current membership status in myCalPERS.	1 Hour	Start
myCalPERS Retirement Enrollment: Verification of Membership Eligibility Verify CalPERS membership, query an active employee's appointment details within your agency, or query a retiree	1 Hour	Start

Online Classes

Business Rules

+ About CalPERS

- Membership

- Qualifications for California State Universities (CSU)
- Qualifications for Public Agencies, State Agencies & Schools
- Requirements for Public Agencies & Schools
- Working After Retirement

+ Payroll Reporting

+ Health

myCalPERS

+ Overview

+ System Access Administration

+ Contracts

+ Retirement Enrollment

+ Payroll

+ Health

+ Payments

- Other Topics



- Certify a Leave of Absence Service Credit Purchase Request
- Reports: Generate & Schedule Cognos Reports
- Retirement Appointment Reconciliation
- Out-of-Class Reporting

Business Rules

Retirement Business Rules

- School benefit provisions
- Reporting overtime and stipends
- Leaves of absence and permanent separations
- CalPERS/CalSTRS election

Health Business Rules

- Health enrollment self-service
- Health enrollment and eligibility
- Health Benefit Officer roles and responsibilities

Advanced Classes

Advanced Compensation Reporting

- Compensation reporting compliance
- Pay schedule compliance
- Compensation limits and reporting

Advanced Membership

- Employment Certification
- Multiple and overtime positions
- CalPERS/CalSTRS election for substitutes

myCalPERS Training

- Process transactions
- Navigate myCalPERS
- Small computer lab or virtual

Enrollment Courses

Retirement enrollment

- Verify membership
- Create appointments
- Add, modify, reconcile retirement enrollments
- Enter leaves of absence and permanent separations

Health enrollment

- Key health enrollments
- View health enrollment details

Specialized Courses

Payroll reporting

- Create, modify, and submit
- Reconcile an earned period payroll report

Payroll adjustments

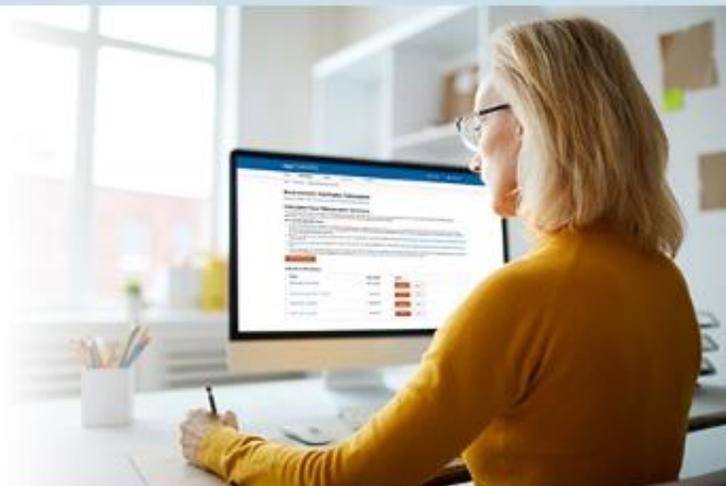
- View posted payroll
- Understand different adjustment types
- Use the Maintain Payroll Records tool

Employer reports (Cognos)

Employers

Offering Early Retirement Incentives to Your Employees?

We can help your employees get the information they need.

[Contact Us](#)

I Want To . . .

[Access myCalPERS Student Guides](#)[Attend Training & Events](#)[Contract with CalPERS for Health & Retirement](#)[Learn About Open Enrollment](#)[Search Actuarial Reports](#)[Stay Up to Date on Policies & Procedures](#)

Resources

[CalPERS 457 Plan](#)[California Employers' Pension Prefunding Trust \(CEPPT\) Fund](#)[California Employers' Retiree Benefit Trust \(CERBT\) Fund](#)[Circular Letters](#)[Governmental Accounting Standards Board \(GASB\)](#)

Forms & Publications

[Health Benefits Plan Enrollment for Active Employees \(HBD-12\) \(PDF\)](#)[Public Agency & Schools Reference Guide \(PDF, 3.04 MB\)](#)[State Reference Guide \(PDF, 2.26 MB\)](#)[Summary of PEPRA \(PDF\)](#)[Workplace Wellness Guide \(PDF\)](#)

Employer Education

We offer a variety of training and informational events to assist you with your CalPERS-related business responsibilities. Our classes, workshops, and meetings are offered on multiple dates. Select the class or event name for complete schedules and more information.

Subscribe to our [Employer Bulletin](#) for customized news and event updates. If you're interested in member-related training for employees, refer to [Member Education](#).

Upcoming Events

Name	Description	Format
CalPERS Educational Forum	<p>Attend this annual event to learn more about CalPERS benefit programs and services. Highlights include informative sessions, exhibits, and private consultations.</p> <p>The next event will be held October 2-4, 2023 at L.A. Live in Los Angeles.</p>	Conference

[Education Center](#)[Employer Education](#)[Member Education](#)[Using myCalPERS](#)

Subscribe to Our Newsletters and Alerts

Subscribe to the Employer Bulletin to receive emails when new training and events are offered.

Email Address

[Subscribe](#)

Classes & Workshops

Name	Description	Format
 Business Rules & myCalPERS Classes	<p>Learn about laws and rules associated with your agency's retirement and/or health contract as well as how to navigate and process transactions in myCalPERS.</p> <p>To register for classes, log in to your myCalPERS business partner account, then select Education.</p>	Instructor-Led and Online
Prefunding Programs Workshops	<p>Learn about the trust funds, to prefund employer pension contributions, retiree health, and Other Post Employment Benefit (OPEB) liabilities.</p> <p>To register, complete the form on Prefunding Programs Workshops.</p>	Instructor-Led

Customized Classes

County Office of Education

- On-site presentations
- All districts attending
- Provides cohesive message
- Email us at calpers_employer_communications@calpers.ca.gov

Employers

New Year, New Laws

The following California legislation will become law January 1.

[Read About the Laws](#)



I Want To . . .

[Access myCalPERS Student Guide](#)

[Attend Training & Events](#)



Resources

[2023 Health Plan Changes](#)

[CALPERS 401\(k\) Plan](#)



Forms & Publications

[Health Benefits Plan Enrollment for Active Employees \(HBD-12\) \(PDF\)](#)



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myCalPERS Student Guides & Resources

These resources will help you navigate and process transactions through myCalPERS. The student guides below will assist you with system functionality related to job functions. Check back often for the most current student guide versions.

Attend an in-person class for a hands-on learning experience where you can complete transactions in a training environment or walk through our student guides scenarios with an instructor in a virtual class. Log in to your [myCalPERS](#) business partner account, then select **Education** to register. If you don't have myCalPERS access, contact your agency's [system access administrator](#).

Our educators can visit your agency to provide tailored education and training at no cost. Email your training request to our [employer education team](#).

Resources

[Employment Certification](#)

[myCalPERS Employer Report \(Cognos\) Catalog](#)

[Reference & Health Guides](#)

[System Access Administrators](#)

[System Enhancements](#)

myCalPERS Student Guides & Resources

- + New Users

- + Retirement

- + Financials

- + Health

- + Payroll

- + Reports

- + System Access

+ New Users

- Retirement

Name	Audience	Description
myCalPERS Retirement Enrollment (PDF, 2.08 MB)	<ul style="list-style-type: none">• Non-Central State Agency• Public Agency• School	Verify membership status, add/change appointments for active employees and retired annuitants, and reconcile and maintain appointment statuses.
myCalPERS Employment Certification Functionality (PDF, 2.04 MB)	<ul style="list-style-type: none">• Non-Central State Agency• Public Agency• School• State/CSU	Submit service credit purchase requests. For arrears determinations, view details, waive appeal periods, and submit reconsiderations and payroll.





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[myCalPERS Technical Requirements](#)

[Policies & Procedures](#)

[Home](#) > [Employers](#) > [Policies & Procedures](#) > [Reference & Health Guides](#)

Reference & Health Guides

The reference and health guides are designed to help you in your business and health transactions with CalPERS. We encourage you to make the applicable guides available to all staff who process enrollments or convey retirement and/or health benefit information.

Reference Guides

- [Public Agency & Schools Reference Guide \(PDF, 3.17 MB\)](#)
- [State Reference Guide \(PDF, 2.47 MB\)*](#)

Health Benefits Guides

- [Public Agency & Schools Health Benefits Guide \(PDF, 1.94 MB\)](#)
- [State Health Benefits Guide \(PDF, 2.14 MB\)](#)

Policies & Procedures

- [Affordable Care Act \(ACA\) Guidance](#)
- [Circular Letters](#)
- [Compliance in Compensation Reporting](#)
- [Employment Certification](#)
- [Health Procedures](#)
- [Pension Reform Impacts](#)
- [Reference & Health Guides](#)

Resources

Employer Education Questions

Open Questions and Answers

Renee Ostrander, Brad Hanson, and Christina Rollins
Employer Account Management Division

Thank you for joining us!

CalPERS School Employer Advisory Committee