

School Employer Advisory Committee

August 7, 2024

Housekeeping (1 of 2)

Webinar is being recorded

Attendee mics are muted

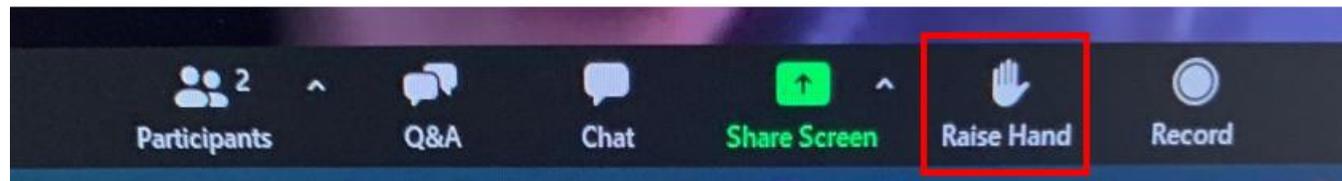
Meeting materials available on www.calpers.ca.gov

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 your mic if you're unmuted



Agenda (1 of 2)

Reciprocal Self-Certification Resources – Veronica Silva-Gil

Employment Certification Resources – Natalie Spencer

Annual Information Request – Liza Lopez

Cognos Reports – Mai Khang

Post-Retirement Employment Requirements – Heather Porter

Break – 10 minutes

Agenda (2 of 2)

Aged Audit Process – Truc Nguyen

Full-Time Equivalent Pay Rate Calculator- Kenneth Noss

Timely Payroll Reporting – Brittney Greer and Jasmine Sullivan

Employer Training – Amanda Howe

Round Table Discussion

Reciprocal Self-Certification Resources

Veronica Silva-Gil

Employer Account Management Division (EAMD)

Reciprocal Self-Certification Resources Overview

Reciprocal Self-Certification Form

Employer Responsibilities

Accessing the Form

CalPERS 1187

Access Rolls

Reviewing Your System Access Administrators

Online Education

Resources

Reciprocal Self-Certification Form

Required for all employees hired after January 1, 2013

Obtain information about qualifying reciprocal retirement system(s)

Determine members' retirement enrollment level

Employer Responsibilities

Use the most recent version of the Reciprocal Self-Certification Form



Provide form to every new enrolled member



Obtain completed form within 10 business days

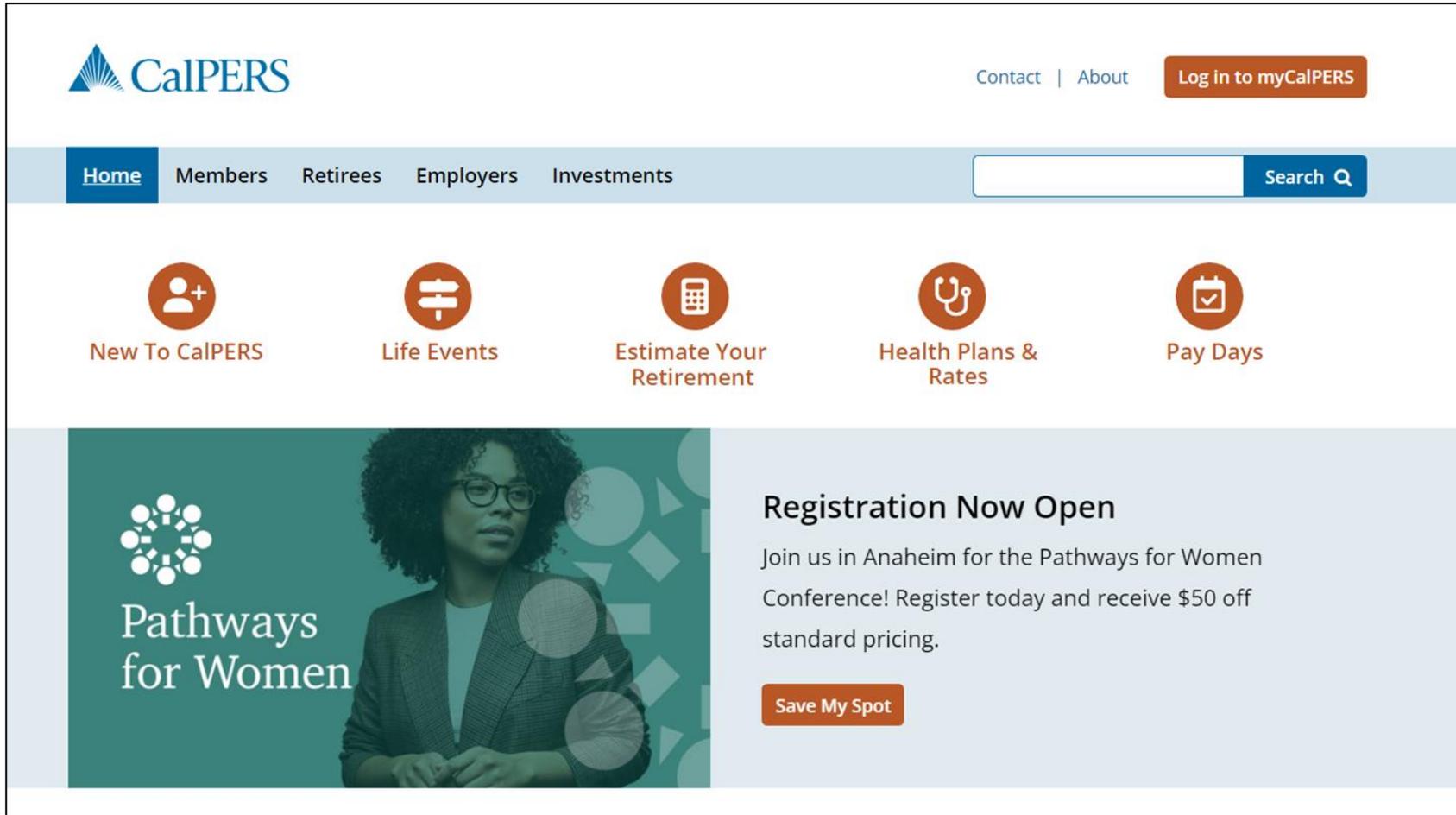


Ensure form is completed thoroughly



Update information within myCalPERS

Accessing the Form (1 of 3)



The screenshot shows the CalPERS website homepage. At the top left is the CalPERS logo. To the right are links for "Contact" and "About", and a "Log in to myCalPERS" button. Below this is a navigation bar with "Home" (highlighted), "Members", "Retirees", "Employers", and "Investments". A search bar is on the right of the navigation bar. The main content area features five circular icons with labels: "New To CalPERS", "Life Events", "Estimate Your Retirement", "Health Plans & Rates", and "Pay Days". Below this is a promotional banner for the "Pathways for Women" conference, featuring a photo of a woman and the text "Registration Now Open". The banner includes a "Save My Spot" button.

Accessing the Form (2 of 3)

The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact | About' and a 'Log in to myCalPERS' button. Below this is a horizontal navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located on the right side of this bar, containing the text 'reciprocal self certification for' and a search icon. Below the navigation bar are five service icons: 'New To CalPERS', 'Life Events', 'Estimate Your Retirement', 'Health Plans & Rates', and 'Pay Days'. A large banner features a photo of a man working on a laptop and the text 'Register Now for myCalPERS' with a sub-message about staying up to date on Open Enrollment communication. Below the banner is a 'Videos' section with three video thumbnails: 'Tell us about yourself' (listing Race, Ethnicity, Preferred Language, Sexual Orientation, Gender Identity), 'Quick Tip: Cost-of-Living Adjustment', and 'Quick Tip: Benefits Education Events'.

Accessing the Form (3 of 3)

The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact | About' and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located on the right side of the navigation bar. The main content area shows a breadcrumb trail 'Home > Site Search' and a 'Site Search' heading. A search input field contains the text 'reciprocal self certification form' and a search button. Below the search bar, a list of search results is displayed. The first result is highlighted with a red rectangular box. This result is titled 'member-reciprocal-self-certification-form-calpers-1187.pdf' and includes the URL 'www.calpers.ca.gov > docs > forms-publications > member-recipr...'. Below the title, it specifies 'File Format: PDF/Adobe Acrobat' and provides a brief description: 'Reciprocal Self-Certification Form. Complete the following information and return this form to your employer within 10 business days to determine your.' Other search results are visible below, including 'List of Qualifying Public Retirement Systems in California' and 'Revised Reciprocal Self-Certification Form - CalPERS'.

Understanding the Form (CalPERS-1187) (1 of 4)



State of California
California Public Employees' Retirement System
www.calpers.ca.gov

State of California
California Public Employees' Retirement System
www.calpers.ca.gov

Reciprocal Self-Certification Form

Complete the following information and return this form to your employer within 10 business days to determine your eligibility for benefits in CalPERS. To ensure this form is completed correctly, please reference the enclosed *List of Qualifying Reciprocal Retirement Systems in California*.

Section 1: Member Information

Member Name (Last)	(First)	(Middle)
Date of Birth	CalPERS ID	Enrollment Date with this Employer

Are you a member of CalPERS with funds on deposit? Yes No

Are you a member of the defined benefit plan of one of the retirement systems listed on the attached *List of Qualifying Reciprocal Retirement Systems in California*? Yes No. If yes, complete Section 2 with membership information for each qualifying reciprocal retirement system. Do not provide CalPERS data on this form. If no, skip to Section 3.

Section 2: Qualifying Reciprocal Membership Information

Data must be validated with reciprocal system prior to completion. Failure to validate information may result in enrollment errors. Refer to the *List of Qualifying Reciprocal Retirement Systems in California*. Only include details on this form if you are a member under the retirement systems listed and not CalPERS-covered.

1) Full name of most recent reciprocal retirement system (do not provide an acronym):

Membership date in most recent reciprocal system (MM/DD/YYYY):

Are you currently active with this reciprocal system? Yes No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY):

Did you receive a refund from this reciprocal system? No Yes, provide refund date (MM/DD/YYYY):

Did you retire from this reciprocal system? No Yes, provide retirement date (MM/DD/YYYY):

Note: If you have additional reciprocal membership, provide the details below for reciprocal system #2. If you do not, skip to Section 3.

2) Full name of reciprocal retirement system (do not provide an acronym):

Membership date (MM/DD/YYYY):

Are you currently active with this reciprocal system? Yes No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY):

Did you receive a refund from this reciprocal system? No Yes, provide refund date (MM/DD/YYYY):

Did you retire from this reciprocal system? No Yes, provide retirement date (MM/DD/YYYY):

Note: If you have additional reciprocal membership, attach a second form. If you do not, skip to Section 3.

Section 3: Sign and Certify

I understand that I am subject to the applicable laws and regulations of each system where I have membership. I also understand that completing this form will only determine my enrollment eligibility in CalPERS. It is not a request to establish reciprocity.

I certify that the information on this form has been verified with the qualifying reciprocal retirement system as true and correct and any information found to be incorrect may require corrections to my CalPERS account including, but not limited to, my retirement enrollment level or formula and adjustments to my member contributions. CalPERS may make any necessary corrections to my account to ensure I am properly enrolled and eligible to receive the correct retirement benefits.

Member Signature	Date
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CalPERS-1187 (Revised 05/2023) Page 1 of 2

Understanding the Form (CalPERS-1187) (3 of 4)

Section 2: Qualifying Reciprocal Membership Information

Section 2: Qualifying Reciprocal Membership Information

The data you provide must be validated with your reciprocal system. Failure to validate information may result in enrollment errors. Refer to the *List of Qualifying Reciprocal Retirement Systems in California* and only include details on this form for membership under the retirement systems listed, not employment covered by CalPERS.

1) Name of most recent reciprocal retirement system: _____
Membership date in most recent reciprocal system (MM/DD/YYYY): _____
Are you currently active with this reciprocal system? Yes No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): _____
Did you receive a refund from this reciprocal system? Yes No, provide refund date (MM/DD/YYYY): _____
Did you retire from this reciprocal system? Yes No, provide retirement date (MM/DD/YYYY): _____
Note: Provide details below for a second reciprocal system or additional membership periods, if applicable. If not, skip to Section 3.

2) Name of reciprocal retirement system: _____
Membership date (MM/DD/YYYY): _____
Are you currently active with this reciprocal system? Yes No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): _____
Did you refund from this reciprocal system? Yes No, provide refund date (MM/DD/YYYY): _____
Did you retire from this reciprocal system? Yes No, provide retirement date (MM/DD/YYYY): _____
Note: If you have additional reciprocal membership, attach a second form. If not, skip to Section 3.

Understanding the Form (CalPERS-1187) (4 of 4)

Section 3: Sign and Certify

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I understand that I am subject to the applicable laws and regulations of each system where I have membership. I also understand that completing this form will only determine my enrollment eligibility in CalPERS. It is not a request to establish reciprocity.

I certify that the information on this form has been verified with the qualifying reciprocal retirement system as true and correct and any information found to be incorrect may require corrections to my CalPERS account including, but not limited to, my retirement enrollment level or formula and adjustments to my member contributions. CalPERS may make any necessary corrections to my account to ensure I am properly enrolled and eligible to receive the correct retirement benefits.

Member Signature

Date

Access Role

Business Partner Retirement Enrollment

Reviewing Your System Access Administrators (1 of 2)

The screenshot displays the myCalPERS user interface. At the top, there is a navigation bar with tabs for Home, Profile (highlighted with a red box), Reporting, Person Information, Education, and Other Organizations. Below this, there are sub-tabs for My Home and Requests. A left sidebar contains sections for Common Tasks and Menu, with links for Person Search and Contact Personal Security Settings. The main content area features a 'Welcome' message, a notice about 'Upcoming Scheduled Maintenance' (stating that there is no maintenance at this time), and a 'My Cases' section. A prominent 'Health Plan Search by ZIP Code' form is visible, with fields for ZIP Code, Member Category (radio buttons for State/CSU and Public Agency/School), and Search Year (a dropdown menu set to 2023), along with a Search button. On the right side, there are promotional banners for 'Forms and Publications Center' and 'QUICK LINKS' including 'CalPERS Quick Picks' and 'View the latest CalPERS Circular Letters'.

Reviewing Your System Access Administrators (2 of 2)

The screenshot displays the myCalPERS user interface. The top navigation bar includes tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, a secondary navigation bar lists various system functions like Summary, Payments, and Retirement Contract. A left-hand menu contains options such as Contacts, View BP Relationships, and Divisions. The main content area is divided into sections: Profile, Addresses, Communication Information, and Contacts. The Profile section shows details like CalPERS ID, Federal Tax ID, and Agency Name. The Addresses section lists physical and mailing addresses. The Communication Information section shows preferred communication methods. The Contacts section contains a table of system administrators.

Contact Type	Name	System Admin	Primary	Phone Number
Health Benefit Assistant	Employee Name 13	Y	N	(281) 222-4040
Executive	Employee Name 62	Y	Y	(323) 342-6709
Payroll	Business Partner	Y	N	
Payroll	Business Partner 103		N	
Payroll	Business Partner 102		N	
Payroll	Business Partner 101		N	
Payroll	Business Partner 2		N	
Payroll	Business Partner 1		N	

Online Education

myCalPERS Retirement Enrollment: Edit Reciprocal Information

Assists with adding and updating reciprocal information in myCalPERS

Practice processing transactions

Available 24/7

Access Online Classes (1 of 6)

The screenshot shows the myCalPERS website interface. At the top, there is a navigation bar with tabs for Home, Profile, Reporting, Person Information, Education (highlighted with a red box), and Other Organizations. Below this, there is a sub-navigation bar with My Home and Requests. On the left side, there is a sidebar with Common Tasks, Menu, Person Search, Contact Personal Security Settings, and a list of links. The main content area displays a welcome message, a notice about upcoming scheduled maintenance (which is currently not applicable), and a section for health plan search by ZIP code. The search form includes fields for ZIP Code, Member Category (State/CSU selected), Search Year (2023), and a Search button. On the right side, there are quick links and a section for the latest CalPERS Circular Letters.

Access Online Classes (2 of 6)

The screenshot shows the myCalPERS website interface. At the top, there is a navigation bar with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, a secondary navigation bar includes Education Resources, Classes, Consultations, and Education Activity & History. The main content area is titled 'Education Resources' and features a 'Common Tasks' sidebar. The main text states: 'We offer various training opportunities to assist you with your CalPERS-related business.' There are four content boxes: 'Classes' (with a red box around the 'Enroll in a Class' link), 'Consultations' (with a 'Request a Consultation' link), 'Activity & History' (with a 'View Activity & History' link), and 'More Resources' (with a 'View Employer Education' link).

Access Online Classes (3 of 6)

The screenshot shows the myCalPERS website interface. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Education Resources, Classes, Consultations, and Education Activity & History. The 'Classes' sub-tab is active. On the left, there is a 'Common Tasks' sidebar. The main content area is titled 'Classes' and includes a description: 'Sign up for an instructor-led class that's offered virtually or in person at a location near you. Or, take an online class at your own pace.' Below this is a link to 'View your Education Activity & History'. There are two filter buttons: 'Instructor-Led' and 'Online', with 'Online' highlighted by a red box. Below the filters, there is a search bar and a link to 'Show class descriptions'. A table lists several classes, each with a 'View Class Dates' button.

Class ^	Action
Advanced Compensation Reporting	View Class Dates
Advanced Membership	View Class Dates
Business Rules for Public Agency Employers	View Class Dates
Business Rules: Health for Public Agency and School Employers	View Class Dates
myCalPERS Employer Reports (Cognos)	View Class Dates
myCalPERS Health Enrollment	View Class Dates
myCalPERS Payroll Adjustments	View Class Dates
myCalPERS Payroll Reporting	View Class Dates

Access Online Classes (4 of 6)

myCalPERS

Home Profile Reporting Person Information Education Other Organizations

Education Resources Classes Consultations | Education Activity & History

Common Tasks **Classes**

Sign up for an instructor-led class that's offered virtually or in person 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 descriptions](#)

Class ^	Action
Advanced Compensation Reporting	View Class Dates
Advanced Membership	View Class Dates
Business Rules for Public Agency Employers	View Class Dates
Business Rules: Health for Public Agency and School Employers	View Class Dates
myCalPERS Employer Reports (Cognos)	View Class Dates
myCalPERS Health Enrollment	View Class Dates
myCalPERS Payroll Adjustments	View Class Dates
myCalPERS Payroll Reporting	View Class Dates

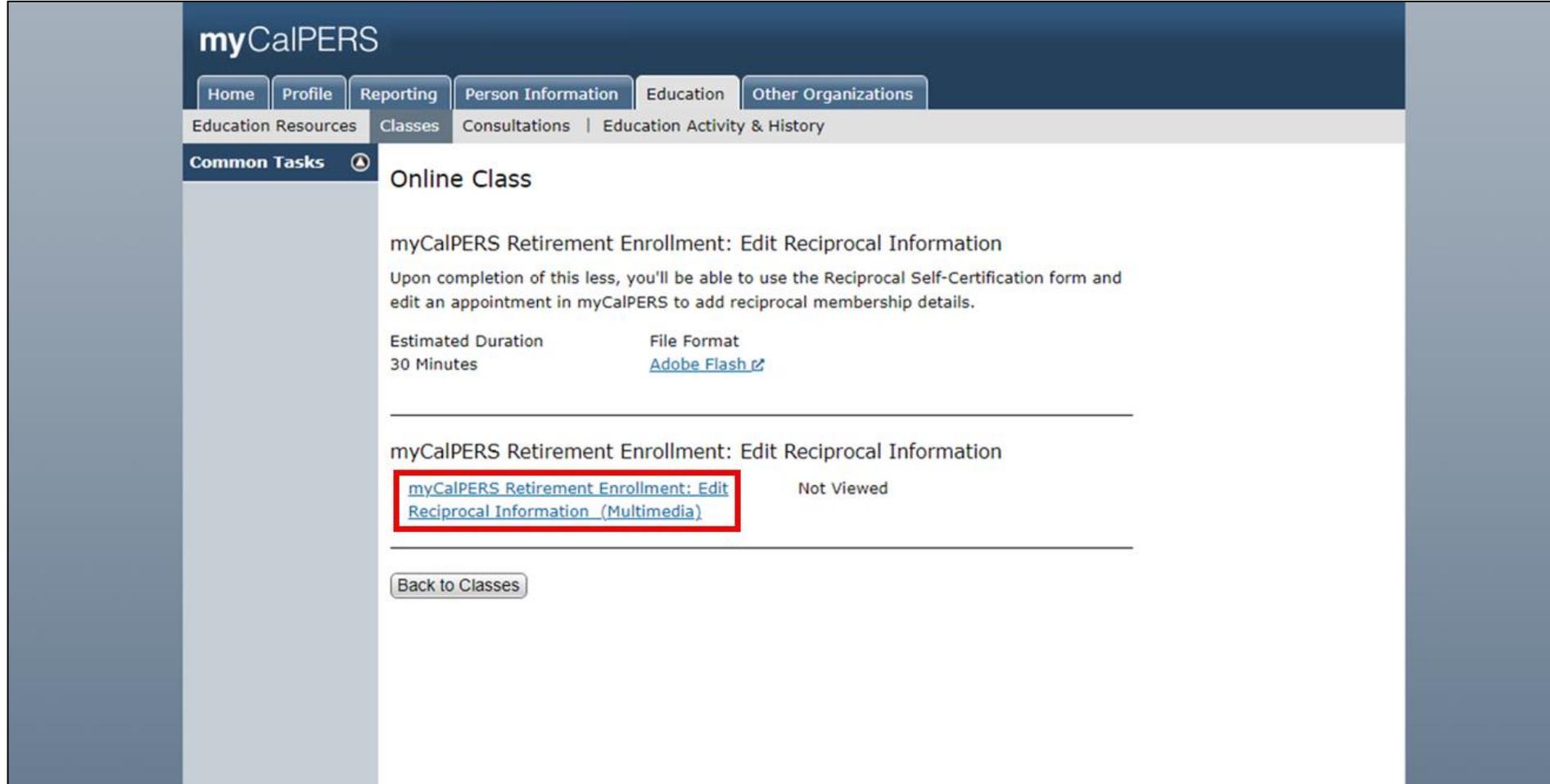
Access Online Classes (5 of 6)

The screenshot shows the myCalPERS user interface. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Education Resources, Classes, Consultations, and Education Activity & History. The 'Classes' sub-tab is active, and the 'Common Tasks' menu is open. The main content area is titled 'Classes' and includes a brief description: 'Sign up for an instructor-led class that's offered virtually or in person at a location near you. Or, take an online class at your own pace.' Below this is a link to 'View your Education Activity & History'. There are two filter tabs: 'Instructor-Led' and 'Online', with 'Online' selected. A search bar contains the text 'myCalPERS Retirement En'. Below the search bar is a table with the following data:

Class ^	Duration ↕	Action
myCalPERS Retirement Enrollment: Edit Reciprocal Information	30 Minutes	Start
myCalPERS Retirement Enrollment: Add a New Appointment	1 Hour	Start
myCalPERS Retirement Enrollment: Add Appointment Events	30 Minutes	Start
myCalPERS Retirement Enrollment: Enrolling a Retired Annuitant	1 Hour	Start

At the bottom right of the table area, it says 'Showing records 1 - 4'.

Access Online Classes (6 of 6)



The screenshot displays the myCalPERS user interface. At the top, the logo 'myCalPERS' is visible. Below it, a navigation bar contains tabs for 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Under the 'Education' tab, there are sub-tabs for 'Education Resources', 'Classes', 'Consultations', and 'Education Activity & History'. A 'Common Tasks' sidebar is on the left. The main content area is titled 'Online Class' and features a list of classes. The first class is 'myCalPERS Retirement Enrollment: Edit Reciprocal Information', with a description: 'Upon completion of this less, you'll be able to use the Reciprocal Self-Certification form and edit an appointment in myCalPERS to add reciprocal membership details.' It lists an 'Estimated Duration' of '30 Minutes' and a 'File Format' of 'Adobe Flash'. The second class is also 'myCalPERS Retirement Enrollment: Edit Reciprocal Information', with a status of 'Not Viewed'. The link for this second class, 'myCalPERS Retirement Enrollment: Edit Reciprocal Information (Multimedia)', is highlighted with a red rectangular box. A 'Back to Classes' button is located at the bottom of the class list.

Resources (1 of 3)

Reciprocal Self-Certification Form (PDF)

CalPERS logo and navigation: Home, **Members**, Retirees, Employers, Investments. Search bar.

Members

Register Now for myCalPERS

Stay up to date on upcoming Open Enrollment communication using your personalized myCalPERS account.

[Register Now for myCalPERS](#)

- I Want To . . .**
 - Apply for Retirement
 - Attend Training & Events
 - Change Retirement Systems
 - Learn About Health Plan Open Enrollment
 - Get the Latest Member News [↗](#)
 - Make a Payment
 - Plan My Financial Future [↗](#)
 - Purchase Service Credit
 - Refund My Contributions
 - Supplement My Retirement Income
 - View Health Plan Rates
- Resources**
 - 2013 Public Employees' Pension Reform Act (PEPRA)
 - 2025 Health Plan Changes
 - Affordable Care Act (ACA)
 - Cal Employee Connect [↗](#)
 - CalPERS 457 Plan
 - CalPERS Benefits Education Events
 - Dental Benefits [↗](#)
 - Disability Retirement
 - Retirement Benefit Formulas
 - Retirement Planning Checklist
- Forms & Publications**
 - Health Benefits Plan Enrollment for Active Employees (HBD-12) (PDF)
 - Planning Your Service Retirement (PUB 1) (PDF)
 - Retirement Allowance Estimate Request (PDF)
 - Service Credit Purchase Options (PUB 12) (PDF)
 - Service Retirement Election Application (PUB 43) (PDF, 1.33 MB)
 - Special Power of Attorney (PDF)

[View All](#) [➔](#)

CalPERS logo and navigation: Home, Members, Retirees, Employers, Investments. Search bar.

Forms & Publications

Browse, download, or print any form, publication, or other documents you may need. Forms are subject to our [Privacy Notice](#) and [Notice of Privacy Practices](#).

To order a publication:

- **Members:** [contact us](#) by phone.
- **Employers:** log in to [myCalPERS](#) [↗](#) and select **Requests** to access the Publication Ordering List.

Filter Documents

Clear All

Document Year: Filter by Year [▼](#)

Active Members

- All Active Members Documents (268)
 - Beneficiaries (13)
 - Community Property (4)
 - Deferred Compensation (1)
 - Health Benefits (155)
 - Judges' Retirement Systems (12)
 - Refunds & Reciprocity (10)
 - Retirement Benefits (71)
 - Service Credit (13)
 - Trusts & Power of Attorney (3)

Show 25 entries

Search:

Showing 1 to 1 of 1 entries (filtered from 1,013 total entries)

Previous **1** Next

Resources (2 of 3)

Using myCalPERS

The screenshot shows the CalPERS homepage. At the top left is the CalPERS logo. To the right are links for 'Contact | About' and a 'Log in to myCalPERS' button. Below the logo is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located in the top right of this bar, containing the text 'education center' and a search icon. Below the navigation bar are five icons with labels: 'New To CalPERS', 'Life Events', 'Estimate Your Retirement', 'Health Plans & Rates', and 'Pay Days'. A large banner features a man working on a laptop with the text 'Register Now for myCalPERS' and 'Stay up to date on upcoming Open Enrollment communication using your personalized myCalPERS account.' Below the banner is a 'Register for myCalPERS Now' button. At the bottom is a 'Videos' section with three video thumbnails: 'Health Equity Starts With You', 'Cost-of-Living Adjustment (COLA)', and 'CalPERS Benefits Education Events (CBEEs)'.

The screenshot shows the CalPERS Education Center page. At the top left is the CalPERS logo. To the right are links for 'Contact | About' and a 'Log in to myCalPERS' button. Below the logo is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located in the top right of this bar. The main heading is 'Education Center'. Below this is a list of links: 'Employer Education', 'Member Education', and 'Using myCalPERS', with the last one highlighted by a red box. To the right is a featured section titled 'Planning Your Financial Future' with the text 'Will you have enough money for the retirement lifestyle you want?' and a 'Watch our Video Series' button. Below this is an 'Overview' section with a bulleted list: 'CalPERS Benefits Education Events (CBEEs) for members are held regularly throughout the state.', 'We offer free, online, and instructor-led classes for members based on career stage.', 'Employers can take classes on business procedures and rules and get hands-on system training for completing transactions in myCalPERS.', and 'The CalPERS Educational Forum for employers is held every fall.' At the bottom left is the date 'June 19, 2024'.

Resources (3 of 3)

[Public Agency & School References Guide \(PDF\)](#)

- Call the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**) with questions

The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a 'Log in to myCalPERS' button. Below this is a navigation bar with tabs for 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located to the right of the 'Employers' tab. Underneath the navigation bar is a secondary menu with links for 'Actuarial Resources', 'Benefit Programs', 'Contracts', 'myCalPERS Technical Requirements', and 'Policies & Procedures'. The main content area has a breadcrumb trail: 'Home > Employers > Policies & Procedures > Reference & Health Guides', with the last three items highlighted in a red box. The main heading is 'Reference & Health Guides'. Below it is a paragraph: '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.' There are three main sections: 'Reference Guides', 'Health Benefits Guides', and 'Policies & Procedures'. The 'Reference Guides' section has a red box around the link 'Public Agency & Schools Reference Guide (PDF, 3 MB)'. The 'Health Benefits Guides' section has two links: 'Public Agency & Schools Health Benefits Guide (PDF, 1.2 MB)' and 'State Health Benefits Guide (PDF, 1.3 MB)'. The 'Policies & Procedures' section has several links: 'Affordable Care Act (ACA) Guidance', 'Circular Letters', 'Compliance in Compensation Reporting', 'Employment Certification', 'Health Procedures', 'Pension Reform Impacts', and 'Reference & Health Guides'. The 'Resources' section has two links: 'myCalPERS Student Guides' and 'PERL'.

Reciprocal Self-Certification Form Questions

Employment Certification Resources

Natalie Spencer
EAMD

When is an Employment Certification Required?

Service Credit Purchase (SCP) requests initiated by:

- Member through their myCalPERS account
- Member submitting a paper request to their employer for upload and certification

Membership reviews initiated by:

- CalPERS team member
- Employer
- Member

Employment Certification Resources and Contact Information

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

[myCalPERS Employment Certification Functionality Student Guide \(PDF\)](#)

[myCalPERS Employment Certification Video](#)

Membership Review Team:

Membership_Reporting@calpers.ca.gov

Employment Certification Questions

Annual Information Request

Liza Lopez

State Social Security Administrator (SSSA) Program



Official State Social Security Administrator

Annual Information Request Overview

SSSA Role

Requesting Access to myCalPERS

Navigating myCalPERS

What is the Annual Information Request (AIR)?

Locating the AIR Online

Resources



State Social Security Administrator (SSSA)

Social Security Administration (SSA) requires each state to designate an administrator of Section 218 Agreements

SSSA has oversight and responsibility statewide, including all public employers and their retirement systems



SSSA Role

Establish Section 218 Agreements for employers

Supervise employee elections

Administer and maintain California's Section 218 Agreement

Liaison between SSA, Internal Revenue Service (IRS), public entities, and stakeholders

Conduct the AIR



Accessing myCalPERS



New myCalPERS Users

Contact the SSSA Team for assistance via:

- Email: sssa@calpers.ca.gov
- Phone: (916) 795-0810

[Social Security and Medicare Agreement Guide to myCalPERS \(PDF\)](#)



myCalPERS System Access Role

Business Partner Social Security

- Contact for SSSA correspondence
- Request new or modify existing Section 218 Agreement
- Upload documents
- Respond to the AIR



Navigating myCalPERS



CalPERS Website



[Contact](#) | [About](#)

[Log in to myCalPERS](#)

[Home](#)

[Members](#)

[Retirees](#)

[Employers](#)

[Investments](#)

[Search Q](#)

New To CalPERS



Life Events



Estimate Your Retirement



Health Plans & Rates



Pay Days



myCalPERS Log In Screen

myCalPERS

Username (required)

Password (required)

[Show Password](#)

 Log In

Register for an Account

Members can register for a myCalPERS account to view health information, plan for retirement, enroll in educational classes or schedule appointments.

Employers and business partners must contact us to register for a myCalPERS account.

[Member Registration](#)



myCalPERS Home

Home Profile Reporting Person Information Education Other Organizations

My Home Requests

Common Tasks ▲

Menu ▼

Person Search

Contact Personal Security Settings

Welcome

Upcoming Scheduled Maintenance
my|CalPERS will be unavailable as follows:

- **From 8:00 p.m. on August 22 until 1:00 a.m. on August 23 (PT)**

Users will be unable to access my|CalPERS during system maintenance. We apologize for the inconvenience.

Employer News

For Direct Authorization Vendors, Health Plan Business Partners, and Dental Plan Carriers:

- [2018 Important Dates for Direct Authorization Vendors \(PDF\)](#)
- [Direct Authorization Vendor User Guide \(PDF, 4.43 MB\)](#)
- [my|CalPERS Enhancements Presentation \(PPT, 3.65 MB\)](#)

Cognos Reports

- Visit [my|CalPERS Employer Reports \(Cognos\)](#) to view the updated list of available reports.
- View [my|CalPERS Cognos Reports Browser Requirements \(PDF\)](#) to ensure your browser is properly configured.
- View [my|CalPERS Employer Reports \(Cognos\) \(PDF, 2 MB\)](#) for instructions on how to generate reports.

My Messages

Date	Message
08/13/2018	2018 CalPERS Public Agency Member Board Election Toolkit The board election is coming up on August 31 and ballots are in the mail. Help get the word out with our easy-to-use toolkit at www.calpers.ca.gov/page/about/board/board-elections/employer-toolkit .
08/13/2018	Open Enrollment for Employers Web Page Now Available The 2018 Open Enrollment for Employers web page is now available. Find information to assist your

CalPERS MARKET VALUE
\$360.74 billion
Reflects market value as of close on 08/21/2018
[View By Asset Class >>](#)

Forms and Publications Center »

QUICK LINKS
CalPERS Quick Picks
[CalPERS website](#)

[Edit Quick Links >>](#)

New Online Reference Guide!
Learn how to conduct business with CalPERS.
[Go Now](#)



Business Partner Profile

Home
Profile
Reporting
Person Information
Education
Pension Outlook
Other Organizations

Summary
Payments
Receivables
Retirement Contract
Health Contract
Agreements
Mergers and Reorganizations

Common Tasks ▲

Menu ▼

- Contacts
- View BP Relationships
- Divisions
- View Service Relationships
- Health Invoice History
- Findings
- SSA Annual Information Request

▼ Summary
Request Update

Profile

CalPERS ID: 7974191690	Status: Active
Federal Tax ID: 12-3456789	Name: ABC City
Category: Public Agency	Regional Office:
County:	Governing Body: City Council
Division Of:	Merged Agency: No

Addresses

Physical: 1 MAIN ST SACRAMENTO, CA 95814	Mailing:
Undeliverable: No	Undeliverable: No

Communication Information

Preferred Communication: Mail	Primary Phone Number: (916) 555-1212
Primary Email:	

▼ Contacts Add New
View More Actions>>

Contact Type	Name	System Admin	Primary	Phone Number
General	Trevor Gohl	Y	Y	

▼ Business Relationships Add New
View More Actions>>

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

▼ Contracts/Agreements
View More Actions>>

Contract/ Agreement Type	Contract/ Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Social Security Agreement (218)	1000371809	Active	03/18/2020	01/01/2000		
SIP - 457 Agreement	1000372809	Work In Progress	03/19/2020	03/19/2020		
Social Security Agreement (218)	1000372810	Cancelled	03/19/2020	01/01/2000		



AIR Form



Official State Social Security Administrator

What is the AIR form?

Employment tax survey

Updates the SSSA Section 218 coverage database



AIR Process Overview

Completed electronically in myCalPERS

Issued in monthly batches

Issued to employers alphabetically

30-day reminder

Employers may receive a follow-up email or telephone call



Locating the AIR form in myCalPERS (1 of 2)

The screenshot shows the myCalPERS web application interface. At the top, there is a navigation bar with tabs for Home, Profile, Reporting, Person Information, Education, Pension Outlook, and Other Organizations. Below this is a secondary navigation bar with links for Summary, Payments, Receivables, Retirement Contract, Health Contract, Agreements, and Mergers and Reorganizations. On the left side, there is a sidebar menu with sections for Common Tasks, Menu, and Findings. The 'SSA Annual Information Request' link is highlighted with a red box. The main content area is titled 'Summary Profile' and contains the following information:

CalPERS ID: 7974191690	Status: Active Request Update
Federal Tax ID: 12-3456789	Name: ABC City
Category: Public Agency	Regional Office:
County:	Governing Body: City Council
Division Of:	Merged Agency: No
Addresses	
Physical: 1 MAIN ST SACRAMENTO, CA 95814	Mailing:
Undeliverable: No	Undeliverable: No
Communication Information	
Preferred Communication: Mail	Primary Phone Number: (916) 555-1212
Primary Email:	



Locating the AIR form in myCalPERS (2 of 2)

Home Profile Reporting Person Information Education Pension Outlook Other Organizations

Summary Payments Receivables Retirement Contract Health Contract Agreements Mergers and Reorganizations

Common Tasks ▲

Menu ▼

- Contacts
- View BP Relationships
- Divisions
- View Service Relationships
- Health Invoice History
- Findings
- SSA Annual Information Request

Name: **CalPERS ID:**

SSA 218 - Annual Information Request

Request Date	Status	Receivable Status
03/04/2019	Not Submitted	N/A

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[DataSource Shifter](#) | [Time Shifter](#) | [Developer Console](#) | [Data Search Tool](#) | [Batch Analysis Tool](#)
 Build: v8.7 Baseline: 200318_085612_v8.7_Int.5388 UID: 1553
 Username: tgohl Datasource: env91_s1ds Schema owner: ENV91_S1_PSRAPPXA Server: ENV91_node3
 Last imported dataset name: 2020/03/05 00:01:03 FULL UNMASKED
 Current patch level: UNKNOWN Database: MYC91_S1.CALPERS.CA.GOV
 Action class :
 psr.web.mvc.common.contract.agreements.ssa.SsaAnnualInformationRequestListAction
 JSP : contracts/agreements/ssaAnnualInformationRequestList.jsp
 SQL query executed by this page: 1 in 0.053 seconds with 1 rows received.
 Duplicate queries executed by this page: 0 in 0.000 seconds with 0 rows received.
 Action execution time: 0.079 seconds



Employer Resources

Social Security State and Local Government – Information

- www.ssa.gov/slge

Tax Information for Federal, State, and Local Governments

- www.irs.gov/government-entities/federal-state-local-governments

Social Security & Medicare Webpage

- www.calpers.ca.gov/sssa
- [Social Security and Medicare Agreement Guide to myCalPERS \(PDF\)](#)



SSSA Contact Information

Email: sssa@calpers.ca.gov

Call: (916) 795-0810

Mail: CalPERS

State Social Security Administrator

P.O. Box 720720

Sacramento, CA 94229



Upcoming Webinar Schedule

Have You Completed the AIR? (County Office of Education, school districts, and public agencies)

- Wednesday, December 11, 2024
10:00-11:00 a.m.

Register for a [Social Security & Medicare Webinar](#)



Annual Information Request Questions



Cognos Reports

Mai Khang
EAMD

Getting Started With Cognos (1 of 2)

The screenshot displays the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact | About' and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located to the right of the navigation bar. Below the navigation bar is a secondary menu with 'Actuarial Resources', 'Benefit Programs', 'Contracts', 'myCalPERS Technical Requirements' (highlighted with a red box), and 'Policies & Procedures'. The main content area features the heading 'myCalPERS Technical Requirements'. On the left, there is a list of links: 'myCalPERS Employer Reports (Cognos) Catalog', 'Special Compensation Reportability Table', 'System Access Administrators', 'System Enhancements', and 'Technical Resources'. On the right, there is a grey box with the heading 'New Employment Certification Upload Functionality' and a paragraph: 'You can now upload a CalPERS Review Report CSV data file in myCalPERS to report payroll during the employment certification process. This is in addition to the existing XML file upload and manual entry options.' Below the paragraph is a button labeled 'Read the Circular Letter (PDF)'.

Getting Started With Cognos (2 of 2)

The screenshot shows the myCalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact | About' and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located to the right of the navigation bar. Below the navigation bar is a secondary menu with 'Actuarial Resources', 'Benefit Programs', 'Contracts', 'myCalPERS Technical Requirements', and 'Policies & Procedures'. The main content area features a heading 'myCalPERS Technical Requirements'. On the left, a list of links is displayed, with 'myCalPERS Employer Reports (Cognos) Catalog' highlighted by a red rectangular box. Other links in the list include 'Special Compensation Reportability Table', 'System Access Administrators', 'System Enhancements', and 'Technical Resources'. On the right, there is a section titled 'New Employment Certification Upload Functionality' with a sub-heading and a paragraph of text. Below this text is a button labeled 'Read the Circular Letter (PDF)'.

Sample Report Table

Accessing Cognos Reports

To access the Cognos reports, log in to [myCalPERS](#) and select the **Reports** link within the **Common Tasks** left-side navigation menu. Refer to the [myCalPERS Employer Reports \(Cognos\) \(PDF\)](#) student guide for additional information related to Cognos.

Show entries

Report 	Report Type 	User Role(s) 
<input type="text" value="Search Report"/>	<input type="text" value="Search Report Type"/>	<input type="text" value="Search User Role(s)"/>
Arrears Receivable Detail Report (PDF) Displays individual member receivables created for mandatory and Gov. Code 20283 arrears	Financials	<ul style="list-style-type: none">• AR/Billing• AR/Billing RO• Employer Maintenance• PA Billing• Payroll• Payroll RO• Retirement Enrollment• Retirement Enrollment RO

myCalPERS Navigation (1 of 2)

Skip to: Content | Footer | Welcome | Help | Contact Us | Log out July 07, 2022

myCalPERS

Home Profile Reporting Person Information Education Other Organizations

My Home Requests

Common Tasks

- Reports
- Document History
- Inquiry List
- Submit Inquiry

Menu

- Person Search
- Contact Personal Security Settings

My Messages

Date	Message
07/07/2022	Payroll Reporting Deadlines, 2021-22 Fiscal Year Earned period reports for this fiscal year must be posted in myCalPERS by the original due date, or before 5:00 p.m. on July 28, whichever is earlier. View the attached Circular Letter for details. View Document
06/27/2022	Split Retired Annuitant Payroll Records by Fiscal Year When an earned period crosses over two fiscal years, report two separate payroll records. This is especially important for retired annuitants close to their 960 total hours worked threshold.
06/21/2022	Employer Pay Rate Verification Requests Payroll errors CRB000250 and CRB000261 that require a pay rate verification can now be submitted to payrateverification@calpers.ca.gov . Include member's name, CalPERS ID, and job title.

myCalPERS Navigation (2 of 2)

The screenshot displays the IBM Cognos Analytics interface. At the top, the header includes the IBM Cognos Analytics logo, a 'Welcome' dropdown menu, and icons for help, notifications, and user profile. On the left, a navigation sidebar is highlighted with a red border, containing 'Home', 'Search', 'My content', 'Team content', and 'Recent'. The main content area features a 'Welcome to IBM Cognos Analytics' message with a sub-header 'Get started by opening a dashboard, report or story!'. Below this is a 'Recent' section with a 'Show more' link, displaying three report cards: 'Participant Retirement Planning Report' (dated 7/6/2022 2:27 PM), 'Business Partner myCalPERS User Access Report' (dated 6/26/2022 6:57 PM), and 'Parent-Child Relationship Dependent With Expiring Certification Report' (dated 6/1/2022 10:28 AM). To the right, a 'Quick reference' section lists links for 'Get started', 'Overview', 'Get started videos', 'Sample data', and 'Support'.

Certificated Members With Less Than a Full Year of Service Credit Report (1 of 2)

By law, a certificated member is to receive a full year of service credit for each academic year

- CalPERS will notify the certificated member in a letter that they are missing service credit if they do not receive a full year of service credit

This report allows one to check all the certificated members on the roster

Certificated Members With Less Than a Full Year of Service Credit Report (2 of 2)

Displays all certificated members who have not earned a full year of service credit in the selected fiscal year

 Certificated Members with Less than a Full Year of Service Credit As Of: 06/26/2023																		
Fiscal Year: 2021/2022 BP CalPERS ID: Pineapple County Schools		Pineapple																
Participant CalPERS ID	Last Name	First Name	Middle Initial	Participant Status	Appointment Identifier	Appointment Start Date	Appointment End Date	Appointment Status	Business Partner Name	Business Partner ID	Division Name	Division ID	Work Calendar	Fiscal Year	Service Credit Earned by Appointment in FY	Total Service Credit Earned in FY	Automated Letter Indicator	Contains Non-Contributory Period
1316026396	Bekele	Roelle		Active	93024789	11/07/2020		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	6860889051	Work 12 Months/Paid 12 Months	2021/2022	0.326	0.326	Y	N
2741146232	De Amelio	Ventura	F	Active	31341810	06/18/2006		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	2126074368	Work 12 Months/Paid 12 Months	2021/2022	0.847	0.847	Y	N
3422046648	Javaloyes	Tina	A	Active	91598084	02/06/2012		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	1101477156	Work 12 Months/Paid 12 Months	2021/2022	0.999	0.999	Y	N
7581674613	Lavia	Gordiano		Active	92274941	01/28/2016		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	1101477156	Work 12 Months/Paid 12 Months	2021/2022	0.923	0.923	Y	N
6247518489	Lohela	Leila	E	Active	30234150	08/24/2005		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	1302283599	Work 12 Months/Paid 12 Months	2021/2022	0.602	0.602	Y	N
7066229572	Lorenzana	Megan	X	Active	93021862	11/13/2020		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	6860889051	Work 12 Months/Paid 12 Months	2021/2022	0.684	0.684	Y	N
5401974609	Sokolova	Anne	R	Active	93019370	10/26/2020		Active	Pineapple County Schools	2452571616	Pineapple Unified School District	6860889051	Work 12 Months/Paid 12 Months	2021/2022	0.664	0.664	Y	N

Out-of-Class Employer Detail Report (1 of 2)

Every year at the end of June, employers are notified to report out-of-class (OOC) hours to CalPERS for the past fiscal year

This report enables CalPERS or employers to locate OOC records reported to CalPERS

Out-of-Class Employer Detail Report (2 of 2)

Out-of-Class Employer Detail Report

Fiscal Year: 2018/2019
 Business Partner: ABC Company - 1234567890
 Business Partner Category:
 Member Category:
 Record Status:

Business Partner CalPERS ID	Business Partner Name	Participant CalPERS ID	Participant Name	Active Appointment Member Category	Active Appointment Enrollment Level	Active Position Title	Active Position Pay Rate Type	Active Position Pay Rate	Active Position Total Earnings	Out-of-Class Position Title	Out-of-Class Pay Rate Type	Out-of-Class Pay Rate	Out-of-Class Total Earnings	Out-of-Class Total Paid Temporary Upgrade Pay	Out-of-Class Period Begin Date	Out-of-Class Period End Date	Out-of-Class Total Hours Worked	Difference in Earnings	Out-of-Class Penalty	Internal Override	Record Status	Receivable Status
1234567890	ABC Company	2345678901	Bircham, Jaxon D	Miscellaneous	Classic	COMMUNICATIONS DISPATCHER II	Hourly	\$51.94	\$16,620.80	SR COMMUNICATIONS DISPATCHER	Hourly	\$57.09	\$18,268.80	\$0.00	12/03/2018	02/24/2019	320	(\$1,648.00)	\$0.00	N	Error	
1234567890	ABC Company	2345678901	BUNGERT CP FEND, Myeeshia T	Miscellaneous	Classic	MENTAL HEALTH PROG SPEC II	Monthly	\$3,559.82	\$14,239.28	HEALTH CARE PROGRAM MGR II	Monthly	\$3,559.82	\$14,239.28	\$712.02	11/19/2018	03/24/2019	981	\$0.00	\$357.15	N	Reviewed-Invalid	
1234567890	ABC Company	2345678901	Cherlyan, Emerencian	Miscellaneous	Classic	ADMIN SUPPORT OFFICER III	Daily	\$100.00	\$10,000.00	ADMIN SERVICES MGR II	Daily	\$100.00	\$10,000.00	\$2,500.00	10/10/2018	03/10/2019	223	\$0.00	\$0.00	N	Error	
1234567890	ABC Company	2345678901	Cherlyan, Maria K D	Miscellaneous	Classic	MAINTENANCE WORKER II	Hourly	\$34.60	\$7,923.40	MAINTENANCE WORKER III	Hourly	\$36.28	\$8,308.12	\$0.00	02/25/2019	03/10/2019	1,020	(\$384.72)	\$192.99	N	Reviewed-Valid	
1234567890	ABC Company	2345678901	Debayona, MARA LEE J	Safety - County Peace Officer	Classic	PROBATION OFFICER	Hourly	\$58.75	\$18,271.25	SUPV PROBATION OFFICER	Hourly	\$66.68	\$20,737.48	\$2,000.00	08/27/2018	03/24/2019	15	(\$2,466.23)	\$0.00	N	Reported	
1234567890	ABC Company	2345678901	Debayona, Shirazai G	Safety - County Peace Officer	Classic	CLERICAL OFFICE SUPV	Hourly	\$37.20	\$9,858.00	OFFICE MGMT COORD	Hourly	\$37.20	\$9,858.00	\$750.00	12/03/2018	05/17/2019	265	\$0.00	\$0.00	N	Reported	
1234567890	ABC Company	2345678901	ENSLLOW, Lixian Y	Miscellaneous	Classic	CLERK-RECORDER OFFICE SPC II	Hourly	\$27.12	\$6,915.60	SUPV RECORDABLE DOC TECH	Hourly	\$30.29	\$7,723.96	\$0.00	07/01/2018	06/30/2019	990	(\$808.36)	\$0.00	N	Error	
1234567890	ABC Company	2345678901	ENSLLOW, TYPING S	Miscellaneous	Classic	SR ACCOUNTANT	Hourly	\$58.27	\$22,550.49	DEPT FISCAL OFFICER	Hourly	\$65.53	\$25,360.11	\$500.00	11/19/2018	03/24/2019	387	(\$2,809.62)	\$0.00	N	Reported	
1234567890	ABC Company	2345678901	Fowkes, Yung Hui A	Miscellaneous	PEPRA	MAINTENANCE WORKER II	Monthly	\$4,500.00	\$38,000.00	MAINTENANCE WORKER III	Monthly	\$4,500.00	\$38,000.00	\$3,000.00	08/01/2018	03/31/2019	1,050	\$0.00	\$1,347.30	N	Pending Validation	
1234567890	ABC Company	2345678901	Guldner, Hamdan D	Miscellaneous	PEPRA	CLINICAL LAB SCIENTIST II	Monthly	\$7,200.00	\$21,600.00	SUPV CLINICAL LAB SCIENTIST	Monthly	\$7,200.00	\$21,600.00	\$6,000.00	12/03/2018	03/10/2019	990	\$0.00	\$2,694.60	N	Reported	
1234567890	ABC Company	2345678901	Macopintac, Czryus	Miscellaneous	Classic	ADMIN SUPPORT OFFICER II	Hourly	\$47.02	\$17,820.56	PROGRAM MGR I	Hourly	\$52.35	\$19,840.65	\$0.00	01/28/2019	04/15/2019	379	(\$2,020.07)	\$0.00	N	Reported	
1234567890	ABC Company	2345678901	Ornigleit, MARA LEE L	Safety - County Peace Officer	Classic	ASSISTANT MANAGER STEP B	Hourly	\$95.13	\$25,114.32	NRS MGR PEDIATRICS-ICU	Hourly	\$108.25	\$28,578.00	\$0.00	08/27/2018	02/24/2019	264	(\$3,463.68)	\$0.00	N	Reported	

08/09/2019, 11:32 AM SPS4209

Page 1

Reported Compensation by Calendar Year Summary Report and Detail Report

These reports intend to give employers member earnings information across all CalPERS-covered employment per calendar year

Designed for employers to track member compensation limits

- Displays member's earnings from any other additional CalPERS-covered employer

Reported Compensation by Calendar Year Summary Report



Reported Compensation by Calendar Year Summary Report

Program : CalPERS
 Business Partner : City of Smallville
 Calendar Year : 2022

Participant CalPERS ID	Last Name	First Name	Middle Name	Division	Reported Earnings by Business Partner	Reported Special Compensation by Business Partner	Total Compensation Reported by Business Partner	Total Calendar Year Compensation	Enrollment Level	Social Security	Calendar Year Compensation Limit
123456789	DOE	JOHN			\$91,943.73	\$0.00	\$91,943.73	\$91,943.73	PEPRA	N	\$153,971.00
234567891	DOE	JANE			\$62,577.98	\$0.00	\$62,577.98	\$62,577.98	PEPRA	N	\$153,971.00
345678912	SMITH	DAVE			\$134,549.33	\$17,927.60	\$152,476.93	\$152,476.93	CLASSIC	N	\$290,000.00
456789123	JOHNSON	JACK			\$103,284.16	\$13,040.20	\$116,324.36	\$116,324.36	PEPRA	N	\$153,671.00
567891234	DOE	JAYNE			\$124,171.62	\$13,580.32	\$137,751.94	\$137,751.94	PEPRA	N	\$153,671.00
678912345	SMITH	JACKSON			\$74,419.53	\$146.18	\$74,565.71	\$74,565.71	PEPRA	N	\$153,671.00

Reported Compensation by Calendar Year Detail Report



Reported Compensation by Calendar Year Detail Report

Program : CalPERS
Business Partner : City of Oaktown
Participant CalPERS ID : 1234567890
Participant Name : Doe, Jane
Calendar Year : 2022

Begin Date	End Date	Transaction Type	Record Status	Rate Plan	Pay Rate Type	Pay Rate	Reportable Earnings	Tax Deferred Member Paid Contributions	Effective Employer Rate	1959 Survivor Contribution	Scheduled Full Time Hours Per Week	Appointment Identifier	Member Category	Enrollment Level	Social Security
10/3/2022	10/16/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y
9/19/2022	10/2/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y
9/5/2022	9/18/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y
8/22/2022	9/4/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y
8/8/2022	8/21/2022	Earning Period Reporting	Posted	58	Hourly	\$106.77	\$8,541.31	\$678.38	9.530%	\$0.00	40	7047930	Miscellaneous	CLASSIC	Y

Arrears Receivable Summary Report

Displays a summary of individual member receivables created for mandatory and Government (Gov.) Code 20283 arrears

Receivable ID	Receivable Description	Financial Reporting Business Partner CalPERS ID	Financial Reporting Business Partner Name	Balance Amount	Invoice Date	Participant CalPERS ID	Last Name	First Name	Business Partner CalPERS ID	Business Partner Name	Service Period Begin Date	Service Period End Date
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$500.00	03/16/2018	0123456789	Wandzlak	ELPHA				
10000123456789	20283 Arrears	0123456789	ABC Company	\$4,929.02	03/16/2018	0123456789	Wandzlak	ELPHA	0123456789	Hacienda La Puente Unified School District	07/01/2003	12/31/2005
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$500.00	03/14/2018	0123456789	Meshechenyakov	Sy				
10000123456789	20283 Arrears	0123456789	ABC Company	\$642.66	03/14/2018	0123456789	Meshechenyakov	Sy	0123456789	Baldwin Park Unified School District	03/01/2003	06/09/2003
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$500.00	03/13/2018	0123456789	Delavara	KHIRSTEN				
10000123456789	20283 Arrears	0123456789	ABC Company	\$4,008.12	03/13/2018	0123456789	Delavara	KHIRSTEN	0123456789	Las Virgenes Unified School District	11/12/2008	06/30/2010
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$86.85	03/08/2018	0123456789	StJulianOmar	A Roy	0123456789	Arcadia Unifed Sch Dist	06/01/1991	07/31/1991
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$7,644.06	03/07/2018	0123456789	SHIRAKI	Jenniger	0123456789	Alliance College-Ready Middle Academy No. 8	07/01/2014	12/31/2015
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$8,733.49	03/02/2018	0123456789	Argast Stewart	Jenniferann	0123456789	Lennox Mathematics, Science & Technology Academy	07/01/2014	12/31/2015
10000123456789	20283 Arrears	0123456789	ABC Company	\$2,305.32	03/02/2018	0123456789	Quaale	Milor	0123456789	Ahambra Unified School District		
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$0.00	01/22/2018	0123456789	CENICERO	HORTENCI	0123456789	Glendale Unified Sch Dist	01/03/2005	09/21/2009
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$0.00	01/20/2018	0123456789	Morisaki	TSUEN-SYONG				
10000123456789	20283 Arrears	0123456789	ABC Company	\$0.00	01/20/2018	0123456789	Morisaki	TSUEN-SYONG	0123456789	Duarte Unified School District	07/01/2006	12/31/2006
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	01/19/2018	0123456789	OKALI	SHALIMAR	0123456789	Antelope Valley Union High Sch Dist	07/01/1988	01/18/1989
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	01/19/2018	0123456789	Marques de Oliveira	ReAnne	0123456789	Antelope Valley Union High Sch Dist	06/01/1988	08/30/1988
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$0.00	01/19/2018	0123456789	Morgan-Rios	Kobey Bryan				
10000123456789	20283 Arrears	0123456789	ABC Company	\$0.00	01/19/2018	0123456789	Morgan-Rios	Kobey Bryan	0123456789	Santa Clarita Community College District	08/01/2008	09/25/2008
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$0.00	01/18/2018	0123456789	Stout-Spahn	HOLLE				
10000123456789	20283 Arrears	0123456789	ABC Company	\$0.00	01/18/2018	0123456789	Stout-Spahn	HOLLE	0123456789	Palos Verdes Peninsula Unified School District	09/01/2016	06/30/2017
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$0.00	01/18/2018	0123456789	APISAJ	KADIE				
10000123456789	20283 Arrears	0123456789	ABC Company	\$0.00	01/18/2018	0123456789	APISAJ	KADIE	0123456789	Granada Hills Charter High School	08/14/2006	10/31/2006
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	01/17/2018	0123456789	Bkumalla	Sompalthana	0123456789	Alliance Renee and Meyer Luskin Academy High	12/01/2015	12/31/2015
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	01/17/2018	0123456789	STANDLEY SR	KAILIE AILEENA-BELL	0123456789	Alliance Renee and Meyer Luskin Academy High	12/01/2015	12/31/2015
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	01/12/2018	0123456789	Andrion	Petya	0123456789	Covina-Valley Unifed Sch Dist	07/06/2009	10/31/2010
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$0.00	01/10/2018	0123456789	Eisenstadt	BRYTNI				
10000123456789	20283 Arrears	0123456789	ABC Company	\$0.00	01/10/2018	0123456789	Eisenstadt	BRYTNI	0123456789	Arcadia Unified Sch Dist	06/01/2013	09/30/2016
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	01/08/2018	0123456789	Salazar	LOLUNJA	0123456789	Montebello Unified School District	09/13/1989	09/30/1989
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	01/08/2018	0123456789	Amir	Bathary	0123456789	Glendale Community College District	07/01/1988	06/30/1993
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$0.00	01/04/2018	0123456789	Angermeir	S Kathleen				
10000123456789	20283 Arrears	0123456789	ABC Company	\$0.00	12/29/2017	0123456789	RUBI-MUNOZ	Essinod	0123456789	Lawndale Elementary School District	05/16/2002	08/15/2003
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	12/29/2017	0123456789	Kekipi	NIELL	0123456789	Glendale Community College District	12/01/2005	02/15/2006
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	12/29/2017	0123456789	Kekipi	NIELL	0123456789	Lennox Mathematics, Science & Technology Academy	09/13/2015	12/31/2015
10000123456789	20283 Arrears	0123456789	ABC Company	\$0.00	06/29/2017	0123456789	Akiba	NIELL	0123456789	El Camino Community College District	07/01/2001	02/28/2003
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	06/29/2017	0123456789	GUERDAT	Chia Qi	0123456789	Ahambra Unified School District	04/01/1985	03/30/1986
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$0.00	06/27/2017	0123456789	Ispirian	Daveri Dream				
10000123456789	20283 Arrears	0123456789	ABC Company	\$0.00	06/27/2017	0123456789	Ispirian	Daveri Dream	0123456789	Walnut Valley Unified School District	07/10/2016	08/31/2016
10000123456789	Mandatory Arrears	0123456789	ABC Company	\$0.00	06/26/2017	0123456789	Gowgani	REBA	0123456789	Long Beach Unified School District	05/22/2006	12/30/2006
10000123456789	Admin Fee - 20283 Arrears	0123456789	ABC Company	\$0.00	06/21/2017	0123456789	dela Pena	Diva				
10000123456789	20283 Arrears	0123456789	ABC Company	\$0.00	06/21/2017	0123456789	dela Pena	Diva	0123456789	Las Virgenes Unified School District	07/01/2000	11/30/2000

Arrears Receivable Detail Report

Displays individual member receivables created for mandatory and Gov. Code 20283 arrears

Arrears Receivable Detail Report																								
01/01/2020 through 01/19/2021																								
Receivable ID:																								
BP CalPERS ID: ABC Company - 1234567890																								
Receivable ID	Receivable Description	Financial Reporting Business Partner CalPERS ID	Financial Reporting Business Partner Name	Balance Amount	Invoice Date	Participant CalPERS ID	Last Name	First Name	Business Partner CalPERS ID	Business Partner Name	Service Period Begin Date	Service Period End Date	Month Start Date	Month End Date	Total Earnings	Employer Rate	Member Rate	Reported Member Contributions	Calculated Member Contributions	Employer Contributions	EPMC	Cost Share	Other Adjustments	
100000016141809	Admin Fee - 20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	02/19/2011	02/28/2011	\$183.44	13.46%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	03/01/2011	03/31/2011	\$183.44	13.46%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	04/01/2011	04/30/2011	\$183.44	13.46%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	05/01/2011	05/31/2011	\$183.44	13.46%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	06/01/2011	06/30/2011	\$183.44	13.46%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	07/01/2011	07/31/2011	\$335.95	15.66%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	08/01/2011	08/05/2011	\$335.95	15.66%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	08/20/2011	08/31/2011	\$170.49	15.66%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	09/01/2011	09/30/2011	\$170.49	15.66%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	10/01/2011	10/31/2011	\$170.49	15.66%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016141810	20283 Arrears	1234567890	ABC Company	\$0.00	08/12/2020	1234567890	ELHARDT	CYMBRE	1234567890	ABC Company	02/07/2011	11/11/2011	11/01/2011	11/11/2011	\$170.49	15.66%	8.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016098740	Admin Fee - 20283 Arrears	1234567890	ABC Company	\$0.00	07/09/2020	1234567890	MESHKOFF	ROMEKA	1234567890	ABC Company	12/30/2000	04/21/2002	01/01/2002	01/04/2002	\$1,350.00	0.00%	7.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
100000016098741	20283 Arrears	1234567890	ABC Company	\$0.00	07/09/2020	1234567890	MESHKOFF	ROMEKA	1234567890	ABC Company	12/30/2000	04/21/2002	01/01/2002	01/04/2002	\$1,350.00	0.00%	7.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Cognos Reports Questions

Post-Retirement Employment

Heather Porter
EAMD

Post-Retirement Employment Overview

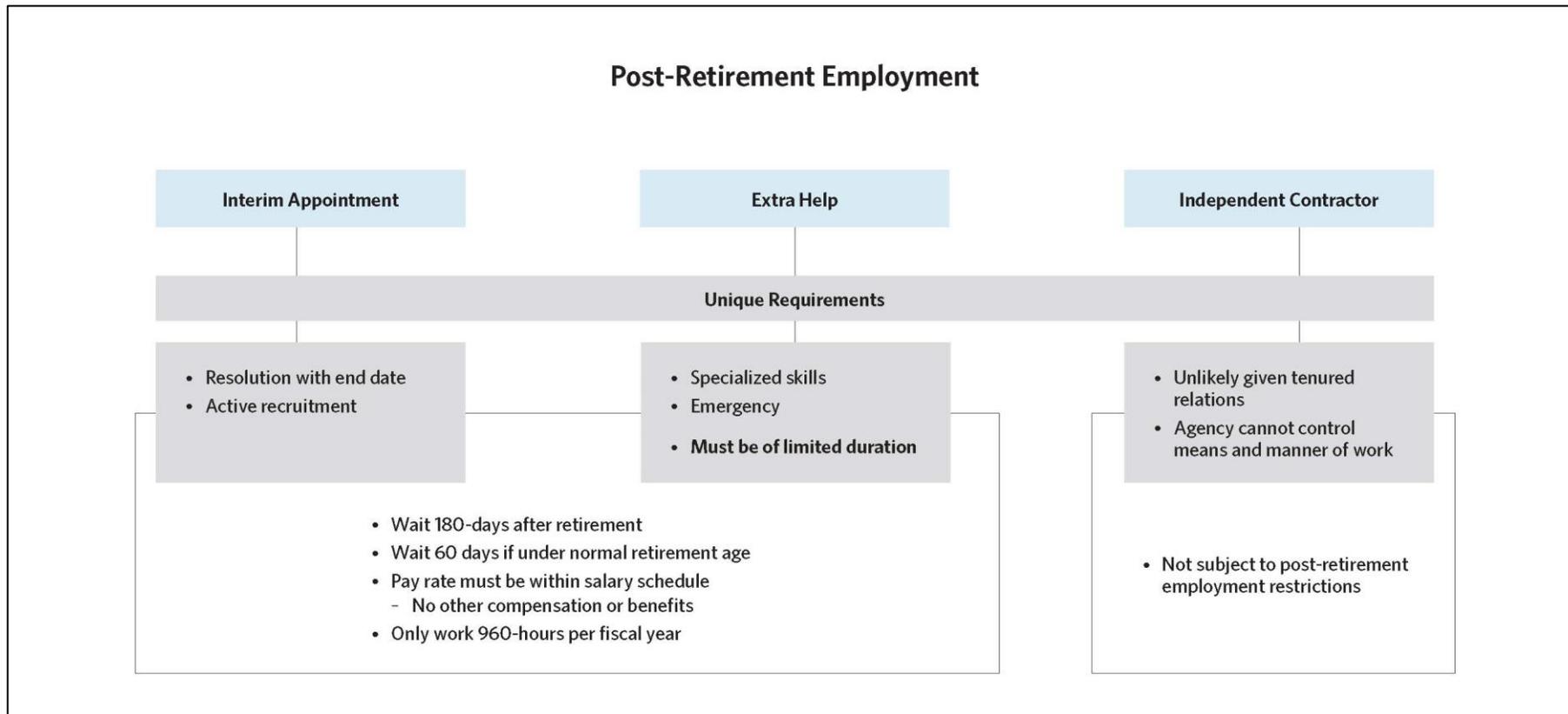
Options for Employment Without Reinstatement

Restrictions

Consequences

myCalPERS Information

Gov. Code 21221(h) Only for Contracting Agencies



Employment Without Reinstatement

Interim Appointment (Gov. Code 21221h) **Contracting Agencies Only**

- Resolution **required** prior to start
 - Must have duration identified
- Higher level unique positions (Director, Chief Operations, City Manager)
- Cannot reappoint retiree to same vacancy
- Must be an active recruitment

Extra Help (Gov. Code 21229 Schools, 21224 State and Contracting Agency)

- Special skills
- Limited duration, i.e., backlog, special project, temp excess work

Restrictions (1 of 3)

Bona fide separation

60-day break if under normal retirement age

- No verbal or written pre-arranged agreements
- Normal retirement age – Highest age in all of retiree's formulas (maximum 62 years)
- Only exception is emergencies declared by the governor
 - Only allows exemption from the 60-day requirement

Restrictions (2 of 3)

180-day break prior to return

Some exceptions apply

- Firefighters or public safety officers
- Resolution of file (not consent calendar) by the governing body passed in a public meeting defining the necessity of the retiree appointment prior to the 180 days
 - Must be received and reviewed by CalPERS prior to first day of employment

Restrictions (3 of 3)

Hours

- 960-hour limit
- Restarts every fiscal year
- All CalPERS employers combined
- Only exception is governor's executive order

Pay

- Pay must be within current salary schedule
- No additional benefits

Consequences of Unlawful Employment

Reinstatement to active membership

- Retirement ceases
- Overpayment of benefit owed
- Cost-of-living adjustment (COLA) restarts at time of new retirement
- Potential health benefit impacts
- Contributions required for service reported during violation period (if service is reportable)

Remedy – required repayment of all benefit payments during violation period

- Actuarial Equivalent Reduction (AER)

Working After Retirement Online Resources

Useful Information in myCalPERS

- 180-day wait period, first day retiree would be eligible to work without a resolution waiver
- Max Normal Retirement Age (NRA)

Member Self Service (MSS)

- Retired annuitants can also find:
 - NRA
 - Total hours
 - 180-day return date

Contact Information

CalPERS Customer Contact Center

- **888 CalPERS** (or **888-225-7377**)

CalPERS website

- www.calpers.ca.gov
- Email
 - Working_After_Retirement@calpers.ca.gov

Post-Retirement Employment Questions

Aged Audit Process

Truc Nguyen
EAMD

Employer Compliance Review (ECR) (1 of 2)

Employers who contract with CalPERS for their employees' retirement benefits must report payroll earnings to CalPERS that are compliant with the Public Employees' Retirement Law (PERL) and have Memorandums of Understandings (MOUs) to support their reporting process

The Office of Audit Services (OFAS) conducts audits and generates ECRs that outline the specifics of non-compliant findings within the scope of the audit

Employer Compliance Review (ECR) (2 of 2)

The ECR ensures CalPERS contracted employers are compliant with applicable sections of the California Gov. Code (sections 7522 et seq. and 20000 et seq.) and Title 2 of the California Code of Regulations (CCR) and that prescribed reporting and enrollment procedures for retirement benefits are being followed

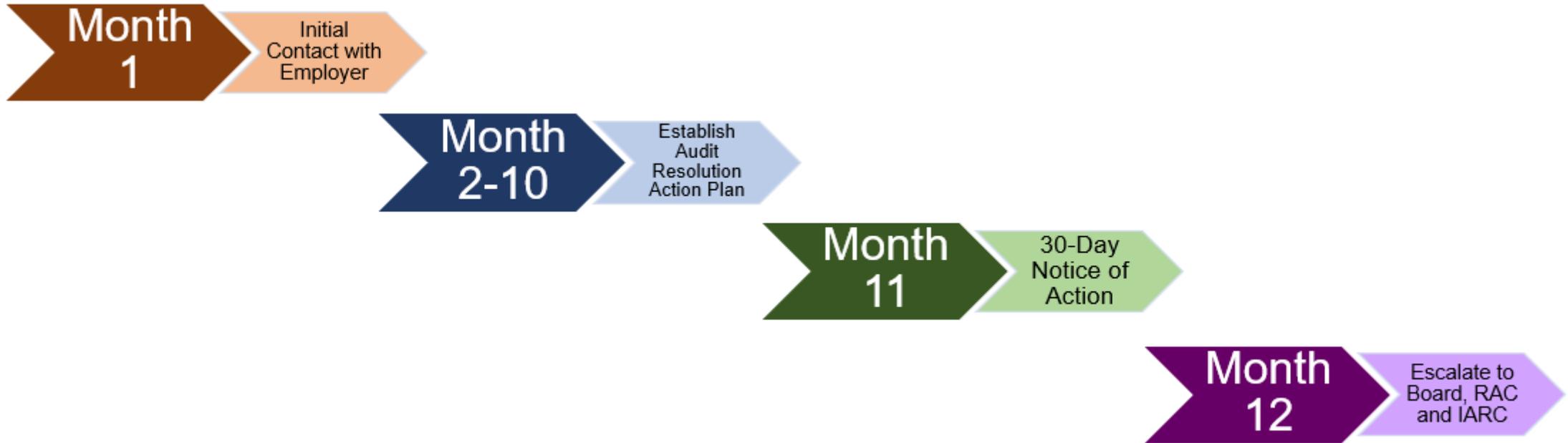
EAMD Audit Compliance & Resolution (ACR)

ACR's Objective

- Serves as liaison between Office of Audit Services (OFAS) and contracting agencies to resolve OFAS' formal ECRs regarding compensation and payroll reporting
- Ensure compliance with the PERL
- Ensure and maintain CalPERS' mission and fiduciary responsibilities under oversight of:
 - CalPERS Board of Administration (Board)
 - Risk & Audit Committee (RAC)
 - Integrated Assurance Risk Council (IARC)

Audit Resolution Process (1 of 4)

Audit Resolution Timeline



Audit Resolution Process (2 of 4)

Audit Resolution Timeline

Audit Resolution Policy: CalPERS Board of Administration has established a resolution policy of 12 months for audits

Month 1 – Initial Contact with Employer

- Provide employer with specific program liaison(s) contact information
- Schedule conference call with assigned liaison(s)

Month 2 through 10 – Establish Audit Resolution Action Plan

- Provide action plan with realistic milestones
- Commit to action plan
- Process necessary corrections

Audit Resolution Process (3 of 4)

Audit Resolution Timeline

Month 11 – 30-Day Notice of Action

- If ECR is not resolved by month 11, EAMD will send a 30-day Notice of Action

Month 12 – Escalate to Board, IRC and IARC

- If ECR is not resolved by month 12, EAMD will:
 - Enforce an administrative hold placed on member accounts which may result in the loss of benefits and/or delay a member's retirement date due to additional review

Audit Resolution Process (4 of 4)

Audit Resolution Timeline

Month 12 – Escalate to Board, IRC and IARC (cont.):

- If ECR is not resolved by month 12, EAMD will:
 - Send notice to all impacted members and/or their bargaining groups alerting them of employer's non-compliance and how the deficiency may impact their retirement benefits
 - Enforce recurring administrative fees for the delinquent resolution and invalid payroll until compliance is obtained. Per CCR 565.3, this may result in \$200.00 per delinquent payroll report

Aged Audit Process (1 of 2)

Unresolved Audits Over 12 Months

Pose significant financial, contractual, and operational risks for the employer and its members.

Significant liability to CalPERS business partners, employees, and the Public Employees' Retirement Fund (PERF)

Reported to:

- CalPERS Chief Executive Officer (CEO)
- Risk Audit Committee (RAC)
- Integrated Assurance Risk Council (IARC)

Aged Audit Process (2 of 2)

Unresolved Audits Over 12 Months

Escalated to the CalPERS Board of Administration for risk appraisal and determination

Recommended for revocation of employer's CalPERS contract and/or pursuing all available remedies to enforce the PERL

- If at any time during the audit resolution process the employer is unresponsive, EAMD may enforce any, if not all, of the items mentioned above

How to Avoid Aged Audit Process

Communicate with EAMD throughout audit resolution process

Establish realistic goals and follow resolution action plan

Ensure labor agreements, MOUs, and compensation reported complies with the PERL

Audit Resources

Website: www.calpers.ca.gov

- [PERL \(PDF\)](#)
- [Compliance in Compensation Reporting](#)

Email: MOU_Review@calpers.ca.gov

Aged Audit Process Questions

Full-Time Equivalent Pay Rate Calculator

Kenneth Noss
EAMD

Full-Time Equivalent (FTE) Payrate (1 of 2)

Gov. Code 20636.1(b)

- “...for classified school members, “payrate” means the normal monthly rate of pay for services rendered on a full-time basis...full-time employment is 40 hours per week.”

California Code of Regulations (CCR) 574(c)

- “...compensation earnable and pensionable compensation for classified school members means 40 hours per week...”

Full-Time Equivalent (FTE) Payrate (2 of 2)

A full-time payrate must be reported to CalPERS for classified school positions

- Full time is based on:
 - 8 hours per day
 - 40 hours per week
 - 2,080 hours per year

Why Do FTE Payrates Matter?

Inaccurate service credit accrual

Inaccurate final compensation

Miscalculated retirement benefits

Unfunded liability and risk to the Public Employees' Retirement Fund (PERF)

How to Calculate FTE Payrates (1 of 2)

Example Employee

- 215 workdays per year
- 7.5 hours in a workday
- 10 work months per year
- \$50,000 annual base salary

How to Calculate FTE Payrates (2 of 2)

Hourly FTE Payrate

- $\$50,000 \div 215 \div 7.5 = \31.01

Daily FTE Payrate

- $\$50,000 \div 215 \div 7.5 \times 8 = \248.06

Monthly FTE Payrate

- $\$50,000 \div 215 \div 7.5 \times 2,080 \div 12 = \$5,374.68$

Amendment to CCR 574 (1 of 3)

Current Text to CCR 574(c), in part:

- “For purposes of...determining compensation earnable and pensionable compensation for classified members, “full-time” employment means 40 hours per week; payments for services rendered, not to exceed 40 hours per week, shall be reported as compensation earnable or pensionable compensation for all months of the year in which work is performed...”

Amendment to CCR 574 (2 of 3)

Amended Text to CCR 574(c):

- (1) For purposes of reporting a classified member's full-time payrate, an employer shall report the classified member's hourly, daily, or monthly full-time equivalent (FTE) payrate. The FTE payrates shall be calculated to the nearest cent and shall be determined as set forth below...
- (A) The classified member's **hourly FTE** payrate shall be determined by dividing the classified member's annual base salary by the number of work days per year, then dividing the result by the number of hours in a work day.

Amendment to CCR 574 (3 of 3)

Amended Text to CCR 574(c) cont.:

- (B) The classified member's **daily FTE** payrate shall be determined by dividing the classified member's annual base salary by the number of work days per year, dividing the result by the number of hours in a work day, then multiplying the result by 8.
- (C) The classified member's **monthly FTE** payrate shall be determined by dividing the classified member's annual base salary by the number of work days per year, dividing the result by the number of hours in a work day, then multiplying the result by the result of multiplying 52 by 40 then dividing by 12.

Resources for School Employers (1 of 5)

Circular Letter: [200-014-24](#)

Amendment to CCR 574

[Compliance in Compensation Reporting](#)

- [FTE Calculator](#)

Resources for School Employers (2 of 5)

Compliance in Compensation Reporting Webpage

- Website: www.calpers.ca.gov

The screenshot displays the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact | About' and a 'Log in to myCalPERS' button. A navigation bar below contains links for 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located to the right of the navigation bar. Below the navigation bar is a secondary menu with links for 'Actuarial Resources', 'Benefit Programs', 'Contracts', 'myCalPERS Technical Requirements', and 'Policies & Procedures'. The main content area features a breadcrumb trail: 'Home > Employers > Policies & Procedures > Compliance in Compensation Reporting'. The title 'Compliance in Compensation Reporting' is prominently displayed. Below the title is a paragraph explaining the requirements for reporting compensation. To the right of the main text is a sidebar with sections for 'Policies & Procedures' and 'Resources'. The 'Resources' section includes links for 'Publicly Available Pay Schedule Checklist', 'Publicly Available Pay Schedule Examples', and 'Special Compensation Reportability Table'. At the bottom of the page, there is a list of expandable links: '+ Reporting Compensation', '+ Pay Schedules', and '+ Calculate Full-Time Equivalent (FTE) Pay Rate for Classified School Members'. The last link is highlighted with a red box.

Resources for School Employers (3 of 5)

Calculate FTE Pay Rate for Classified School Members

Calculate Full-Time Equivalent (FTE) Pay Rate for Classified School Members

It's important for all CalPERS-contracted employers to report pay rates appropriately for their CalPERS-covered employees, in accordance with Gov. Code and regulations, found in the PERL. Incorrect pay rate reporting will cause inaccurate service credit accrual and inaccurate retirement benefit calculations.

Defining Pay Rates for School Employees

Pursuant to Gov. Code 20636.1(b), "pay rate" is the normal monthly rate of pay, or base pay, for a school member; for classified members, **full time is defined as 40 hours per week**. Payments for services rendered, not to exceed 40 hours per week, shall be reported as compensation earnable for all months of the year in which work is performed.

Reporting monthly earnings as pay rates for classified school members is a common payroll reporting error. When a pay rate isn't based on 40 hours per week, 173.3333 hours per month, or 2,080 hours per year, the pay rate and service credit will be reported inaccurately, which will cause inaccurate accrual of service credit and miscalculated final compensation.

Full time is based on 40 hours per week. 2,080 hours per year is based on 40 hours per week multiplied by 52 weeks. 173.333 hours per month is based on 2,080 hours per year divided by 12 months per year.

Calculating the FTE Pay Rate

School employers report hourly, daily, and monthly pay rates. However, many school employers have full-time employees who work less than 40 hours per week. Due to Gov. Code section 20636.1(b), all full-time employees must have an FTE pay rate reported to CalPERS. We've provided an example that displays how to calculate the FTE pay rate, and how the properly reported FTE pay rate affects service credit reporting.

The information listed on this page provides school employers with the knowledge they need to report accurate FTE pay rates. We've also provided an FTE calculator that will assist in confirming your FTE calculations.

[FTE Pay Rate Calculator
\(Classified School Members\)](#)

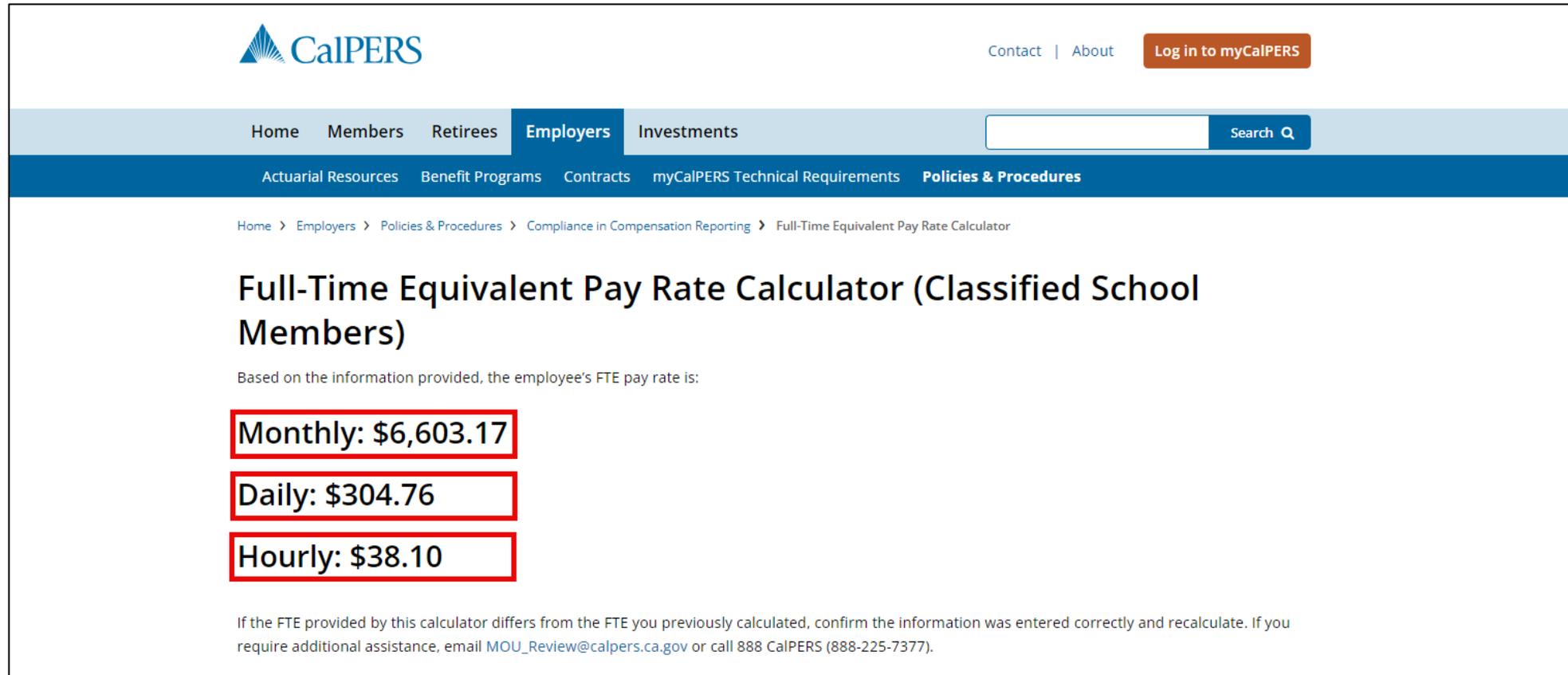
Resources for School Employers (4 of 5)

FTE Calculator

The screenshot shows the CalPERS website interface for the Full-Time Equivalent Pay Rate Calculator. The page title is "Full-Time Equivalent Pay Rate Calculator (Classified School Members)". Below the title, there is a instruction: "Provide the information for your employees using exact numbers." The form contains four input fields: "Monthly Earnings (required)" with an example of 4321.00 and a value of 4000; "Hours Worked Per Day (required)" with an example of 7.50 and a value of 6; "Months Worked Per Year (required)" with an instruction to enter a whole number between 9 and 12 and a value of 10; and "Days Worked Per Year (required)" with an example of 175.00 and a value of 175. A "Calculate" button is located at the bottom center of the form, highlighted with a red box.

Resources for School Employers (5 of 5)

FTE Calculator Results



The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact | About' and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located to the right of the navigation bar. Below the navigation bar is a secondary menu with 'Actuarial Resources', 'Benefit Programs', 'Contracts', 'myCalPERS Technical Requirements', and 'Policies & Procedures'. The main content area shows a breadcrumb trail: 'Home > Employers > Policies & Procedures > Compliance in Compensation Reporting > Full-Time Equivalent Pay Rate Calculator'. The title of the page is 'Full-Time Equivalent Pay Rate Calculator (Classified School Members)'. Below the title, it states 'Based on the information provided, the employee's FTE pay rate is:'. Three results are displayed in red-bordered boxes: 'Monthly: \$6,603.17', 'Daily: \$304.76', and 'Hourly: \$38.10'. At the bottom, there is a disclaimer: 'If the FTE provided by this calculator differs from the FTE you previously calculated, confirm the information was entered correctly and recalculate. If you require additional assistance, email MOU_Review@calpers.ca.gov or call 888 CalPERS (888-225-7377).'

Additional Resources

Website: www.calpers.ca.gov

- [PERL \(PDF\)](#)
- [Public Agency & Schools Reference Guide \(PDF\)](#)
- [Circular Letters](#)
- [Compliance in Compensation Reporting](#)

Email: MOU_Review@calpers.ca.gov

Full-Time Equivalent Pay Rate Calculator Questions

Timely Payroll Reporting

Brittney Greer and Jasmine Sullivan

EAMD

Payroll Agenda

Earned Period Reports

Payroll Adjustments

Zero Payroll and Confirmation of No Payroll

Resources

Earned Period Reports (1 of 2)

Timely reporting of payroll is essential to ensure:

- The timely processing of retirement applications, service credit purchases, or refunds
- Service and contributions are accurate
- Interest appropriately accumulates to member accounts

Earned Period Reports (2 of 2)



- Payroll **reporting** is due



- If there are projected contributions it will apply to the receivables and a \$200 admin fee will apply on a separate receivable



- If the payroll report remains suspended, \$200 payroll correction fee will apply on a separate receivable and again 30 days later until report is in **Posted** status

Payroll Adjustments

Unposted Adjustment Reports (ADJ)

Timeliness of Adjustments

- Avoid escalations
- Avoid overpayments to members and beneficiaries
- Avoid incorrect information provided on members myCalPERS account

Zero Payroll and Confirmation of No Payroll

Report zero payroll

Confirmation of no payroll

- Payroll schedule
- Retirement Appointment Reconciliation (RAR)

Payroll Schedule (1 of 3)

Confirm unposted payroll by earned period reports

myCalPERS

Home Participant Business Partner **Reporting** Admin Workflow my Toolbox

Manage Reports Billing and Payment Summary **Payroll Schedules** Out-of-Class Validation Service Credit Purchase Health Reconciliation Retirement Appointment Reconciliation

Common Tasks **Menu**

Name: City of _____ CalPERS ID: _____ *Required Fields

Payroll Schedule Options

Method: *

- Add New Payroll Schedule
- Request Extension for Existing Payroll Schedule
- Setup Future Fee Waiver
- Request Exemption for Non-Reportable Payroll Earned Period

Continue

Select A Program

Program: CalPERS

Existing Payroll Schedules View More Actions >>

Type	Name	Begin Date	End Date	Status	View Periods
Semi-Monthly		07/01/1982	09/30/2007	Terminated	View Periods
Bi-Weekly		12/25/2006		Approved	View Periods

Payroll Schedule (2 of 3)

Confirm unposted payroll by earned period reports

The screenshot shows the myCalPERS interface. The top navigation bar includes 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Below this, a secondary navigation bar contains 'Manage Reports', 'Billing and Payments', 'Payroll Schedule', 'Out-of-Class Validation', 'Member Requests', and 'Retirement Appointment Reconciliation'. The 'Payroll Schedule' section is active, displaying 'Name: City of [redacted]' and 'CalPERS ID: [redacted]'. Under 'Schedule Details', it shows 'Type: Monthly', 'Status: Approved', 'Schedule Begin Date: 07/01/1982', and 'Program: CalPERS'. The 'Payroll Periods' section shows 'Fiscal Year: 2023/2024' and a 'Display' button. A table lists payroll periods with columns for Earned Period, Report Due Date, Report Submitted, Report Post Date, Report Status, Extension Status, Exemption Status, and Participants with Unposted Payroll. The '2023/2024' fiscal year and the 'Display' button are highlighted with red boxes. The 'View' link for the 05/01/2024-05/31/2024 period is also highlighted with a red box.

Earned Period	Report Due Date	Report Submitted	Report Post Date	Report Status	Extension Status	Exemption Status	Participants with Unposted Payroll
06/01/2024-06/30/2024	07/30/2024						
05/01/2024-05/31/2024	06/30/2024						View
04/01/2024-04/30/2024	05/30/2024						View
03/01/2024-03/31/2024	04/30/2024	04/30/2024	04/30/2024	Suspended			View
02/01/2024-02/29/2024	03/30/2024	03/28/2024	03/29/2024	Posted			View
01/01/2024-01/31/2024	03/01/2024	02/28/2024	02/29/2024	Posted			View

Payroll Schedule (3 of 3)

Confirm unposted payroll by earned period reports

Participants with Unposted Payroll
Payroll has not been posted for the following participants. Please report payroll or select the applicable appointments to confirm payroll is not reportable or maintain the enrollment.
[Select All](#)
[Maintain Enrollment] [Confirm Unposted Payroll]
Show 25 entries
Showing 1 to 25 of 1,000 entries

First Previous 1 2 3 4 5 ... 40 Next Last

<input type="checkbox"/>	Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Division	Last Reported Payroll Record Status	Rate Plan	Projected Member Contributions	Projected Employment Contributions
<input type="checkbox"/>				Active	Active	No		Posted	1949	\$0.00	\$0.00
<input type="checkbox"/>				Active	Active	No		Posted	28012	\$0.00	\$0.00

Retirement Appointment Reconciliation (1 of 2)

Confirm unposted payroll

myCalPERS

Home Participant **Reporting** Admin Workflow my Toolbox

Manage Reports Billing and Payment Summary Payroll Schedules Out-of-Class Validation Service Credit Purchase Health Reconciliation **Retirement Appointment Reconciliation**

Common Tasks Name: City of _____ CalPERS ID: _____

Unposted Payroll Reconciliation

Reconciliation Batch Date: 01/22/2024 10:42 PM Total Number of Appointments Listed: 192

Search For Participants To Reconcile

Program: CalPERS
 Member Category: _____
 Appt Status: _____ Retired Annuitant: _____ Member Account Status: _____
 Last Name: _____ SSN: _____ Payroll Past Due: _____
 Participant CalPERS ID: _____

The following filters can be used to identify participant appointments that have an Unposted Earned Period record found within the selected search criteria.

Payroll Schedule Type: Bi-Weekly Fiscal Year: _____ Earned Period: _____
 From Date: _____ To Date: _____

Search Clear

Participants With Unposted Payroll

Select All Maintain Enrollment Number of Appointments Listed: 3
 Show 25 entries
 Showing 1 to 3 of 3 entries First Previous 1 Next Last

Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Division	Last Reported Earned Period	Payroll Past Due	Unposted Payroll Periods
<input type="checkbox"/> 8796873391			Active	Active	No		01/01/2024 - 01/14/2024	Yes	Review
<input type="checkbox"/> 5395131282			Active	Active	No		01/01/2024 - 01/14/2024	Yes	Review
<input type="checkbox"/> 9542387914			Active	Active	No		01/01/2024 - 01/14/2024	Yes	Review

Show 25 entries First Previous 1 Next Last

Select All Maintain Enrollment

Generate Excel Report

Retirement Appointment Reconciliation (2 of 2)

Confirm unposted payroll

Unposted Payroll Periods (2 Records)

[Select All](#)

Payroll has not been posted for the following payroll periods. Please post payroll and/or select the payroll periods to confirm payroll is not reportable.

Show entries

Showing 1 to 2 of 2 entries

First Previous Next Last

<input type="checkbox"/>	Earned Period Begin Date	Earned Period End Date	Payroll Due Date	Payroll Past Due	Payroll Record Status	Unposted Payroll Record Exists	Contributory
<input type="checkbox"/>	04/01/2024	04/30/2024	05/30/2024	Yes		No	Yes
<input type="checkbox"/>	05/01/2024	05/31/2024	06/30/2024	Yes		No	Yes

Showing 1 to 2 of 2 entries

First Previous Next Last

[Select All](#)

Payroll Resources

Student Guides

- [myCalPERS Payroll Reporting \(PDF\)](#)
- [myCalPERS Payroll Adjustments \(PDF\)](#)
- [myCalPERS Retirement Appointment Reconciliation \(PDF\)](#)

Reference Guide

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

Educational Classes

- [Business Rules & myCalPERS Classes](#)

Contact Center

- Contact us at **888 CalPERS** (or **888-225-7377**)

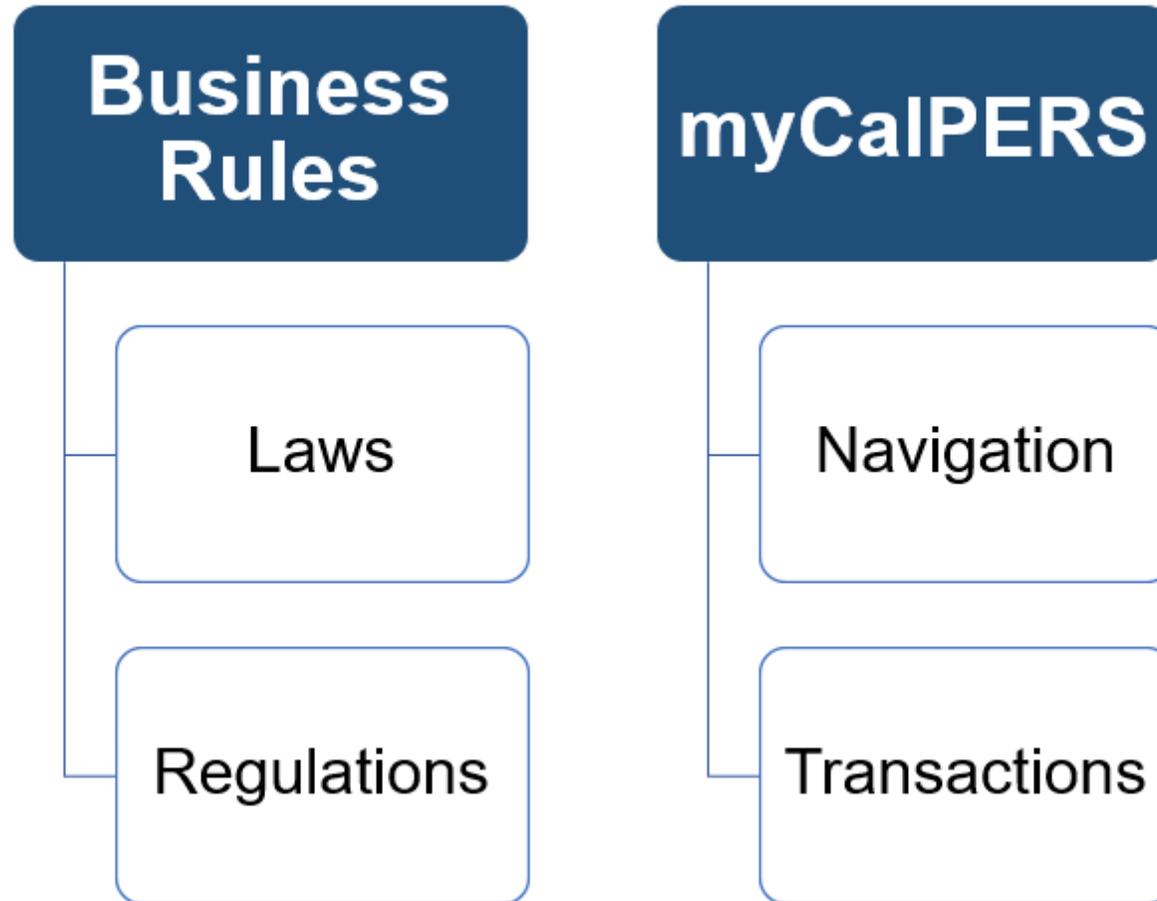
Timely Payroll Reporting Questions

Employer Education & Resources

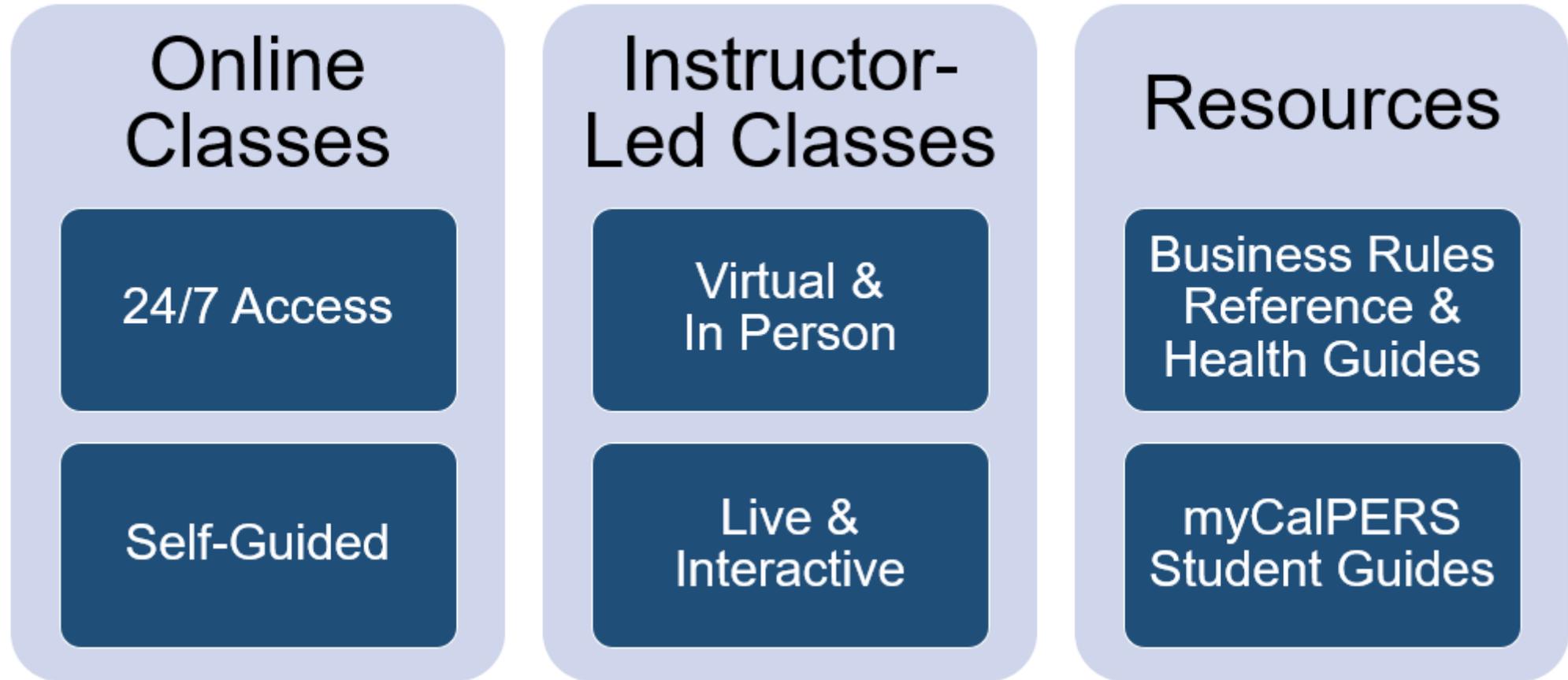
Amanda Howe

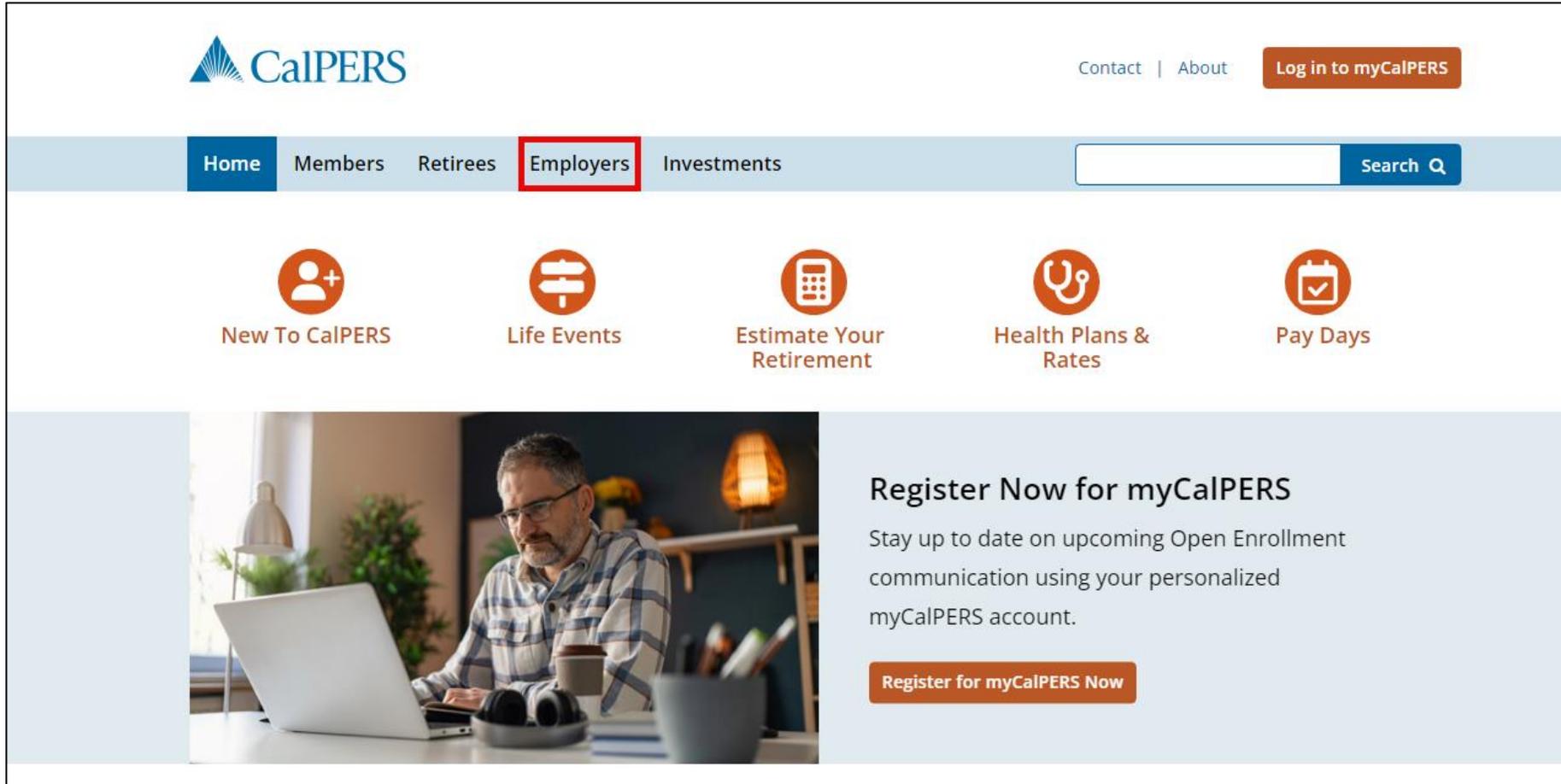
Customer Education Outreach Division (CEOD)

Employer Education Class Types

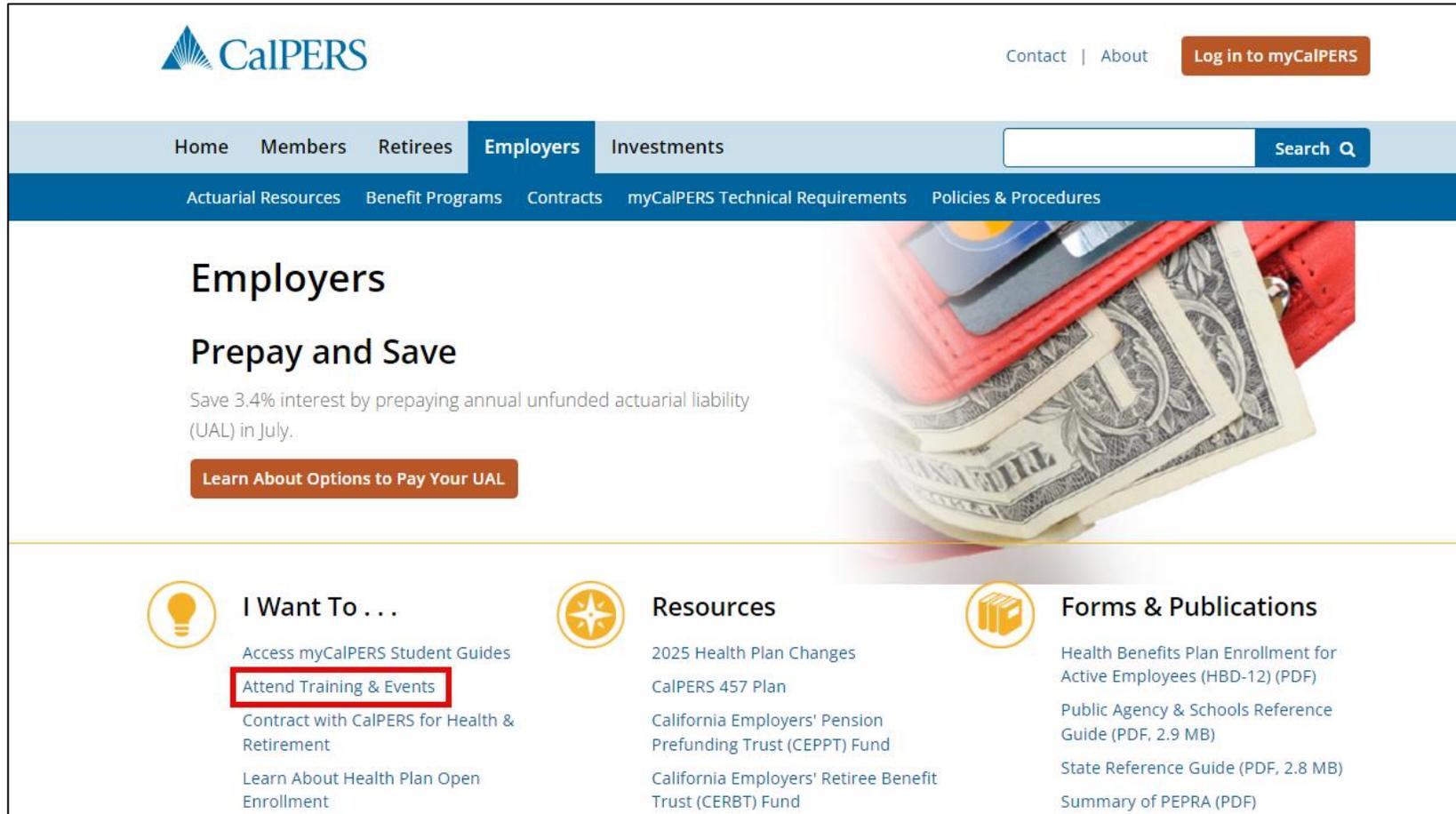


Employer Education Delivery & Resources





The screenshot displays the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers' (highlighted with a red box), and 'Investments'. A search bar is located to the right of the navigation bar. Below the navigation bar are five service icons: 'New To CalPERS' (person with plus), 'Life Events' (calendar), 'Estimate Your Retirement' (calculator), 'Health Plans & Rates' (stethoscope), and 'Pay Days' (calendar with checkmark). At the bottom, there is a promotional banner for 'Register Now for myCalPERS' featuring a photo of a man working on a laptop and a 'Register for myCalPERS Now' button.



The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers' (highlighted), and 'Investments'. A search bar is located to the right of the navigation bar. Below the navigation bar is a secondary menu with 'Actuarial Resources', 'Benefit Programs', 'Contracts', 'myCalPERS Technical Requirements', and 'Policies & Procedures'. The main content area features a large heading 'Employers' and a sub-heading 'Prepay and Save'. Below this is a text block: 'Save 3.4% interest by prepaying annual unfunded actuarial liability (UAL) in July.' and a button 'Learn About Options to Pay Your UAL'. To the right of this text is an image of a red wallet containing several US dollar bills. Below the main content area are three columns of links, each with an icon: 'I Want To...' (lightbulb icon), 'Resources' (compass icon), and 'Forms & Publications' (book icon). The 'I Want To...' column lists 'Attend Training & Events' (highlighted with a red box), 'Contract with CalPERS for Health & Retirement', and 'Learn About Health Plan Open Enrollment'. The 'Resources' column lists '2025 Health Plan Changes', 'CalPERS 457 Plan', 'California Employers' Pension Prefunding Trust (CEPPT) Fund', and 'California Employers' Retiree Benefit Trust (CERBT) Fund'. The 'Forms & Publications' column lists 'Health Benefits Plan Enrollment for Active Employees (HBD-12) (PDF)', 'Public Agency & Schools Reference Guide (PDF, 2.9 MB)', 'State Reference Guide (PDF, 2.8 MB)', and 'Summary of PEPRA (PDF)'.

CalPERS

Contact | About [Log in to myCalPERS](#)

Home Members Retirees **Employers** Investments Search **Q**

Actuarial Resources Benefit Programs Contracts myCalPERS Technical Requirements Policies & Procedures

Employers

Prepay and Save

Save 3.4% interest by prepaying annual unfunded actuarial liability (UAL) in July.

[Learn About Options to Pay Your UAL](#)

I Want To . . .

- [Attend Training & Events](#)
- [Contract with CalPERS for Health & Retirement](#)
- [Learn About Health Plan Open Enrollment](#)

Resources

- [2025 Health Plan Changes](#)
- [CalPERS 457 Plan](#)
- [California Employers' Pension Prefunding Trust \(CEPPT\) Fund](#)
- [California Employers' Retiree Benefit Trust \(CERBT\) Fund](#)

Forms & Publications

- [Health Benefits Plan Enrollment for Active Employees \(HBD-12\) \(PDF\)](#)
- [Public Agency & Schools Reference Guide \(PDF, 2.9 MB\)](#)
- [State Reference Guide \(PDF, 2.8 MB\)](#)
- [Summary of PEPRA \(PDF\)](#)

[Home](#) [Members](#) [Retirees](#) [Employers](#) [Investments](#) [Search](#) 

[Home](#) > [Education Center](#) > [Employer Education](#)

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
2024 Pathways for Women Conference	Join us this summer for a dynamic forum to inspire career growth and advance women of all backgrounds. The event is on August 26-27, 2024 at the Hilton Anaheim, California.	Conference
2024 CalPERS Educational Forum	Do you administer CalPERS benefits? Register today for the 25th Educational Forum on October 28-30 in San Diego where you can engage with experts, and colleagues, and receive guidance on CalPERS services that impact your daily work.	Conference

Classes & Workshops

Name	Description	Format
Business Rules & myCalPERS Classes	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. To register for classes, log in to your myCalPERS business partner account, then select Education .	Instructor-Led and Online

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.

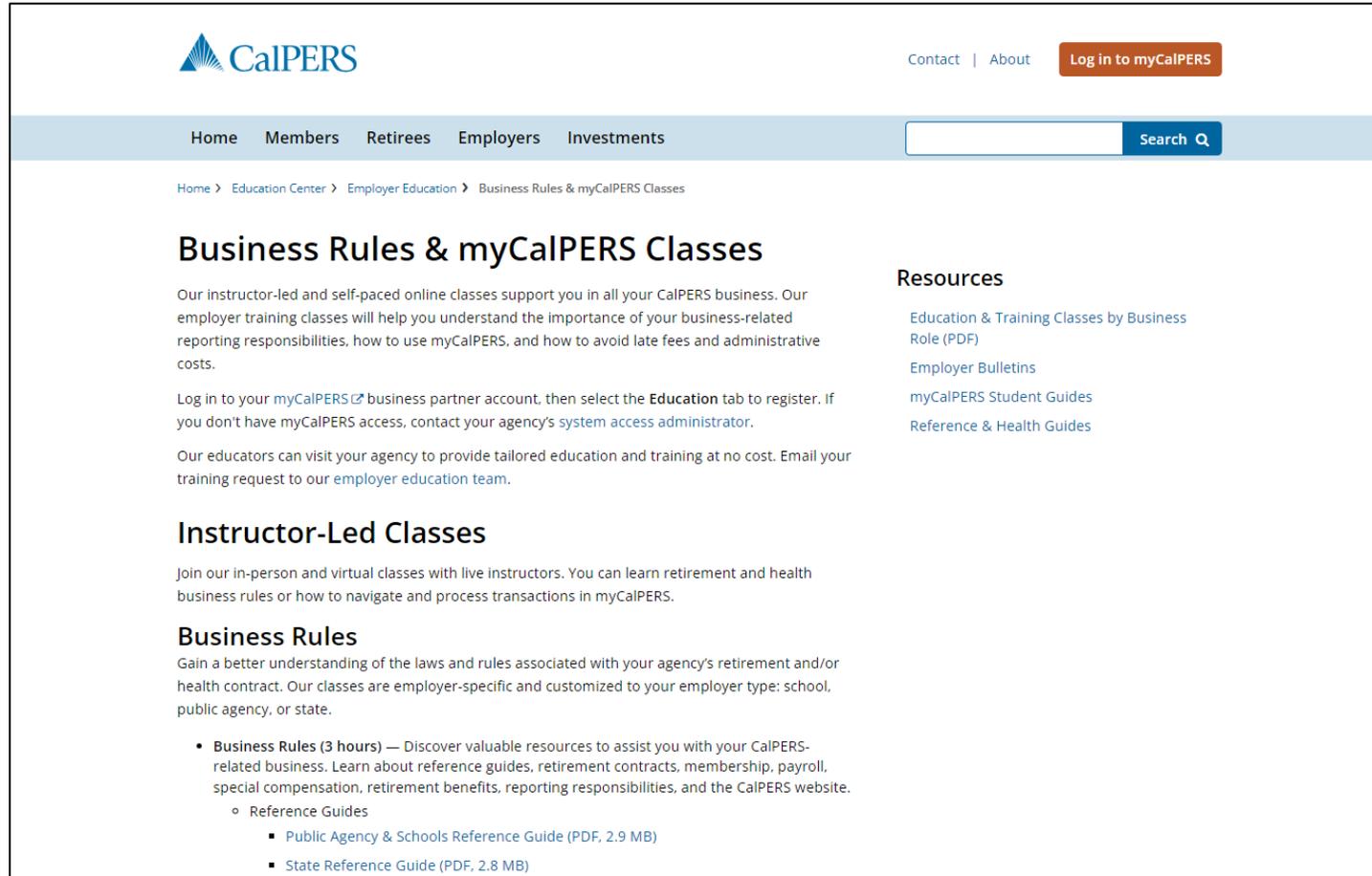
Email Address

[Subscribe](#)

Resources

- [Education & Training Classes by Business Role \(PDF\)](#)
- [Headquarters & Regional Offices](#)
- [myCalPERS Employer Reports \(Cognos\)](#)
- [myCalPERS Student Guides](#)
- [myCalPERS Technical Requirements](#)
- [Reference & Health Guides](#)
- [System Access Administrators](#)

Forms & Publications



The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a 'Log in to myCalPERS' button. Below this is a navigation bar with links for 'Home', 'Members', 'Retirees', 'Employers', and 'Investments', along with a search bar. The main content area features a breadcrumb trail: 'Home > Education Center > Employer Education > Business Rules & myCalPERS Classes'. The primary heading is 'Business Rules & myCalPERS Classes'. The text explains that instructor-led and self-paced online classes support users in understanding business-related reporting responsibilities, myCalPERS usage, and avoiding late fees. It provides instructions on logging into a myCalPERS business partner account and contacting system access administrators if needed. It also mentions that educators can provide tailored education at no cost. A 'Resources' sidebar lists links for 'Education & Training Classes by Business Role (PDF)', 'Employer Bulletins', 'myCalPERS Student Guides', and 'Reference & Health Guides'. The 'Instructor-Led Classes' section invites users to join in-person or virtual classes. The 'Business Rules' section offers a better understanding of laws and rules, with a list of resources including a 3-hour business rules course and reference guides for public agencies/schools and the state.

 [Contact](#) | [About](#) [Log in to myCalPERS](#)

[Home](#) [Members](#) [Retirees](#) [Employers](#) [Investments](#) [Search](#) 

[Home](#) > [Education Center](#) > [Employer Education](#) > [Business Rules & myCalPERS Classes](#)

Business Rules & myCalPERS Classes

Our instructor-led and self-paced online classes support you in all your CalPERS business. Our employer training classes will help you understand the importance of your business-related reporting responsibilities, how to use myCalPERS, and how to avoid late fees and administrative costs.

Log in to your [myCalPERS](#) business partner account, then select the **Education** tab 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](#).

Instructor-Led Classes

Join our in-person and virtual classes with live instructors. You can learn retirement and health business rules or how to navigate and process transactions in myCalPERS.

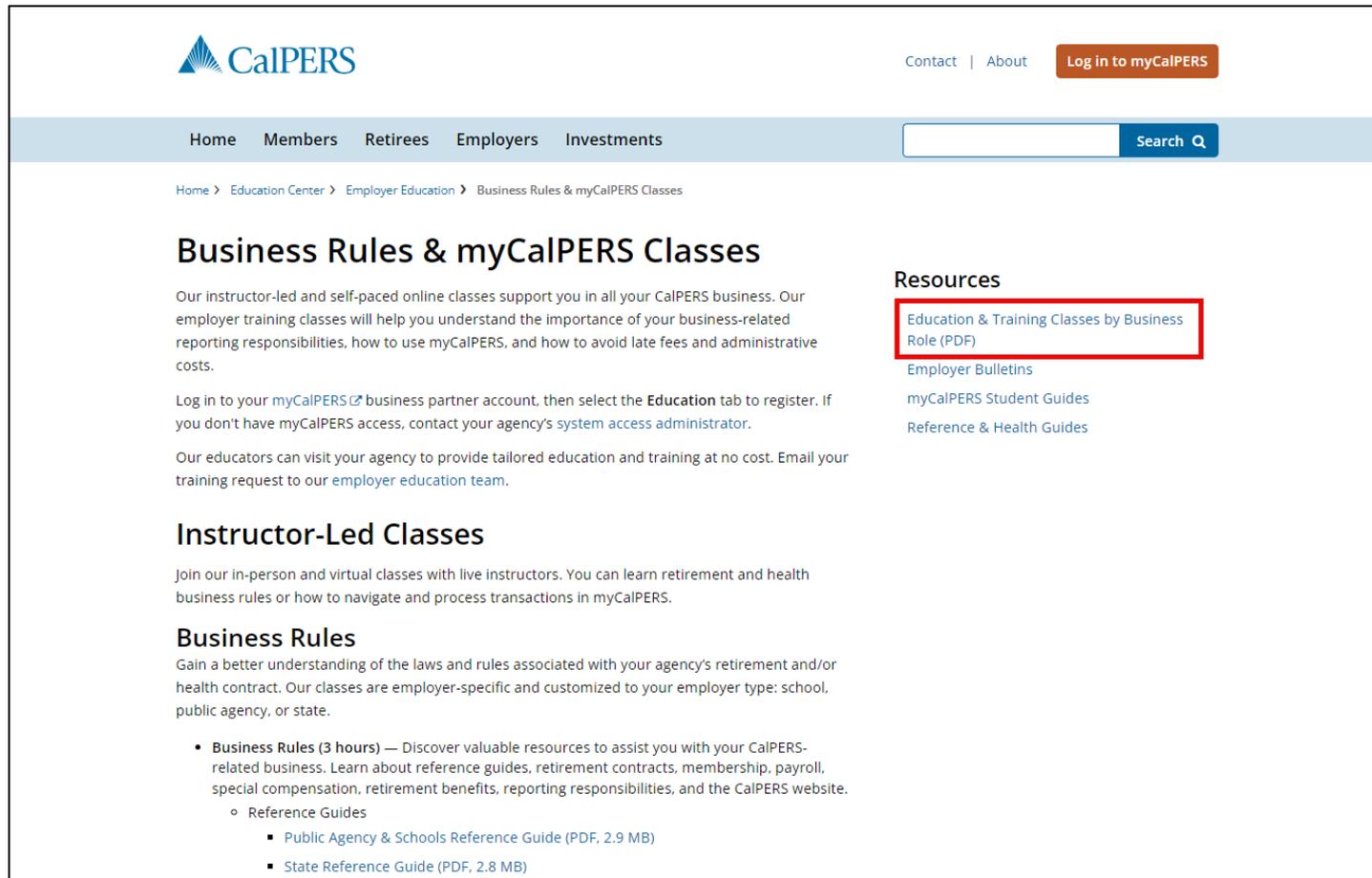
Business Rules

Gain a better understanding of the laws and rules associated with your agency's retirement and/or health contract. Our classes are employer-specific and customized to your employer type: school, public agency, or state.

- **Business Rules (3 hours)** — Discover valuable resources to assist you with your CalPERS-related business. Learn about reference guides, retirement contracts, membership, payroll, special compensation, retirement benefits, reporting responsibilities, and the CalPERS website.
 - Reference Guides
 - [Public Agency & Schools Reference Guide \(PDF, 2.9 MB\)](#)
 - [State Reference Guide \(PDF, 2.8 MB\)](#)

Resources

- [Education & Training Classes by Business Role \(PDF\)](#)
- [Employer Bulletins](#)
- [myCalPERS Student Guides](#)
- [Reference & Health Guides](#)



 [Contact](#) | [About](#) [Log in to myCalPERS](#)

[Home](#) [Members](#) [Retirees](#) [Employers](#) [Investments](#) [Search](#)

[Home](#) > [Education Center](#) > [Employer Education](#) > [Business Rules & myCalPERS Classes](#)

Business Rules & myCalPERS Classes

Our instructor-led and self-paced online classes support you in all your CalPERS business. Our employer training classes will help you understand the importance of your business-related reporting responsibilities, how to use myCalPERS, and how to avoid late fees and administrative costs.

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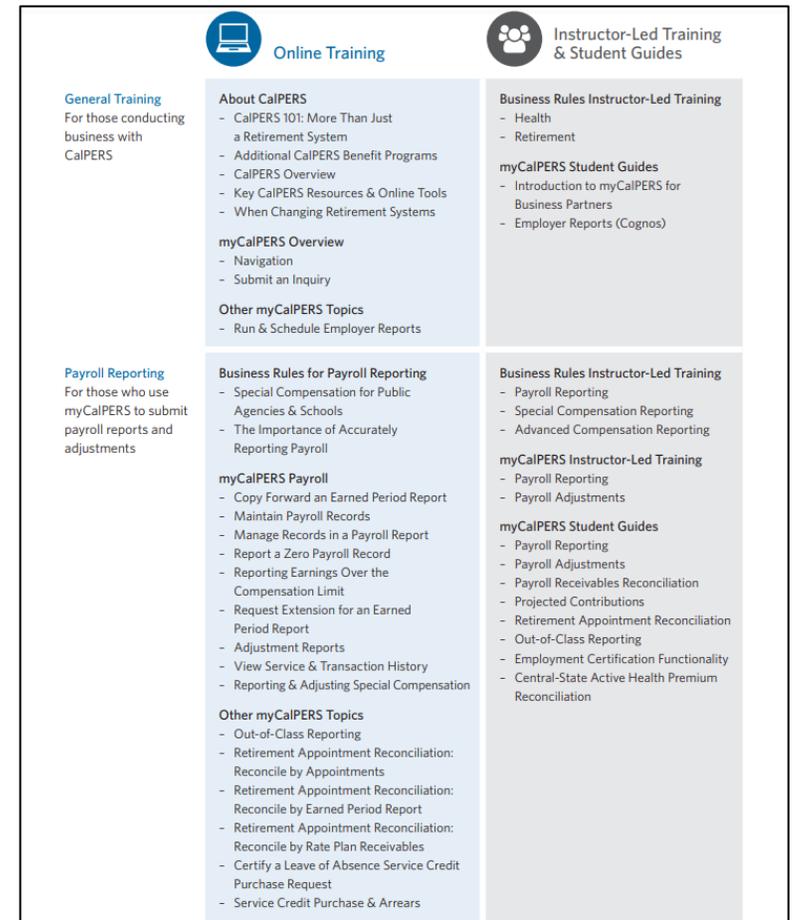
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 - Reference Guides
 - [Public Agency & Schools Reference Guide \(PDF, 2.9 MB\)](#)
 - [State Reference Guide \(PDF, 2.8 MB\)](#)

Resources

- [Education & Training Classes by Business Role \(PDF\)](#)
- [Employer Bulletins](#)
- [myCalPERS Student Guides](#)
- [Reference & Health Guides](#)



 **Online Training**

 **Instructor-Led Training & Student Guides**

General Training
For those conducting business with CalPERS

- **About CalPERS**
 - CalPERS 101: More Than Just a Retirement System
 - Additional CalPERS Benefit Programs
 - CalPERS Overview
 - Key CalPERS Resources & Online Tools
 - When Changing Retirement Systems
- **myCalPERS Overview**
 - Navigation
 - Submit an Inquiry
- **Other myCalPERS Topics**
 - Run & Schedule Employer Reports

Business Rules Instructor-Led Training

- Health
- Retirement

myCalPERS Student Guides

- Introduction to myCalPERS for Business Partners
- Employer Reports (Cognos)

Payroll Reporting
For those who use myCalPERS to submit payroll reports and adjustments

- **Business Rules for Payroll Reporting**
 - Special Compensation for Public Agencies & Schools
 - The Importance of Accurately Reporting Payroll
- **myCalPERS Payroll**
 - Copy Forward an Earned Period Report
 - Maintain Payroll Records
 - Manage Records in a Payroll Report
 - Report a Zero Payroll Record
 - Reporting Earnings Over the Compensation Limit
 - Request Extension for an Earned Period Report
 - Adjustment Reports
 - View Service & Transaction History
 - Reporting & Adjusting Special Compensation
- **Other myCalPERS Topics**
 - Out-of-Class Reporting
 - Retirement Appointment Reconciliation: Reconcile by Appointments
 - Retirement Appointment Reconciliation: Reconcile by Earned Period Report
 - Retirement Appointment Reconciliation: Reconcile by Rate Plan Receivables
 - Certify a Leave of Absence Service Credit Purchase Request
 - Service Credit Purchase & Arrears

Business Rules Instructor-Led Training

- Payroll Reporting
- Special Compensation Reporting
- Advanced Compensation Reporting

myCalPERS Instructor-Led Training

- Payroll Reporting
- Payroll Adjustments

myCalPERS Student Guides

- Payroll Reporting
- Payroll Adjustments
- Payroll Receivables Reconciliation
- Projected Contributions
- Retirement Appointment Reconciliation
- Out-of-Class Reporting
- Employment Certification Functionality
- Central-State Active Health Premium Reconciliation

The screenshot shows the CalPERS website page for "Business Rules & myCalPERS Classes". The header includes the CalPERS logo, navigation links for "Contact" and "About", and a "Log in to myCalPERS" button. A secondary navigation bar contains "Home", "Members", "Retirees", "Employers", and "Investments", along with a search bar. The breadcrumb trail reads "Home > Education Center > Employer Education > Business Rules & myCalPERS Classes". The main content area features a section titled "Business Rules & myCalPERS Classes" with introductory text and a "Resources" sidebar. The sidebar lists "Education & Training Classes by Business Role (PDF)", "Employer Bulletins" (highlighted with a red box), "myCalPERS Student Guides", and "Reference & Health Guides". The main text includes instructions on logging in and a list of "Business Rules (3 hours)" with sub-items for "Public Agency & Schools Reference Guide (PDF, 2.9 MB)" and "State Reference Guide (PDF, 2.8 MB)".

Business Rules & myCalPERS Classes

Our instructor-led and self-paced online classes support you in all your CalPERS business. Our employer training classes will help you understand the importance of your business-related reporting responsibilities, how to use myCalPERS, and how to avoid late fees and administrative costs.

Log in to your myCalPERS or business partner account, then select the **Education** tab 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.

Instructor-Led Classes

Join our in-person and virtual classes with live instructors. You can learn retirement and health business rules or how to navigate and process transactions in myCalPERS.

Business Rules

Gain a better understanding of the laws and rules associated with your agency's retirement and/or health contract. Our classes are employer-specific and customized to your employer type: school, public agency, or state.

- **Business Rules (3 hours)** — Discover valuable resources to assist you with your CalPERS-related business. Learn about reference guides, retirement contracts, membership, payroll, special compensation, retirement benefits, reporting responsibilities, and the CalPERS website.
 - Reference Guides
 - Public Agency & Schools Reference Guide (PDF, 2.9 MB)
 - State Reference Guide (PDF, 2.8 MB)

Resources

- Education & Training Classes by Business Role (PDF)
- **Employer Bulletins**
- myCalPERS Student Guides
- Reference & Health Guides

The screenshot shows the CalPERS website page for "Email Subscriptions". The header includes the CalPERS logo, navigation links for "Contact" and "About", and a "Log in to myCalPERS" button. A secondary navigation bar contains "Home", "Members", "Retirees", "Employers", and "Investments", along with a search bar. The breadcrumb trail reads "Home > Email Subscriptions". The main content area features a section titled "Email Subscriptions" with a list of subscription options. The "Employer Bulletin" option is highlighted with a red box. To the right, there is a "Subscribe to our newsletters and alerts" form with an "Email Address" input field and a "Subscribe" button.

Email Subscriptions

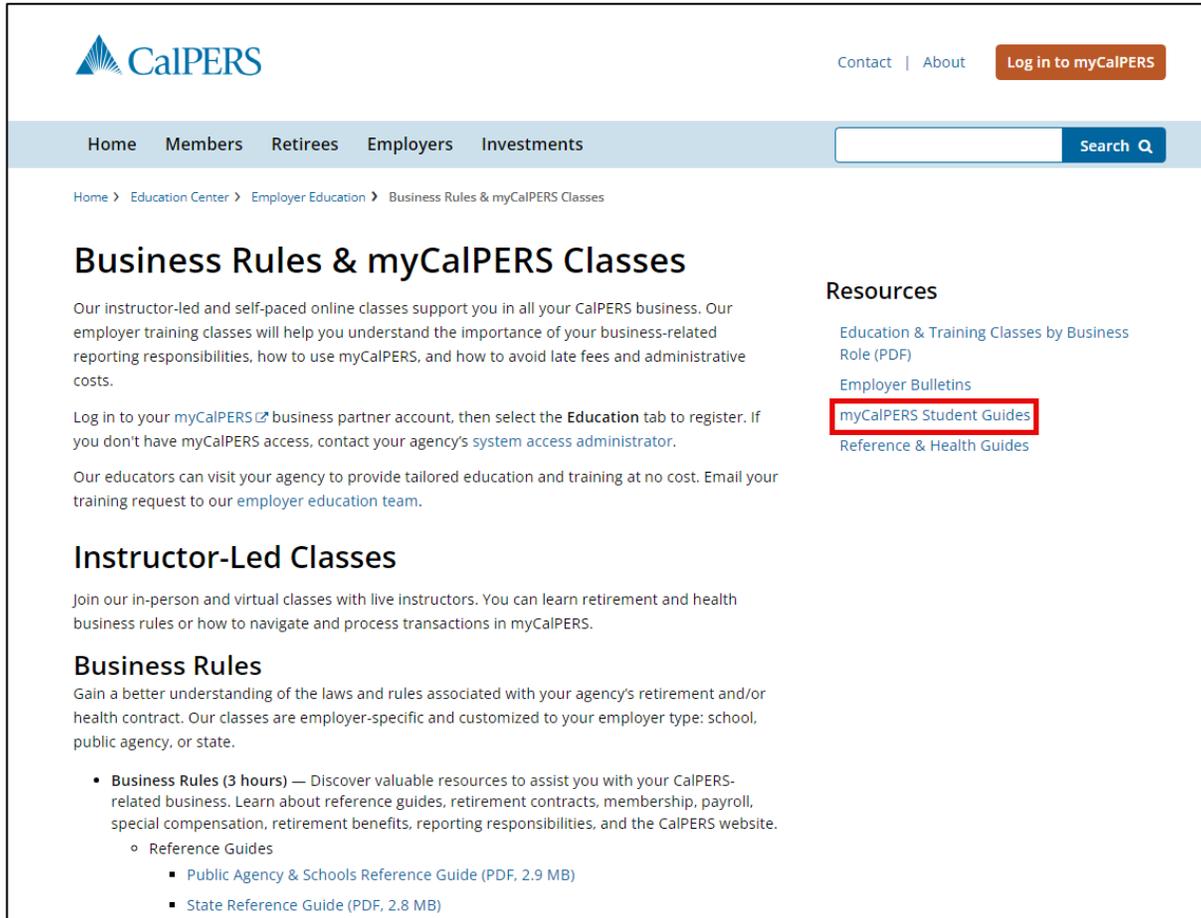
- **All Board Meeting Notices and Agenda Alerts**
Access Board meeting notices and agendas as soon as they are available.
- **CalPERS Legislative News**
Receive updates on CalPERS policy issues and actions.
- **CalPERS Long-Term Care Program Alert**
Stay up-to-date with Long-Term Care Program news and updates.
- **CalPERS News**
Get updates on important issues and events as the news happens.
- **Employer Bulletin**
Get customized employer news, Circular Letters, and event updates.
- **Member Education Bulletin**
Learn when our member education events, videos, and instructor-led classes will be held.
- **Regulatory Actions**
Receive updates on proposed CalPERS Regulatory Actions.
- **State Social Security Administrator Program Newsletter**
Learn about Social Security and Medicare coverage for state and local government employees.

Subscribe to our newsletters and alerts

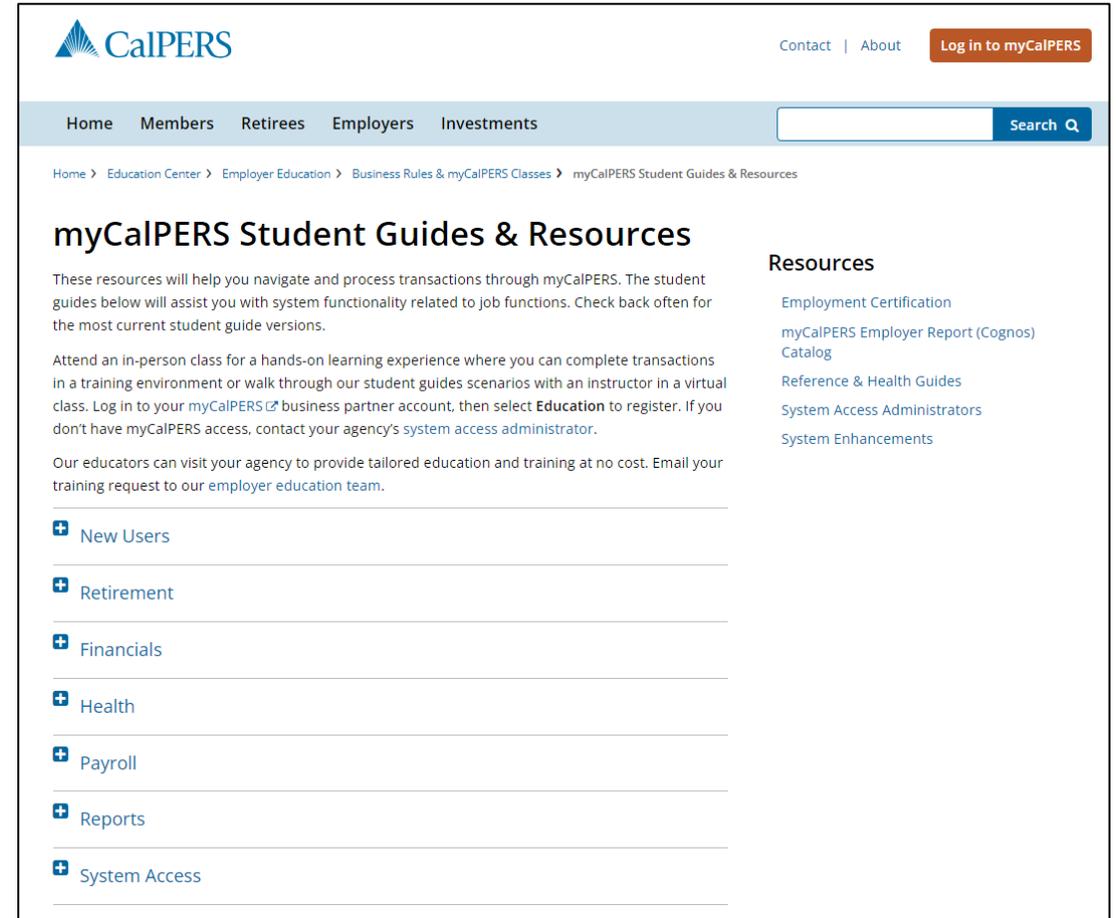
To get started, enter your email address below and select **Subscribe**. You'll choose or change your subscriptions on the next page.

Email Address

Subscribe

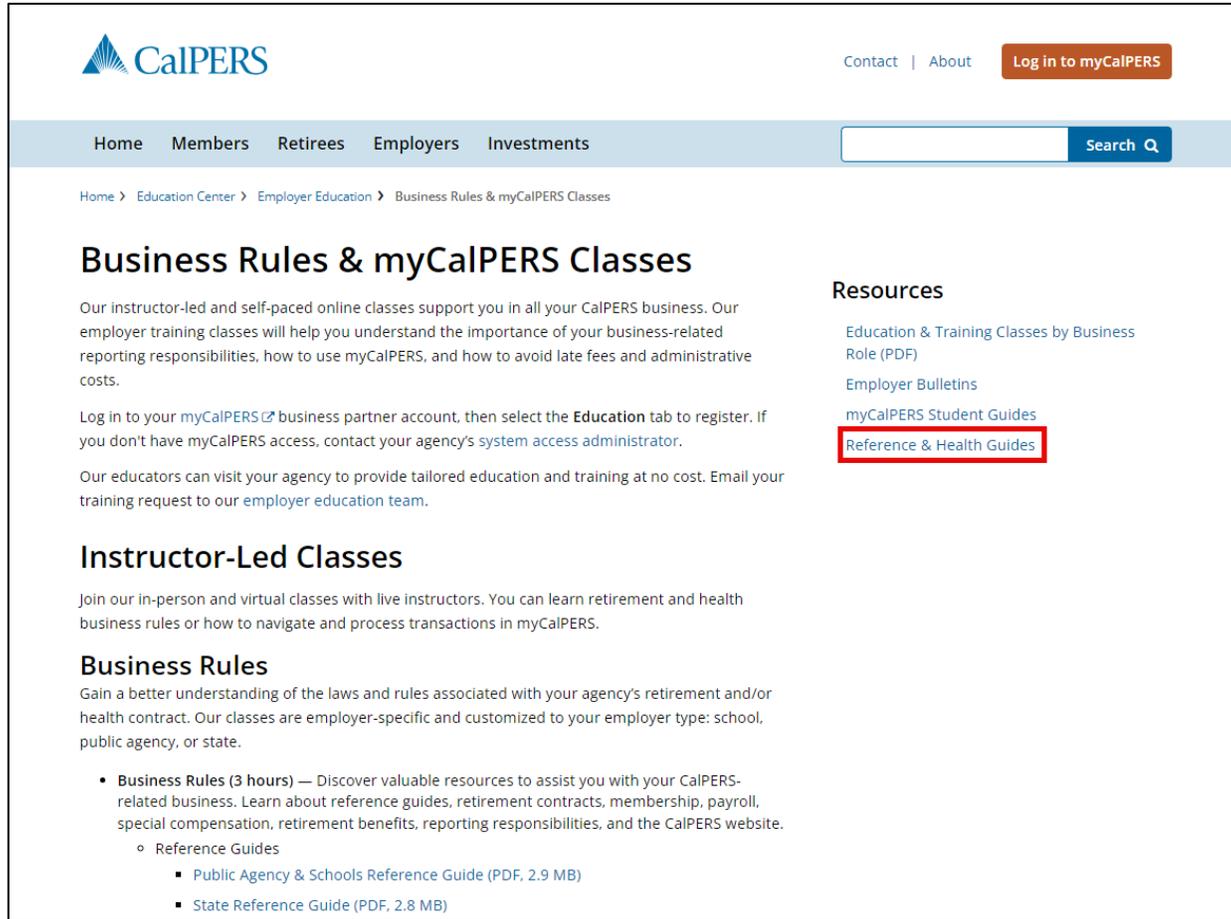


The screenshot shows the CalPERS website page for "Business Rules & myCalPERS Classes". The header includes the CalPERS logo, navigation links for "Contact" and "About", and a "Log in to myCalPERS" button. A secondary navigation bar contains "Home", "Members", "Retirees", "Employers", and "Investments", along with a search bar. The breadcrumb trail is "Home > Education Center > Employer Education > Business Rules & myCalPERS Classes". The main content area features a heading "Business Rules & myCalPERS Classes" followed by introductory text about instructor-led and self-paced online classes. Below this is a "Log in" instruction and a note about educator visits. A "Resources" sidebar lists "Education & Training Classes by Business Role (PDF)", "Employer Bulletins", "myCalPERS Student Guides" (highlighted with a red box), and "Reference & Health Guides". The main content continues with sections for "Instructor-Led Classes" and "Business Rules", including a list of business rules with a sub-section for "Reference Guides" containing "Public Agency & Schools Reference Guide (PDF, 2.9 MB)" and "State Reference Guide (PDF, 2.8 MB)".



The screenshot shows the CalPERS website page for "myCalPERS Student Guides & Resources". The header includes the CalPERS logo, navigation links for "Contact" and "About", and a "Log in to myCalPERS" button. A secondary navigation bar contains "Home", "Members", "Retirees", "Employers", and "Investments", along with a search bar. The breadcrumb trail is "Home > Education Center > Employer Education > Business Rules & myCalPERS Classes > myCalPERS Student Guides & Resources". The main content area features a heading "myCalPERS Student Guides & Resources" followed by introductory text about resources for navigating transactions. Below this is a paragraph about attending in-person or virtual classes. A "Resources" sidebar lists "Employment Certification", "myCalPERS Employer Report (Cognos) Catalog", "Reference & Health Guides", "System Access Administrators", and "System Enhancements". The main content continues with a paragraph about educator visits and a list of resources: "New Users", "Retirement", "Financials", "Health", "Payroll", "Reports", and "System Access".

School Employer Advisory Committee



 [Contact](#) | [About](#) [Log in to myCalPERS](#)

[Home](#) [Members](#) [Retirees](#) [Employers](#) [Investments](#) [Search Q](#)

[Home](#) > [Education Center](#) > [Employer Education](#) > [Business Rules & myCalPERS Classes](#)

Business Rules & myCalPERS Classes

Our instructor-led and self-paced online classes support you in all your CalPERS business. Our employer training classes will help you understand the importance of your business-related reporting responsibilities, how to use myCalPERS, and how to avoid late fees and administrative costs.

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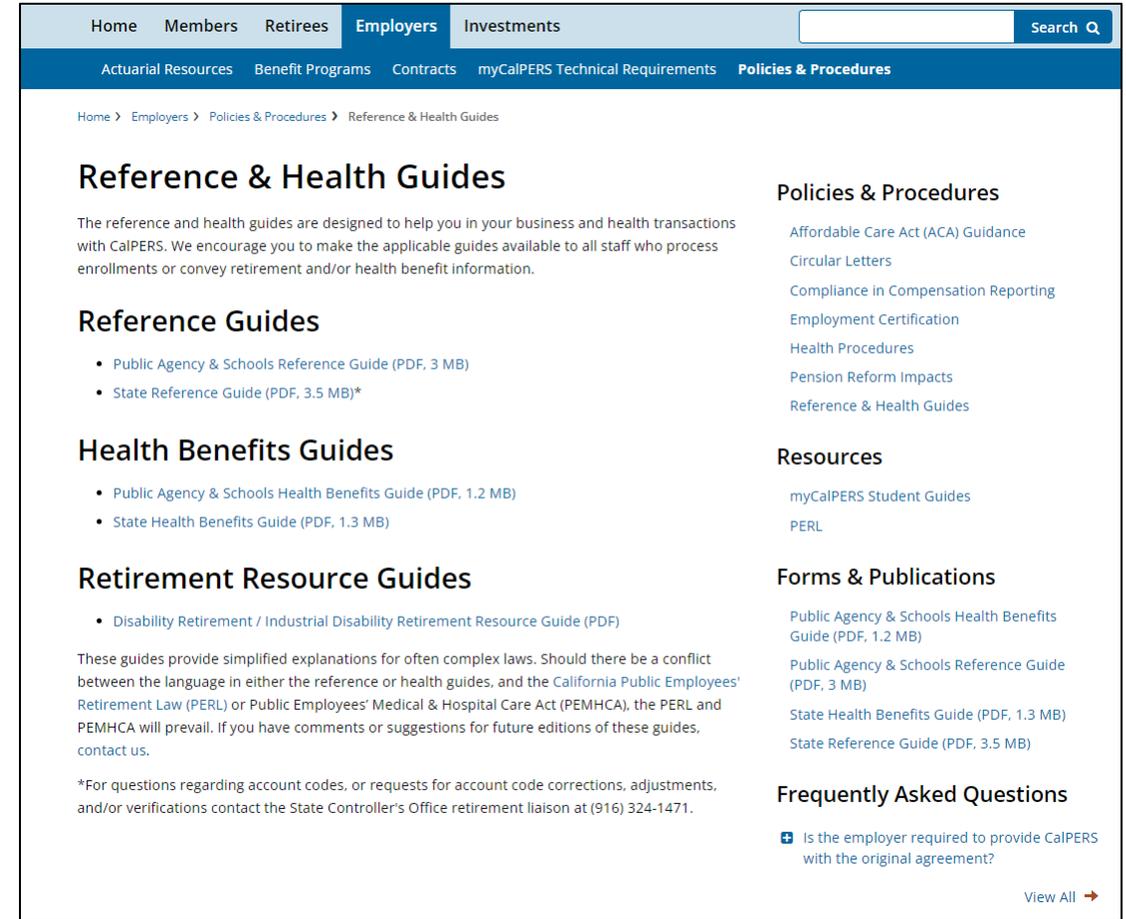
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 - Reference Guides
 - [Public Agency & Schools Reference Guide \(PDF, 2.9 MB\)](#)
 - [State Reference Guide \(PDF, 2.8 MB\)](#)

Resources

- [Education & Training Classes by Business Role \(PDF\)](#)
- [Employer Bulletins](#)
- [myCalPERS Student Guides](#)
- [Reference & Health Guides](#)



[Home](#) [Members](#) [Retirees](#) [Employers](#) [Investments](#) [Search Q](#)

[Actuarial Resources](#) [Benefit Programs](#) [Contracts](#) [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 \(PDF, 3 MB\)](#)
- [State Reference Guide \(PDF, 3.5 MB\)*](#)

Health Benefits Guides

- [Public Agency & Schools Health Benefits Guide \(PDF, 1.2 MB\)](#)
- [State Health Benefits Guide \(PDF, 1.3 MB\)](#)

Retirement Resource Guides

- [Disability Retirement / Industrial Disability Retirement Resource Guide \(PDF\)](#)

These guides provide simplified explanations for often complex laws. Should there be a conflict between the language in either the reference or health guides, and the California Public Employees' Retirement Law (PERL) or Public Employees' Medical & Hospital Care Act (PEMHCA), the PERL and PEMHCA will prevail. If you have comments or suggestions for future editions of these guides, contact us.

*For questions regarding account codes, or requests for account code corrections, adjustments, and/or verifications contact the State Controller's Office retirement liaison at (916) 324-1471.

Policies & Procedures

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

Resources

- [myCalPERS Student Guides](#)
- [PERL](#)

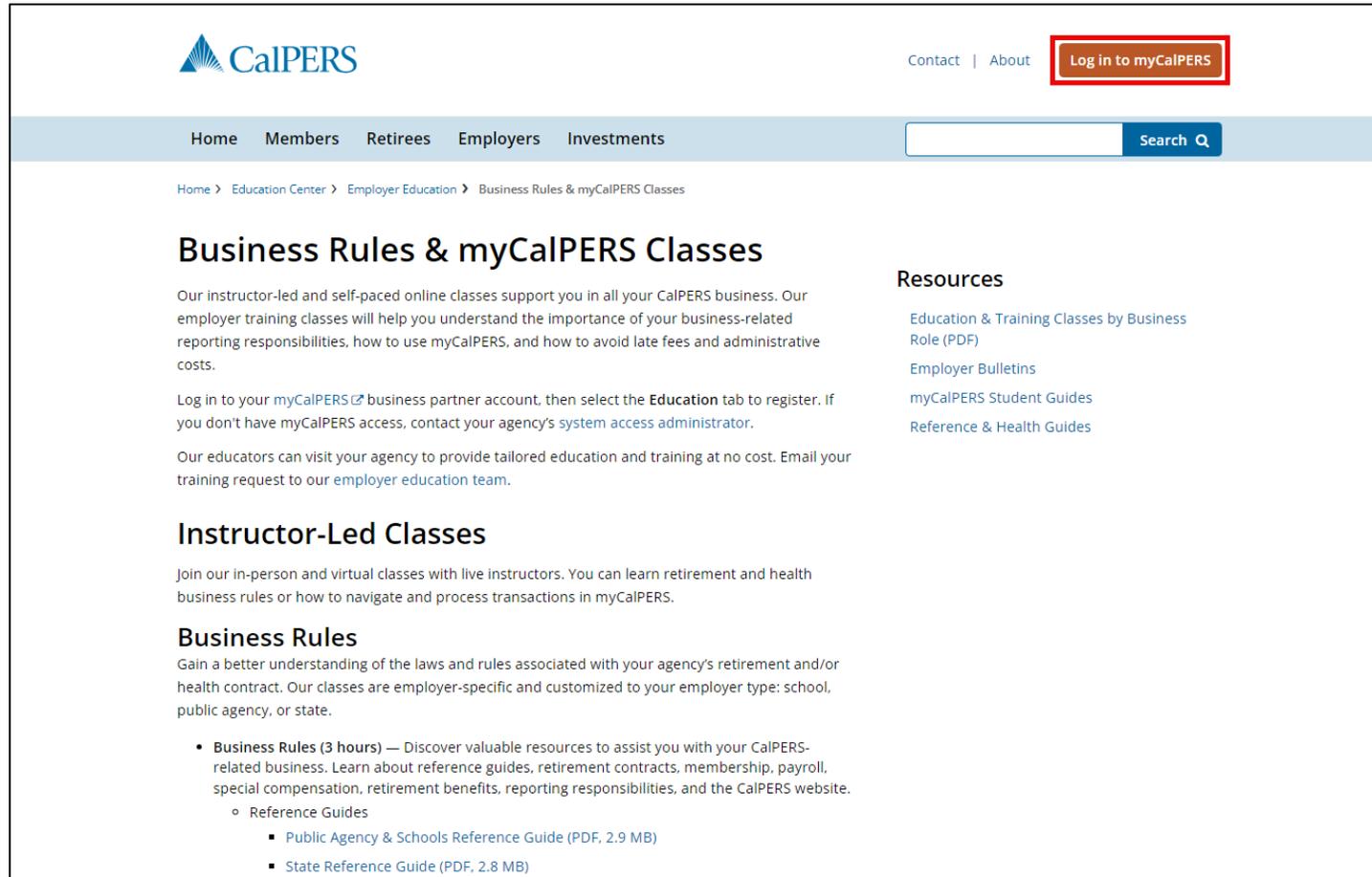
Forms & Publications

- [Public Agency & Schools Health Benefits Guide \(PDF, 1.2 MB\)](#)
- [Public Agency & Schools Reference Guide \(PDF, 3 MB\)](#)
- [State Health Benefits Guide \(PDF, 1.3 MB\)](#)
- [State Reference Guide \(PDF, 3.5 MB\)](#)

Frequently Asked Questions

- [Is the employer required to provide CalPERS with the original agreement?](#)

[View All](#) →



The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a red-bordered button labeled 'Log in to myCalPERS'. Below this is a navigation bar with links for 'Home', 'Members', 'Retirees', 'Employers', and 'Investments', followed by a search bar with a 'Search' button. The main content area has a breadcrumb trail: 'Home > Education Center > Employer Education > Business Rules & myCalPERS Classes'. The main heading is 'Business Rules & myCalPERS Classes'. The text describes instructor-led and self-paced online classes. It includes instructions on how to log in to a myCalPERS business partner account and contact a system access administrator. It also mentions that educators can visit agencies for tailored education. Below this are sections for 'Instructor-Led Classes' and 'Business Rules'. The 'Business Rules' section includes a list of resources, such as 'Business Rules (3 hours)' and 'Reference Guides' (Public Agency & Schools Reference Guide and State Reference Guide). On the right side, there is a 'Resources' section with links to 'Education & Training Classes by Business Role (PDF)', 'Employer Bulletins', 'myCalPERS Student Guides', and 'Reference & Health Guides'.

 [Contact](#) | [About](#) [Log in to myCalPERS](#)

[Home](#) [Members](#) [Retirees](#) [Employers](#) [Investments](#) [Search](#) 

[Home](#) > [Education Center](#) > [Employer Education](#) > [Business Rules & myCalPERS Classes](#)

Business Rules & myCalPERS Classes

Our instructor-led and self-paced online classes support you in all your CalPERS business. Our employer training classes will help you understand the importance of your business-related reporting responsibilities, how to use myCalPERS, and how to avoid late fees and administrative costs.

Log in to your [myCalPERS](#) business partner account, then select the **Education** tab 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](#).

Instructor-Led Classes

Join our in-person and virtual classes with live instructors. You can learn retirement and health business rules or how to navigate and process transactions in myCalPERS.

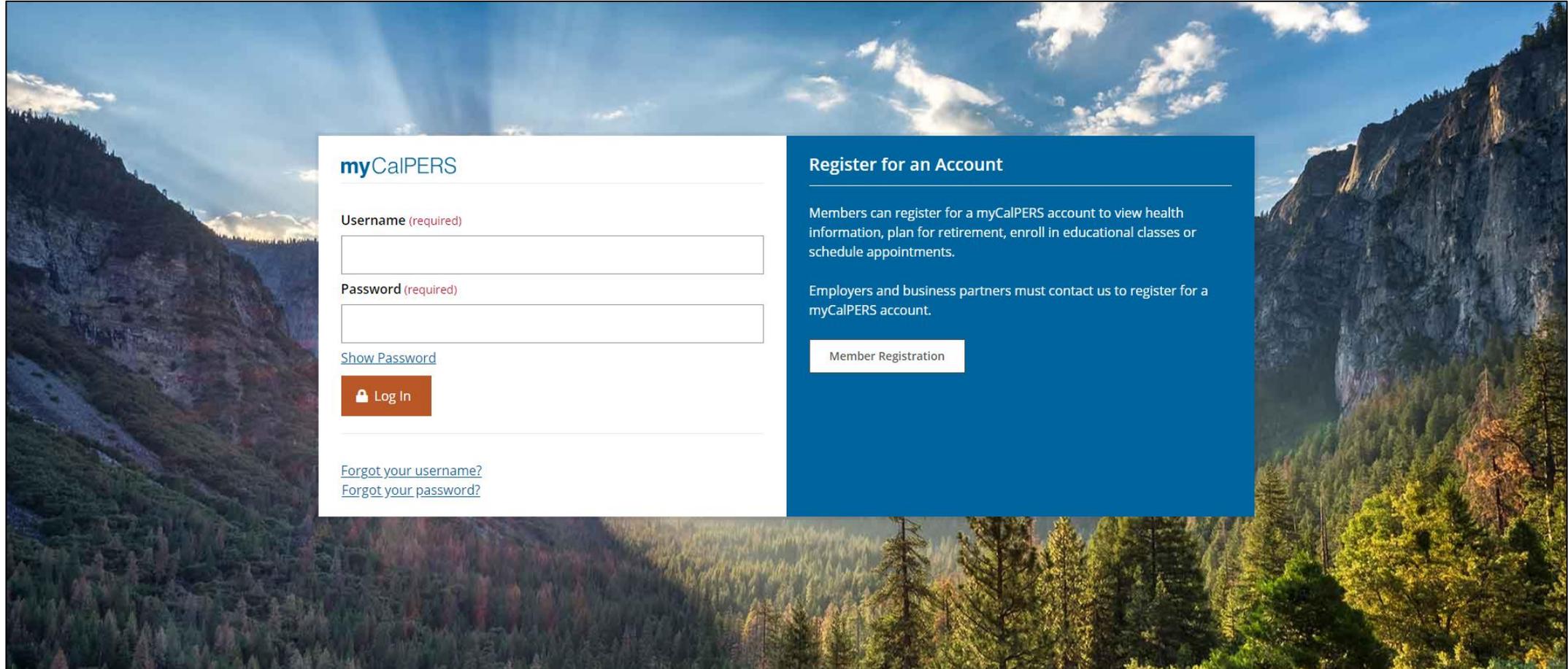
Business Rules

Gain a better understanding of the laws and rules associated with your agency's retirement and/or health contract. Our classes are employer-specific and customized to your employer type: school, public agency, or state.

- **Business Rules (3 hours)** — Discover valuable resources to assist you with your CalPERS-related business. Learn about reference guides, retirement contracts, membership, payroll, special compensation, retirement benefits, reporting responsibilities, and the CalPERS website.
 - Reference Guides
 - [Public Agency & Schools Reference Guide \(PDF, 2.9 MB\)](#)
 - [State Reference Guide \(PDF, 2.8 MB\)](#)

Resources

- [Education & Training Classes by Business Role \(PDF\)](#)
- [Employer Bulletins](#)
- [myCalPERS Student Guides](#)
- [Reference & Health Guides](#)



The screenshot shows the myCalPERS user interface. At the top, there is a navigation bar with tabs for Home, Profile, Reporting, Person Information, Education (highlighted with a red box), and Other Organizations. Below this, there are sub-tabs for My Home and Requests. A left sidebar contains a 'Common Tasks' section with a 'Menu' dropdown, listing 'Person Search' and 'Contact Personal Security Settings'. The main content area features a 'Welcome' message and a 'Upcoming Scheduled Maintenance' notice, which states that myCalPERS will be unavailable as follows:

- There is no scheduled maintenance at this time.

All of our online services and features are currently available.

We've made it easier than ever for you to conduct your business with CalPERS - all in a safe, secure, and reliable environment.

Go to [myCalPERS Technical Requirements](#) to view resources tailored just for you.

Below this, there is a section titled 'Member Health Enrollment Requests' with a dropdown arrow. It contains the following information:

- There are 17 pending health enrollment changes that must be confirmed or rejected. These changes were submitted by your employees from their myCalPERS account.
- There are 0 uploaded supporting documents that require your review.
- View details on the [Maintain Member Health Enrollment Request](#) page.
- 1 successful health transaction that did not require review was created in the past 30 days. This change was submitted by your employee from their myCalPERS account.
- View details of all health transactions on [Employer Health Event Transaction Report](#).

On the right side of the page, there is a 'Forms and Publications Center' section with a red asterisk indicating '*Required Fields'. Below it is a 'QUICK LINKS' section with 'CalPERS Quick Picks' and a link to the 'CalPERS website'. At the bottom right, there is a 'GO »' button and a partial image of hands typing on a keyboard.

The screenshot shows the myCalPERS website interface. At the top, the logo 'myCalPERS' is displayed. Below it is a navigation bar with tabs for 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. The 'Education' tab is selected, and a sub-menu shows 'Classes', 'Consultations', and 'Education Activity & History'. On the left side, there is a 'Common Tasks' sidebar with a dropdown arrow. The main content area is titled 'Education Resources' and contains an introductory paragraph: 'We offer various training opportunities to assist you with your CalPERS-related business.' Below this are four content boxes: 1. 'Classes': 'We offer a variety of online and instructor-led classes. Browse our complete class list or browse by class title or location. [Enroll in a Class](#)' 2. 'Consultations': 'You can request one-on-one consultations with an employer educator. [Request a Consultation](#)' 3. 'Activity & History': 'Check the status of classes and consultations you've scheduled with us. Edit, reschedule, or cancel your activities any time. [View Activity & History](#)' 4. 'More Resources': '[View Employer Education](#) on CalPERS website. [Email us](#) if you have a special training request.'

myCalPERS

Home Profile Reporting Person Information Education Other Organizations

Education Resources Classes Consultations | Education Activity & History

Common Tasks Education Resources

We offer various training opportunities to assist you with your CalPERS-related business.

Classes

We offer a variety of online and instructor-led classes. Browse our complete class list or browse by class title or location.

[Enroll in a Class](#)

Consultations

You can request one-on-one consultations with an employer educator.

[Request a Consultation](#)

Activity & History

Check the status of classes and consultations you've scheduled with us. Edit, reschedule, or cancel your activities any time.

[View Activity & History](#)

More Resources

[View Employer Education](#) on CalPERS website. [Email us](#) if you have a special training request.

The screenshot displays the myCalPERS user interface. At the top, the 'myCalPERS' logo is visible. Below it is a navigation bar with tabs for 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. The 'Reporting' tab is currently selected. Underneath, a secondary navigation bar includes 'Education Resources', 'Classes', 'Consultations', and 'Education Activity & History'. The 'Classes' link is highlighted with a red box. On the left side, there is a 'Common Tasks' sidebar with an upward arrow icon. The main content area is titled 'Education Resources' and contains the following text: 'We offer various training opportunities to assist you with your CalPERS-related business.' Below this, there are four distinct sections: 1. 'Classes': Describes online and instructor-led classes and includes a red-bordered button labeled 'Enroll in a Class'. 2. 'Consultations': Describes one-on-one consultations with employer educators and includes a 'Request a Consultation' link. 3. 'Activity & History': Describes checking the status of scheduled classes and consultations, including 'View Activity & History' link. 4. 'More Resources': Includes links for 'View Employer Education' and 'Email us'.

myCalPERS

Home Profile Reporting Person Information Education Other Organizations

Education Resources Classes Consultations | Education Activity & History

Common Tasks ▲ **Classes**

Sign up for an instructor-led class that's offered virtually or in person 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 descriptions](#)

Class ▲	Action
Advanced Compensation	View Class Dates
Advanced Membership	View Class Dates
Business Rules for School Employers	View Class Dates
Business Rules: Health for Public Agency and School Employers	View Class Dates
myCalPERS Employer Reports (Cognos)	View Class Dates
myCalPERS Health Enrollment	View Class Dates
myCalPERS Payroll Adjustments	View Class Dates
myCalPERS Payroll Reporting	View Class Dates

myCalPERS

Home Profile Reporting Person Information Education Other Organizations

Education Resources Classes Consultations | Education Activity & History

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myCalPERS

Home Profile Reporting Person Information Education Other Organizations

Education Resources Classes Consultations Education Activity & History

Common Tasks ⬆

View Class Dates

Business Rules for School Employers

To provide a better understanding and working knowledge of how to conduct business with CalPERS in accordance with the current laws and regulations of the State of California. Highlighting such topics as the employers' responsibilities regarding contracts, membership, payroll, compensation review, and retirement benefits.

Classes Near You

Instructor-led classes are hosted by our eight Regional Offices throughout the state. View our [Regional Offices Map \(PDF\)](#). You can sign up for in-person classes held at a Regional Office, or stay at home and attend one that's offered virtually.

Regional Office Delivery Method

Date & Time ⬆	Location ⬆	Action
07/23/2024 1:00 PM - 4:00 PM	Virtual Class (Sacramento RO)	<input type="button" value="Enroll"/> 25 seats left
08/06/2024 1:00 PM - 4:00 PM	California Public Employees' Retirement System - Lincoln Plaza East, Room 1733 400 Q Street Sacramento, CA 95811 Room: 1733 Get Directions	<input type="button" value="Enroll"/> 24 seats left
08/20/2024	Virtual Class	<input type="button" value="Enroll"/>

myCalPERS

Home Profile Reporting Person Information Education Other Organizations

Education Resources Classes Consultations | Education Activity & History

Common Tasks View Class Dates

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myCalPERS

Home Profile Reporting Person Information Education Other Organizations

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

Common Tasks Education Activity & History

Instructor-Led Classes Online Classes Consultations

Your Enrollments | [Employer Enrollments](#)

Date & Time	Class	Location	Status	Action
08/06/2024 1:00 PM - 4:00 PM	Business Rules for School Employers	California Public Employees' Retirement System - Lincoln Plaza East, Room 1733 400 Q Street Sacramento, CA 95811 Room: 1733 Get Directions	Enrolled	Reschedule Edit Enrollment Cancel Enrollment
06/11/2024 1:00 PM - 3:00 PM	myCalPERS Retirement Enrollment	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class Meeting ID: 846 2717 6085 Password: 776158	Attended	Print Certificate (PDF)

myCalPERS

Home Profile Reporting Person Information Education Other Organizations

Education Resources Classes Consultations Education Activity & History

Common Tasks Education Activity & History

Instructor-Led Classes Online Classes Consultations

Your Enrollments | [Employer Enrollments](#)

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Contact Us

Email our employer educators

- calpers_employer_communications@calpers.ca.gov

Employer Education & Resources Questions

Round Table

Brad Hanson
EAMD

Thank You