Introduction

This student guide is a resource to assist you with processing your Section 218 Agreement and Social Security Administration Annual Information Request within the my|CalPERS system.

State Social Security Administrator’s (SSSA) Office

Social Security Administration requires that every State designates a State Social Security Administrator (SSSA). In California, this role was designated to the California Public Employees’ Retirement System (CalPERS) and authorized by California Government Code 22200. The SSSA administers the provisions of the State of California’s Section 218 Agreement. A Section 218 Agreement is the contract that provides social security and/or Medicare coverage to employees in government positions.

The SSSA is committed to providing assistance and support to all state and public agencies in California as required by federal and state law.

For more information about SSSA assistance and services provided to California’s public agencies and state departments, refer to the contact information below or the CalPERS website at www.calpers.ca.gov/sssa.

Contact Information

The SSSA office can be reached by:

- **E-mail**: SSSA@calpers.ca.gov
- **Direct Phone**: (916) 795-0810
- **Mail**: CalPERS
  
  State Social Security Administrator
  
  P.O. Box 720720
  
  Sacramento, CA 94229

Disclaimer

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

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Training Opportunities

Before accessing my|CalPERS, we recommend you review the Introduction to my|CalPERS for Business Partners guide and take the Business Rules training class (instructor-led or online). This class covers the simplified explanation of laws defined by the California Public Employees’ Retirement Law (PERL).
Unit 1: Accessing my|CalPERS

my|CalPERS is a secure, self-service website where you will access your account details. my|CalPERS is available to all agencies in the State of California, even for those that do not participate in the CalPERS retirement and health program.

In this unit, you will learn how to obtain my|CalPERS access and log into the system.

Non-CalPERS Business Partners

As a non-CalPERS business partner, you will utilize your my|CalPERS account to view or request changes to a Section 218 Agreement and complete your Annual Information Request (AIR) electronically.

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Scenario 1: Request Access to my|CalPERS

New to my|CalPERS
If your agency does not currently have a business profile in my|CalPERS, a senior manager from your agency will need to request access and designate a System Access Administrator (SAA).

To request access, email bp_inquiry@calpers.ca.gov and include the following information

• Requestor’s contact information (i.e., name, title, phone number, email address)
• Designated SAA’s contact information (i.e., name, title, phone number, email address, user name)
• Statement authorizing that person be the SAA contact

   Note: The requestor may also be the SAA.

For assistance with access to my|CalPERS please contact CalPERS at 888 CalPERS
(or 888-225-7377) or TTY (877) 249-7442.

System Access Administrators (SAAs)
SAAs are responsible for granting and maintaining users access for your agency. Visit the System Access Administrators page on the CalPERS website for more information.

Account Access
If you handle social security and Medicare related business for your agency, your SAA will need to grant you the following access roles:

• System Access Administrator (SAA)
• Business Partner Social Security

Your SAA should provide you with your my|CalPERS username and temporary password which you will utilize to log in to your account.
Scenario 2: Log into my|CalPERS

After your my|CalPERS account has been established, use your username and password to log into my|CalPERS for your business needs.

**Step Actions**

Step 1  
Visit the [CalPERS website](http://www.calpers.ca.gov) at www.calpers.ca.gov.

Step 2  
Select the **my|CalPERS Log In** button.

Step 3  
Choose the **Business Partner** radio button.

Step 4  
Select the **Continue** button.
Step 5  Enter your username.

Step 6  Select the **Continue** button.

Step 7  Enter your password.

Step 8  Select the **Log In** button. For further guidance on completing your account set-up, refer to the [Introduction to myCalPERS for Business Partners](#) student guide.

**You have completed this scenario.**
Unit 2: Section 218 Agreement

This unit will help you understand and navigate the Section 218 Agreement (Social Security and/or Medicare) in my CalPERS.

A Section 218 Agreement is the contract that provides social security and/or Medicare coverage to employees in government positions. Your agency is required to have this agreement to provide social security and/or Medicare coverage in addition to a retirement system.

Terminations
As of April 20, 1983, social security coverage extended by a Section 218 agreement may not be terminated. Election to participate is irrevocable.

Modifications
An agency may request to modify an existing Section 218 agreement to cover:

- New positions
- Previously excluded positions
- Retirement system ineligibles
- Employees changing their vote in favor of coverage
- New positions joining a retirement system

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Scenario 1: View Your Section 218 Agreement

This scenario will help you access your agency’s Section 218 Agreement in myCalPERS.

**Step Actions**

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

![Profile Navigation](image)

Step 2  Select **Agreements** local navigation link.

![Agreements Navigation](image)

Step 3  Select the **Agreement Type** link you wish to review.

![Agreement Type Selection](image)

Step 4  Review the Agreement Summary section.

![Agreement Summary](image)

Step 5  Within the Exclusions section, review the contract exclusions (if any).

![Exclusions Table](image)

You have completed this scenario.
Scenario 2: Upload Contract Documents

Once your agency contacts the SSSA office to establish or modify a Section 218 Agreement, the first set of documents will be uploaded into your account to complete. Download and complete the documents, then follow the step actions in this scenario to upload the documents electronically in my|CalPERS.

**Note:** Agencies are required to send original documents with a wet signature after the SSSA has approved your document.

**System Logic**

- You will be able to view the documents and the date of upload in my|CalPERS.
- You may edit the documents after submission by completing the steps below.

**Step Actions**

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

**Step 2** Select the **Agreements** local navigation link.

**Step 3** Select the **Agreement Type** link with the **Work in Progress** status.

**Step 4** Select the **Upload/Replace** link.
Step 5  Select **Upload** from the Submission Method drop-down list.

Step 6  Select the **Browse**... button to locate and upload a document from your computer.

Step 7  Select the **Submit** button.

Step 8  Verify the document upload is complete.

You have completed this scenario.
Unit 3: Social Security Administrator Annual Information Request

Social Security Administration requires that State Social Security Administrators (SSSA) contact all public agencies on an annual basis to maintain data and ensure tax compliance.

The Annual Information Request (AIR) form was established to obtain this information from California public employers. Beginning July 1, 2018, agencies will be required to file their Annual Information Request (AIR) online.

What to Know Before You Begin

The following information will be requested:

1. Federal tax identification number
2. Supporting documentation for organization changes (name change, merger)
3. Public Retirement System
4. Social security and Medicare withholding practices
5. Information for agency subcomponents (departments) using different tax identification number

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AIR Notifications

**CalPERS Business Partner**
You will receive notification by mail or email to file the AIR electronically based on your notification preferences in my|CalPERS.

*Note:* Agencies will be notified throughout the year to complete their annual filing beginning July 1, 2018. You must wait until your notification date to complete the AIR.

**School Employer**
The County Office of Education (COE) will receive notification by mail to complete the AIR in my|CalPERS. COE’s will have 60 days from the date of notification to complete the AIR.

**Non-CalPERS Business Partner**
Agencies not part of the CalPERS health and retirement programs will receive initial notification by mail. Once you set up a profile in my|CalPERS, you will receive an annual notification by mail or email based on your selected notification preference.

For steps on how to set up a new account in my|CalPERS, review [Unit 1; Scenario 1: Request Access to my|CalPERS](#).
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Scenario 1: Complete the AIR in my CalPERS

This scenario outlines how to file the AIR form electronically.

**Step Actions**

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

Step 2  Select the **SSA Annual Information Request** left-side link.

Step 3  Select the **Request Date** link.

Step 4  Complete the Annual Information Request section.
Note: For step-by-step instruction by entity, refer to the following:
Assistance with AIR Questions for Public Agencies
Assistance with AIR Questions for County Office of Education

Step 6
Select the **Submit** button. A green confirmation box will display at the top of the page.

You have completed this scenario.
Assistance with AIR Questions – Public Agencies

The following is a step-by-step outline for the AIR questions for Public Agencies.

Federal Tax ID Number

If your agency has an Employer Identification Number (EIN) to conduct business with the IRS and you have misplaced it, you will need to visit the IRS Lost EIN webpage for steps on how to locate a missing EIN number.

Has the agency had any name changes?

If the agency has never changed its name, select the **No** radio button and proceed to the next question.

If your agency has changed its name since the last AIR submission, select the **Yes** radio button and upload legal name change documents*.

If your agency has changed its name at any point in its existence, select the **Yes** radio button and confirm the appropriate legal documents are on file.

*To submit legal evidence for a name change:

**Step 1** Select the **Upload Document** link.

**Step 2** Select **Upload** from the Submission Method drop-down menu.

**Step 3** Select the **Browse**... button to locate and upload the document.

**Step 4** Select the **Submit** button.
Does the agency have an employer-provided Public Retirement System?
If yes, select the Yes radio button and from the drop-down menu select the retirement system that covers positions under your agency.

**Note:** For an agency that has more than one retirement system, two drop-down menus are provided. If you only have one retirement system, leave the second drop-down menu blank.

If no, select the No radio button and continue to the next question.

Does the agency have any employees?
If yes, select the Yes radio button and provide the number of employees in the agency.

If no, select the No radio button and respond to the below questions:

**Note:** For agencies that have dissolved, merged, or become inactive, upload the supporting documentation.

Social Security and Medicare Tax Withholding Practices
The remaining questions collect social security and Medicare tax information. Respond based on your agency’s current withholding practices for members and non-members of the Public Retirement system.
Positions Being Excluded from Social Security and Medicare Tax

This table provides definitions for excluded position types:

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<th>Definition</th>
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<td>Elective Positions</td>
<td>Elective positions are those filled by an election. The method of selection must constitute an election under state law. For example, mayor, member of legislature, county commissioner, county or city attorney, and members of the board.</td>
</tr>
<tr>
<td>Part-Time Positions</td>
<td>Part-time positions are those in which the number of work hours normally required by the position in a week or pay period is less than the normal time requirements for the majority of positions in the employing entity.</td>
</tr>
<tr>
<td>Fee-Basis Positions</td>
<td>A fee-based public official is one who receives and retains remuneration directly from the public. For example, the justice of peace and local registrar.</td>
</tr>
<tr>
<td>Agricultural Labor Positions</td>
<td>Agricultural services that would be excluded from social security and Medicare tax if performed by a private employment.</td>
</tr>
<tr>
<td>Election Worker Positions</td>
<td>Election workers can be excluded if paid less than the threshold amount mandated by law. For this amount, contact the SSSA.</td>
</tr>
<tr>
<td>Student Services</td>
<td>A student performing services in the employ of a school, college or university where the student is enrolled and regularly attending class.</td>
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Assistance with AIR Questions – County Office of Education

This section provides details on the questions for the County Office of Education AIR. The AIR for the County Office of Education captures information on organizational changes such as the creation, dissolution, unification, unionization, annexation, or lapsation of any new school district(s).

Federal Tax ID Number

If your agency has an Employer Identification Number (EIN) to conduct business with the IRS and you have misplaced it, you will need to visit the IRS Lost EIN webpage for steps on how to locate a missing EIN number.

Are there any organizational changes to the County Office of Education?

An organization change occurs when there is a creation, dissolution, unification, unionization, annexation, or lapsation of any new school district(s).

For this question, select the appropriate radio button for your organization’s status and proceed to the next question.

Important: Whether or not an organizational change has been (or will be) made, this must be reported on the Mergers and Reorganizations page of my|CalPERS. Refer to the Reporting Mergers and Reorganizations section for a step-by-step outline.

Are there School District(s) out of existence in the current fiscal year due to dissolution, unification, unionization, annexation or lapsation?

If no district(s) are out of existence in the current fiscal year, select the No radio button and proceed to the next question.

If there are districts out of existence in the current fiscal year, select the Yes radio button and upload supporting documentation.
Are there new School District(s) in existence in the upcoming fiscal year?

If no new districts have been formed for the upcoming fiscal year, select the No radio button followed by the Submit button to complete the AIR.

If new districts have been created for the upcoming fiscal year, select the Yes radio button and upload supporting documentation.

Supporting Documentation

Supporting documentation for organizational changes is any legal documentation that the creation, dissolution, unification, unionization, annexation, or lapsation of any new school district(s) has occurred.

If you have multiple districts with organizational changes, submit a roster that includes:

- School district
- Tax ID
- Type of change

Upload Supporting Documentation

Step 1 Select the Upload Document link.

Step 2 Select Upload from the Submission Method drop-down menu.

Step 3 Select the Browse... button to locate and upload the document.

Step 4 Select the Submit button.
Reporting Mergers and Reorganizations - County Office of Education

Whether or not your agency had organizational changes, this information must be recorded within my|CalPERS as part of the AIR process. Follow the steps below to complete your submission.

Step 1
Select the Profile global navigation tab, then Mergers and Reorganizations.

Step 2
In the School District Reorganizations panel, select the appropriate Effective Date.

Step 3
In the School District Organization Changes panel, select the appropriate radio button.

If your agency had no organizational changes, select the No radio button and proceed to Step 4.

If your agency had organizational changes, select the Yes radio button and contact the SSSA Office for further assistance.

Step 4
Select the Submit button.