Announcements

Circular Letter

October 9, 2019
Circular Letter: 200-045-19
Distribution: IV, V, VI, X, XII, XVI

To: **All CalPERS Employers**

Subject: **Retirement Appointment Reconciliation (Enhanced my|CalPERS Functionality)**

Purpose

The purpose of this Circular Letter is to follow up on the California Public Employees' Retirement System (CalPERS) Circular Letter 200-003-17 and provide additional information regarding recent Retirement Appointment Reconciliation (RAR) updates within my|CalPERS. Based on your feedback, my|CalPERS has been enhanced to assist you with your RAR efforts.

Business Rules Enhancements

The following business rules enhancements have been implemented.

- Business rules for identifying unposted payroll have been enhanced to identify which employer payroll schedule to use when:

  – Employers have more than one active payroll schedule.

  – Employee appointments have site change events (for state agencies only).

- Exclude On Leave appointments that are less than six months with no end date and/or that have an end leave date entered in my|CalPERS.

  – Missing payroll periods identified outside of these leave periods will not be excluded from appearing on these pages.

  – Once the leave exceeds six months or reaches the reported end leave date, the employee appointments will begin appearing on these pages.

Payroll Reporting

CalPERS has implemented new functionality in my|CalPERS that allows you to report zero payroll records for earned periods where active employees and/or retired annuitants did not work. Zero payroll records are reported via file upload or online manual entry and can be reported in lieu of confirming unposted payroll on the RAR or payroll schedule pages. For more information on XML file requirements and to view the specification documents, download the [Employer Technical Toolkit.](#)

Enhancements to RAR and Payroll Schedule Pages

The following my|CalPERS enhancements have been made to the RAR and payroll schedule pages.

- View synchronized unposted earned period data on the RAR and payroll schedule pages, making reconciliation efforts more efficient for larger employers.
- Employers can mass confirm unposted payroll by individual earned periods on the RAR page (up to 500 records at one time).
- View and access on-page links which provide individual employee appointment and transaction information.
- The RAR page has new search filters such as: "Payroll Past Due," "Payroll Schedule Type," and "Earned Period."
- Retired annuitant filters and column indicators have been added, allowing employers to quickly and accurately identify retired annuitant appointments.
- Applied filters are stored when navigating between these pages for the current session.
- Missing payroll terminology has been changed to "Unposted Payroll" to accommodate future earned periods not yet past due.
- Up to 1,000 records are displayed alphabetically, with a default of 25 employees viewable per page, to improve page load response times.
- The payroll schedule page has been streamlined to create an Excel report of the data displayed when selecting the "Generate Excel Report" button.

Reports

The following Cognos reports are available in my|CalPERS to assist you with reconciling your agency's data.

- Business Partner On Leave Report
- Confirmation of No Payroll Reportable Report
- Retirement Appointment Reconciliation Report
- Separated Retirement Reconciliation Appointments Report

Resources

The following resources supplement this Circular Letter and are intended to assist CalPERS employers with their ongoing compliance.

my|CalPERS Student Guides

- my|CalPERS Retirement Appointment Reconciliation (PDF) – Reconcile your agency's retirement appointments with unposted payroll.
- my|CalPERS Retirement Enrollment (PDF) – Verify membership status, enroll employees into CalPERS membership, and reconcile and maintain appointment statuses.
- my|CalPERS Payroll Reporting (PDF) – Use online data entry method to create an earned period report, add and maintain records, process a report, and reconcile unposted payroll.
- my|CalPERS Projected Contributions (PDF) – Understand the Projected Contributions process to save your agency money by avoiding late payroll reporting penalties and interest, and inaccurate actuarial calculations.

Circular Letters

- Circular Letter 200-003-17 (PDF) – Retirement Appointment Reconciliation
- Circular Letter 200-048-18 (PDF) – Enrolling and Reporting Retired Members
- Circular Letter 200-013-18 (PDF) – Retirement Contribution Projection for Active Members
- Circular Letter 200-015-16 (PDF) – Reporting Permanent Separation Dates in my|CalPERS

If you have any questions, please call our CalPERS Customer Contact Center at **888 CalPERS** (or **888**-225-7377).

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