myCalPERS Disability Retirement Employer Certification Functionality

Student Guide

October 2026

CalPERS

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myCalPERS Disability Retirement Employer Certification Functionality

This guide will assist you with submitting requested information and supporting documentation for disability and industrial disability retirement (DR/IDR) applications using myCalPERS.

Purpose

Employers will use this process to provide requested employment, separation, payroll, disability determination, and supporting documents needed to review a member's DR or IDR application.

What's New

myCalPERS system enhancements provide more electronic updates and exchanges of information regarding disability retirement. The new functionality allows employers to submit employment information, local safety determinations, and employer-originated applications for disability or industrial disability retirement electronically.

Disclaimer

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

System Access

If you are unable to process these scenarios, contact your agency's system access administrator to update your myCalPERS access.

Request for Employment Information for Disability Retirement

Employers may be asked to provide employment, separation, supporting documentation, and other case-specific information for disability or industrial disability retirement applications through myCalPERS. Employers will receive an email notification directing them to complete the request in myCalPERS. The employer must provide the requested information within 21 days of the notification.

Request for Employment Information

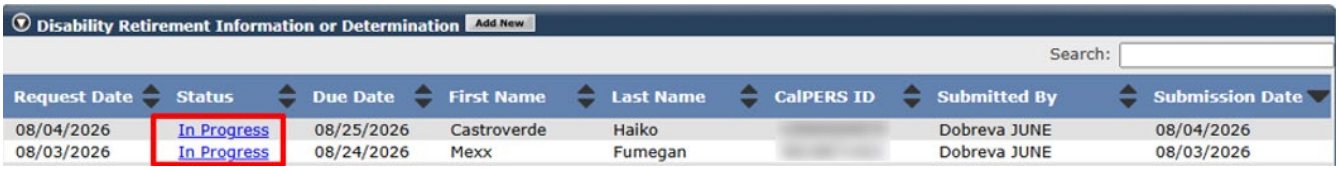
Once the employer receives the email notification to complete the request for additional information, follow the steps below in myCalPERS:

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

Step 2 Select the **Disability Retirement Certification** left side navigation link.

Step 3 In the Disability Retirement Information or Determination panel, locate the member associated with the request.

Step 4 Select the **Status** link for the request you intend to complete.



Note: By default, only requests with *Requested* or *In-Progress* status display. Use the *Status* filter at the top to display Submitted (employer has submitted information to CalPERS), Denied (employer has rejected information request), Cancelled (CalPERS cancelled the request), or Expired (information not provided by due date) requests.

Step 5 Complete any requested fields in the applicable sections.

Sample Email Notification

Subject: Request for Information for Disability Retirement

Request for Member CalPERS ID:

Additional information is needed regarding the disability retirement application. Please login to the Business Partner page, navigate to the **Reporting** tab, left hand navigation, and select **Disability Retirement Certification** to submit the requested information.

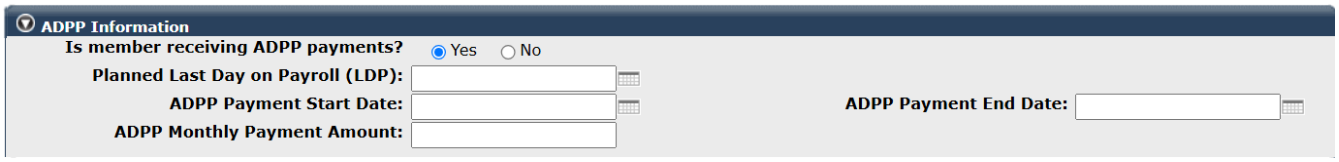
This request must be completed **by August 19, 2026**. Failure to provide the requested information within this timeframe may result in the cancellation of the employees' application and/or affect their eligibility for retirement benefits. If the application is cancelled, the employee will be required to submit a new application, which may impact their retirement date and eligibility for retirement. For assistance, please visit our website to review the **myCalPERS Disability Retirement Employer Certification Functionality Student Guide**.

We are here to assist you. If you have any questions, call us at **888 CalPERS (888-225-7377)**.

Advanced Disability Pension Payment (ADPP) Information

If the member is not receiving ADPP, select the **No** radio button.

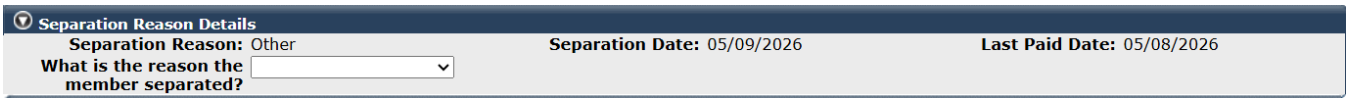
If the member is receiving ADPP payments, select the **Yes** radio button and enter the requested dates and amounts.



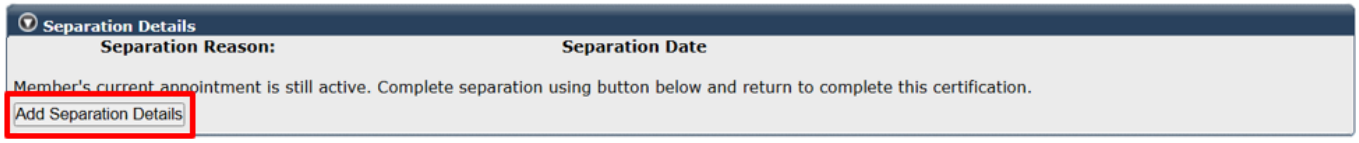
Separation Reason Details

Scenario 1: If the reason for separation is **Retirement** or **Resigned**, you will be asked whether it was in lieu of termination. If yes, you must provide personnel records and supporting documents must be provided.

Scenario 2: If the separation reason is **Other**, use the dropdown to select the reason for separation.

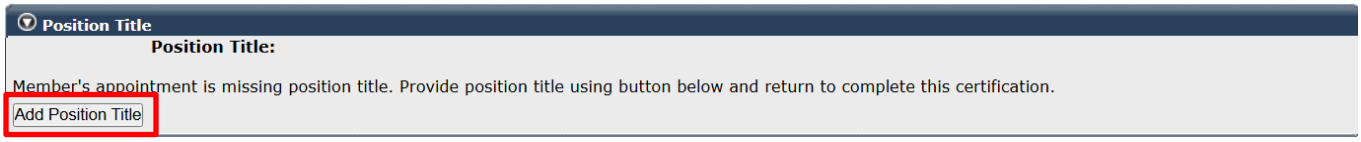


Scenario 3: If the member is **active**, you may be asked to review or update separation details. Select **Add Separation Details** and update accordingly.



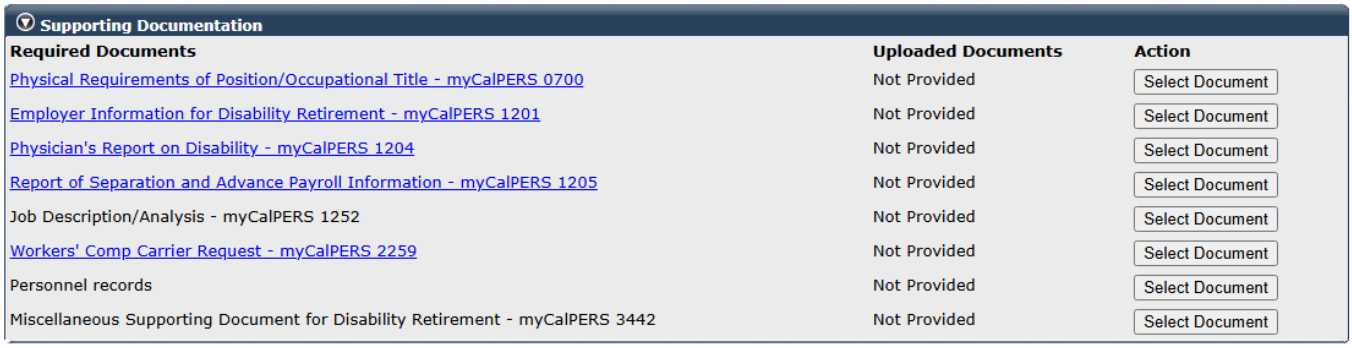
Position Title

To add the member's position title, select **Add Position Title**.



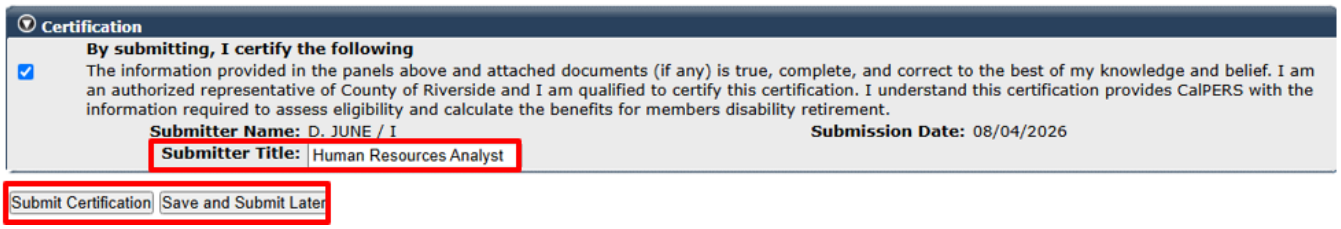
Supporting Documentation

Any required documents will be listed in the **Supporting Documentation** panel. Select the hyperlink to view the required form. To upload the applicable form or documentation, click **Select Document**.



Certification

If all documents and information have been provided, select the checkbox to certify, enter your title in the *Submitter Title* field, and select **Submit Information**. If additional information or documents need to be provided later, select **Save and Submit Later**.



Local Safety Determinations

When a disability or industrial disability retirement application is received for a local safety member, we will send a request to the employer to complete the Disability Retirement Employer Certification Request in myCalPERS. Employers may download a copy of the request for medical determination and follow-up letters from the **Document History** page. These letters will no longer be mailed to the employer. The employer must submit the disability determination and any additional requested documents.

Disability Retirement Employer Certification Request

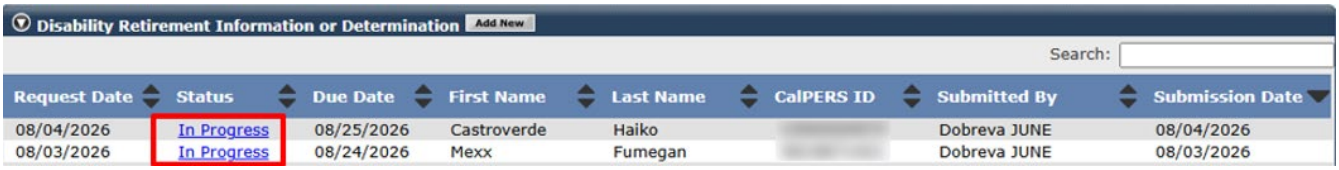
To submit the disability determination and additional documentation, follow the steps below:

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

Step 2 Select the **Disability Retirement Certification** local navigation link.

Step 3 Within the **Disability Retirement Information or Determination** section, locate the member in the list.

Step 4 Select the **Status** link for the request you intend to complete.



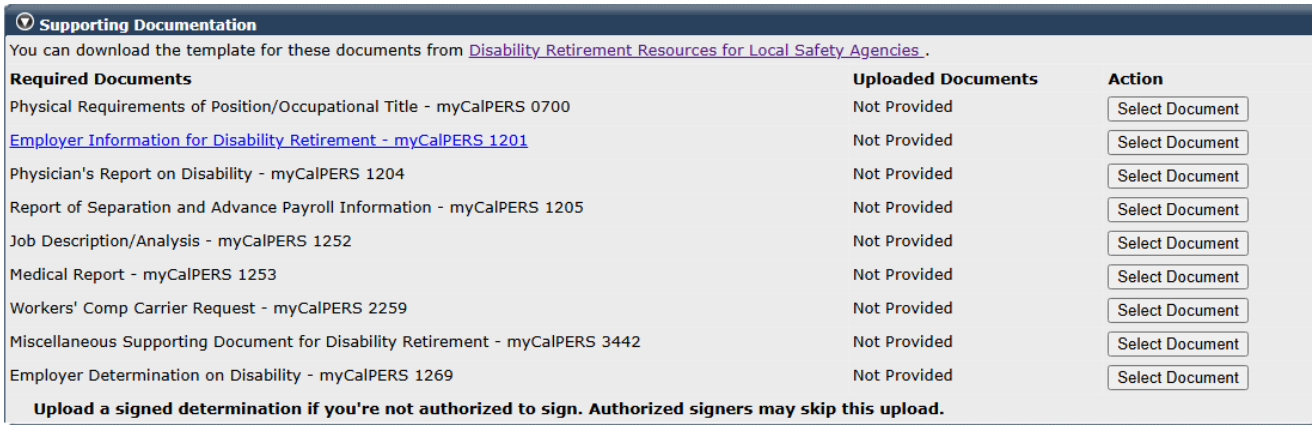
Note: By default, only requests with *Requested* or *In-Progress* status display. Use the *Status* filter to display Submitted (employer has submitted information to CalPERS), Denied (employer has denied local safety determination request), Cancelled (CalPERS cancelled the request), or Expired (information not provided by due date) requests.

Step 5 Select the radio button next to the appropriate Determination Type (Approved or Denied).

Step 6 A series of questions will be displayed based on the determination type. Complete the additional information for the determination.

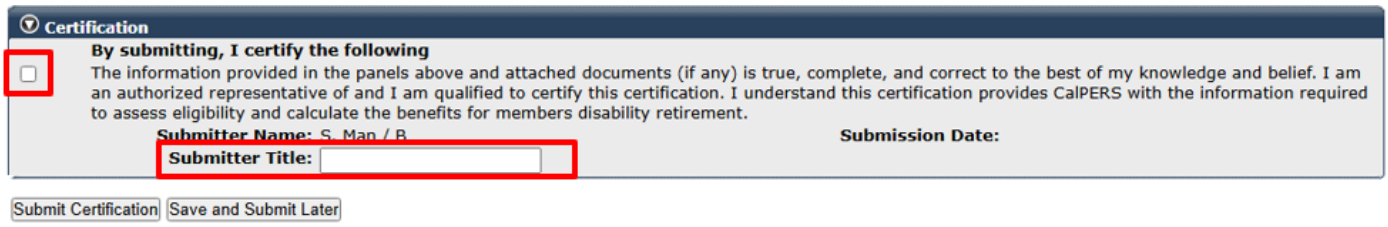
Step 7 Complete the *Supporting Documentation* section by uploading each requested document. To download forms, select the **Disability Retirement Resources for Local Safety Agencies** link at the top of the panel.

****Required documents include the Physical Requirements of Position/Occupational Title form, job duty statement, Physician's Report on Disability, and for IDR applications, the Workers' Compensation Carrier Request form. If you are not the delegated authority, you must also upload the signed Employer Determination on Disability.



Step 8 In the *Certification* section, select the certification check box. Enter your employment title in the *Submitter Title* field, then select **Submit Certification** if all documents and information have been provided. If you need to gather additional documents, select **Save and Submit Later**.

Reminder: If you are not the delegated authority, you can certify the information provided page, but you must also upload a signed determination.



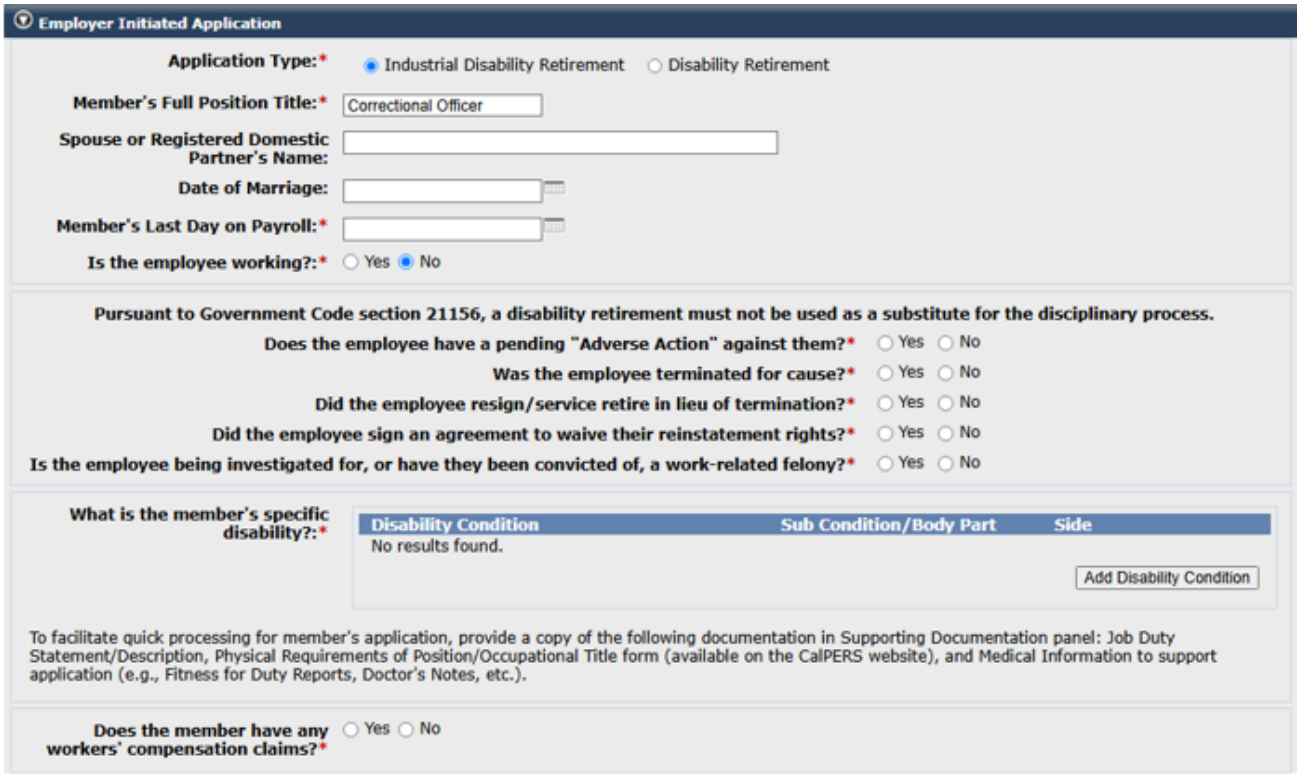
Employer-Originated Application

To initiate an employer-originated disability or industrial disability retirement application, complete the application and upload supporting documents directly into myCalPERS.

Initiate Employer-Originated Application

To initiate the employer-originated application, follow the steps below in myCalPERS:

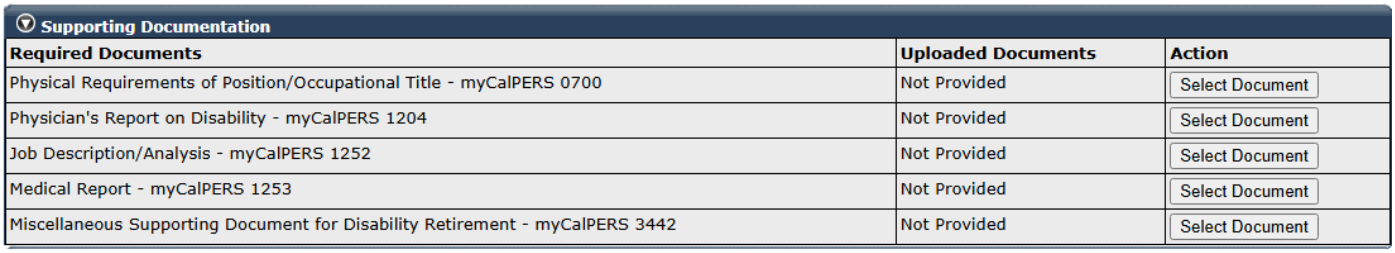
Step 1 Select the **Reporting** global navigation tab.
Step 2 Select the **Disability Retirement Certification** local navigation link.
Step 3 In the *Initiate New Application* panel, select **Initiate Disability Application**.
Step 4 To search for the member, click **Select Member**.
Step 5 Enter the member's CalPERS ID or SSN and either their date of birth, last name, or first name. Then select **Search**.
Step 6 If the correct member is displayed, select **Continue** to proceed. If the incorrect member is displayed, click **Select Member** and search again.
Step 7 Select the application type, then enter the member's position title and select **Continue**.
Step 8 Complete all required fields in the *Employer Initiated Application* section.



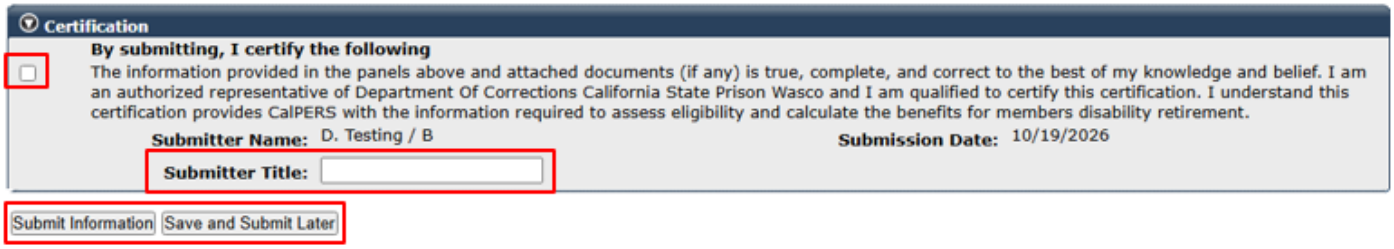
Note: If *Yes* is selected for any question regarding the disciplinary process, personnel records must be submitted.

Step 9 In the *Supporting Documentation* panel, click **Select Document** to upload the required documents. Required documents include the Job Duty Statement/Description and Physical Requirements of Position/Occupational Title. If *Yes* was selected for any item regarding the disciplinary process, personnel records are also required.

If the required documents are not available, select **Save and Submit Later**. Return to the application later to provide the required documents and submit the application.



Step 10 Once all required documents have been uploaded, certify the application by checking the box and entering the submitter's title. Then, select **Submit Information**.



Result: The employer-originated application has been submitted.

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