

myCalPERS Employment Certification Functionality

Student Guide

August 22, 2025



myCalPERS Employment Certification Functionality

This guide will assist you with submitting employment information for service credit purchases and membership review. The [Employment Certification](#) page on the CalPERS website lists online resources, e.g., Guides, Circular Letters, data element definitions, and presentations.

Service Credit Purchases

Employment certification and payroll details for service credit purchase requests must be submitted through myCalPERS. Employees requesting to purchase service credit for prior employment periods will need to complete a service credit purchase request via their myCalPERS account or by completing the applicable form from the CalPERS website. The employee will submit the form to the employer associated to the employment period. If you receive the form, complete and submit the certification in myCalPERS.

Membership Reviews

You may be required to submit employment information and service period (payroll) details for an employee whose membership status needs to be reviewed. This can be for any type of arrears driven by late enrollment or pre-review for service credit purchase. To ensure an accurate reflection of service credit to your employee's account, your agency must submit the requested information through myCalPERS.

System Access

You must have the Business Partner Arrears user role and at least one of the following roles:

- Business Partner Payroll
- Business Partner Payroll Limited
- Business Partner Retirement Enrollment
- Business Partner Retirement Enrollment Limited

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

Disclaimer

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

Training Opportunities

Prior to taking a myCalPERS training, new users should review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide and take a [Business Rules class](#). Business rules summarize the laws defined by the California Public Employees' Retirement Law (PERL).

What's New

Unit 2, Scenario 2: Reassociate Previously Reported Payroll Effective is for expired service credit purchase requests that were submitted *prior to April 2024*. You may reassociate the reported payroll records in a Reviewed-SCP Expired status from the previous request instead of re-entering them manually.

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Unit 1: Employment Certification Fields

Before you begin processing, you will learn how to complete some of the employment certification fields in myCalPERS.

For business rules and additional information, refer to the following resources:

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

Employment Certification

Appointment Tenure

Enter the tenure as of the begin date of the requested period.

Contract Exclusions

Confirm if the position is excluded in your agency's contract in myCalPERS.

- **Schools:** Contract exclusions do not apply. The [Public Agency & Schools Reference Guide \(PDF\)](#) provides a complete list of positions excluded by law.
- **Public agencies:** Review your agency's contract exclusions within myCalPERS > **Profile** global navigation tab > **Retirement Contract** local navigation link > Exclusions section.
- **State agencies & California State Universities (CSUs):** The [State Reference Guide \(PDF\)](#) provides a complete list of positions excluded by law.

Employment Category

Enter the category of the position if the employee was brought into membership when they started in this position.

Hiring Document (myCalPERS 2788)

We recommend that you upload this form. You may also upload additional information related to the time base and tenure of the appointment.

Position Titles

This is the position that they were in at the time of their request. These must match in the Employment Information and Pay Period Detail sections.

Time Base

Enter the time base as of the begin date of the requested service credit purchase period.

Payroll

Begin/End Dates

Enter earned periods by pay period, separated by fiscal year, and match the begin and end dates on the Employment Information section. You cannot combine multiple pay periods.

- **Public agencies and schools:** Enter your agency's earned period begin and end dates based on your agencies pay schedule.
- **State agencies and CSUs:** Enter the pay period dates based on the State Controller's Office decentralized payroll calendars.

Division

This only displays for public agencies and county office of education employers.

Overtime Hours

Enter the number of overtime hours for the period.

Pay Rate

Enter the full-time pay rate for the earned period even if the employee is part-time.

Pay Rate Type

Enter the pay rate type (Hourly, Monthly, or Daily) per your pay schedule.

Position Titles

This is the position that they were in during the requested time. This must match in the Employment Information and Pay Period Detail sections.

Reportable Earnings

Enter the reportable gross earnings for the earned period when earned, not paid. Do not enter overtime earnings.

Scheduled Full Time Hours Per Week

Complete for all pay rate types (hourly, monthly, and daily). Enter the number of hours that are considered full time for the position.

Scheduled Full Time Days Per Week

Complete if the Pay Rate Type field is Daily in addition to completing the Scheduled Full Time Hours Per Week field. Enter the numbers of days considered full time for the position.

Special Compensation

Report only the reportable special compensation for the earned period per your agency's Memorandum of Understanding (MOU).

Total Hours Worked

Report only the regular hours worked in the earned period.

Unit 2: Service Credit Purchase Certification

CalPERS offers a variety of service credit purchase options for eligible members. To learn more about the options and requirements, visit the [Service Credit](#) page on the CalPERS website.

Service Credit Purchase Process

Below is an overview on the process and your employer responsibilities:

1. Member submits a service credit purchase (SCP) request in myCalPERS or by paper form to the employer that they worked for during the time that they are requesting to purchase.
2. For requests submitted through myCalPERS, a new request will display on the Member Requests page of your employer myCalPERS account to certify and submit the SCP in myCalPERS (Scenario 1, 2, or 4) within 30 days. For paper requests, you will need to generate the new requests on the Member Requests page.

Note: If the SCP request is a resubmission of an expired SCP request made prior to March 2024, you can reassociate the Reviewed-SCP Expired status payroll records instead of re-entering them. If needed, you may also update any of these previously submitted payroll records (Scenario 2).

3. CalPERS reviews the SCP request for arrears. If arrears apply, an arrears determination letter is sent to you, providing you a 30-day appeal period (refer to Unit 3 for more information).
4. CalPERS reviews the SCP request for eligibility and notifies the member of the results. If eligible, the member has 60 days to review the SCP election packet in myCalPERS and elect to make the purchase.

Note: If the member doesn't elect to purchase but later requests for the same period, you can review the original request in myCalPERS.

Employment and Service Period Certification Statuses

Service Credit Purchase Request Statuses

- **Requested:** Employee has submitted the request to the employer, but the employer has not started or submitted the certification.
- **In-Progress:** Employer has started but has not submitted the certification.
- **Certification Expired:** Request has expired due to employer failing to complete and submit the request within 30 days. The member must resubmit their request. There may also be increased cost.
- **Submitted:** Employer has certified and submitted the request to CalPERS for review.
- **Complete:** CalPERS has completed the service credit purchase request process.
- **Rejected:** Employer has rejected the request.
- **Employer Withdrawn:** Employer has withdrawn the request because they opened it in error or a member requested it.

Correcting a Service Credit Purchase Certification

- **In-Process:** Corrections can be made by opening the request.
- **Submitted:** Corrections can be made by calling the CalPERS contact center.
- **Completed:** Corrections cannot be made.

Notifications

For your agency to receive timely notifications of a member's service credit purchase deduction election, your system access administrator must designate a *primary* Payroll and Human Resources contact type. Your agency's system access administrator should follow the steps in the [myCalPERS System Access Administration \(PDF\)](#) student guide for establishing and maintaining agency contacts.

Documentation

To access documentation that has been sent regarding a service credit purchase request, go to your agency's document history within myCalPERS > Common Tasks left-side folder > **Document History** left-side link.

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Scenario 1: Certify a Service Credit Purchase Request

Part I: You will certify a service credit purchase request. After that, you will do part II (Scenario 3) to submit the payroll details for the service credit purchase request period.

Members have two options for submitting a service credit purchase request:

myCalPERS

Members can request to purchase service credit by completing and submitting the service credit purchase request from their myCalPERS account. Once submitted, you will locate the request in myCalPERS, complete the employment certification portion, and submit the request by using this scenario starting with step 1.

Request Form

Members can submit their request using the applicable service credit purchase request form. It is critical that they submit the form to their employer at the time of the requested period, which may not always be their current employer. You will then follow the steps in this scenario to complete the employment certification portion and submit the request starting with step 8.

System Logic

- During the requested period, create a separate request for the following if the member:
 - Held more than one position/appointment
 - Had multiple time bases
 - Changed employers (including campus and department changes)
- For guidance on completing the fields, return to Unit 1.

Step Actions (18 steps)

myCalPERS

Step 1	Select the Reporting global navigation tab.
Step 2	Select the Member Requests local navigation link.
Step 3	Within the Employment and Service Period Certification List section, locate the member within the list.
Step 4	Select the Status link for the request you wish to complete.

Employment and Service Period Certification List Add New									
Excel		Search: <input type="text"/>							
Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		1200000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		2300000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		3400000076	08/18/1992	06/01/1994		
08/09/2023	Requested	Flower	Aileen		4400000066	04/18/1988	06/09/2023		
08/10/2023	In-Progress	Madrigal	Renato		4500000065	03/07/2007	06/15/2009		

Note: By default, only requests with Requested or In-Progress status display on this page. At the top, use the Status filter to display Submitted, Certification Expired, Rejected, or Employer Withdrawn requests.

Step 5 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Employment Periods [Add New](#)

Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.

Participant	CalPERS Id	Division	Start Date – End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/01/2014 – 07/19/2014			Service Prior to Membership

[Return](#)

Step 6 Review and complete the Employment Information section.

Employment Information

Participant: * Eric Sanchez
Participant's Email Address: ericSanchez@agencyname.com
Business Partner: Agency Name
Participant's Phone Number: (999) 888-7777
Division: Department Name

Dates of Employment: *
From: 10/20/2014 To: 06/30/2015

Employment Category: *

Primary Position Title as displayed on your publicly available pay schedule: *

Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS? * ☐ Yes ☒ No [View Exclusions](#)

Time Base: *
☐ Full Time ☐ Part Time
☐ Intermittent ☐ Indeterminate
☐ On Call ☐ Work(ed) As Needed

CBU: *
Class Code: *

Appointment Tenure: *
☐ Permanent
☐ Indeterminate
☐ Seasonal
☐ Temporary

Months per Year: *
☐ 8 Months ☐ 9 Months
☐ 11 Months ☐ 12 Months ☐ 10 Months

Please upload the participant's hiring document (myCalPERS 2788): [Add Document](#)

Service Credit Purchase Type Requested: Service Prior to Membership
Is the participant above a member of a reciprocal system? * ☐ Yes ☐ No

Was the service rendered through an independent contractor or paid through a third party or temporary employment agency? * ☐ Yes ☐ No

For teacher's assistants in a credential program only:
Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period? * ☐ Yes ☐ No

Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? * ☐ Yes ☐ No

[Save](#) [Return](#)

- You may need to correct the service period start and end dates to reflect all reportable employment prior to the membership date.
- The CBU and Class Code fields only display for state agencies and CSUs.
- We recommend that you upload the myCalPERS 2788 to submit your agency's hiring documents.

Step 7 Skip to step 17.

Paper Request Form

Step 8 Select the **Reporting** global navigation tab.

Step 9 Select the **Member Requests** local navigation link.

Step 10 Within the Employment and Service Period Certification List section, select the **Add New** button.

Employment and Service Period Certification List [Add New](#)

Excel Search:

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
02/22/2021	Requested	Sanchez	Eric		0123456789	03/01/2014	07/19/2014		
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	08/11/2006		

Step 11

Complete the Employment Information section.

- You may need to correct the service period start and end dates to reflect all reportable employment prior to the membership date.
- The CBU and Class Code fields only display for state agencies and CSUs.
- We recommend that you upload the myCalPERS 2788 to submit your agency's hiring documents.

Step 12

Select the **Yes** radio button.

Is the participant requesting to purchase Service Credit?* ☒ Yes ☐ No

Step 13

Select the radio button for the service credit type.

Service Credit Purchase Type Requested:* ☐ Service Prior to Membership ☐ Comprehensive Employment and Training Act (CETA) ☐ Fellowship ☐ Prior Service as Public Service ☐ Local System Redeposit ☐ Optional Arrears

Note: Each service credit purchase type must be requested separately.

Step 14

Select the **Add Document** button to upload the service credit purchase request form.

Please upload the participant's Service Prior to Membership related signed service credit purchase request form (myCalPERS 1168): *

Step 15

Locate the document, and then select the **Open** button.

Step 16 Complete the remaining questions.

Is the participant above a member of a reciprocal system? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982?*	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under a fellowship program? *	<input type="radio"/> Yes <input type="radio"/> No
Was this position filled by an election or appointment to a fixed term of office? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered through an independent contractor or paid through a third party or temporary employment agency ? *	<input type="radio"/> Yes <input type="radio"/> No
For teacher's assistants in a credential program only:	
Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period ? *	<input type="radio"/> Yes <input type="radio"/> No
Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? *	<input type="radio"/> Yes <input type="radio"/> No

Step 17 Select the **Save** button.

Step 18 Did the member hold multiple positions during the service credit purchase request period?

Yes: How did the member submit their request?

- **myCalPERS Request:** Within the Employment Periods section, select the **Add New** button and return to step 6.
- **Request Form:** Return to step 10.

No: Continue to scenario 3 to submit payroll for the service credit purchase request period.

You have completed part I of II.

Scenario 2: Reassociate Previously Reported Payroll

This is for expired service credit purchase requests that were submitted *prior to April 2024*.

When a member submits a new request for the same period, you may reassociate the reported payroll records in a Reviewed-SCP Expired status from the previous request instead of re-entering them manually. If needed, you may update any previously submitted payroll records.

Note: For any payroll reported as part of certifying a service credit purchase request *after March 2024*, payroll records will automatically reassociate from the previous certification and will be available to re-use once the request expires.

If you are unable to reassociate pay periods or receive an error when attempting to submit a certification, please call CalPERS at **888 CalPERS** or (888-225-7377).

Step Actions (7 steps)

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

Step 2 Select the **Search Payroll Records by Participant** left-side navigation link.

The screenshot shows the CalPERS Reporting interface. The top navigation bar includes 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Below this, a secondary bar contains 'Manage Reports', 'Billing and Payments', 'Payroll Schedule', 'Out-of-Class Validation', 'Member Requests', 'Health Reconciliation', and 'Retirement Appointment Reconciliation'. The left sidebar has a 'Common Tasks' section with a 'Menu' dropdown. The 'Menu' dropdown is open, showing 'Organization Search', 'Adjustment Reports', and 'Search Payroll Records by Participant' (which is highlighted with a red box). The main content area shows 'Name: Agency Name' and 'CalPERS ID: 9876543210'. Below this, there are two buttons: 'Create or Edit Report' and 'Work On Existing Payroll Reports'.

Step 3 Enter the employee's CalPERS ID or SSN, then from the Report Type drop-down list, select Payroll - CalPERS Review to display reports relevant to certification.

The screenshot shows the 'Search Payroll Records by Participant' form. It includes fields for 'CalPERS ID:', 'SSN:', 'Start Date:', 'End Date:', and 'Fiscal Year:'. There is a 'Report Type:' dropdown menu with 'Posted:' and 'Un-Posted:' options. A 'Search' button is present. Below the form, there is a 'Participant Detail' section showing 'Last Name: SMITH', 'First Name: SALLY', and 'Middle Name: S'. The 'Report Type' dropdown is open, showing 'Payroll - Earned Period', 'Payroll - Adjustments', and 'Payroll - CalPERS Review' (which is highlighted with a red box).

Step 4 Select the **Search** button.

Step 5 In the second column, select the appropriate **Report Earned Period** link.

Step 6 At the bottom left, select the **Refresh Records** button.

The screenshot shows a button labeled 'Refresh Records' (highlighted with a red box) and a button labeled 'Generate Report Summary'.

Step 7 All records will change to a Reported status and will be available for recertification with the member's new request.

The screenshot shows a table titled 'Records Present in the Report'. The table has columns for 'SSN', 'CalPERS ID', 'Name', 'Earned Period', 'Member Category', 'Status', 'Earnings', 'Special Compensation', 'Hours Worked', and 'OT Hours'. The table contains one record for SSN xxx-xx-3210, CalPERS ID 0123456789, Name SMITH, SALLY, Earned Period 03/21/2011 - 04/01/2011, Member Category, Status Reported, Earnings \$690.90, Special Compensation \$36.75, Hours Worked 35.0, and OT Hours 0.0.

SSN	CalPERS ID	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
<input type="checkbox"/> xxx-xx-3210	0123456789	SMITH, SALLY	03/21/2011 - 04/01/2011		Reported	\$690.90	\$36.75	35.0	0.0

You have completed this scenario.

Scenario 3: Submit Payroll for a Service Credit Purchase Request Period

In addition to submitting employment information, payroll details for the service credit purchase request period must be submitted by either of these two options:

- **Online data entry:** Payroll is entered into myCalPERS manually for each earned period using the steps outlined in this scenario starting with step 1.
- **File upload:** Payroll for each earned period is uploaded into myCalPERS using a CSV or XML file using the steps outlined in this scenario starting with step 17. Refer to the [Technical Resources](#) page of the CalPERS website to download and use the CalPERS Review Report Template (CSV) as well as the Data Element Definition document, which you can refer to when filling out the CalPERS Review Report Template.

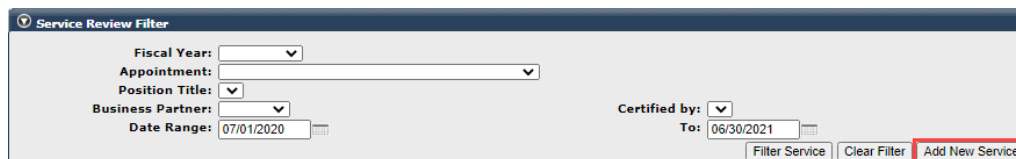
System Logic

- You must report payroll for the entire service credit purchase period. If an earned period does not have reportable earnings, report a zero-period (0.00) record. Refer to the [myCalPERS Payroll Reporting \(PDF\)](#) student guide (Unit 4, Scenario 4) for steps.
- Do not report payroll for dates outside of the requested service credit purchase period. You may need to adjust the begin/end dates of record(s) to correspond with the service credit purchase period dates.
- Earned periods cannot be lumped together. Report each earned period separately.
- All earnings should be reported in one record, including adjustments, unless:
 - The earned period crosses fiscal years.
 - There are multiple pay rates, positions, or time bases for the same earned period.
- Ensure information is reported accurately as it will be used in the calculation of the service credit purchase and may impact membership date, member cost, and employer liability.
- If a payroll schedule causes an error to occur, contact CalPERS.

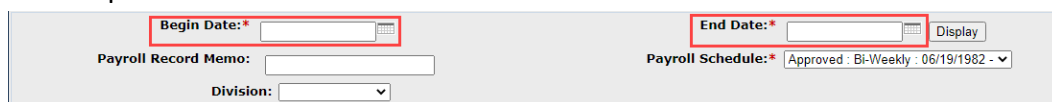
Step Actions (46 steps)

Manual Entry

Step 1 Within the Service Review Filter section, select the **Add New Service** button.



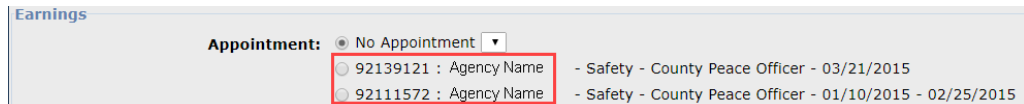
Step 2 Within the Maintain Record Details section, enter the begin and end dates of the earned period.



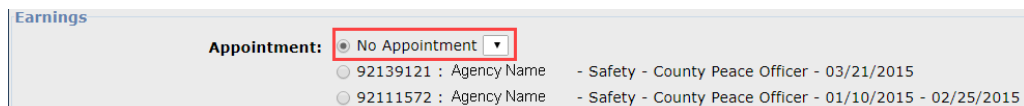
Step 3 Complete the Earnings sub-section. The Position Title and Class Code fields are required for state agencies and CSUs.



Step 4 Is this appointment in myCalPERS?
Yes: Select the applicable **appointment** radio button.



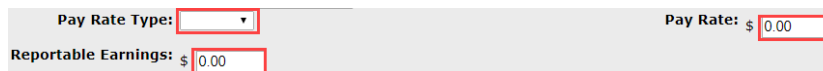
No: For an appointment that isn't in myCalPERS (e.g., service prior to membership), leave the **No Appointment** radio button selected.



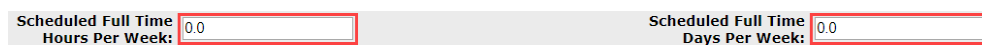
Step 5 Select the correct payroll schedule from the drop-down list.



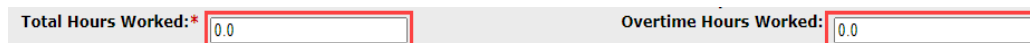
Step 6 Complete the Payroll Schedule, Pay Rate Type, and Pay Rate fields. In the Reportable Earnings field, enter only earnings based on reportable hours. Do not include overtime earnings.



Step 7 Complete the Scheduled Full Time Hours Per Week field. If their Pay Rate Type is Daily, complete the Scheduled Full Time Days Per Week field as well.
Note: Report what is considered full time for the position whether the member works full time or not.

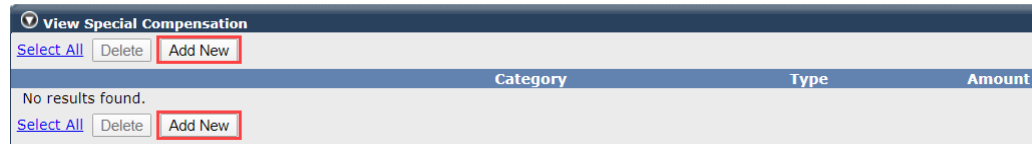


Step 8 Complete the Total Hours Worked field with only the regular (non-overtime) hours worked in the period. If they worked overtime in this period, enter the hours in the Overtime Hours Worked field.

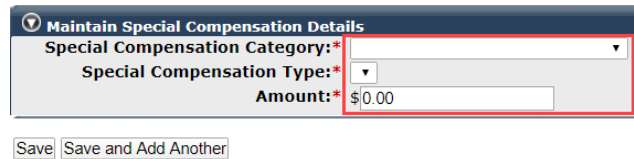


Step 9 Is there special compensation to be reported?
Yes: Select the **View Special Compensation** link on the far right.
No: Skip to step 15.

Step 10 Within the View Special Compensation section, select the **Add New** button.



Step 11 Within the Maintain Special Compensation Details section, complete the Special Compensation Category, Special Compensation Type, and Amount fields.



Step 12 Is there additional special compensation to add to this record?

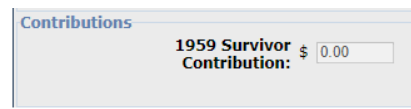
Yes: Select the **Save and Add Another** button and return to step 11.

No: Continue to step 13.

Step 13 Select the **Save** button.

Step 14 Select the **Return** link.

Step 15 If applicable, enter the contributions in the 1959 Survivor Contribution field.



Step 16 Do you have additional periods or report adjustments to report?

Yes: Select the **Save & Continue** button and return to step 2.

No: Select the **Save & Return** button and skip to step 40 Submit/Reject.

File Upload

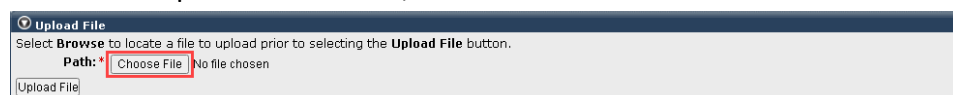
Step 17 Select the **Reporting** global navigation tab.

Step 18 Within the Create or Edit Report section, select Upload File from the Method drop-down list.



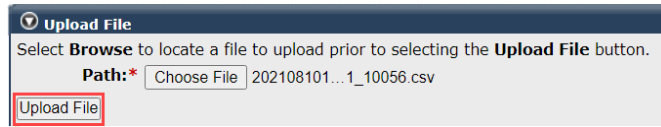
Step 19 Select the **Continue** button.

Step 20 Within the Upload File section, select the **Choose File** button.



Step 21 Locate the file, and then select the **Open** button.

Step 22 Select the **Upload File** button.



Upload File

Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.

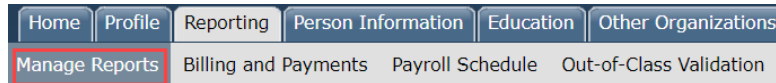
Path:* Choose File 202108101...1_10056.csv

Upload File

Step 23 Within the File Upload History section, locate your report.

Step 24 Refresh the page until the File Status column of your report shows *Accepted*.

Step 25 Select the **Manage Reports** local navigation link.



Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation

Step 26 Scroll down to the Work on Existing CalPERS Review Reports section.

Step 27 Review the Status column.



CalPERS Review Report Date	Submit Date	Status	Report Posted Date	Test Report	Report Name
09/03/2021 - 09/03/2021	09/03/2021	Valid Report		No	
09/03/2021 - 09/03/2021	09/03/2021	Suspended		No	

Step 28 What is the status of the report?

Valid Report: Your report is valid. Skip to step 34.

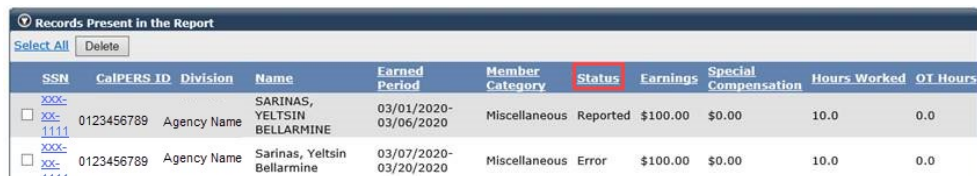
Suspended: Your report has error(s) that must be corrected. Continue to step 29.

Step 29 Select the **CalPERS Review Report Date** link for the suspended report.



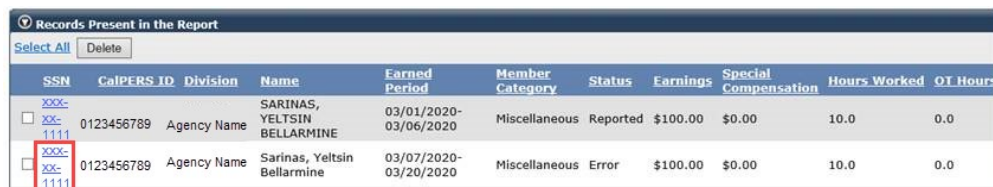
CalPERS Review Report Date	Submit Date	Status	Report Posted Date	Test Report	Report Name
09/03/2021 - 09/03/2021	09/03/2021	Valid Report		No	
09/03/2021 - 09/03/2021	09/03/2021	Suspended		No	

Step 30 Within the Record Present in the Report section, review the Status column for records with errors.



SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
XX-XX-1111	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
XX-XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/07/2020-03/20/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0

Step 31 Select the **SSN** link for the record that has an error.



SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
XX-XX-1111	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
XX-XX-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/07/2020-03/20/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0

Step 32 Review the messages section to determine what requires correction.

Step 33 Select the **Save & Return** button.

Step 34 Are there additional records with errors?

Yes: Return to step 31.

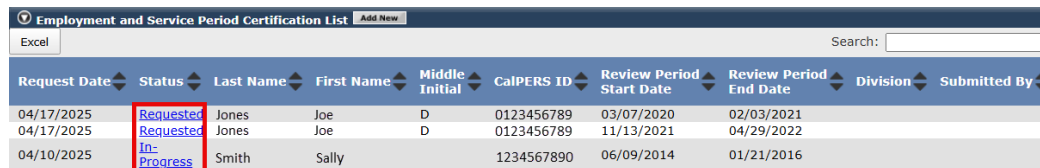
No: Continue to step 35.

Step 35 Select the **Reporting** global navigation tab.

Step 36 Select the **Member Requests** local navigation link.

Step 37 Within the Employment and Service Period Certification List section, locate the member within the list. By default, only requests with a Requested or In-Progress status display. At the top, use the status filter to display a request with a Submitted, Certification Expired, Rejected, or Employer Withdrawn status.

Step 38 Select the **Status** link for the request you wish to complete.



Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/17/2025	Requested	Jones	Joe	D	0123456789	03/07/2020	02/03/2021		
04/17/2025	Requested	Jones	Joe	D	0123456789	11/13/2021	04/29/2022		
04/10/2025	In-Progress	Smith	Sally		1234567890	06/09/2014	01/21/2016		

Step 39 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.



Participant	CalPERS Id	Division	Start Date - End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/01/2014 - 07/19/2014			Service Prior to Membership

[Return](#)

Submit, Reject, or Withdraw a Service Credit Purchase Request

Step 40 What would you like to do with this request?

Submit: You've completed the certification and are ready to submit to CalPERS, continue to step 41.

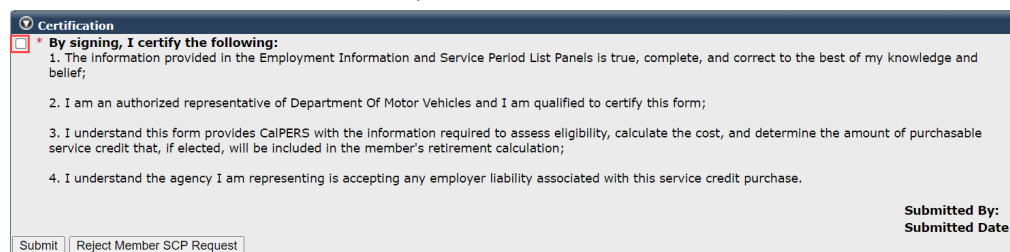
Reject: The member submitted a request via myCalPERS and you wish to reject their request, skip to step 43.

Withdraw: The member submitted the request to you via paper form, you initiated it in myCalPERS but now wish to withdraw the request, skip to step 46.

Submit

Step 41

Within the Certification section, select the certification check box.



The screenshot shows a 'Certification' section with a blue header. Below the header, there is a checkbox labeled 'By signing, I certify the following:' followed by four numbered statements. At the bottom right, there are fields for 'Submitted By:' and 'Submitted Date:'. At the bottom left, there are two buttons: 'Submit' and 'Reject Member SCP Request'.

Certification

☐ * By signing, I certify the following:

1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of Department Of Motor Vehicles and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

Submitted By:
Submitted Date:

Submit Reject Member SCP Request

Step 42

Select the **Submit** button.

You have completed this scenario.

Reject

Step 43

Select the caret to expand the SCP Request Reject Reason section.

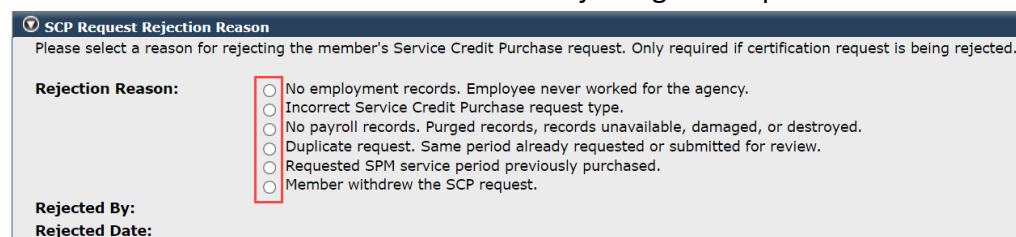


The screenshot shows a section titled 'SCP Request Rejection Reason' with a blue header and a red triangle icon on the left.

SCP Request Rejection Reason

Step 44

Select the radio button for the reason for rejecting the request.



The screenshot shows the 'SCP Request Rejection Reason' section. It includes a text prompt, a 'Rejection Reason:' label, and a list of six radio button options. The first option, 'No employment records. Employee never worked for the agency.', is selected. Below the list are fields for 'Rejected By:' and 'Rejected Date:'.

SCP Request Rejection Reason

Please select a reason for rejecting the member's Service Credit Purchase request. Only required if certification request is being rejected.

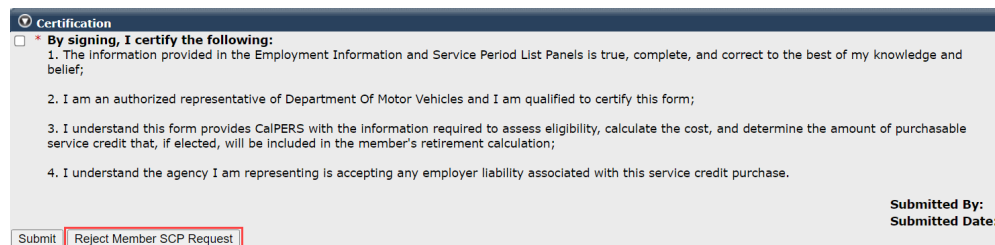
Rejection Reason:

- ☒ No employment records. Employee never worked for the agency.
- ☐ Incorrect Service Credit Purchase request type.
- ☐ No payroll records. Purged records, records unavailable, damaged, or destroyed.
- ☐ Duplicate request. Same period already requested or submitted for review.
- ☐ Requested SPM service period previously purchased.
- ☐ Member withdrew the SCP request.

Rejected By:
Rejected Date:

Step 45

Within the Certification section, select the **Reject Member SCP Request** button.



The screenshot shows the 'Certification' section. The 'Reject Member SCP Request' button at the bottom left is highlighted with a red box.

Certification

☐ * By signing, I certify the following:

1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of Department Of Motor Vehicles and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

Submitted By:
Submitted Date:

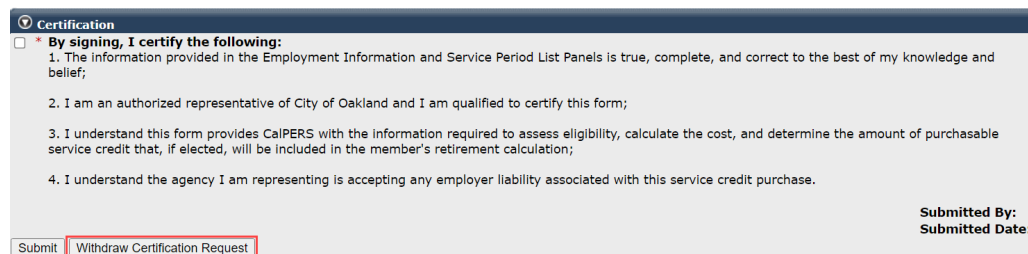
Submit Reject Member SCP Request

You have completed this scenario.

Withdraw

Step 46

Within the Certification section, select the **Withdraw Certification Request** button.



The screenshot shows the 'Certification' section. The 'Withdraw Certification Request' button at the bottom left is highlighted with a red box.

Certification

☐ * By signing, I certify the following:

1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of City of Oakland and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

Submitted By:
Submitted Date:

Submit Withdraw Certification Request

You have completed this scenario.

Scenario 4: Certify a Leave of Absence Service Credit Purchase Request

A member can submit a service credit purchase request for a past leave of absence via:

myCalPERS

After a member logs in to their myCalPERS account, they can submit a request to purchase service credit. After that, you will locate the request in myCalPERS, complete the employment certification portion, and submit the request by following the steps in this scenario.

Request Form

A member can submit a hard copy of the applicable service credit purchase request form to the employer where the leave of absence occurred. Refer the employee to the [Request Service Credit \(PDF\)](#) hand out. If you receive the form, complete the employer certification portions, and then fax or mail it to CalPERS.

System Logic

Each leave of absence period must be requested separately.

Note: These instructions for certifying a leave of absence service credit purchase do not apply to temporary disability absence.

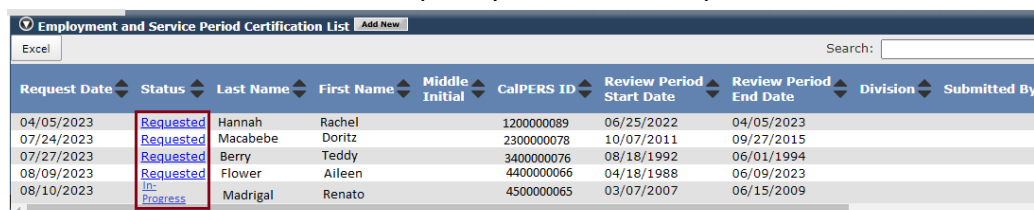
Step Actions (14 steps)

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

Step 2 Select the **Member Requests** local navigation link.

Step 3 Within the Employment and Service Period Certification List section, locate the member within the list.

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



Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		1200000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		2300000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		3400000076	08/18/1992	06/01/1994		
08/09/2023	Requested	Flower	Aileen		4400000066	04/18/1988	06/09/2023		
08/10/2023	In Progress	Madrigal	Renato		4500000065	03/07/2007	06/15/2009		

Note: By default, only requests with Requested or In-Progress status display on this page. At the top, use the Status filter to display Submitted, Certification Expired, Rejected, or Employer Withdrawn requests.

Step 5 Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Employment Periods [Add New](#)

Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.

Participant	CalPERS Id	Division	Start Date - End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		11/06/2006 - 12/22/2006			Maternity/Paternity Leave of Absence

[Return](#)

Step 6 Review the Dates of Employment fields and update the dates of the leave of absence. If the approved leave dates are different from the dates requested, correct the dates.

Employment Information

Participant: * 0123456789 - Eric Sanchez

Business Partner: Agency Name

Division:

Dates of Employment: *

From: 11/06/2006 To: 12/22/2006

Service Credit Purchase Type Requested: Maternity/Paternity Leave of Absence

Step 7 Select the **Save** button.

Submit, Reject, or Withdraw a Service Credit Purchase Request

Step 8 What would you like to do with this request?

Submit: You've completed the certification and are ready to submit to CalPERS, continue to step 9.

Reject: The member submitted the request via myCalPERS and you wish to reject their request, skip to step 11.

Withdraw: The member submitted the request to you via paper form, you initiated it in myCalPERS but now wish to withdraw the request, skip to step 14.

Submit

Step 9 Within the Certification section, select the certification check box.

Certification

☒ * By signing, I certify the following:

1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of Department Of Motor Vehicles and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

Submitted By: Submitted Date:

Step 10 Select the **Submit** button.

You have completed this scenario.

Reject

Step 11

Select the caret to expand the SCP Request Rejection Reason section.



Step 12

Select the reason radio button for rejecting the service credit purchase request.

A screenshot of a form titled "SCP Request Rejection Reason". It contains a text prompt: "Please select a reason for rejecting the member's Service Credit Purchase request. Only required if certification request is being rejected." Below this is a "Rejection Reason:" label followed by a list of five radio button options: "No employment records. Employee never worked for the agency.", "Incorrect Service Credit Purchase request type.", "No payroll records. Purged records, records unavailable, damaged, or destroyed.", "Duplicate request. Same period already requested or submitted for review.", and "Requested SPM service period previously purchased." The first option is selected. Below the list are fields for "Rejected By:" and "Rejected Date:". A red box highlights the first radio button option.

Step 13

Within the Certification section, select the **Reject Member SCP Request** button.

A screenshot of a form titled "Certification". It contains a checkbox labeled "By signing, I certify the following:" followed by four numbered statements. At the bottom right, there are labels for "Submitted By:" and "Submitted Date:". At the bottom left, there are two buttons: "Submit" and "Reject Member SCP Request". The "Reject Member SCP Request" button is highlighted with a red box.

You have completed this scenario.

Withdraw

Step 14

Within the Certification section, select the **Withdraw Certification Request** button.

A screenshot of a form titled "Certification". It contains a checkbox labeled "By signing, I certify the following:" followed by four numbered statements. At the bottom right, there are labels for "Submitted By:" and "Submitted Date:". At the bottom left, there are two buttons: "Submit" and "Withdraw Certification Request". The "Withdraw Certification Request" button is highlighted with a red box.

You have completed this scenario.

Scenario 5: Review a Service Credit Purchase Request

You will review or check the status of a submitted service credit purchase request.

System Logic

The following is a list of the service credit purchase request statuses:

- **Requested:** An employee submitted the request, but you have not started or submitted the certification.
- **In-Progress:** You have started but have not submitted the certification.
- **Certification Expired:** Request has expired because you haven't submitted the request within 30 days. The member must resubmit their request. There may also be increased cost.
- **Submitted:** You certified and submitted the request to CalPERS for review.
- **Complete:** CalPERS has completed the service credit purchase request process.
- **Rejected:** You rejected the request.
- **Employer Withdrawn:** You withdrew the request due to the member's request or you opened it in error.

Correcting a Service Credit Purchase Certification

- **In-Process:** Corrections can be made by opening the request.
- **Submitted:** Corrections can be made by calling the CalPERS contact center.
- **Completed:** Corrections cannot be made.

Step Actions (12 steps)

Check the Status

Step 1	Select the Reporting global navigation tab.
Step 2	Select the Member Requests local navigation link.
Step 3	Within the Employment and Service Period Certification List section, locate the member within the list.
Step 4	Within the Employment and Service Period Certification List section, review the status column to check the status of the request.

Review

Step 5

Do you want to review a request with a Requested or In-Progress status?

Yes: Select the **Status** link for the request you wish to complete.

Employment and Service Period Certification List Add New									
Excel Search: <input type="text"/>									
Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		120000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		230000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		340000076	08/18/1992	08/01/1994		
08/09/2023	Requested	Flower	Aileen		440000066	04/18/1988	06/09/2023		
08/10/2023	In Progress	Madrigal	Renato		450000065	03/07/2007	06/15/2009		

No: By default, only requests in Requested or In-Progress status display. At the top, use the Status filter to display a request with a Complete, Submitted, Certification Expired, Rejected, or Employer Withdrawn status.

Employment and Service Period Certification Filter

CalPERS ID:

Status:

Last Name:

Requested between:

Submitted By:

SSN:

Division:

First Name:

and:

Complete

Submitted

Certification Expired

Rejected

Employer Withdrawn

Requested

Filter Data

Clear Filter

Step 6

Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Employment Periods Add New						
Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.						
Participant	CalPERS Id	Division	Start Date – End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/24/2014 – 07/19/2014	Miscellaneous	Fire Fighter Trainee	Service Prior to Membership

Return

Step 7

Review the Employment Information section.

Employment Information

Participant: * Eric Sanchez

Participant's Email Address: ericSanchez@agencyname.com

Business Partner: Agency Name

Dates of Employment: * From: 02/06/2006 To: 08/11/2006

Employment Category: * Miscellaneous

Primary Position Title as displayed on your publicly available pay schedule: * Police Officer Trainee

Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS? * ☐ Yes ☒ No [View Exclusions](#)

Time Base: * ☐ Full Time ☒ Part Time ☐ Intermittent ☐ On Call ☐ Indeterminate ☐ Work(ed) As Needed ☐ Fractional Time Base: / ☒ Scheduled hours per week: 40.0

Appointment Tenure: * ☐ Permanent ☐ Indeterminate ☐ Seasonal ☒ Temporary Term End Date: 08/11/2006

Months per Year: * ☐ 8 Months ☐ 9 Months ☒ 11 Months ☐ 12 Months ☐ 10 Months

Please upload the participant's hiring document (myCalPERS 2788):

Service Credit Purchase Type Requested: ☐ Service Prior to Membership ☒ Yes ☐ No

Is the participant above a member of a reciprocal system? * ☐ Yes ☒ No

Was the service rendered through an independent contractor or paid through a third party or temporary employment agency? * ☐ Yes ☒ No

For teacher's assistants in a credential program only:

Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period? * ☐ Yes ☒ No

Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? * ☒ Yes ☐ No

Did the Participant withdraw these funds? * ☐ Yes ☒ No

Plan Type: * ☐ Defined Benefit ☒ Defined Contribution

Plan Name: * ICMA-RC Deferred Comp P

Step 8 Select the **Return** link at bottom right.

Step 9 Select the **Status** link for the request you wish to review.

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		1200000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		2300000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		3400000076	08/18/1992	06/01/1994		
08/09/2023	Requested	Flower	Aileen		4400000066	04/18/1988	06/09/2023		
08/10/2023	In Progress	Madrigal	Renato		4500000065	03/07/2007	06/15/2009		

Step 10 Within the Service Review Filter section, change the Date Range and To fields to match the period of the service credit purchase request.

Service Review Filter

Fiscal Year:

Appointment:

Division:

CBU:

Business Partner:

Date Range: 07/01/2013

Position Title:

Class Code:

Certified by:

To: 06/30/2015

Filter Service Clear Filter Add New Service

Step 11 Select the **Filter Service** button.

Step 12 Within the Service Period List section, review the reported payroll for the service credit purchase period.

Start Date	End Date	Appointment ID	Position Title	Full Time Pay Rate	Reportable Earnings	FT Hours per Week	Reportable Hours Worked	Overtime Hours Worked
07/05/2014	07/18/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
07/01/2014	07/04/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	32.0	0.0
06/21/2014	06/30/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	48.0	0.0
06/07/2014	06/20/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
05/24/2014	06/06/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
05/10/2014	05/23/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
04/26/2014	05/09/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
04/12/2014	04/25/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
03/29/2014	04/11/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	80.0	0.0
03/24/2014	03/28/2014		Fire Fighter Trainee	\$13.21	\$0.00	0.0	40.0	0.0

Showing 1 to 10 of 10 entries

First Previous 1 Next Last

You have completed this scenario.

Unit 3: Arrears

Arrears are the cost of retirement contributions from a member's earnings that were not previously reported and paid to CalPERS. An agency may be responsible for paying both the member and employer contributions along with an administrative cost associated with each arrears determination.

You are responsible for determining membership eligibility upon hire, including checking an employee's CalPERS membership status in myCalPERS. If the employee is not eligible at date of hire, continue to monitor their eligibility throughout their employment.

Upon meeting the eligibility requirements, you must enroll the member into membership within 90 days of their eligibility date. Failure to enroll a member timely will result in an arrears determination.

Arrears Administrator

For your agency to receive timely notifications of arrears determinations, your system access administrator must designate a *primary* Arrears Administrator contact type. We recommend selecting email as the preferred method of communication. Your agency's system access administrator should follow the steps in the [myCalPERS System Access Administration \(PDF\)](#) student guide for establishing and maintaining agency contacts.

What Initiates an Arrears Review?

Below is a list of reasons that may cause an arrears determination:

- Member not enrolled into membership in myCalPERS timely (90-day violation)
- Membership date input error
- Missing payroll
- You updated/corrected an appointment
- Service Prior to Membership (SPM) request
- Retirement, death, and/or disability review
- Employer/member calls the CalPERS Contact Center
- Member refunds or re-deposits

Arrears Determination Processes

Late Appointments (90-day violation)

This is the process and the associated scenarios related to 90-day violations:

1. You enter an appointment with an eligibility date more than 90 days in the past.
2. myCalPERS creates an arrears determination (Scenario 1).
3. A Notification of Reported Late Appointment letter (myCalPERS 0847) is sent to you.
4. You have 30 days to waive the appeal (Scenario 2) or submit documentation for reconsideration (Scenario 3).
5. Once the appeal is waived or the 30-day period has passed, you must submit payroll for the appears period (Scenario 4).
6. If payroll is not reported within 60 days, a Notification of Employer Paid Arrears Processing letter (myCalPERS 2723) is sent to you to request the payroll.
7. A Notification of Arrears Determination letter (myCalPERS 2785) is sent to you advising of CalPERS' determination.
8. Once payroll is submitted, invoice(s) are sent to you for contributions and late fee.
9. The member is sent the Employer Paid Arrears letter (myCalPERS 1360 or 2786) advising them their account has been credited for the arrears period at no cost to them.

All Other Reasons

This is the process and the associated scenarios for all other arrears reasons (list on page 24):

1. CalPERS has determined there may be arrears for a member (list of reasons on page 24).
2. The Request for Employment Information 1st letter (myCalPERS 2783) is sent to you.
3. You must submit payroll for the arrears period (Scenario 4).
4. If the certification is not received within 30 days, the Request for Employment Information 2nd letter (myCalPERS 2784) is sent to you.
5. Once the certification is received, CalPERS will review for possible arrears.
6. If arrears are found, the Notification of Arrears Determination letter (myCalPERS 2785) is sent to you advising of CalPERS' determination.
7. Applicable invoice(s) are sent to you for the contributions and late fee.
8. The Employer Paid Arrears (myCalPERS 1360 or 2786) is sent to the member advising their account has been credited for the arrears period at no cost to them.

Documentation

Review documentation that has been sent regarding an arrears determination. Within myCalPERS, select the Common Tasks left-side folder, then select the **Document History** left-side link.

Contents

Scenario 1: Review Arrears Determination	28
Scenario 2: Waive Appeal	29
Scenario 3: Submit Reconsideration	30
Scenario 4: Report Payroll.....	32

Scenario 1: Review Arrears Determination

You want to review an arrears determination.

Step Actions (6 steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

Person Search

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN: * AND Date of Birth: OR Last Name: OR First Name:

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link.

Appointment History <input type="button" value="Add New"/>								View More Actions*
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date	
Agency Name		Regular		Miscellaneous	Active	07/22/2013		

Step 5 Within the Arrears Determinations section, select the **Details** link.

Arrears Determinations								
Employer	BP ID	Appointment ID	Type	Begin Date	End Date	Determination Date	Status	Update Date
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020 Details

Step 6 Review the Arrears Detail section.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 3379260
CalPERS ID: 0123456789
Enrollment Date: 06/04/1994

Determination Information

Arrears Period Begin Date: 06/04/1994
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 03/07/2021
Source of Payroll: Paper Form (MEM1344)
Arrears Period End Date: 07/12/1996
Admin Fee: Yes

Reason: 1,000 hours of work within the fiscal year (July 1 to June 30)

Does this determination change the enrollment level from PEPPA to Classic?
No
Create Date: 02/05/2021
Determination Date: 02/05/2021
Update Date: 02/05/2021

Contribution Receivable ID: In Progress
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.

Reconsideration Request

If your agency does not agree with this determination, you must provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 03/07/2021.

Reason for Reconsideration: *

Please select document type and upload documentation to support your reconsideration request.

Document Type: *

You have completed this scenario.

Scenario 2: Waive Appeal

You agree with the arrears determination and elect to waive the appeal.

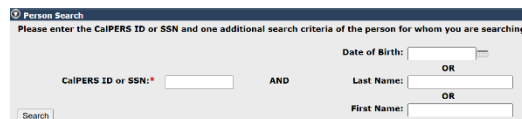
System Logic

- An appeal can be waived within 30 days of when the arrears determination was created.
- Once an appeal is waived, payroll for the arrears period can be reported. Refer to Unit 2, Scenario 4 for reporting payroll. If payroll has been associated to the arrears determination from a submitted employment certification, the payroll will automatically post.

Step Actions (7 steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.




Person Search

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN: AND Date of Birth: OR Last Name: OR First Name:

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
Agency Name		Regular		Miscellaneous	Active	07/22/2013	

[View More Actions](#)

Step 5 Within the Arrears Determinations section, select the **Details** link.



Employer	BP ID	Appointment ID	Type	Begin Date	End Date	Determination Date	Status	Update Date
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020 Details

Step 6 Within the Arrears Detail section, select the **Waive Appeal** button.



Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes

Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the No enrollment level from PEPPA to Classic?

Create Date: 11/10/2020
Determination Date: 11/10/2020
Admin Fee Receivable ID: In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.

[Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020.

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: *

Step 7 Within the Waive Appeal section, select the **Yes** button.

You have completed this scenario.

Scenario 3: Submit Reconsideration

You want to submit additional information and documentation for reconsideration of an arrears determination.

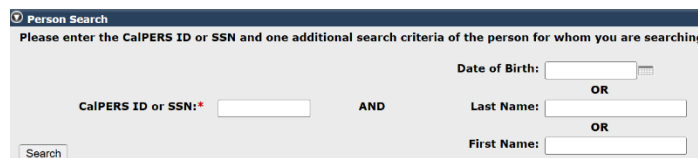
System Logic

- You have 30 days from when the arrears determination was created to submit documentation for reconsideration.
- Once the appeal period closes, if CalPERS determines the arrears stands, your agency will need to report payroll for the arrears period. Refer to Unit 2, Scenario 4 for reporting payroll of this student guide. If payroll has already been associated to the arrears determination from a submitted employment certification, the payroll will be automatically posted.

Step Actions (10 steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



The form is titled "Person Search" and includes a sub-header: "Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching." It features three input fields: "CalPERS ID or SSN:" (with a red asterisk), "Date of Birth:" (with a calendar icon), and "Last Name:" (with an "OR" label above it). Below the "Last Name:" field is a "First Name:" field (with an "OR" label above it). A "Search" button is located at the bottom left.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link.

Appointment History <small>Add New</small>							View More Actions
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
Agency Name		Regular		Miscellaneous	Active	07/22/2013	

Step 5 Within the Arrears Determinations section, select the **Details** link.

Arrears Determinations								
Employer	BP ID	Appointment Id	Type	Begin Date	End Date	Determination Date	Status	Update Date
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020 Details

Step 6 Within the Arrears Detail section, complete the Reason for Reconsideration field.

Arrears Detail

Appointment Information

Employer: Agency Name
Appointment ID: 92991672
CalPERS ID: 0123456789
Enrollment Date: 07/01/2020

Determination Information

Arrears Period Begin Date: 07/01/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Processing Date: 12/25/2020
Source of Payroll: N/A - Late Enrollment
Arrears Period End Date: 07/14/2020
Admin Fee: Yes

Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPPA to Classic? No
Create Date: 11/10/2020
Determination Date: 11/10/2020

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight. [Waive Appeal](#)

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: * [Add Document](#)

[Submit](#)

Step 7 Select from the Document Type drop-down list.

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type: * [Add Document](#)

[Submit](#)

Step 8 Select the **Add Document** button.

Please select document type and upload documentation to support your consideration request

Document Type: * Election of Optional Membership - Part-Time Employee: myCalPERS 0843 [Add Document](#)

[Submit](#)

Step 9 Locate the document, and then select the **Open** button.

Step 10 Select the **Submit** button.

Please select document type and upload documentation to support your consideration request

Document Type: * Election of Optional Membership - Part-Time Employee: myCalPERS 0843 [View Document](#) [Replace](#)

Election of Optional Membership.docx is added.

[Submit](#)

You have completed this scenario.

Scenario 4: Report Payroll

CalPERS has requested that you report payroll for an arrears determination.

System Logic

- For late appointment reporting, only report payroll as prior period adjustments for the arrears period once the appeal has been waived (Unit 2, Scenario 1 of this student guide) or the 30-day appeal period has closed. Refer to the [myCalPERS Payroll Reporting \(PDF\)](#) student guide (Unit 3, Scenario 4) for the proper reporting steps.
- If an arrears determination is completed through an employment certification containing payroll that has been submitted by your agency, there are no further actions needed to post the arrears payroll to a member's account. The arrears payroll will post when arrears determination has a completed status.
- For reporting employer paid arrears through the regular payroll reporting process and to learn more about the arrears process, refer to the [myCalPERS Payroll Reporting \(PDF\)](#) and [myCalPERS Payroll Adjustments \(PDF\)](#) student guides.
- Continue reporting the member's current payroll in your earned period reports. Refer to the [myCalPERS Payroll Reporting \(PDF\)](#) student guide.

You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at www.calpers.ca.gov.

- Take the online classes below available 24 hours a day. Sign up for classes via the **Education** tab in myCalPERS.
 - myCalPERS Employment Certification: Certify a Leave of Absence Service Credit Purchase Request
 - myCalPERS Employment Certification: Service Credit Purchase & Arrears
- [Employment Certification](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Employment Certification
- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > Employer Education > (Under Resources on the right) myCalPERS Student Guides & Resources
- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > Employer Education > (Under Classes & Workshops) Business Rules & myCalPERS Classes
- [myCalPERS Technical Requirements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [Public Agency & Schools Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [State Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Reference Guide (PDF)
- [Circular Letters - CalPERS](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations> Public Employees' Retirement Law (PERL)
- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > Employer Reports (Cognos) Catalog

CalPERS Contacts

Email

- To contact [employer educators](#) for questions and requests, email **calpers_employer_communications@calpers.ca.gov**.
- To contact the [employer response team](#) for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.
- To contact the [membership team](#) for assistance with the service credit purchase and employment certification processes, email **membership_reporting@calpers.ca.gov**.

Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

Submit Inquiry

You can send secure messages through myCalPERS. Expand the Common Tasks left-side navigation folder, and then select the **Submit Inquiry** link to submit a question or request.