# myCalPERS Employment Certification Functionality

Student Guide

October 31, 2025



# myCalPERS Employment Certification Functionality

This guide will assist you with submitting employment information for service credit purchases and membership review. The <u>Employment Certification</u> 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 <u>Introduction to myCalPERS for Business Partners (PDF)</u> student guide and take a <u>Business Rules class</u>. 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 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 reentering them manually.

# **Contents**

Unit 1: Employment Certification Fields	4
Unit 2: Service Credit Purchase Certification	6
Unit 3: Arrears	. 25
CalPERS Resources	. 33
CalPERS Contacts	. 34

# **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 <u>Public Agency & Schools Reference Guide</u> (<u>PDF</u>) 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 <u>State Reference Guide (PDF)</u>
   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 <u>Service Credit</u> 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 reentering 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 <a href="myCalPERS System Access Administration">myCalPERS System Access Administration</a> (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.

#### Contents

Scenario 1: Certify a Service Credit Purchase Request	8
Scenario 2: Reassociate Previously Reported Payroll	12
Scenario 3: Submit Payroll for a Service Credit Purchase Request Period	13
Scenario 4: Certify a Leave of Absence Service Credit Purchase Request	19
Scenario 5: Review a Service Credit Purchase Request	22

# **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.



**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.

© Employme	© 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

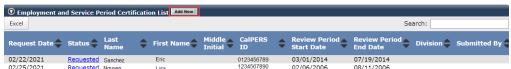
Step 6 Review and complete the Employment Information section.

Employment Information				
Participant: *	Eric Sanchez			
Participant's Email Address:	ericSanchez@agencyname.com	Participant's F	Phone Number: (999) 888	3-7777
Business Partner:	Agency Name	Division: Department Na	ame 🗸	
Dates of Employment: *	,			
	From: 10/20/2014	To: 06/30/2015		
Employment Category: *	~			
Primary Position Title as disp	olayed on your publicly available p	pay schedule: *		
Was the participant's employ contract agreement with Cal	yment excluded from CalPERS me PERS?*	mbership due to your agency's	○ Yes ● No	View Exclusions
Time Base:*	○ Full Time	O Part Time		
	Intermittent	<ul> <li>Indeterminate</li> </ul>		
	○ On Call	<ul> <li>Work(ed) As Needed</li> </ul>		
CBU:*		~		
Class Code:*				
Appointment Tenure:*	O Permanent Indeterminate Seasonal Temporary			
Months per Year:*	○ 8 Months ○ 11 Months	9 Months 12 Months	○ 10 Months	
Please upload the participan (myCalPERS 2788):	t's hiring document	Add Document		
Service Credit Purchase Type	Requested:	Service Prior to Membership		
Is the participant above a me	ember of a reciprocal system? *	○ Yes ○ No		
	rough an independent contractor temporary employment agency ?			
For teacher's assistants in a	credential program only:			
Did the employee require a t California teacher training in assistant during the requeste	stitution to serve as a teacher's	○ Yes ○ No		
CalPERS, during the specified	e to a retirement plan, other than d time period? *	○ Yes ○ No		Return
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.



#### Step 11 Complete the Employment Information section.

Step 15



- 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.

	3 3 3 4 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3
Step 12	Select the <b>Yes</b> radio button. <b>Is the participant requesting to purchase Service Credit?*</b> ONO  Percondition of the participant requesting to purchase Service Credit?*
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 <b>Add Document</b> 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): *  Add Document

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? *	○ Yes ○ No				
	Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982?*	○ Yes ○ No				
	Was the service rendered under a fellowship program? *	○ Yes ○ No				
	Was this position filled by an election or appointment to a fixed term of office? *	○ Yes ○ No				
	Was the service rendered through an independent contractor or paid through a third party or temporary employment agency ? * For teacher's assistants in a credential program only:	○ Yes ○ No				
	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				
Step 17	Select the <b>Save</b> button.					
Step 18	Did the member hold multiple positions during the service credit request period?	purchase				
	Yes: How did the member submit their request?					
	<ul> <li>myCalPERS Request: Within the Employment Periods sector</li> <li>Add New button and return to step 6.</li> <li>Request Form: Return to step 10.</li> </ul>	tion, select the				
	<b>No</b> : Continue to scenario 3 to submit payroll for the service credi request period.	t purchase				
	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 reentering 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.



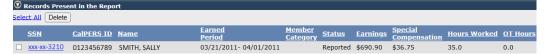
Step 3 Enter the employee's CalPERS ID or SSN, then from the Report Type drop-down list, select Payroll - CalPERS Review to display reports relevant to certification.



- 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.

Refresh Records 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.



# 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 <u>Technical Resources</u> 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 <a href="myCalPERS Payroll Reporting">myCalPERS Payroll Reporting</a> (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.

Service Review Filter				
Fiscal Year:				
Appointment:		~		
Position Title:	~			
Business Partner:	~	Certified	by: 🕶	
Date Range:	07/01/2020		To: 06/30/2021	
			Filter Service Clear Filter	Add New Service

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

Begin Date:*	End Date:* Display
Payroll Record Memo:	Payroll Schedule:* Approved : Bi-Weekly : 06/19/1982 - ▼
Division:	

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

I	Earnings	
	Member Category:	<u> </u>
	Position Title:	
	Class Code:	

Step 4 Is this appointment in myCalPERS?

**Yes**: Select the applicable **appointment** radio button.

Earnings		
Appointment:	No Appointment ▼	
	<ul> <li>92139121 : Agency Name</li> </ul>	- Safety - County Peace Officer - 03/21/2015
	92111572 : Agency Name	- Safety - County Peace Officer - 01/10/2015 - 02/25/2015

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

Earnings			
	Appointment:	No Appointment ▼	
		<ul> <li>92139121 : Agency Name</li> </ul>	- Safety - County Peace Officer - 03/21/2015
		92111572 : Agency Name	- Safety - County Peace Officer - 01/10/2015 - 02/25/2015

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

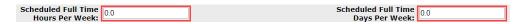
Payroll Schedule:*	~	
		-

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.

Pay Rate Type:	Pay Rate: \$ 0.00
Reportable Earnings: \$ 0.00	

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. **•** View Special Compensation Select All Delete Add New No results found. Select All Delete Add New Within the Maintain Special Compensation Details section, complete the Special Step 11 Compensation Category, Special Compensation Type, and Amount fields. Maintain Special Compensation Details Special Compensation Category: Special Compensation Type:\* Amount:\* \$ 0.00 Save Save and Add Another 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. Select the Return link. Step 14 Step 15 If applicable, enter the contributions in the 1959 Survivor Contribution field. Contributions 1959 Survivor \$ 0.00 Contribution: Do you have additional periods or report adjustments to report? Step 16 **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. Within the Create or Edit Report section, select Upload File from the Method Step 18 drop-down list. O Create or Edit Report Method: \* Upload File Continue Step 19 Select the Continue button. Step 20 Within the Upload File section, select the **Choose File** button. Select Browse to locate a file to upload prior to selecting the Upload File button Path: \* Choose File No file chosen

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

Step 21

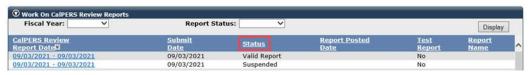
Step 22 Select the **Upload File** button.



- 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.



- Step 26 Scroll down to the Work on Existing CalPERS Review Reports section.
- Step 27 Review the Status column.

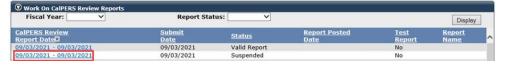


Step 28 What is the status of the report?

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

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

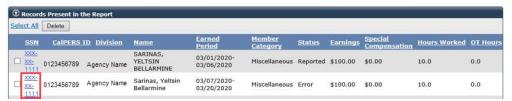
Step 29 Select the **CalPERS Review Report Date** link for the suspended report.



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



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



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

Step 33	Select the <b>Save &amp; Return</b> button.

Step 34 Are there additional records with errors?

Yes: Return to step 31.

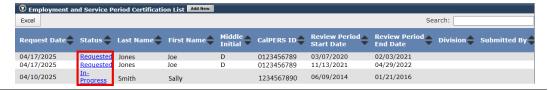
**No**: Continue to step 35.

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.



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.



#### Submit, Reject, or Withdraw a Service Credit Purchase Request

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

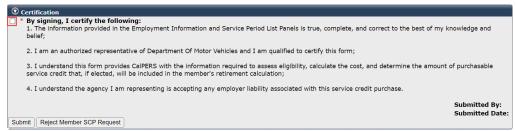
**Submit**: You've completed the certification and are ready to submit to CalPERS, continue to step 41.

**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.



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.

SCP SCP	Request Rejection Reason	

Step 44 Select the radio button for the reason for rejecting the request.

<b>⊙</b> 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:				

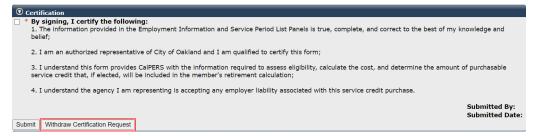
Step 45 Within the Certification section, select the **Reject Member SCP Request** button.

<b>O</b> (	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 k belief;	nowledge and
	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 service credit that, if elected, will be included in the member's retirement calculation;	of purchasable
	4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.	
Subi	mit Relect Member SCP Request	Submitted By: Submitted Date:
Subi	III. Reject Metriber 50-r Request	

You have completed this scenario.

#### Withdraw

Step 46 Within the Certification section, select the **Withdraw Certification Request** button.



# 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.

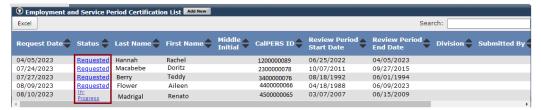
# Step Actions (14 steps)

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.



**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.



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?

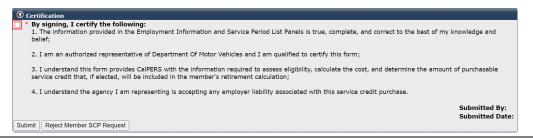
**Submit**: You've completed the certification and are ready to submit to CalPERS, continue to step 9.

**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.



Step 10 Select the **Submit** button.

#### Reject

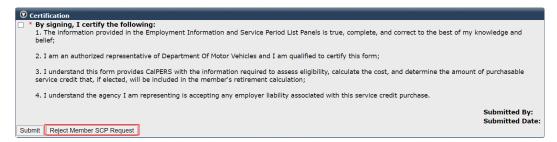
Step 11 Select the caret to expand the SCP Request Rejection Reason section.



Step 12 Select the reason radio button for rejecting the service credit purchase request.

♥ 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:				

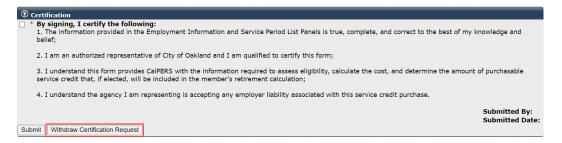
Step 13 Within the Certification section, select the **Reject Member SCP Request** button.



You have completed this scenario.

#### Withdraw

Step 14 Within the Certification section, select the **Withdraw Certification Request** button.



# **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 <b>Reporting</b> global navigation tab.		
Step 2	Select the <b>Member Requests</b> 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.



**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.



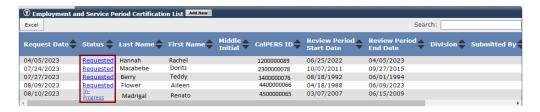
Step 6 Within the Employment Periods section, select the **Start Date – End Date** link. **Note**: There may be more than one period of employment displayed.

© Employment Periods Add New						
Manahan haa						
	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
Participant Eric Sanchez	CalPERS Id 0123456789	Division	Start Date - End Date 03/24/2014 - 07/18/2014	Employment Category Miscellaneous	Position Title Fire Fighter Trainee	SCP Type Service Prior to Membership

Step 7 Review the Employment Information section.

© Employment Information			
	Eric Sanchez		
Participant's Email Address:	ericSanchez@agencyname.com	Participant's Phone Number: (999) 888-7777	
Business Partner:		Division:	
Dates of Employment: *			
	From: 02/06/2006	To: 08/11/2006	
Employment Category: * M	scellaneous		
Primary Position Title as dis	played on your publicly available p	ay schedule: * Police Officer Trainee	
Was the participant's emplo contract agreement with Cal	yment excluded from CalPERS me PERS?*	nbership due to your agency's Yes   No View Exclu	ısions
Time Base:*	Full Time Intermittent On Call  Part Tim Indeterm Work(ed	() Flactional Time base.	
Appointment Tenure:*	Permanent Indeterminate Seasonal Term End Date: 08/11/2006		
Months per Year:*	O 8 Months O 11 Months	9 Months 10 Months	
Please upload the participan (myCalPERS 2788):	t's hiring document		
Service Credit Purchase Type	•	Service Prior to Membership	
Is the participant above a m	ember of a reciprocal system? *	○ Yes   No	
	rough an independent contractor · temporary employment agency ?		
For teacher's assistants in a	credential program only:		
Did the employee require a t California teacher training ir assistant during the request	stitution to serve as a teacher's	○ Yes	
Did the Participant contribut CalPERS, during the specifie	e to a retirement plan, other than d time period? *	Yes     No	
Did the	Participant withdraw these funds	? * Yes • No	
	Plan Typ	Defined Benefit  Defined Contribution	
	Plan Nan	e:* ICMA-RC Deferred Comp PS	

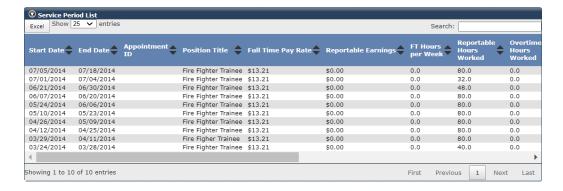
- Step 8 Select the **Return** link at bottom right.
- Step 9 Select the **Status** link for the request you wish to review.



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.



- 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.



#### 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 <u>myCalPERS System Access Administration (PDF)</u> 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 2<sup>nd</sup> 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 additi	onal search cri	teria of the person for w	hom you are searching
		Date of Birth:	
			OR
CalPERS ID or SSN:*	AND	Last Name:	
			OR
Search		First Name:	

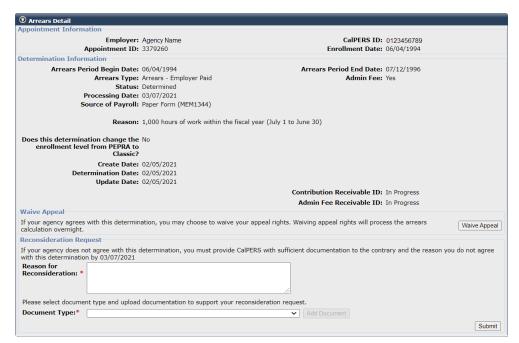
- Step 3 Select the **Search** button.
- Step 4 Within the Appointment History section, select the **View More Actions** link.

• Appointment I	History 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.

① Arrears Determinations									
Employer	BP ID	Appointment Id	Туре	<b>Begin Date</b>	End Date	<b>Determination Date</b>	Status	<b>Update Date</b>	
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined		<u>Details</u>
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020	<u>Details</u>

Step 6 Review the Arrears Detail section.



# **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)

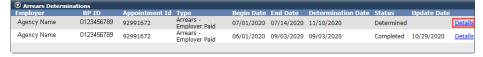
- Step 1 Select the **Person Information** global navigation tab.
- Step 2 Complete the Person Search section.



- Step 3 Select the **Search** button.
- Step 4 Within the Appointment History section, select the **View More Actions** link.



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



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



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

#### **Scenario 3: Submit Reconsideration**

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

# System Logic

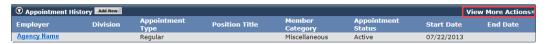
- You have 30 days from when the arrears determination was created to submit documentation for reconsideration.
- Once the appeal period closes, if CalPERS determines the arrears stands, your agency will
  need to report payroll for the arrears period. Refer to Unit 2, Scenario 4 for reporting
  payroll 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.



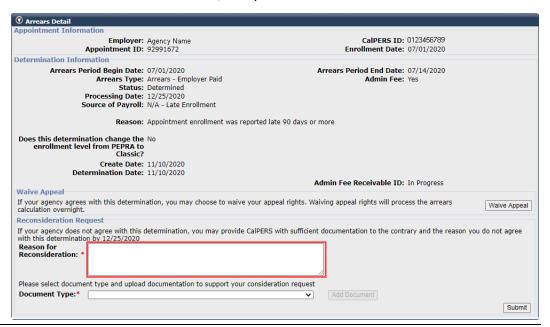
- Step 3 Select the **Search** button.
- Step 4 Within the Appointment History section, select the **View More Actions** link.



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



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



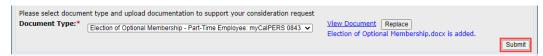
Step 7 Select from the Document Type drop-down list.

Reconsideration Request	
If your agency does not agree with this determination, you with this determination by 12/25/2020	may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree
Reason for Reconsideration: *	
Please select document type and upload documentation to  Document Type:*	support your consideration request  Add Document
	Submit

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

ı	Please select docume	nt 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.



# **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 <a href="myCalPERS Payroll Reporting">myCalPERS Payroll Reporting</a> (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 <u>myCalPERS Payroll Reporting (PDF)</u> and <u>myCalPERS Payroll Adjustments (PDF)</u> student guides.
- Continue reporting the member's current payroll in your earned period reports. Refer to the <u>myCalPERS Payroll Reporting (PDF)</u> student guide.

# CalPERS Resources

Obtain more information by visiting the <u>CalPERS website</u> at www.calpers.ca.gov.

- Take the online classes below (available 24 hours a day) by selecting the **Education** tab in myCalPERS:
  - myCalPERS Employment Certification: Certify a Leave of Absence Service Credit
     Purchase Request
  - o 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 <u>employer educators</u> for questions and requests, email calpers\_employer\_communications@calpers.ca.gov.
- To contact the <u>employer response team</u> for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.
- To contact the <u>membership team</u> 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.