

myCalPERS Payroll Reporting

Student Guide

June 26, 2026



Introduction

This guide will assist you with earned period payroll reporting. Payroll reports contain your employees' records that are uploaded or added manually to preprocessing areas before they are submitted in myCalPERS. After a report is submitted for processing, all records are validated, and errors are identified to allow for corrections.

Disclaimer

- Business partner and participant information has been masked in this procedure guide.
- We strive to provide accurate information within this guide; however, the Public Employees' Retirement Law is the authoritative source for CalPERS policies.

What's New

- If initiating payroll reporting by file upload (Unit 2, Scenario 3), you may now use a CSV file instead of an XML file.
- Refer to Unit 8, Scenario 3 on how to request a compensation compliance analysis to ensure compliant payroll reporting. Users should no longer contact the Audit Compliance and Resolution Unit at mou_review@calpers.ca.gov for compensation compliance questions.

System Access

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

Training Opportunities

We offer instructor-led and self-paced online classes based on this guide. Follow these steps to ensure your CalPERS education experience is comprehensive and well-structured:

1. Take [Business Rules](#) instructor-led classes.
2. Review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide.
3. Attend a [myCalPERS](#) instructor-led class.
4. Refresh your knowledge with [self-paced online classes](#) as needed.

To access the classes, log in to your [myCalPERS](#) business partner account and then select the **Education** tab.

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Unit 1: Person Search Tool

In this unit, you will learn to use the Person Search tool to verify an active employee's appointment details and position information. A new or returning employee must have an appointment with your agency in myCalPERS before submitting payroll for them.

System Logic

The Person Search tool needs to be refreshed in between searches. Clear the last employee's profile information by selecting the **Person Search** left-side link.

Step Actions (5 steps)

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

Step 2 Complete the Person Search section.

Person Search
Please enter 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 **Employer** link that has an Active appointment status.

| Appt ID | Employer | Division | Appointment Type | Position Title | Member Category | Appointment Status |
|------------|-----------------------------|----------|------------------|----------------|-----------------|--------------------|
| 6646750118 | Agency Name | | Regular | | Miscellaneous | Active |

Step 5 Within the Appointment Details section, review your employee's appointment details, which includes their Enrollment Eligibility Date and Member Base Rate.

Appointment Details

Program
Program: CalPERS
Membership Status: Active
Membership Date: 01/12/2026
Enrollment Eligibility Date: 01/12/2026

Position Information
Employer: Agency Name
Original Hire Date: 01/12/2026
Member Category: Miscellaneous
Transit Worker: No
Position Title:
CBU: -
Work Calendar: Work 12 Months/Paid 12 Months

Retired Annuitant: No
Health Only: No
Enrollment Reason: Full Time for 6 months or more
Contributing Appointment: Yes
Appointment Status: Active
Years Prior Service:
Enrollment Level: PEPRA New
Member Base Rate: 8.25%
Contribution Modification: None
Report Contributions on Monthly: \$0.00
Earnings in Excess of:
Rate Plan Identifier: 27415

CalPERS ID (Employer): 1262943822
Temporary Position: No
Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?
Appointment ID: 6646750118
Contributing Appointment Date: 01/12/2026
Leave Type:
Formula Name: 2% @ 62 Formula for Miscellaneous/Industrial Members
Cost Share: 0.0%

Created by User: Employer
Created on: 01/06/2026 10:45 AM
Appointment Profile Last Refreshed: 01/06/2026 10:45 AM
Last Refreshed by: Employer
Refunded Appointment: No

You have completed this scenario.

Unit 2: Initiate Payroll Reporting

In this unit, you will learn how to create an earned period payroll report. A payroll report is not complete until the report has been submitted and posted.

Transmitting Payroll Information

There are two methods for transmitting payroll information through myCalPERS:

- **Online Data Entry** – This method uses myCalPERS to enter your payroll data. There are two online data entry options.
 - **Manual Entry** – Create a new earned period or adjustment payroll report by entering each payroll record. This is used primarily by new agencies for their first payroll report.
 - **Copy Forward** – Copy a posted earned period payroll report to create a new earned period report. Copied records can be modified or deleted, and new records can be added. This is commonly used when earnings are the same (or similar) across earned periods.
- **File Upload** – This method uses a payroll report file with data from your internal payroll system and uploads it to myCalPERS.

Reporting Payroll Adjustments Records

For online-data-entry users, if you are only reporting adjustment records, create an adjustment report. Refer to the [myCalPERS Payroll Adjustments \(PDF\)](#) student guide for step actions.

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Scenario 1: Online Data Entry – Manual Entry

You will create a payroll report by manually entering information for each payroll record within the report. This method is primarily used by new agencies for their first payroll report.

New Contracting Agencies

The following must be in myCalPERS before reporting earned period records:

- Your retirement contract: otherwise, you cannot enroll employees in CalPERS and report their payroll.
- Your agency’s payroll schedule (Monthly, Semi-monthly, Bi-weekly, or Quadri-weekly)
- Your employees’ PERS appointments with your agency

Step Actions (18 steps)

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

Step 2 Within the Create or Edit Report section, select Manually Create Earned Period Report from the Method drop-down list.

The screenshot shows the myCalPERS Reporting section. The top navigation bar includes Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, there are tabs for Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Member Requests. The main content area is titled 'Common Tasks' and 'Menu'. The 'Create or Edit Report' section is highlighted, showing the 'Method' dropdown menu set to 'Manually Create Earned Period Report'. The 'Continue' button is visible next to the dropdown. The form also displays 'Name: Agency Name' and 'CalPERS ID: 1262943822'.

Step 3 Select the **Continue** button.

Step 4 Complete the Create Report section.

The screenshot shows the 'Create Report' form. The fields are: Program: CalPERS (dropdown), Report Type: Payroll-Earned Period (radio button), Payroll Schedule: Bi-Weekly (dropdown), and Earned Period: 09/14/2024 - 09/27/2024 (dropdown). A 'Save & Continue' button is located at the bottom of the form.

Step 5 Select the **Save & Continue** button.

Step 6 Within the Search and Add New Record to the Report section, enter the employee’s SSN or CalPERS ID.

Step 7

Select the **Add New** button.

Search and Add New Record to the Report
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:
CalPERS ID:
Record Type:
Member Category:
Division:
Record Status:
Error Message:
Last Name:
Transaction Type:
Rate Plan:

Step 8

If needed, within the Maintain Record Details section, modify the Begin Date and End Date fields.

Maintain Record Details
To add details to the record select Display after entering dates.

Begin Date: *
End Date: *
Payroll Record Memo:

[View Employee Rate Summary](#)

Step 9

Select the **Display** button.

Step 10

Complete the Earnings subsection.

Earnings
Appointment: * Agency Name : Appt Id - 9991754018 : 2024-07-15 : Miscellaneous : Regular

Transaction Type: *
Pay Rate Type:
Pay Rate: \$
Reportable Earnings: \$
Scheduled Full Time Hours Per Week:
Scheduled Full Time Days Per Week:
Total Hours Worked:
Special Compensation: [View Special Compensation](#)

Contributions
Taxed Member Paid Contributions: \$
Tax Deferred Member Paid Contributions: \$
Tax Deferred Employer Paid Member Contributions: \$

Service Credit Purchase Deductions
Taxed Member Paid Contribution: \$
Tax Deferred Member Paid Contribution: \$ [View Employee Rate Summary](#)

- **Transaction Type:** If the correct transaction type is not in the drop-down list, correct the begin or end dates, then select the **Display** button.
- **Scheduled Full Time Hours Per Week:** This is required for all pay rate types. Enter the number of hours your agency considers full time for this position.
- **Scheduled Full Time Days Per Week:** If pay rate type is daily, complete in addition to Scheduled Full Time Hours Per Week. Enter the number of days your agency considers full time for this position.
- **Total Hours Worked:** Enter only if employee is a retired annuitant.

Step 11

Do you need to report special compensation?

Yes: Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 12.

No: Skip to step 16.

Step 12 Within the View Special Compensation section, select the **Add New** button.

View Special Compensation

Select All Delete Add New

| Category | Type | Amount |
|-------------------|------|--------|
| No results found. | | |

Select All Delete Add New

Step 13 Complete the Maintain Special Compensation Details section.

Maintain Special Compensation Details

Special Compensation Category:*

Special Compensation Type:*

Amount:*\$ 0.00

Save Save and Add Another

Step 14 Do you need to report additional special compensation?

Yes: Select the **Save and Add Another** button, then return to step 13.

No: Select the **Save** button, then continue to step 15.

Step 15 Select the **Return** link at the bottom right under the View Special Compensation section.

View Special Compensation

Select All Delete Add New

| Category | Type | Amount |
|---|-------------------|----------|
| <input type="checkbox"/> Special Assignment Pay | Bilingual Premium | \$200.00 |

Select All Delete Add New

Return

Step 16 Is the record for a contributory employee?

Yes: Within the Contributions subsection, enter contribution amounts into the appropriate fields, then continue to step 17.

Contributions

Taxed Member Paid Contributions: \$ 0.00

1959 Survivor Contribution: \$ 0.00

Tax Deferred Member Paid Contributions: \$ 0.00

Tax Deferred Employer Paid Member Contributions: \$ 0.00

No: Continue to step 17.

Step 17 Do you need to report a service credit purchase deduction?

Yes: Within the Service Credit Purchase Deductions subsection, enter contribution amounts into the appropriate fields, then continue to step 18.

Service Credit Purchase Deductions

Taxed Member Paid Contribution: \$ 0.00

Tax Deferred Member Paid Contribution: \$ 0.00

No: Continue to step 18.

Step 18 Select the **Save & Exit** button.

Note: Repeat steps 6-18 until all payroll records are in the report.

You have completed this scenario.

Scenario 2: Online Data Entry – Copy Forward

You will copy forward a previously posted payroll report to create a new earned period report.

Copy forward allows you to copy prior posted payroll records, make changes to the copied records, and then submit the report for a new earned period. This method is commonly used when earnings are the same (or similar) across earned periods.

System Logic

Adjustment records will not copy forward.

Step Actions (5 steps)

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

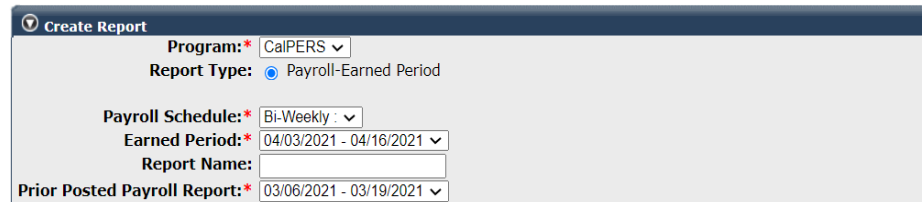
Step 2 Within the Create or Edit Report section, select Copy Prior Posted Payroll Report from the Method drop-down list.



The screenshot shows the 'Reporting' tab selected in the top navigation bar. Below it, the 'Manage Reports' section is active, displaying 'Name: Agency Name' and 'CalPERS ID: 1262943822'. The 'Create or Edit Report' section is highlighted, and the 'Method' dropdown menu is open, showing 'Copy Prior Posted Payroll Report' selected. The 'Continue' button is visible to the right of the dropdown. Below this, the 'Work On Existing Payroll Reports' section is also visible.

Step 3 Select the **Continue** button.

Step 4 Complete the Create Report section.



The screenshot shows the 'Create Report' section with the following fields: 'Program:*' set to 'CalPERS', 'Report Type:' with 'Payroll-Earned Period' selected, 'Payroll Schedule:*' set to 'Bi-Weekly', 'Earned Period:*' set to '04/03/2021 - 04/16/2021', 'Report Name:' is empty, and 'Prior Posted Payroll Report:*' set to '03/06/2021 - 03/19/2021'.

Step 5 Select the **Save & Continue** button.

You have completed this scenario.

Scenario 3: File Upload

You will create a payroll report by uploading an CSV or XML file to myCalPERS.

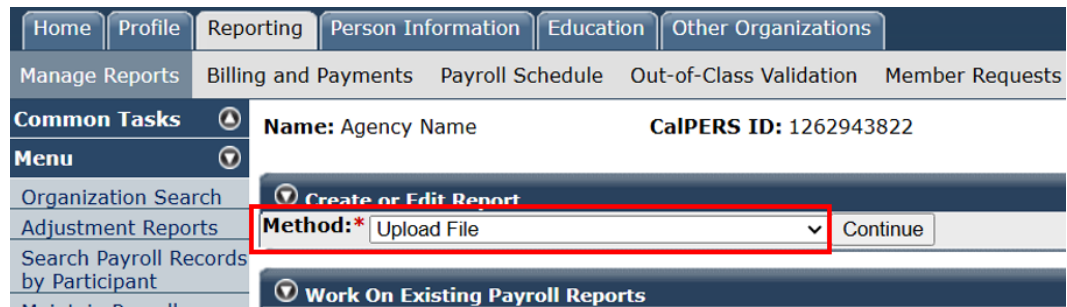
Resources

To start using the file upload method, refer to the [Technical Resources](#) webpage. The Toolkit folder contains files to assist you in ensuring your agency can connect to myCalPERS and submit correctly formatted files. If you have questions or issues, contact [myCalPERS System Support](mailto:employertechnicalsupport@calpers.ca.gov) at employertechnicalsupport@calpers.ca.gov.

Step Actions (11 steps)

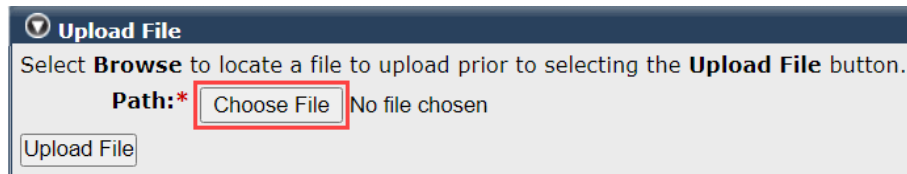
Step 1 Select the **Reporting** global navigation tab.

Step 2 Within the Create or Edit Report section, select Upload File from the Method drop-down list.



Step 3 Select the **Continue** button.

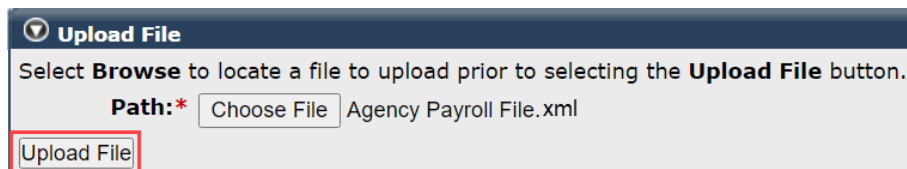
Step 4 Within the Upload File section, select the **Choose File** button.



Step 5 Select the payroll file from your computer.

Step 6 Select the **Open** button.

Step 7 Select the **Upload File** button.



Step 8

Select the **View Preprocessing Areas** link at the bottom right under the File Upload History section.

Note: The File Status column will display one of the following:

- **Ready:** Prepared to go through processing in myCalPERS
- **Accepted:** Passed first level validations (formatting, required fields, etc.)
- **Rejected:** Failed the first level validations (contribution totals, payroll dates with regards to permanent separations, etc.)

| File Upload History | | | | | | | Valid | Error | Total |
|---------------------|-------------|-------------|------------------|---------------------------------------|--|-------|-------|-------|-------|
| File Type | Upload Date | File Status | Batch Job Status | File Name | | | | | |
| Payroll Reporting | 11/02/2020 | Ready | | 20200402153458_010_10006_CPRVALID.xml | | 97 | 6 | 103 | |
| Payroll Reporting | 10/29/2020 | Accepted | Completed | 20201029130618_459_10006.xml | | 17 | 0 | 17 | |
| 7 | 10/29/2020 | Accepted | Completed | 20201029122628_668_00007.xml | | 183 | 0 | 183 | |
| 7 | 10/29/2020 | Accepted | Completed | 20201029094907_619_00007.xml | | 17 | 0 | 17 | |
| Payroll Reporting | 10/28/2020 | Accepted | Completed | 20201028143230_233_10006.xml | | 96 | 6 | 102 | |
| 7 | 10/28/2020 | Accepted | Completed | 20201028094843_071_00007.xml | | 157 | 0 | 157 | |
| Payroll Reporting | 10/27/2020 | Accepted | Completed | 20201027135057_851_10006.xml | | 97 | 4 | 101 | |
| 7 | 10/27/2020 | Accepted | Completed | 20201027120547_908_10006.xml | | 93 | 4 | 97 | |
| 7 | 10/27/2020 | Accepted | Completed | 20201027084858_151_00007.xml | | 18 | 3 | 21 | |
| Payroll Reporting | 10/27/2020 | Accepted | Completed | 20201027102247_211_10006.xml | | 68 | 3 | 71 | |
| Payroll Reporting | 10/27/2020 | Accepted | Completed | 20201027090222_960_10006.xml | | 49 | 2 | 51 | |
| 7 | 10/23/2020 | Accepted | Completed | 20201023150829_908_00007.xml | | 99 | 0 | 99 | |
| Payroll Reporting | 10/23/2020 | Accepted | Completed | 20201023124658_169_10006.xml | | 22 | 4 | 26 | |
| 7 | 10/23/2020 | Accepted | Completed | 20201023082802_962_00007.xml | | 8 | 1 | 9 | |
| Payroll Reporting | 10/22/2020 | Accepted | Completed | 20201022170819_345_10006.xml | | 21 | 4 | 25 | |
| Payroll Reporting | 10/22/2020 | Accepted | Completed | 20201022152202_836_10006.xml | | 20 | 3 | 23 | |
| Payroll Reporting | 10/22/2020 | Accepted | Completed | 20201022101016_044_10006.xml | | 19 | 3 | 22 | |
| Payroll Reporting | 10/21/2020 | Accepted | Completed | 20201021160045_118_10006.xml | | 18 | 2 | 20 | |
| 7 | 10/21/2020 | Accepted | Completed | 20201021152850_409_00007.xml | | 70 | 0 | 70 | |
| Payroll Reporting | 10/21/2020 | Accepted | Completed | 20201021145041_045_10006.xml | | 10 | 0 | 10 | |
| 7 | 10/21/2020 | Accepted | Completed | 20201021083533_645_00007.xml | | 41 | 0 | 41 | |
| Payroll Reporting | 10/21/2020 | Accepted | Completed | 20201021013201_774_10006.xml | | 19472 | 0 | 19472 | |
| Payroll Reporting | 10/21/2020 | Accepted | Completed | 20201020235422_426_10006.xml | | 19450 | 23 | 19473 | |
| Payroll Reporting | 10/20/2020 | Accepted | Completed | 20201020224917_631_10006.xml | | 19450 | 23 | 19473 | |
| Payroll Reporting | 10/20/2020 | Accepted | Completed | 20201020220424_048_10006.xml | | 19450 | 23 | 19473 | |

[View Preprocessing Areas](#)

Step 9

Within the Preprocessing Area section, select the **Payroll Reporting** link.

| Preprocessed Data | | | | Valid | Error | Total |
|--|--|--|--|-------|-------|-------|
| Affected Subscriber List | | | | 90 | 2 | 92 |
| Census | | | | - | - | - |
| Direct Authorization | | | | 90 | 2 | 92 |
| Health Carrier Rate Data | | | | - | - | - |
| Health Carrier ZIP Code Plan Relationship Data | | | | - | - | - |
| Health Enrollment | | | | - | - | - |
| Medical Group Assignment List | | | | - | - | - |
| Payroll Reporting | | | | - | - | - |
| Retirement Enrollment | | | | - | - | - |

[Upload Data File](#) [View Upload History](#)

Step 10

Within the Work on Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link to access the report's Payroll Report Detail page.

| Work On Existing Payroll Reports | | | | | | |
|---|---|-----------------------------------|-----------------------|-------------------------------------|-------------|--|
| Program: <input type="text" value="CalPERS"/> | | Fiscal Year: <input type="text"/> | | Report Status: <input type="text"/> | | |
| Schedule Name | Earned Period / Adjustment Date | Status | Report Type | Due Date | Submit Date | |
| | 06/13/2024 - 06/13/2024 | Posted | Payroll - Adjustments | | 06/13/2024 | |
| | 06/12/2024 - 06/12/2024 | Posted | Payroll - Adjustments | | 06/12/2024 | |
| | 06/10/2024 - 06/10/2024 | Posted | Payroll - Adjustments | | 06/10/2024 | |
| | 06/10/2024 - 06/10/2024 | Posted | Payroll - Adjustments | | 06/10/2024 | |
| | 06/07/2024 - 06/07/2024 | Posted | Payroll - Adjustments | | 06/07/2024 | |

Note: Select the **View Max** link at the bottom of the Work on Existing Payroll Reports section to display all payroll reports.

Step 11

At the bottom right of the Payroll Report Detail page, select the **View Records** link to access the records within the report.

[Process Report](#) [Cancel Report](#) [Generate Report Summary](#)

[View Records](#)

You have completed this scenario.

Unit 3: View Payroll Records Page

In this unit, you will navigate to a report's View Payroll Records page to review, maintain, and add records in the report.

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Scenario 1: Navigate to the View Payroll Records Page

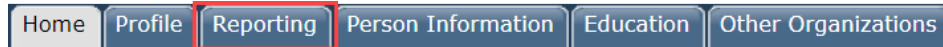
You left the View Payroll Records page and need to return to it to work on your payroll report.

System Logic

Do not use the **Apply Mass Update** link on the View Payroll Records page.

Step Actions (3 steps)

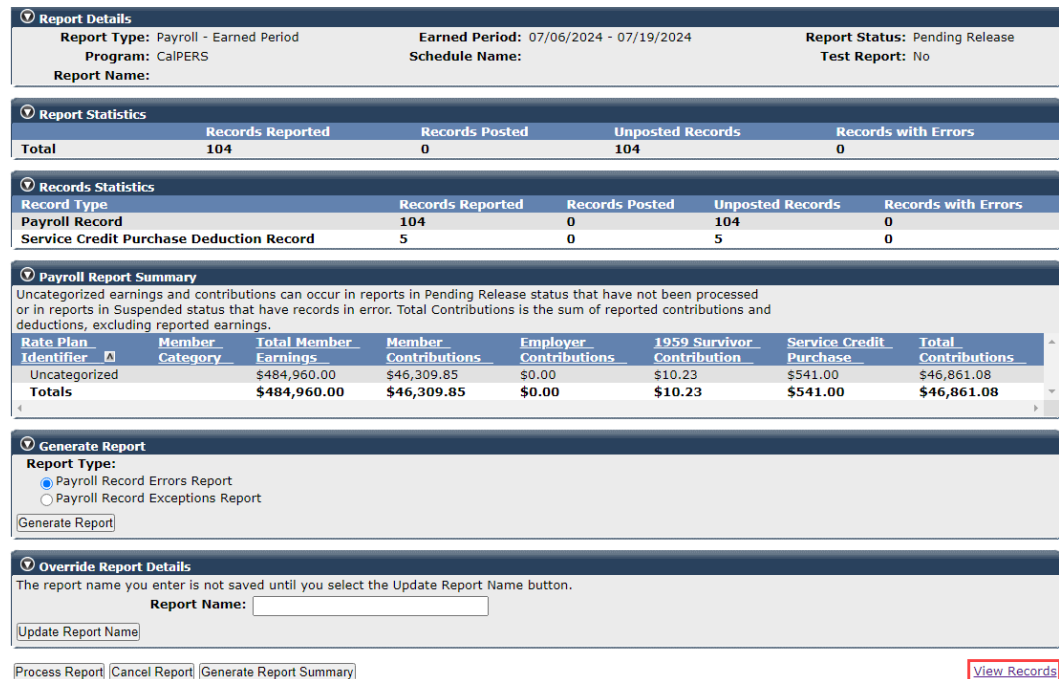
Step 1 Select the **Reporting** global navigation tab.



Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.



Step 3 At the bottom right of the Payroll Report Detail page, select the **View Records** link to access the View Payroll Records page.



You have completed this scenario.

Scenario 2: Review the View Payroll Records Page

The View Payroll Records Page contains three sections: Report Details, Search and Add New Records to the Report, and Records Present in the Report.

Report Details

| | | |
|---|---|---------------------------------------|
| Report Type: Payroll - Earned Period | Earned Period: 08/03/2024 - 08/16/2024 | Report Status: Pending Release |
| Program: CalPERS | Schedule Name: | Test Report: No |
| Report Name: Test Earned Period Report | | |

Search and Add New Record to the Report

To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

| | |
|---------------------------------------|--|
| SSN: <input type="text"/> | Last Name: <input type="text"/> |
| CalPERS ID: <input type="text"/> | |
| Record Type: <input type="text"/> | Transaction Type: <input type="text"/> |
| Member Category: <input type="text"/> | |
| Division: <input type="text"/> | Rate Plan: <input type="text"/> |
| Record Status: <input type="text"/> | |
| Error Message: <input type="text"/> | |

Search Clear Add New

Records Present in the Report

[Select All](#) | [Delete](#) | [Edit Selected Records](#) | [Save Selection](#)
[Apply Mass Update](#)

| SSN | CalPERS ID | Division | Name | Earned Period | Member Category | Status | Earnings | Special Compensation |
|--------------------------------------|------------|-------------|----------------------|------------------------|-----------------|--------------------|------------|----------------------|
| <input type="checkbox"/> xxx-xx-4095 | 4106079499 | Agency Name | Al Bidany, Elizabeth | 08/03/2024- 08/16/2024 | Miscellaneous | Pending Validation | \$3,327.60 | \$0.00 |
| <input type="checkbox"/> xxx-xx-9157 | 1658871068 | | Al Bidany, Marion | 08/03/2024- 08/16/2024 | Safety - Fire | Pending Validation | \$5,407.04 | \$438.77 |
| <input type="checkbox"/> xxx-xx-5016 | 3394429613 | Agency Name | Alemu, Manuel | 08/03/2024- 08/16/2024 | Miscellaneous | Valid | \$3,484.70 | \$45.00 |
| <input type="checkbox"/> xxx-xx-4918 | 7213906293 | Agency Name | Algaoch, Francis | 08/03/2024- 08/16/2024 | Miscellaneous | Valid | \$4,186.60 | \$0.00 |
| <input type="checkbox"/> xxx-xx-3234 | 3720832865 | Agency Name | Barron, Setsuko | 08/03/2024- 08/16/2024 | Miscellaneous | Error | \$2,333.30 | \$103.34 |
| <input type="checkbox"/> xxx-xx-8898 | 2648464347 | Agency Name | Caprice, Manuel F | 08/03/2024- 08/16/2024 | Miscellaneous | Error | \$0.00 | \$0.00 |
| <input type="checkbox"/> xxx-xx-8898 | 2648464347 | Agency Name | Caprice, Manuel | 08/03/2024- 08/16/2024 | Miscellaneous | Valid But Held | \$2,839.80 | \$211.10 |
| <input type="checkbox"/> xxx-xx-0450 | 1898391026 | Agency Name | Catinojos, Raquel B | 08/03/2024- 08/16/2024 | Miscellaneous | Error | \$0.00 | \$0.00 |
| <input type="checkbox"/> xxx-xx-0450 | 1898391026 | Agency Name | Catinojos, Raquel | 08/03/2024- 08/16/2024 | Miscellaneous | Valid But Held | \$3,668.80 | \$48.00 |

[Select All](#) | [Delete](#) | [Edit Selected Records](#) | [Save Selection](#)
[View Payroll Report Summary](#)

[Process Report](#) | [Generate Report Summary](#)

Report Details

This section displays the payroll report's earned period, status, and name.

Report Details

| | | |
|---|---|---------------------------------------|
| Report Type: Payroll - Earned Period | Earned Period: 08/03/2024 - 08/16/2024 | Report Status: Pending Release |
| Program: CalPERS | Schedule Name: | Test Report: No |
| Report Name: Test Earned Period Report | | |

Search and Add New Record to the Report

Use this section to search for a record, filter records, or add records to the report.

- Search for a record by entering the employee's SSN, last name, or CalPERS ID. You may apply additional filters before selecting the **Search** button.
- Add a record to the report by entering an employee's SSN or CalPERS ID before selecting the **Add New** button.

Search and Add New Record to the Report

To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

| | |
|---------------------------------------|--|
| SSN: <input type="text"/> | Last Name: <input type="text"/> |
| CalPERS ID: <input type="text"/> | |
| Record Type: <input type="text"/> | Transaction Type: <input type="text"/> |
| Member Category: <input type="text"/> | |
| Division: <input type="text"/> | Rate Plan: <input type="text"/> |
| Record Status: <input type="text"/> | |
| Error Message: <input type="text"/> | |

Search Clear Add New

Records Present in the Report

This section lists records in the report. You can select a column heading to sort it in ascending or descending order.

| Records Present in the Report | | | | | | | | | |
|--|------------------------|---------------------------------------|------------------|--------------------------------|-----------------|-----------------------------------|------------|----------------------|--|
| Select All | Delete | Edit Selected Records | | Save Selection | | Apply Mass Update | | | |
| SSN | CalPERS ID | Division | Name | Earned Period | Member Category | Status | Earnings | Special Compensation | |
| <input type="checkbox"/> xxx-xx-2946 | 1090785151 | Agency Name | Acevedo, Abigail | 11/22/2025- 12/05/2025 | Miscellaneous | Valid | \$592.16 | \$13.31 | |
| <input type="checkbox"/> xxx-xx-7448 | 5919418709 | Agency Name | Ambrosio, Maria | 11/22/2025- 12/05/2025 | Miscellaneous | Error | \$3,554.40 | \$0.00 | |
| <input type="checkbox"/> xxx-xx-7521 | 1116362001 | Agency Name | Arvio, Mezbin | 11/22/2025- 12/05/2025 | Miscellaneous | Error | \$200.00 | \$0.00 | |
| <input type="checkbox"/> xxx-xx-7521 | 1116362001 | Agency Name | Arvio, Mezbin | 11/22/2025- 12/05/2025 | Miscellaneous | Valid But Held | \$3,512.00 | \$0.00 | |
| <input type="checkbox"/> xxx-xx-5574 | 7275497835 | Agency Name | Cominos, Ibiza | 11/22/2025- 12/05/2025 | Miscellaneous | Pending Validation | \$2,632.60 | \$0.00 | |
| <input type="checkbox"/> xxx-xx-5658 | 4895257444 | Agency Name | Le duc, Safiya | 11/22/2025- 12/05/2025 | Miscellaneous | Pending Validation | \$3,842.40 | \$106.07 | |
| <input type="checkbox"/> xxx-xx-4264 | 1176717351 | Agency Name | Loloy, Babar A | 11/22/2025- 12/05/2025 | Safety - Fire | Valid With Exceptions | \$0.00 | \$0.00 | |
| <input type="checkbox"/> xxx-xx-4264 | 1176717351 | Agency Name | Loloy, Babar | 11/22/2025- 12/05/2025 | Safety - Fire | Valid With Exceptions | \$8,847.49 | \$1,132.16 | |
| <input type="checkbox"/> xxx-xx-4569 | 2687316116 | Agency Name | Lorenz, Shin | 11/22/2025- 12/05/2025 | Miscellaneous | Pending Validation | \$4,209.56 | \$0.00 | |

[Select All](#) [Delete](#) [Edit Selected Records](#) [Save Selection](#)

[Process Report](#) [Generate Report Summary](#)

[View Payroll Report Summary](#)

- **Select All:** Selects all the records displayed on the current page.
- **Delete:** Deletes any selected records.
- **Edit Selected Records:** Queues the selected records and displays the first record's Maintain Payroll Record page. After saving, the next record in the queue displays.
- **Save Selection:** Saves selected records on the current page to a queue. You can add more records from other pages to the queue by navigating to the page, selecting the record's check box, and selecting the **Save Selection** button again. Select the **Edit Selected Records** button to start reviewing the queued records. Alternately, select the **View Max** link at the bottom of the Records Present in the Report section to display all records on one page.
- **Apply Mass Update:** *Do not use this link.*
- **Process Report:** Processes the payroll report.
- **Generate Report Summary:** Runs the Payroll Report Summary report.
- **View Payroll Report Summary:** Returns you to the Payroll Report Detail page.

Status Column

The Status column in the Records Present in the Report section will display one of the following:

- **Error** – Record needs to be corrected.
- **Pending Validation** – Record has not been validated.
- **Posted** – Record is error free, and it has posted to the member's account.
- **Valid** – Record has passed the first level of validation and is most likely error free.
- **Valid But Held** – There are two records for one employee for the same earned period, and the other record has an error.
- **Valid With Exceptions** – Does not indicate the record has an error, but it could be an issue. Review the exception and verify that the record details are accurate.

Unit 4: Maintain Records Within an Earned Period Payroll Report

It is your agency's responsibility to ensure your employees' payroll is reported accurately and timely, as earned not paid, to ensure correct payment of benefits.

System Logic

- CalPERS defines the first earned period of a new fiscal year as having an end date of July 1 or later.
- When data is not reportable for a field, that field must be left at its default (blank or 0.0).
- Do not use the **Apply Mass Update** link on the View Payroll Records page.

Reporting Member and Employer Paid Arrears

- Report payroll records associated to a *member* paid arrears determination through the employment certification process—not through earned period or adjustment reports. Refer to the [myCalPERS Employment Certification Functionality \(PDF\)](#) student guide for more information.
- We recommend reporting payroll records associated to an *employer* paid arrears determination in an adjustment report. If they are reported in an earned period report, the records will not post until the 30-day appeal period expires, causing the earned period report to remain in suspended status past its due date, and resulting in a \$200 late reporting fee. To waive your appeal rights so the records will post, refer to the [myCalPERS Employment Certification Functionality \(PDF\)](#) student guide.
- Arrears Apply – Employer Paid records will post the day after they are processed.

Contents

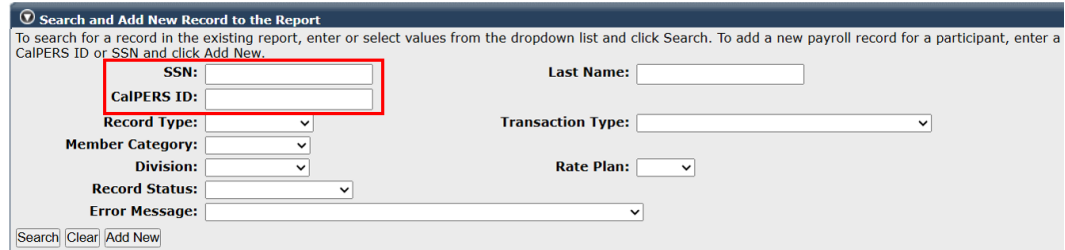
| | |
|--|----|
| Scenario 1: Delete an Employee's Payroll Record | 17 |
| Scenario 2: Add a Payroll Record for a New Active Employee | 18 |
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Scenario 1: Delete an Employee's Payroll Record

Your employee permanently separated. You will delete their payroll record because they didn't work during the current earned period.

Step Actions (5 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.



Search and Add New Record to the Report
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:
CalPERS ID:

Record Type:
Member Category:
Division:
Record Status:
Error Message:

Last Name:
Transaction Type:
Rate Plan:

Step 2 Select the **Search** button.

Step 3 Within the Records Present in the Report section, select the check box next to the **SSN** link of the employee's record you need to delete.

Step 4 Select a **Delete** button.

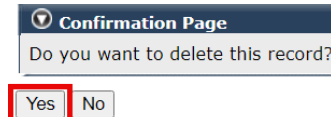


Records Present in the Report

[Apply Mass Update](#)

| SSN | CalPERS ID | Division | Name | Earned Period | Member Category | Status | Earnings | Special Compensation |
|---|------------|-------------|------------------|------------------------|-----------------|--------|----------|----------------------|
| <input checked="" type="checkbox"/> xxx-xx-2946 | 1090785151 | Agency Name | Acevedo, Abigail | 11/22/2025- 12/05/2025 | Miscellaneous | Valid | \$592.16 | \$13.31 |

Step 5 Confirm the deletion by selecting the **Yes** button.



Confirmation Page
Do you want to delete this record?

You have completed this scenario.

Scenario 2: Add a Payroll Record for a New Active Employee

Your new employee's PERS appointment is in myCalPERS, so you will enter their payroll details in your payroll report.

Step Actions (13 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.

Step 2 Select the **Add New** button.

Search and Add New Record to the Report
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:
CalPERS ID:
Record Type:
Member Category:
Division:
Record Status:
Error Message:
Last Name:
Transaction Type:
Rate Plan:
Search Clear **Add New**

Step 3 If needed, within the Maintain Record Details section, modify the Begin Date and End Date fields.

Maintain Record Details
To add details to the record select Display after entering dates.

Begin Date:
End Date:
Payroll Record Memo:
[View Employee Rate Summary](#)

Step 4 Select the **Display** button.

Step 5 Complete the Earnings subsection.

Earnings
Appointment: * Agency Name : Appt Id - 9991754018 : 2024-07-15 : Miscellaneous : Regular

Transaction Type: *
Pay Rate Type:
Pay Rate:
Reportable Earnings:
Scheduled Full Time Hours Per Week:
Scheduled Full Time Days Per Week:
Total Hours Worked:
Special Compensation:
[View Special Compensation](#)

- **Appointment:** Select the appropriate Appointment radio button.
- **Transaction Type:** If the correct transaction type is not in the drop-down list, correct the begin or end dates, then select the **Display** button.
- **Scheduled Full Time Hours Per Week:** This is required for all pay rate types. Enter the number of hours your agency considers full time for this position.
- **Scheduled Full Time Days Per Week:** If pay rate type is daily, complete in addition to Scheduled Full Time Hours Per Week. Enter the number of days your agency considers full time for this position.
- **Total Hours Worked:** Report hours if employee is a retired annuitant.
- **Note:** Employees who start in the middle of the earned period may need their earnings and contributions adjusted for the next earned period.

Step 6 Do you need to report special compensation?

Yes: Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 7.

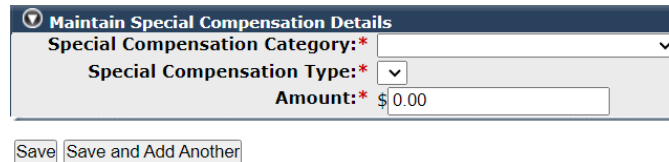
No: Skip to step 11.

Step 7 Within the View Special Compensation section, select the **Add New** button.



The screenshot shows the 'View Special Compensation' section. At the top, there are buttons for 'Select All', 'Delete', and 'Add New'. Below this is a table with columns for 'Category', 'Type', and 'Amount'. The table is empty, with the text 'No results found.' displayed. At the bottom left of the table area, there are buttons for 'Select All', 'Delete', and 'Add New'. The 'Add New' button is highlighted with a red box.

Step 8 Complete the Maintain Special Compensation Details section.



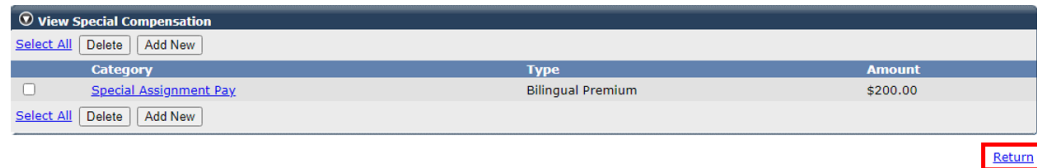
The screenshot shows the 'Maintain Special Compensation Details' section. It contains three input fields: 'Special Compensation Category:*' (a dropdown menu), 'Special Compensation Type:*' (a dropdown menu), and 'Amount:*' (a text box with '\$0.00' entered). Below these fields are two buttons: 'Save' and 'Save and Add Another'.

Step 9 Do you need to report additional special compensation?

Yes: Select the **Save and Add Another** button, then return to step 8.

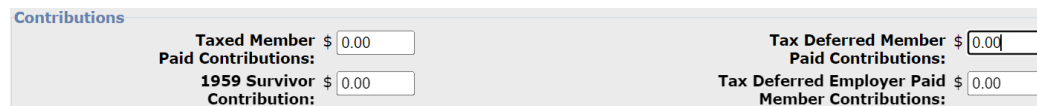
No: Select the **Save** button, then continue to step 10.

Step 10 Select the **Return** link at the bottom right under the View Special Compensation section.



The screenshot shows the 'View Special Compensation' section. At the top, there are buttons for 'Select All', 'Delete', and 'Add New'. Below this is a table with columns for 'Category', 'Type', and 'Amount'. The table contains one entry: 'Special Assignment Pay' under the 'Category' column, 'Bilingual Premium' under the 'Type' column, and '\$200.00' under the 'Amount' column. At the bottom left of the table area, there are buttons for 'Select All', 'Delete', and 'Add New'. At the bottom right of the page, there is a 'Return' button highlighted with a red box.

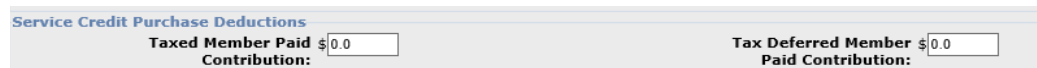
Step 11 Within the Contributions subsection, enter contribution amounts into the appropriate fields.



The screenshot shows the 'Contributions' subsection. It contains three input fields: 'Taxed Member Paid Contributions:' (a text box with '\$0.00' entered), '1959 Survivor Contribution:' (a text box with '\$0.00' entered), and 'Tax Deferred Member Paid Contributions:' (a text box with '\$0.00' entered).

Step 12 Do you need to report a service credit purchase deduction?

Yes: Within the Service Credit Purchase Deductions subsection, enter contribution amounts into the appropriate fields, then continue to step 13.



The screenshot shows the 'Service Credit Purchase Deductions' subsection. It contains two input fields: 'Taxed Member Paid Contribution:' (a text box with '\$0.00' entered) and 'Tax Deferred Member Paid Contribution:' (a text box with '\$0.00' entered).

No: Continue to step 13.

Step 13 Select the **Save & Exit** button.

You have completed this scenario.

Scenario 3: Add a Payroll Record for a Non-Contributory Employee

Your new retired annuitant (RA) has an active appointment in myCalPERS, so you will enter their payroll details in your payroll report.

Report non-contributory records as an *Earned Period No Contribution and No Service* transaction type. Use this transaction type to report payroll for an employee who is:

- A retired annuitant (RA)
- A local alternate retirement plan (Gov. Code 20306) member
- Working in an overtime position. If the *Earned Period No Contribution and No Service* transaction type does not display in the drop-down list, contact CalPERS.

System Logic

- For a copy-forwarded RA record, the Total Hours Worked field will reset to zero. You must update their Total Hours Worked each time you report their payroll.
- If an RA's hours cross fiscal years, report their payroll in two records (one per fiscal year).

Step Actions (11 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.

Step 2 Select the **Add New** button.

Search and Add New Record to the Report
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:
CalPERS ID:
Record Type:
Member Category:
Division:
Record Status:
Error Message:
Last Name:
Transaction Type:
Rate Plan:

Step 3 If needed, within the Maintain Record Details section, modify the Begin Date and End Date fields.

Maintain Record Details
To add details to the record select Display after entering dates.

Begin Date:
End Date:
Payroll Record Memo:

[View Employee Rate Summary](#)

Step 4 Select the **Display** button.

Step 5 Complete the Earnings subsection.

- **Scheduled Full Time Hours Per Week:** This is required for all pay rate types. Enter the number of hours your agency considers full time for this position.
- **Scheduled Full Time Days Per Week:** If pay rate type is daily, complete in addition to Scheduled Full Time Hours Per Week. Enter the number of days your agency considers full time for this position.
- **Total Hours Worked:** Report hours only if employee is a retired annuitant.

Step 6 Do you need to report special compensation?

Yes: Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 7.

No: Skip to step 9.

Step 7 Within the View Special Compensation section, select the **Add New** button.

Step 8 Complete the Maintain Special Compensation Details section.

Step 9 Do you need to report additional special compensation?

Yes: Select the **Save and Add Another** button, then return to step 8.

No: Select the **Save** button, then continue to step 10.

Step 10 Select the **Return** link at the bottom right under the View Special Compensation section.

Step 11 Select the **Save & Exit** button.

You have completed this scenario.

Scenario 4: Modify a Payroll Record Due to Zero-Payroll

Your employee didn't work during the earned period, so you will report zero-payroll for them.

You may report a zero-payroll record for both contributory and non-contributory employees who do not work the earned period. Reporting a zero-payroll record will prevent the employee from being listed during the payroll reconciliation process (refer to Unit 6: Reconcile Unposted Payroll Records), and you will not need to confirm unposted payroll for them at that time.

System Logic

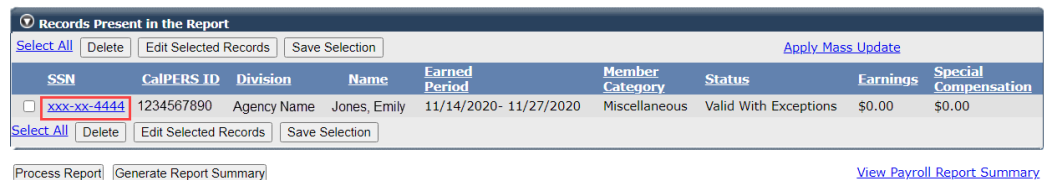
- Zero-payroll records will have a Valid With Exceptions record status.
- When initiating payroll reporting by the copy-forward method, zero-payroll records will copy forward. If the employee works the new earned period, modify the copied record by updating reportable earnings and all other applicable fields.
- myCalPERS permanently separates active employees with six consecutive months of unreported payroll. Entering a zero-payroll record or confirming unposted payroll will prevent automatic permanent separation due to unreported payroll; however, myCalPERS will permanently separate an employee with 12 consecutive months of zero-payroll records reported.

Step Actions (12 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you need to modify.



The screenshot shows a table titled "Records Present in the Report". The table has columns for SSN, CalPERS ID, Division, Name, Earned Period, Member Category, Status, Earnings, and Special Compensation. A single record is displayed for Emily Jones, with SSN xxx-xx-4444, CalPERS ID 1234567890, and Status Valid With Exceptions. The Earnings and Special Compensation columns both show \$0.00. Below the table are buttons for "Process Report" and "Generate Report Summary", and a link for "View Payroll Report Summary".

| SSN | CalPERS ID | Division | Name | Earned Period | Member Category | Status | Earnings | Special Compensation |
|-----------------------------|------------|-------------|--------------|------------------------|-----------------|-----------------------|----------|----------------------|
| xxx-xx-4444 | 1234567890 | Agency Name | Jones, Emily | 11/14/2020- 11/27/2020 | Miscellaneous | Valid With Exceptions | \$0.00 | \$0.00 |

Step 4 Within the Earnings subsection, change Pay Rate Type to blank.



The screenshot shows the "Earnings" subsection. It includes an "Appointment" section with a radio button selected for "Agency Name : Appt Id - 24655630 : 2001-04-06 : Miscellaneous : Regular". Below this, there is a "Transaction Type" dropdown menu set to "Earned Period Reporting". The "Pay Rate Type" dropdown menu is highlighted with a red box, and the "Pay Rate" field shows \$0.00.

Step 5 Report zero (0) for the following fields: Pay Rate, Reportable Earnings, Scheduled Full Time Hours Per Week, Scheduled Full Time Days Per Week, Total Hours Worked.

Earnings

Appointment:* Agency Name : Appt Id - 24655630 : 2001-04-06 : Miscellaneous : Regular

Transaction Type:* Earned Period Reporting

Pay Rate Type: [dropdown]

Pay Rate: \$ 0.00

Reportable Earnings: \$ 0.00

Scheduled Full Time Hours Per Week: 0.0

Scheduled Full Time Days Per Week: 0.0

Total Hours Worked: 0.0

Special Compensation: \$0.00

[View Special Compensation](#)

Step 6 Is there special compensation in the record?

Yes: Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 7.

No: Skip to step 10.

Step 7 Select the **Select All** link.

View Special Compensation

Select All Delete Add New

| Category | Type | Amount |
|--|-------------------|----------|
| <input type="checkbox"/> Statutory Items | Uniform Allowance | \$30.19 |
| <input type="checkbox"/> Educational Pay | Paramedic Pay | \$303.84 |

Select All Delete Add New

Note: Special compensation should be deleted and not reported as zero (0).

Step 8 Select the **Delete** button.

Step 9 Select the **Return** link at the bottom right under the View Special Compensation section.

View Special Compensation

Select All Delete

| Category | Type | Amount |
|-------------------|------|--------|
| No results found. | | |

Select All Delete Add New

[Return](#)

Step 10 Within the Contributions subsection, report zero (0) contribution amounts.

Contributions

Taxed Member \$ 0.00

Paid Contributions:

1959 Survivor Contribution: \$ 0.00

Tax Deferred Member \$ 0.00

Paid Contributions:

Tax Deferred Employer Paid Member Contributions: \$ 0.00

Step 11 Within the Service Credit Purchase Deductions subsection, report zero (0) contribution amounts.

Service Credit Purchase Deductions

Taxed Member Paid Contribution: \$ 0.0

Tax Deferred Member Paid Contribution: \$ 0.0

Step 12 Select the **Save & Exit** button.

You have completed this scenario.

Scenario 5: Modify Payroll Record Due to Permanent Separation

Your employee permanently separated in the middle of the earned period, so you will modify their earned period record (*end date, reportable earnings, and contributions*).

Use the same steps to modify a record for an employee on an unpaid leave of absence.

Step Actions (14 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you need to modify.

| SSN | CalPERS ID | Division | Name | Earned Period | Member Category | Status | Earnings | Special Compensation |
|-----------------------------|------------|-------------|--------------|------------------------|-----------------|-----------------------|----------|----------------------|
| xxx-xx-4444 | 1234567890 | Agency Name | Jones, Emily | 11/14/2020- 11/27/2020 | Miscellaneous | Valid With Exceptions | \$0.00 | \$0.00 |

Step 4 Within the Maintain Record Details section, modify the End Date field.

Begin Date: 11/23/2020

End Date: 11/27/2020

Step 5 Select the **Display** button.

Step 6 Within the Earnings subsection, modify the Reportable Earnings field.

Appointment: Agency Name : Appt Id - 28513570 : 2004-01-20 : Miscellaneous : Regular

Transaction Type: Earned Period Reporting

Pay Rate Type: Hourly Pay Rate: \$ 54.86

Reportable Earnings: \$ 4114.60

Scheduled Full Time Hours Per Week: 37.5 Scheduled Full Time Days Per Week: 0.0

Total Hours Worked: 0.0

Special Compensation: \$57.65

Step 7 Do you need to modify special compensation?

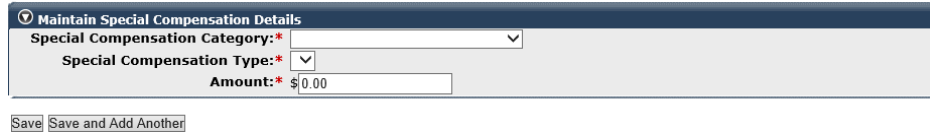
Yes: Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 8.

No: Skip to step 12.

Step 8 Within the View Special Compensation section, select the special compensation item's **Category** link.

| Category | Type | Amount |
|--|--------------------|---------|
| Special Assignment Pay | Shift Differential | \$57.65 |

Step 9 Update the Maintain Special Compensation Details section.



Step 10 Select the **Save** button.

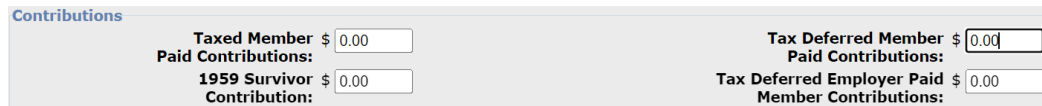
Step 11 Do you need to modify additional special compensation items?

Yes: Return to step 8.

No: Select the **Return** link at the bottom right under the View Special Compensation section, then continue to step 12.

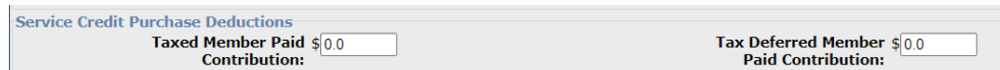


Step 12 Within the Contributions subsection, update contribution amounts in the appropriate fields.



Step 13 Do you need to modify a service credit purchase deduction?

Yes: Within the Service Credit Purchase Deductions subsection, update contribution amounts in the appropriate fields, then continue to step 14.



No: Continue to step 14.

Step 14 Select the **Save & Exit** button.

You have completed this scenario.

Scenario 6: Modify a Payroll Record with a Pay Rate Increase

Your employee received a pay raise effective the beginning of the earned period. You will modify the employee's earned period payroll record to reflect the:

- New pay rate
- Increased reportable earnings
- Increased contributions for contributory employees

Why is Pay Rate Important?

When an employee retires, we calculate their retirement benefit by using a formula that includes years of service credit, age at retirement, and final compensation. Pay rate impacts final compensation; it must be reported accurately to ensure the employee retires without delay and receives the correct retirement allowance.

Step Actions (12 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link next to the employee's record you need to modify.

Search and Add New Record to the Report
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN: Last Name:
CalPERS ID: 1234567890
Record Type: Transaction Type:
Member Category: Rate Plan:
Division:
Record Status:
Error Message:

Records Present in the Report

[Apply Mass Update](#)

| SSN | CalPERS ID | Division | Name | Earned Period | Member Category | Status | Earnings | Special Compensation |
|--|------------|-------------|--------------|-------------------------|-----------------|-----------------------|----------|----------------------|
| <input type="checkbox"/> xxx-xx-4444 | 1234567890 | Agency Name | Jones, Emily | 11/14/2020 - 11/27/2020 | Miscellaneous | Valid With Exceptions | \$0.00 | \$0.00 |

[View Payroll Report Summary](#)

Step 4 Within the Maintain Record Details section, Earnings subsection, modify the Pay Rate and Reportable Earnings fields.

Earnings

Appointment: * Agency Name : Appt Id - 24655780 : 2001-04-14 : Miscellaneous : Regular

Transaction Type: *

Pay Rate Type:

Reportable Earnings: \$

Scheduled Full Time Hours Per Week:

Total Hours Worked:

Special Compensation: \$0.00

Scheduled Full Time Days Per Week:

Pay Rate: \$

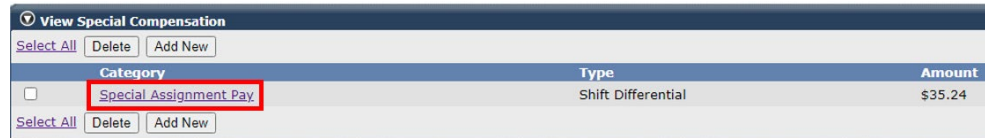
[View Special Compensation](#)

Step 5 Do you need to modify special compensation?
Yes: Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 6.
No: Skip to step 10.

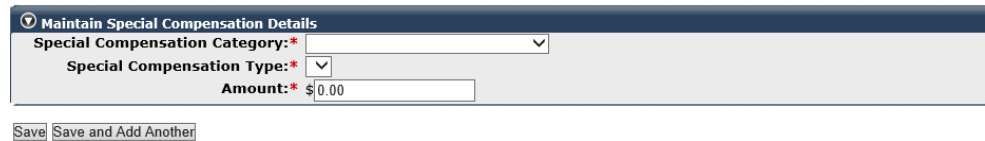
Step 6 Do you need to add new special compensation or modify an existing special compensation?
Add new special compensation: Within the View Special Compensation section, select the **Add New** button, then continue to step 7.



Modify existing special compensation: Within the View Special Compensation section, select the special compensation item's **Category** link, then continue to step 7.



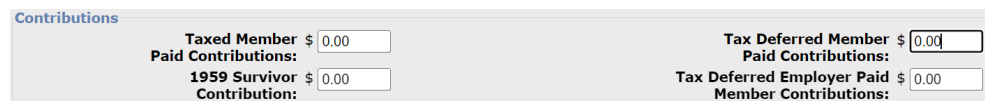
Step 7 Complete the Maintain Special Compensation Details section.



Step 8 Do you need to report additional special compensation?
Yes: Select the **Save and Add Another** button, then return to step 7.
No: Select the **Save** button, then continue to step 9.

Step 9 Select the **Return** link at the bottom right under the View Special Compensation section.

Step 10 Within the Contributions subsection, update contribution amounts in the appropriate fields.



Step 11 Do you need to modify a service credit purchase deduction?
Yes: Within the Service Credit Purchase Deductions section, update contribution amounts in the appropriate fields, then continue to step 12.
No: Continue to step 12.

Step 12 Select the **Save & Exit** button.
You have completed this scenario.

Scenario 7: Modify and Add a Payroll Record with a Mid-Earned Period Pay Rate Increase

Your employee received a raise in the middle of the earned period, so you will submit two payroll records due to reflect the mid-earned period pay rate increase.

- First, modify the existing earned period record by changing the end date to the day before the pay rate increase, and then update the earnings and contributions that were earned within these dates.
- Next, add a second payroll record with a begin date as the first day of the pay rate increase and an end date as the last day of the earned period. The new pay rate, earnings, and contributions must reflect what was earned within these dates.

System Logic

When initiating payroll reporting by the copy-forward method, both records will copy forward. Delete the record with the old pay rate and modify the earnings and any other applicable fields for the record with the newer pay rate.

Step Actions (26 steps)

Part I: Modify Existing Record

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you wish to modify.

Search and Add New Record to the Report
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN: Last Name:
CalPERS ID: 1234567890
Record Type: Transaction Type:
Member Category: Division: Rate Plan:
Record Status: Error Message:

Records Present in the Report
 [Apply Mass Update](#)

| SSN | CalPERS ID | Division | Name | Earned Period | Member Category | Status | Earnings | Special Compensation |
|--|------------|-------------|--------------|------------------------|-----------------|-----------------------|----------|----------------------|
| <input type="checkbox"/> xxx-xx-4444 | 1234567890 | Agency Name | Jones, Emily | 11/14/2020- 11/27/2020 | Miscellaneous | Valid With Exceptions | \$0.00 | \$0.00 |

[View Payroll Report Summary](#)

Step 4 Within the Maintain Record Details section, modify the End Date field to the day before the pay rate increase.

Maintain Record Details
To add details to the record select Display after entering dates.

Begin Date: * 11/23/2020
End Date: * 11/27/2020
Payroll Record Memo:

Step 5 Select the **Display** button.

Step 6 Within the Earnings subsection, modify the Reportable Earnings field.

Earnings
Appointment:* Agency Name : Appt Id - 24655780 : 2001-04-14 : Miscellaneous : Regular

Transaction Type:* Earned Period Reporting
Pay Rate Type: Hourly Pay Rate: \$ 38.55
Reportable Earnings: \$ 693.90
Scheduled Full Time: 40.0 Scheduled Full Time: 0.0
Hours Per Week: Total Hours Worked: 0.0 Days Per Week:
Special Compensation: \$0.00 [View Special Compensation](#)

Step 7 Do you need to modify special compensation?

Yes: Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 8.

No: Skip to step 12.

Step 8 Within the View Special Compensation section, select the special compensation item's **Category** link.

View Special Compensation
[Select All](#) [Delete](#) [Add New](#)

| <input type="checkbox"/> | Category | Type | Amount |
|--------------------------|--|--------------------|---------|
| <input type="checkbox"/> | Special Assignment Pay | Shift Differential | \$57.65 |

[Select All](#) [Delete](#) [Add New](#)

Step 9 Update the Maintain Special Compensation Details section.

Maintain Special Compensation Details
Special Compensation Category:*
Special Compensation Type:*
Amount:* \$ 0.00
[Save](#) [Save and Add Another](#)

Step 10 Select the **Save** button.

Step 11 Do you need to modify additional special compensation items?

Yes: Return to step 8.

No: Select the **Return** link at the bottom right under the View Special Compensation section, then continue to step 12.

View Special Compensation
[Select All](#) [Delete](#) [Add New](#)

| <input type="checkbox"/> | Category | Type | Amount |
|--------------------------|--|--------------------|---------|
| <input type="checkbox"/> | Special Assignment Pay | Shift Differential | \$35.24 |

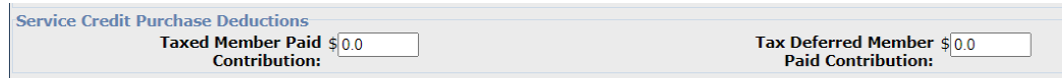
[Select All](#) [Delete](#) [Add New](#) [Return](#)

Step 12 Within the Contributions subsection, update contribution amounts in the appropriate fields.

Contributions
Taxed Member \$ 0.00
Paid Contributions:
1959 Survivor Contribution: \$ 0.00
Tax Deferred Member \$ 0.00
Paid Contributions:
Tax Deferred Employer Paid Member Contributions: \$ 0.00

Step 13 Do you need to modify a service credit purchase deduction?

Yes: Within the Service Credit Purchase Deductions subsection, update contribution amounts in the appropriate fields, then continue to step 14.



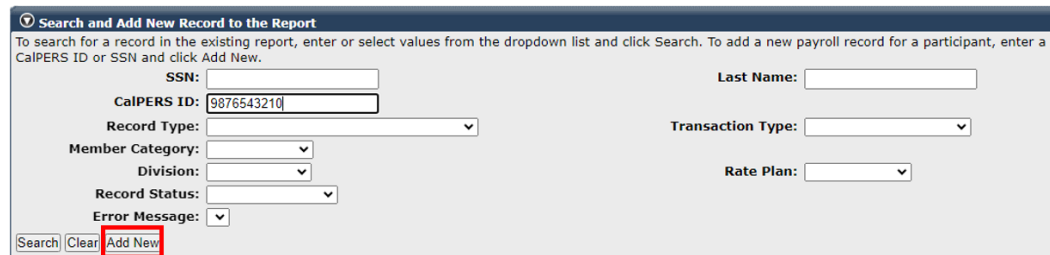
The screenshot shows the 'Service Credit Purchase Deductions' section. It contains two input fields: 'Taxed Member Paid Contribution' with a value of \$0.00 and 'Tax Deferred Member Paid Contribution' with a value of \$0.00.

No: Continue to step 14.

Step 14 Select the **Save & Continue** button.

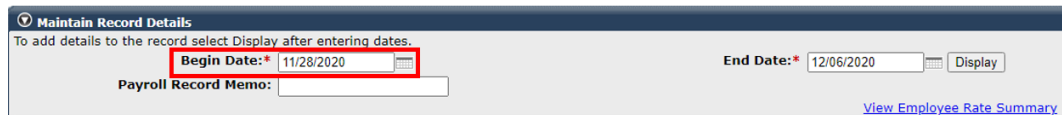
Part II: Add Second Record Reflecting New Pay Rate

Step 15 Within the Search and Add New Record to the Report section, select the **Add New** button.



The screenshot shows the 'Search and Add New Record to the Report' form. It includes fields for SSN, CalPERS ID (9876543210), Last Name, Record Type, Member Category, Division, Record Status, Error Message, Transaction Type, and Rate Plan. There are 'Search', 'Clear', and 'Add New' buttons at the bottom. The 'Add New' button is highlighted with a red box.


Step 16 Within the Maintain Record Details section, modify the Begin Date field to the first day of the pay increase.



The screenshot shows the 'Maintain Record Details' form. It includes fields for 'Begin Date' (11/28/2020) and 'End Date' (12/06/2020). There is a 'Display' button and a 'Payroll Record Memo' field. A red box highlights the 'Begin Date' field.

Step 17 Select the **Display** button.

Step 18 Complete the Earnings subsection.



The screenshot shows the 'Earnings' subsection. It includes fields for 'Appointment' (Agency Name : Appt Id - 92442505 : 2017-02-11 : Miscellaneous : Regular), 'Transaction Type' (Earned Period Reporting), 'Pay Rate Type', 'Pay Rate' (\$0.00), 'Reportable Earnings' (\$0.00), 'Scheduled Full Time Hours Per Week' (0.0), 'Scheduled Full Time Days Per Week' (0.0), 'Total Hours Worked' (0.0), and 'Special Compensation' (0.00). There is a 'View Special Compensation' link at the bottom right.

- **Scheduled Full Time Hours Per Week:** This is required for all pay rate types. Enter the number of hours your agency considers full time for this position.
- **Scheduled Full Time Days Per Week:** If pay rate type is daily, complete in addition to Scheduled Full Time Hours Per Week. Enter the number of days your agency considers full time for this position.
- **Total Hours Worked:** Enter only if employee is a retired annuitant.

Step 19 Do you need to report special compensation?

Yes: Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 20.

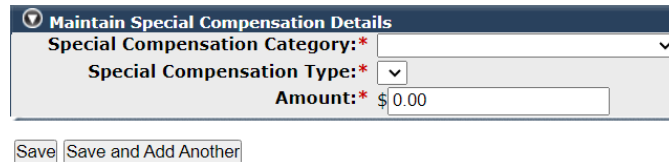
No: Skip to step 24.

Step 20 Within the View Special Compensation section, select the **Add New** button.



The screenshot shows the 'View Special Compensation' section. At the top, there are buttons for 'Select All' and 'Delete'. Below is a table with columns for 'Category', 'Type', and 'Amount'. The table is empty, with the text 'No results found.' displayed. At the bottom of the table, there are buttons for 'Select All', 'Delete', and 'Add New'. The 'Add New' button is highlighted with a red box.

Step 21 Complete the Maintain Special Compensation Details section.



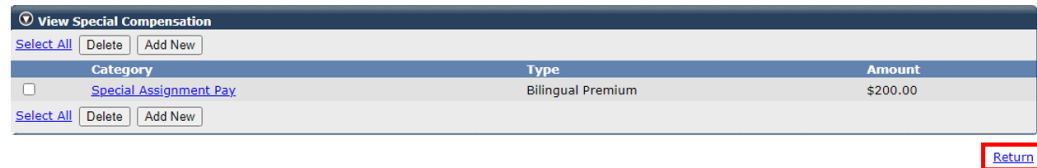
The screenshot shows the 'Maintain Special Compensation Details' section. It contains three input fields: 'Special Compensation Category:*' (a dropdown menu), 'Special Compensation Type:*' (a dropdown menu), and 'Amount:*' (a text box with '\$0.00' entered). Below the input fields are two buttons: 'Save' and 'Save and Add Another'.

Step 22 Do you need to report additional special compensation?

Yes: Select the **Save and Add Another** button, then return to step 21.

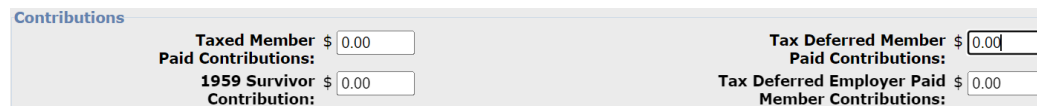
No: Select the **Save** button, then continue to step 23.

Step 23 Select the **Return** link at the bottom right under the View Special Compensation section.



The screenshot shows the 'View Special Compensation' section. At the top, there are buttons for 'Select All', 'Delete', and 'Add New'. Below is a table with columns for 'Category', 'Type', and 'Amount'. The table contains one entry: 'Special Assignment Pay' under the 'Category' column, 'Bilingual Premium' under the 'Type' column, and '\$200.00' under the 'Amount' column. At the bottom of the table, there are buttons for 'Select All', 'Delete', and 'Add New'. A 'Return' button is located at the bottom right of the screenshot, highlighted with a red box.

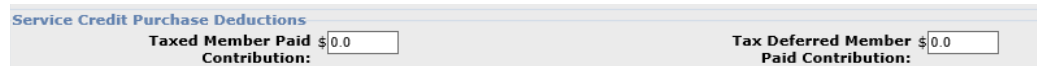
Step 24 Within the Contributions subsection, enter contribution amounts into the appropriate fields.



The screenshot shows the 'Contributions' subsection. It contains three input fields: 'Taxed Member Paid Contributions:' (with '\$0.00' entered), '1959 Survivor Contribution:' (with '\$0.00' entered), and 'Tax Deferred Member Paid Contributions:' (with '\$0.00' entered).

Step 25 Do you need to report a service credit purchase deduction?

Yes: Within the Service Credit Purchase Deductions subsection, enter contribution amounts into the appropriate fields, then continue to step 26.



The screenshot shows the 'Service Credit Purchase Deductions' subsection. It contains two input fields: 'Taxed Member Paid Contribution:' (with '\$0.00' entered) and 'Tax Deferred Member Paid Contribution:' (with '\$0.00' entered).

No: Continue to step 26.

Step 26 Select the **Save & Exit** button.

You have completed this scenario.

Scenario 8: Modify a Payroll Record to Add Special Compensation

You will add special compensation to an employee's payroll record.

Refer to the [Special Compensation Reportability Table](#) on the CalPERS website for information on special compensation types.

System Logic

When reporting special compensation, your agency must:

- Verify the special compensation is reportable.
- Identify the amount, type, and category of special compensation.
- Report for the pay period the special compensation was earned, not when it was paid.

Step Actions (11 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you wish to modify.

The screenshot displays two sections of the CalPERS system interface. The top section, titled "Search and Add New Record to the Report", contains a form with fields for SSN, CalPERS ID, Last Name, Record Type, Member Category, Division, Transaction Type, Record Status, and Rate Plan. Below the form are buttons for "Search", "Clear", and "Add New". The bottom section, titled "Records Present in the Report", features a table with columns for SSN, CalPERS ID, Division, Name, Earned Period, Member Category, Status, Earnings, and Special Compensation. A single record is shown with the SSN "xxx-xx-4444" highlighted in red. Below the table are buttons for "Select All", "Delete", "Edit Selected Records", and "Save Selection", along with a link for "Apply Mass Update". At the bottom of the interface are buttons for "Process Report" and "Generate Report Summary", and a link for "View Payroll Report Summary".

Step 4 If needed, within the Maintain Record Details section, modify the Begin Date and End Date fields.

The screenshot displays the "Maintain Record Details" section of the CalPERS system interface. It includes a form with fields for "Begin Date" and "End Date", both of which are highlighted in red. There is a "Display" button next to the "End Date" field. Below the date fields is a "Payroll Record Memo" field. At the bottom right of the section is a link for "View Employee Rate Summary".

Step 5 Within the Earnings subsection, select the **View Special Compensation** link at the right side.

Earnings
 Appointment:* Agency Name : Appt Id - 91745494 : 2013-01-07 : Miscellaneous : Regular
 Transaction Type:* Earned Period Reporting
 Pay Rate Type: Hourly Pay Rate: \$ 44.93
 Reportable Earnings: \$ 3594.70
 Scheduled Full Time Hours Per Week: 40.0 Scheduled Full Time Days Per Week: 0.0
 Total Hours Worked: 0.0
 Special Compensation: \$0.00 [View Special Compensation](#)

Step 6 Within the View Special Compensation section, select the **Add New** button.

View Special Compensation
[Select All](#) [Delete](#)

| Category | Type | Amount |
|-------------------|------|--------|
| No results found. | | |

[Select All](#) [Delete](#) [Add New](#)

Step 7 Complete the Maintain Special Compensation Details section.

Maintain Special Compensation Details
 Special Compensation Category:*
 Special Compensation Type:*
 Amount:* \$ 0.00
[Save](#) [Save and Add Another](#)

Step 8 Do you need to report additional special compensation?

Yes: Select the **Save and Add Another** button, then return to step 7.

No: Select the **Save** button, then continue to step 9.

Step 9 Select the **Return** link at the bottom right under the View Special Compensation section.

View Special Compensation
[Select All](#) [Delete](#) [Add New](#)

| Category | Type | Amount |
|---|-------------------|----------|
| <input type="checkbox"/> Special Assignment Pay | Bilingual Premium | \$200.00 |

[Select All](#) [Delete](#) [Add New](#) [Return](#)

Step 10 Within the Contributions subsection, update contribution amounts in the appropriate fields.

Contributions
 Taxed Member Paid Contributions: \$ 0.00
 1959 Survivor Contribution: \$ 0.00
 Tax Deferred Member Paid Contributions: \$ 0.00
 Tax Deferred Employer Paid Member Contributions: \$ 0.00

Step 11 Select the **Save & Exit** button.

You have completed this scenario.

Scenario 9: Report Payroll When an Employee Has Reached the Compensation Limit

CalPERS notifies employers of the new annual compensation limits each year in a [Circular Letter](#).

The annual compensation limit does not limit the salary an employer can pay an employee, but it impacts how your agency reports this information to CalPERS. Once the compensation limit is reached, report compensation over the limit without member contributions.

You can track your employees' compensation by running the Reported Compensation by Calendar Year Summary Report throughout the year.

To submit payroll for an employee who reaches the compensation limit:

- First, modify the earned period record to reflect the compensation up to the limit and its contributions.
- Second, add another record in the same payroll report with the remaining reportable earnings that are over the limit without contributions.

System Logic

- When initiating payroll reporting by the copy-forward method, both records will copy forward. In the copy-forwarded report, delete the record with contributions and modify the earnings and any other applicable fields for the record without contributions.
- myCalPERS tracks the reportable compensation and displays an exception message as an employee approaches the limit as well as an error message once the employee reaches the annual compensation limit for the calendar year.

Step Actions (11 steps)

Part I: Modify Existing Record

Step 1 Within the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you wish to modify.

| Records Present in the Report | | | | | | | | | |
|--------------------------------------|------------|-------------------------|-----------------------|-----------------------------|-----------------|-----------------------|-------------------|----------------------|--|
| Select All | | Delete | Edit Selected Records | | Save Selection | | Apply Mass Update | | |
| SSN | CalPERS ID | Division | Name | Earned Period | Member Category | Status | Earnings | Special Compensation | |
| <input type="checkbox"/> xxx-xx-4444 | 1234567890 | Agency Name | Jones, Emily | 11/14/2020- 11/27/2020 | Miscellaneous | Valid With Exceptions | \$0.00 | \$0.00 | |
| Select All | | Delete | Edit Selected Records | | Save Selection | | | | |
| Process Report | | Generate Report Summary | | View Payroll Report Summary | | | | | |

Step 4 Within the Record Details section, Earnings subsection, adjust the reportable earnings (and special compensation, if applicable) to the compensation limit.

Earnings

Appointment: * Agency Name : Appt Id - 24655780 : 2001-04-14 : Miscellaneous : Regular

Transaction Type: * Earned Period Reporting

Pay Rate Type: Hourly Pay Rate: \$ 38.55

Reportable Earnings: \$ 693.90

Scheduled Full Time 40.0 Scheduled Full Time 0.0

Hours Per Week: Total Hours Worked: 0.0 Days Per Week:

Special Compensation: \$0.00 [View Special Compensation](#)

Note: An error will occur if an earned period record includes compensation with contributions over the Internal Revenue Code limit.

Step 5 Within the Contributions subsection, report contribution amounts in the appropriate fields for this record's compensation.

Contributions

Taxed Member Paid Contributions: \$ 0.00

1959 Survivor Contribution: \$ 0.00

Tax Deferred Member Paid Contributions: \$ 0.00

Tax Deferred Employer Paid Member Contributions: \$ 0.00

Step 6 Select the **Save & Continue** button.

Part II: Add Second Record

Step 7 Within the same earned period report, in the Search and Add New Record to the Report section, enter the employee's SSN or CalPERS ID.

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

Search and Add New Record to the Report

To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN: CalPERS ID: 1234567890 Last Name:

Record Type: Transaction Type:

Member Category: Division: Rate Plan:

Record Status: Error Message:

Search Clear **Add New**

Step 9 Within the Maintain Record Details section, the Begin Date and End Date fields should default to those of the earned period report. Ensure both dates match those of the first record, then select the **Display** button.

Maintain Record Details

To add details to the record select Display after entering dates.

Begin Date: * 11/14/2020 End Date: * 11/27/2020 **Display**

Payroll Record Memo:

[View Employee Rate Summary](#)

Step 10

Within the Earnings subsection, complete the payroll information.

- Enter the reportable earnings (and special compensation, if applicable) that is over the compensation limit.
- Contributions remain at their default (\$0.00).

Earnings

Appointment:* Agency Name : Appt Id - 93657214 : 2022-02-19 : Miscellaneous : Regular

Transaction Type:*

Pay Rate Type: Pay Rate: \$

Reportable Earnings: \$

Scheduled Full Time Hours Per Week: Scheduled Full Time Days Per Week:

Total Hours Worked:

Special Compensation: \$88.80 [View Special Compensation](#)

Contributions

Taxed Member Paid Contributions: \$ Tax Deferred Member Paid Contributions: \$

Tax Deferred Employer Paid Member Contributions: \$

Service Credit Purchase Deductions

Taxed Member Paid Contribution: \$ Tax Deferred Member Paid Contribution: \$

[Return to View Records page](#) [View Employee Rate Summary](#)

Step 11

Select the **Save and Exit** button.

You have completed this scenario.

Scenario 10: Verify Monthly Pay Rates Over Threshold

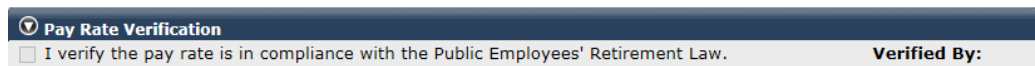
Your agency must verify all pay rates reported over \$25,000 per month in myCalPERS. In addition, all pay rates reported over \$35,000 per month require verification by both your agency and CalPERS prior to the payroll records being posted. Once a pay rate is verified, it does *not* need to be reverified until the pay rate increases by over 5%.

Step Actions

Verify Records with Monthly Pay Rates Over \$25,000 (3 steps)

Step 1 When the monthly pay rate reaches the first threshold (\$25,000), an error code CRB00249 will display at the top of the page.

Step 2 Within the Pay Rate Verification section at the bottom of the payroll record, select the “I verify the pay rate is in compliance with the Public Employees’ Retirement Law” check box.




The screenshot shows a dark blue header with a white downward arrow and the text "Pay Rate Verification". Below the header is a light gray box containing a checked checkbox followed by the text "I verify the pay rate is in compliance with the Public Employees' Retirement Law." To the right of this box is a label "Verified By:" followed by a blank space.

Step 3 The error will clear, and the payroll record will process. If the pay rate increases by 5%, complete the same steps to reverify.

Verify Records with Monthly Pay Rates Over \$35,000 (4 steps)

Step 1 If the monthly pay rate reaches the second threshold, an error code CRB00250 will display at the top of the page.

Step 2 Within the Pay Rate Verification section at the bottom of the payroll record, select the “I verify the pay rate is in compliance with the Public Employees’ Retirement Law” check box.



The screenshot shows a dark blue header with a white downward arrow and the text "Pay Rate Verification". Below the header is a light gray box containing two checked checkboxes. The first checkbox is followed by the text "I verify the pay rate is in compliance with the Public Employees' Retirement Law." and the second checkbox is followed by the text "CalPERS Review Completed." To the right of the first checkbox is a label "Verified By:" followed by a blank space. To the right of the second checkbox is another label "Verified By:" followed by a blank space.

Step 3 To get the CalPERS Review Completed check box checked, email payrateverification@calpers.ca.gov with the member’s name, CalPERS ID, job title, and your agency’s publicly available salary schedule for CalPERS to verify the pay rate reported. CalPERS will email your agency upon completion.

Step 4 Once the pay rate is verified by CalPERS, the error will clear, and the payroll record can be processed. If the pay rate increases by 5%, complete the same steps to reverify.

You have completed this scenario.

Unit 5: Process an Earned Period Payroll Report

In this unit, you will learn how to process an earned period report.

Earned period reports must be submitted and posted on or before 30 calendar days following the last day of the earned period. You must also reconcile unposted payroll records within this time (refer to Unit 6). If you do not, a \$200 late reporting fee will be assessed as well as an additional \$200 fee for each unreported or unconfirmed retired annuitant.

If the report suspends due to records with errors, you can accept the valid records to post to member accounts. You have 60 days from the date you first selected the **Process Report** button to correct the errors and reprocess the report; otherwise, a \$200 late correction fee will be assessed on day 61 and every 30 days after until the report is in Posted status.

Payroll Report Statuses

Select the **Reporting** global navigation tab to display the Manage Reports page. The Work on Existing Payroll reports section displays earned period and adjustment reports. The Status column indicates if a report is pending release, processing, posted, or suspended.

| Schedule Name | Earned Period / Adjustment Date | Status | Report Type | Due Date | Submit Date | Initial Record Posted Date | Report Posted Date | Test Report | Report Name |
|---------------|---------------------------------|-----------------|-------------------------|------------|-------------|----------------------------|--------------------|-------------|-------------|
| | 08/03/2024 - 08/16/2024 | Pending Release | Payroll - Earned Period | 09/15/2024 | 11/19/2024 | | | No | Test Earne |
| | 07/20/2024 - 08/02/2024 | Suspended | Payroll - Earned Period | 09/01/2024 | 08/16/2024 | | | No | |
| | 07/06/2024 - 07/19/2024 | Posted | Payroll - Earned Period | 08/18/2024 | 08/05/2024 | 08/13/2024 | 08/13/2024 | No | |

- **Pending Release** – A new report that needs to be processed and validated.
- **Processing** – The **Process Report** button has been selected, and the report is undergoing a level two validation.
- **Posted** – Processing is complete, and the report contains no errors or arrears records. All records have posted to the members’ accounts. An adjustment is required to make any corrections.
- **Suspended** – Processing is complete, and the report contains at least one error or arrears record. You may select the **Accept Valid Records** button to post valid records, then address errors, and select the **Process Report** button again to reprocess the report.

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| Scenario 2: Process an Earned Period Payroll Report | 41 |
| Scenario 3: Error List, Payroll Exception, and Payroll Summary Reports | 43 |
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Scenario 1: Review the Payroll Report Detail Page

Within the Work On Existing Payroll Reports section, select one of the **Earned Period / Adjustment Date** links to access the Payroll Report Detail Page.

| Schedule Name | Earned Period / Adjustment Date | Status | Report Type | Due Date | Submit Date | Initial Record Posted Date | Report Posted Date | Test Report | Report Name |
|---------------|---|-----------------|-------------------------|------------|-------------|----------------------------|--------------------|-------------|-------------|
| | 10/17/2024 - 10/25/2024 | Pending Release | Payroll - Earned Period | 11/24/2024 | | 11/19/2024 | | No | |
| | 08/03/2024 - 08/16/2024 | Pending Release | Payroll - Earned Period | 09/15/2024 | | 11/19/2024 | | No | Test Earne |
| | 07/20/2024 - 08/02/2024 | Suspended | Payroll - Earned Period | 09/01/2024 | | 08/16/2024 | | No | |
| | 07/06/2024 - 07/19/2024 | Posted | Payroll - Earned Period | 08/18/2024 | 08/05/2024 | 08/13/2024 | 08/13/2024 | No | |

The Payroll Report Detail page displays the payroll report's statistics (number of records reported, posted, unposted, and with errors).

Report Details

Report Type: Payroll - Earned Period Earned Period: 12/28/2019 - 01/10/2020 Report Status: Pending Release

Program: CalPERS Schedule Name: Test Report: No

Report Name:

Report Statistics

| Total | Records Reported | Records Posted | Unposted Records | Records with Errors |
|-------|------------------|----------------|------------------|---------------------|
| | 84 | 0 | 84 | 1 |

Records Statistics

| Record Type | Records Reported | Records Posted | Unposted Records | Records with Errors |
|--|------------------|----------------|------------------|---------------------|
| Payroll Record | 84 | 0 | 84 | 1 |
| Service Credit Purchase Deduction Record | 5 | 0 | 5 | 0 |

Payroll Report Summary

Uncategorized earnings and contributions can occur in reports in Pending Release status that have not been processed or in reports in Suspended status that have records in error. Total Contributions is the sum of reported contributions and deductions, excluding reported earnings.

| Rate Plan Identifier | Member Category | Total Member Earnings | Member Contributions | Employer Contributions | 1959 Survivor Contribution | Service Credit Purchase | Total Contributions |
|----------------------|-----------------|-----------------------|----------------------|------------------------|----------------------------|-------------------------|---------------------|
| 25846 | Safety - Police | \$8,514.46 | \$532.47 | \$1,582.24 | \$0.00 | \$0.00 | \$2,114.71 |
| | Uncategorized | \$340,410.35 | \$30,578.74 | \$0.00 | \$9.30 | \$331.63 | \$30,919.67 |
| Totals | | \$348,924.81 | \$31,111.21 | \$1,582.24 | \$9.30 | \$331.63 | \$33,034.38 |

Generate Report

Report Type:

Payroll Record Errors Report

Payroll Record Exceptions Report

Generate Report

Override Report Details

The report name you enter is not saved until you select the Update Report Name button.

Report Name:

Update Report Name

Accept Valid Records

The **Accept Valid Records** button displays in the Report Statistics section for specific report types (Earned, Adjustment, and Gap) if the report has at least one record with a Valid or Arrears Apply – Employer Paid status, the Rate Plan Identifier reflects uncategorized, and there are no records in Posted status.

- You may select the **Accept Valid Records** button once per report to post any Valid records. Additionally, records in the report will be categorized to their appropriate rate plan identifier and displayed in the Payroll Report Summary section.
- You can still edit and remove Arrears Apply – Employer Paid records from the report after selecting the **Accept Valid Records** button; however, you cannot edit or remove them once the **Process Report** button has been selected.

| Report Statistics | Records Reported | Records Posted | Unposted Records | Records with Errors |
|--------------------------------------|------------------|----------------|------------------|---------------------|
| Accept Valid Records | | | | |
| Total | 109 | 0 | 109 | 0 |

Payroll Report Summary

Review the total contributions of a payroll report without having to use the **Generate Report Summary** button to generate a report.

| Payroll Report Summary | | | | | | | |
|--|-----------------|-----------------------|----------------------|------------------------|----------------------------|-------------------------|---------------------|
| Uncategorized earnings and contributions can occur in reports in Pending Release status that have not been processed or in reports in Suspended status that have records in error. Total Contributions is the sum of reported contributions and deductions, excluding reported earnings. | | | | | | | |
| Rate Plan Identifier | Member Category | Total Member Earnings | Member Contributions | Employer Contributions | 1959 Survivor Contribution | Service Credit Purchase | Total Contributions |
| 25846 | Safety - Police | \$8,514.46 | \$532.47 | \$1,582.24 | \$0.00 | \$0.00 | \$2,114.71 |
| Uncategorized | | \$340,410.35 | \$30,578.74 | \$0.00 | \$9.30 | \$331.63 | \$30,919.67 |
| Totals | | \$348,924.81 | \$31,111.21 | \$1,582.24 | \$9.30 | \$331.63 | \$33,034.38 |

Override Report Details

You can name a report to identify it more easily. Complete the Report Name field, select the **Update Report Name** button, then select the **Yes** button to confirm the name. You cannot change a report's name after the report has posted.

| Override Report Details | |
|--|----------------------|
| The report name you enter is not saved until you select the Update Report Name button. | |
| Report Name: | <input type="text"/> |
| <input type="button" value="Update Report Name"/> | |

Cancel Report

You can cancel reports without posted records for the following:

- For file-upload reports: Test or non-test report prior to a new file submission for the same earned period
- Adjustment report created in error
- Copy-forwarded report that is pending release or in suspended status

Generate Report Summary

Use the **Generate Report Summary** button at the bottom left of the page to review a financial data summary of the payroll report.

[Return to Manage Reports](#)

Scenario 2: Process an Earned Period Payroll Report

You will select the **Process Report** button from either the Payroll Report Detail page or the View Payroll Records page. Selecting the **Process Report** button initiates a series of validations on the records within the report.

System Logic

You cannot remove Arrears Apply – Employer Paid records from the report after selecting the **Process Report** button, and they will not post to myCalPERS until the 30-day appeal period expires. If you waive your appeal rights so the records will post, refer to the [myCalPERS Employment Certification Functionality \(PDF\)](#) student guide.

Step Actions

Process From the Payroll Report Detail Page (5 steps)

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

Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.

| Schedule Name | Earned Period / Adjustment Date | Status | Report Type | Due Date | Submit Date | Initial Record Posted Date | Report Posted Date | Test Report | Report Name |
|---------------|---------------------------------|-----------------|-------------------------|------------|-------------|----------------------------|--------------------|-------------|-------------|
| | 07/05/2024 - 07/19/2024 | Pending Release | Payroll - Earned Period | 08/18/2024 | 10/29/2024 | | | No | Jones, J |
| | 06/13/2024 - 06/13/2024 | Posted | Payroll - Adjustments | | 06/13/2024 | 06/13/2024 | | No | |

Step 3 At the bottom left of the Payroll Report Detail page, select the **Process Report** button.

Override Report Details
The report name you enter is not saved until you select the Update Report Name button.

Report Name:

Update Report Name

[Process Report](#) [Cancel Report](#) [Generate Report Summary](#) [View Records](#)

[Return to Manage Reports](#)

Step 4 Under the Confirmation Page section, select the **Yes** button to confirm the request to process the report.

Confirmation Page
Do you want to process this report?

[Yes](#) [No](#)

Step 5 Select the **Save & Exit** button.

You have completed this scenario.

Process From the View Payroll Records Page (5 steps)

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

Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.

The screenshot shows the 'Reporting' section of the system. The 'Work On Existing Payroll Reports' section is active, displaying a table of reports. The table has columns for Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, Test Report, and Report Name. Two rows are visible, with the 'Earned Period / Adjustment Date' column highlighted in red for both rows: '07/06/2024 - 07/19/2024' and '06/13/2024 - 06/13/2024'.

| Schedule Name | Earned Period / Adjustment Date | Status | Report Type | Due Date | Submit Date | Initial Record Posted Date | Report Posted Date | Test Report | Report Name |
|---------------|---------------------------------|-----------------|-------------------------|------------|-------------|----------------------------|--------------------|-------------|-------------|
| | 07/06/2024 - 07/19/2024 | Pending Release | Payroll - Earned Period | 08/18/2024 | 10/29/2024 | | | No | |
| | 06/13/2024 - 06/13/2024 | Posted | Payroll - Adjustments | | 06/13/2024 | 06/13/2024 | | No | Jones, J |

Step 3 At the bottom right of the Payroll Report Detail page, select the **View Records** link to access the records within the report.

The screenshot shows the 'Override Report Details' page. It includes a text input field for 'Report Name' and an 'Update Report Name' button. At the bottom right, there is a 'View Records' link highlighted with a red box. Other buttons include 'Process Report', 'Cancel Report', and 'Generate Report Summary'.

[View Records](#)

Step 4 At the bottom left of the page, select the **Process Report** button.

The screenshot shows the report summary page. It includes a pagination bar with 'Showing records 1 - 25' and navigation links like 'First << Previous', '1 2 3 4 5', 'Next >>', and 'Last | View Max'. Below the pagination bar are buttons for 'Select All', 'Delete', 'Edit Selected Records', and 'Save Selection'. At the bottom, there are two buttons: 'Process Report' (highlighted with a red box) and 'Generate Report Summary'.

[Process Report](#) [Generate Report Summary](#)

Step 5 Under the Confirmation Page section, select the **Yes** button to confirm the request to process the report.

The screenshot shows the 'Confirmation Page' section. It asks 'Do you want to process this report?' and has two buttons: 'Yes' (highlighted with a red box) and 'No'.

[Yes](#) [No](#)

You have completed this scenario.

Scenario 3: Error List, Payroll Exception, and Payroll Summary Reports

Within the Payroll Report Detail page, you will run three reports:

- **Error List Report:** Lists Error records and error descriptions. File upload reporters use this report to identify the records with errors that need to be corrected or deleted.
- **Payroll Exception Report:** Lists Valid with Exception records and exception descriptions.
- **Payroll Report Summary:** Lists the report statistics and financial summary for the earned period report. You may select the **Earned Period/Payroll Adjustment Date** link to review the Contribution Detail Report to review the record details.

System Logic

The Error List Report and the Payroll Exception Report will not retrieve pending validation and suspended records. Before running these reports, you need to validate each record (open the record and save) to update the status from Pending Validation.

Step Actions (6 steps)

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

Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.

| Schedule Name | Earned Period / Adjustment Date | Status | Report Type | Due Date | Submit Date | Initial Record Posted Date | Report Posted Date | Test Report | Report Name |
|---------------|---------------------------------|-----------------|-------------------------|------------|-------------|----------------------------|--------------------|-------------|-------------|
| | 07/05/2024 - 07/19/2024 | Pending Release | Payroll - Earned Period | 08/18/2024 | 10/29/2024 | | | No | |
| | 06/13/2024 - 06/13/2024 | Posted | Payroll - Adjustments | | 06/13/2024 | 06/13/2024 | | No | Jones, J |

Step 3 Which report do you want to run?

Error List Report or the Payroll Exception Report: Continue to step 4.

Payroll Summary Report: Skip to step 6.

Step 4 Within the Generate Report section, select the **Payroll Record Errors Report** or the **Payroll Record Exceptions Report** radio button.

Generate Report

Report Type:

Payroll Record Errors Report

Payroll Record Exceptions Report

Generate Report

Step 5 Select the **Generate Report** button.

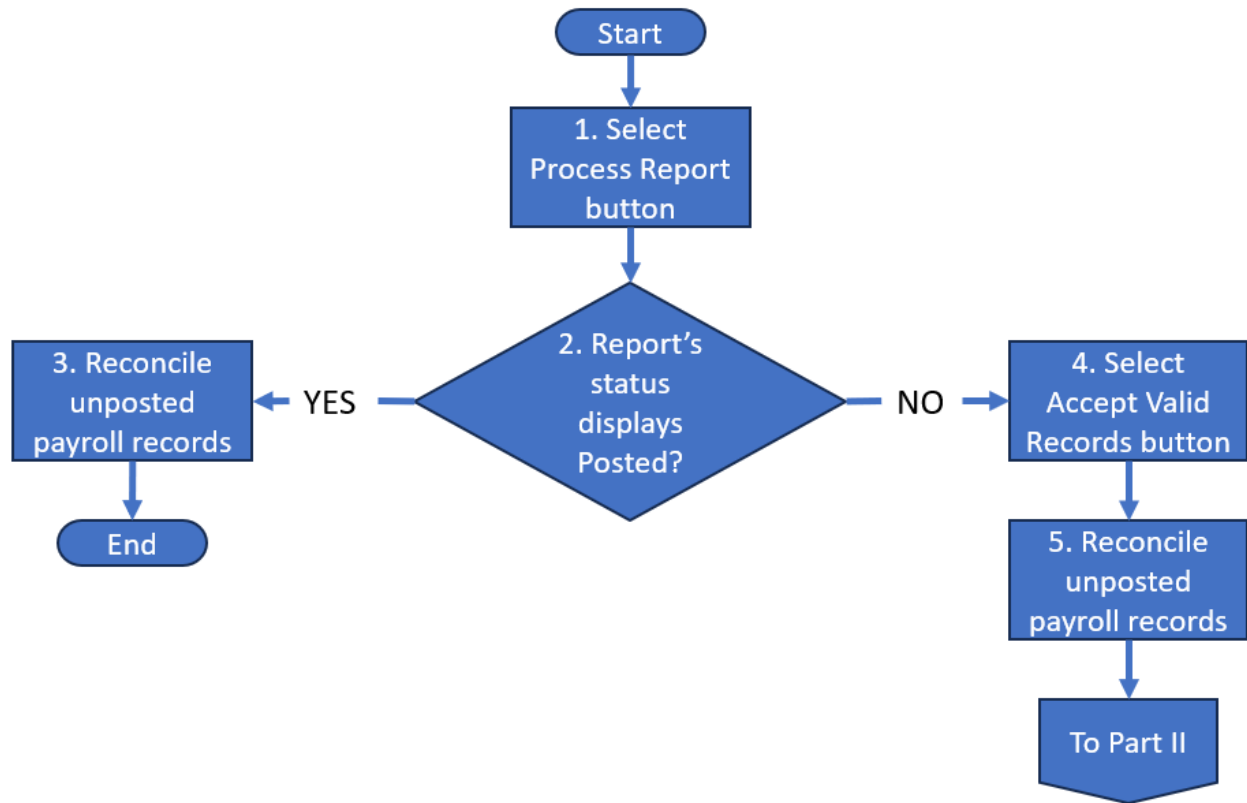
Step 6 At the bottom of the page, select the **Generate Report Summary** button to access the Payroll Report Summary as a report. This report will allow you to run the Contribution Detail Report for each rate plan.

You have completed this scenario.

Earned Period Report Processing Flowcharts

Step Actions (8 steps)

Part I: Complete Within 30 Days of the Earned Period End Date



Step 1 Select the **Process Report** button (refer to Unit 5, Scenario 1).

Step 2 Does the report's status display Posted?

Yes: Continue to step 3.

No: Skip to step 4.

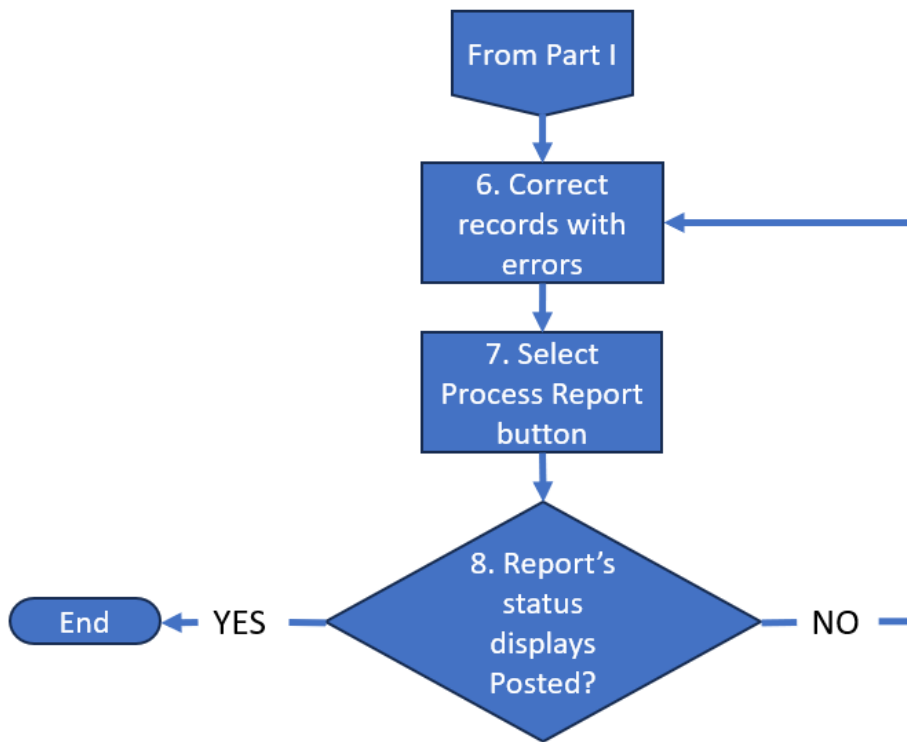
Step 3 Reconcile unposted payroll records (refer to Unit 6).

You have completed this scenario.

Step 4 Select the **Accept Valid Records** button.

Step 5 Reconcile unposted payroll records (refer to Unit 6).

Part II: Complete Within 60 Days of First Selecting the Process Report Button



Step 6 Correct records with errors in the report.

Step 7 Select the **Process Report** button to reprocess the report.

Step 8 Does the report's status display Posted?

No: Return to step 6.

Yes: You have completed this scenario.

Unit 6: Reconcile Unposted Payroll Records

In this unit, you will learn how to use the **Payroll Schedule** local navigation link to reconcile your appointments that are missing payroll. Each earned period displays any active appointments that did not have payroll reported, so you can address them (confirm the unposted payroll or process an adjustment).

System Logic

- In lieu of using the **Confirm Unposted Payroll** button, report zero payroll to proactively address when an employee has no earnings (refer to Unit 4, Scenario 4).
- Transactions completed outside of the Payroll Schedule page (such as posting payroll adjustment records or updating the employee's appointment) will update the list after a nightly batch.
- If you have the Business Partner Retirement Enrollment access role, you may use the **Maintain Enrollment** button to update an appointment (refer to the [myCalPERS Retirement Appointment Reconciliation \(PDF\)](#) student guide, Unit 2).

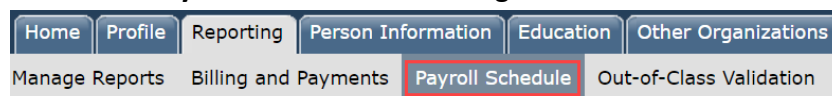
Best Practices

- Save time by waiting to reconcile your payroll until at least one day after your payroll report posts, because only the appointments missing payroll will display.
- After payroll has been reconciled, continue to check if the **View** link displays under the Participants with Unposted Payroll column due to a retroactive new enrollment.

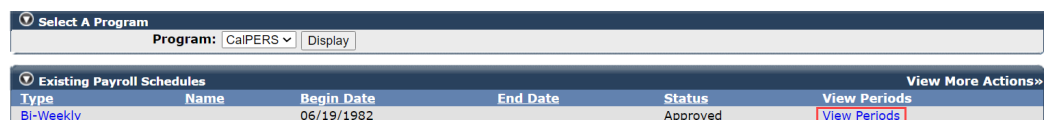
Step Actions (7 steps)

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

Step 2 Select the **Payroll Schedule** local navigation link.



Step 3 Within the Existing Payroll Schedules section, select the **View Periods** link for the appropriate payroll schedule.



Step 4 Within the Payroll Periods section, select the **Display** button. You may need to change the Fiscal Year drop-down field option beforehand.



Step 5 Under the Participants with Unposted Payroll column, select the appropriate **View** link.

| Payroll Periods | | | | | | | |
|---|-----------------|------------------|------------------|---------------|------------------|------------------|------------------------------------|
| Fiscal Year: 2023/2024 <input type="button" value="Display"/> | | | | | | | |
| Earned Period | Report Due Date | Report Submitted | Report Post Date | Report Status | Extension Status | Exemption Status | Participants with Unposted Payroll |
| 06/08/2024-06/21/2024 | 07/21/2024 | | | | | | View |
| 05/25/2024-06/07/2024 | 07/07/2024 | | | | | | View |
| 05/11/2024-05/24/2024 | 06/23/2024 | 06/07/2024 | | Suspended | | | View |
| 04/27/2024-05/10/2024 | 06/09/2024 | 05/28/2024 | 06/05/2024 | Posted | | | View |

Note: The **View** link displays when there is at least one appointment to reconcile. **View** links will display for future earned periods because payroll has not been initiated for those periods yet.

Step 6 Within the Participants with Unposted Payroll section, select the appropriate **Participant CalPERS ID** check boxes for the employees with unposted payroll. Use the Search for Participants with Unposted Payroll section to filter the list if necessary.

| Participant CalPERS ID | Name | Appt ID | Appt Status | Member Account Status | Retired Annuitant | Last Reported Payroll Record Status | Rate Plan | Projected Member Contributions | Projected Employer Contributions |
|--------------------------|------------------------------------|----------|-------------|-----------------------|-------------------|-------------------------------------|-----------|--------------------------------|----------------------------------|
| <input type="checkbox"/> | 0123456789 Al Bidany, Aleh C. | 93657214 | Active | Active | No | Valid | 27415 | \$0.00 | \$0.00 |
| <input type="checkbox"/> | 1234567890 Al Bidany, Elizabeth A. | 24655630 | Active | Active | No | Valid | 899 | \$0.00 | \$0.00 |

Note:

- Maintaining the appointments or confirming unposted payroll within the reconciliation page automatically updates the list.
- An employee’s appointment with an On Leave event won’t be listed if the leave:
 - Is less than six months.
 - Has an end leave date, regardless of the length of the leave.
- You can select the **Generate Excel Report** button at the bottom left of the page to run a report listing the participants before you start confirming unposted payroll.

Step 7 Select the **Confirm Unposted Payroll** button.

| Participants with Unposted Payroll | | | | | | | | | |
|--|------------------------------------|----------|-------------|-----------------------|-------------------|-------------------------------------|-----------|--------------------------------|----------------------------------|
| Payroll has not been posted for the following participants. Please report payroll or select the applicable appointments to confirm payroll is not reportable or maintain the enrollment. | | | | | | | | | |
| Select All | | | | | | | | | |
| Maintain Enrollment: <input type="button" value="Confirm Unposted Payroll"/> | | | | | | | | | |
| Show 25 entries | | | | | | | | | |
| Showing 1 to 25 of 132 entries | | | | | | | | | |
| First Previous 1 2 3 4 5 6 Next Last | | | | | | | | | |
| Participant CalPERS ID | Name | Appt ID | Appt Status | Member Account Status | Retired Annuitant | Last Reported Payroll Record Status | Rate Plan | Projected Member Contributions | Projected Employer Contributions |
| <input checked="" type="checkbox"/> | 0123456789 Al Bidany, Aleh C. | 93657214 | Active | Active | No | Valid | 27415 | \$0.00 | \$0.00 |
| <input checked="" type="checkbox"/> | 1234567890 Al Bidany, Elizabeth A. | 24655630 | Active | Active | No | Valid | 899 | \$0.00 | \$0.00 |

Note: The Confirmation of No Payroll Contributions Reportable Report can be run to review the participants who were confirmed with no payroll, which employee confirmed them, and the confirmation date.

You have completed this scenario.

Unit 7: Add Payroll Schedules

In this unit, you will learn how to request a new payroll schedule, such as monthly, semi-monthly, bi-weekly, or quadri-weekly.

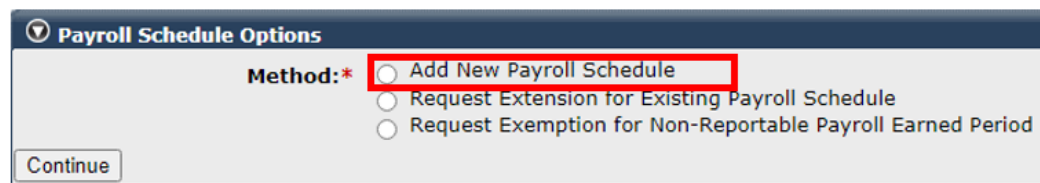
Changes in the earned period dates must be approved by CalPERS in advance. After we approve a new payroll schedule, you will be contacted within five business days, and then you may report payroll using the new schedule.

Step Actions (6 steps)

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

Step 2 Select the **Payroll Schedule** local navigation link.

Step 3 Within the Payroll Schedule Options section, select the **Add New Payroll Schedule** radio button.



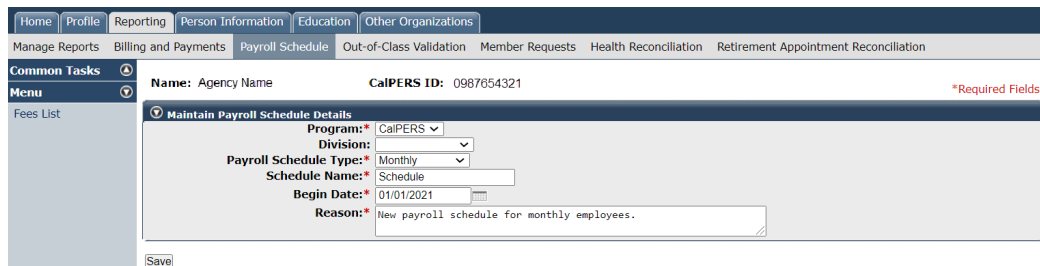
Payroll Schedule Options

Method:* Add New Payroll Schedule
 Request Extension for Existing Payroll Schedule
 Request Exemption for Non-Reportable Payroll Earned Period

Continue

Step 4 Select the **Continue** button.

Step 5 Complete the Maintain Payroll Schedule Details section.



Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation Member Requests Health Reconciliation Retirement Appointment Reconciliation

Common Tasks

Menu

Fees List

Name: Agency Name CalPERS ID: 0987654321 *Required Fields

Maintain Payroll Schedule Details

Program:* CalPERS
Division:
Payroll Schedule Type:* Monthly
Schedule Name:* Schedule
Begin Date:* 01/01/2021
Reason:* New payroll schedule for monthly employees.

Save

Step 6 Select the **Save** button.
You have completed this scenario.

Unit 8: Support Requests

In this unit, you will learn how to request a payroll due-date extension, a fee waiver, and a compensation compliance analysis.

Due-Date Extension

Payroll due-date extension requests must be made at least 10 business days prior to the payroll due date and no more than 30 days before the due date. Otherwise, myCalPERS will not provide an extension request option.

If an extension is granted for a report, it's due date cannot be extended again.

Fee Waiver

If myCalPERS does not provide an extension request option and a late fee has been assessed for an earned period, you may request a waiver of penalties through the fee waiver request and dispute process.

Compensation Compliance Analysis

You can request a compensation compliance analysis to ensure your payroll reporting is compliant with the PERL. Review topics include labor agreements, out-of-class validations, publicly available pay schedules, compensation settlement agreements, side letter/resolutions documents, and general compensation compliance inquiries.

CalPERS will notify you by email after the request has been reviewed and completed. To access your determination letter, select the Document History left-side link.



Contents

| | |
|--|----|
| Scenario 1: Request a Due-Date Extension | 50 |
| Scenario 2: Request a Fee Waiver | 51 |
| Scenario 3: Request a Compensation Compliance Analysis | 53 |

Scenario 1: Request a Due-Date Extension

You are unable to submit your earned period report before its due date, so you will request a due-date extension.

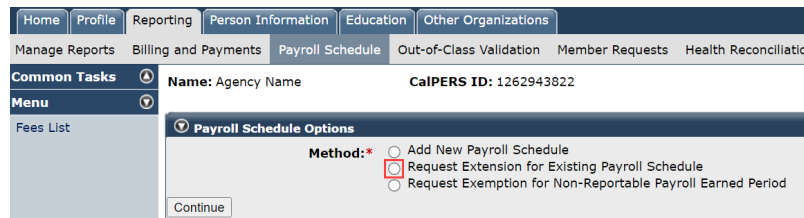
Step Actions (10 steps)

Part I: Submit an Extension Request

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

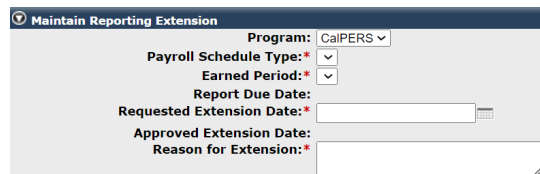
Step 2 Select the **Payroll Schedule** local navigation link.

Step 3 Within the Payroll Schedule Options section, select the **Request Extension for Existing Payroll Schedule** radio button.



Step 4 Select the **Continue** button.

Step 5 Complete the Maintain Reporting Extension section.



Step 6 Select the **Save** button.

Part II: Within 2-5 Business Days, Review Request Status.

Step 7 Select the **Reporting** global navigation tab.

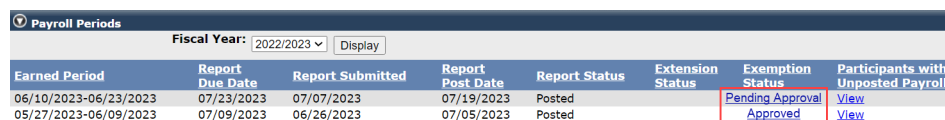
Step 8 Select the **Payroll Schedule** local navigation link.

Step 9 Within the Existing Payroll Schedules section, select the **View Periods** link for the appropriate payroll schedule.



| Type | Name | Begin Date | End Date | Status | View Periods |
|-----------|------|------------|----------|----------|------------------------------|
| Bi-Weekly | | 06/19/1982 | | Approved | View Periods |

Step 10 Within the Payroll Periods section, review the status of your request under the Exemption Status column.



| Earned Period | Report Due Date | Report Submitted | Report Post Date | Report Status | Extension Status | Exemption Status | Participants with Unposted Payroll |
|-----------------------|-----------------|------------------|------------------|---------------|------------------|------------------|------------------------------------|
| 06/10/2023-06/23/2023 | 07/23/2023 | 07/07/2023 | 07/19/2023 | Posted | | Pending Approval | View |
| 05/27/2023-06/09/2023 | 07/09/2023 | 06/26/2023 | 07/05/2023 | Posted | | Approved | View |

You have completed this scenario.

Scenario 2: Request a Fee Waiver

You will request a fee waiver within myCalPERS.

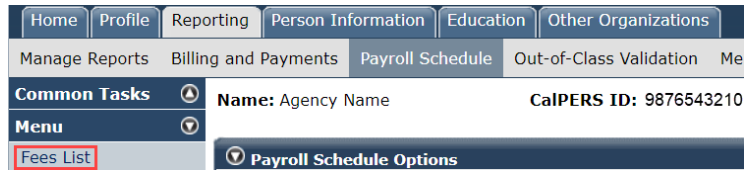
Step Actions (12 Steps)

Part I: Submit a Waiver Request

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

Step 2 Select the **Payroll Schedule** local navigation link.

Step 3 Select the **Fees List** left-side link.



Step 4 Within the Fee List section, select the **Fee ID** link.



| Fee Type | Fee Reason | Division | Fee ID | Date Assessed | Fee Amount | Fee Status |
|--|---|-------------|-----------------|---------------|------------|------------|
| Admin Fee - Retired Annuitant Late Fee | Admin Fee - Retired Annuitant Late Fee | | 100000016855547 | 07/06/2022 | \$0.00 | Open |
| Admin Fee - Late Payroll Reporting | Missing report 05/28/2022 - 06/10/2022 fees | Agency Name | 100000016868354 | 07/12/2022 | \$0.00 | Paid |
| Admin Fee - Late Payroll Reporting | Missing report 06/11/2022 - 06/24/2022 fees | Agency Name | 100000016878392 | 07/26/2022 | \$0.00 | Paid |

Note: You can only request a fee waiver if Fee Status column displays *Open*.

Step 5 Are you requesting a waiver of an Admin Fee - Retired Annuitant Late Fee?

Yes: Select the check boxes for the listed employees, then continue to step 6.

No: Continue to step 6.

Step 6 Complete the Reason for Appeal field.



[Save](#) [Generate Fee Status Report](#)

Note: Selecting the **Generate Fee Status Report** link will run the Retired Annuitant Late Fee Status Report if appealing a Retired Annuitant Late Fee.

Step 7 Select the **Save** button.

Part II: Review Request Status

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

Step 9 Select the **Payroll Schedule** local navigation link.

Step 10 Select the **Fees List** left-side link.

The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are links for Manage Reports, Billing and Payments, Payroll Schedule, and Out-of-Class Validation. A 'Common Tasks' section contains a 'Fees List' link highlighted with a red box. Other elements include 'Name: Agency Name', 'CalPERS ID: 9876543210', and a 'Payroll Schedule Options' button.

Step 11 Select the **Display** button. You may need to change the Fiscal Year drop-down field option beforehand.

The screenshot shows the 'Fee List' header. It includes a dropdown for 'Programs' set to 'California Public Employees' Retirement System', a 'Fiscal Year' dropdown set to '2024/2025', and a 'Display' button highlighted with a red box. Below the header is a table with columns: Fee Type, Fee Reason, Division, Fee ID, Date Assessed, Fee Amount, and Fee Status. The text 'No results found.' is visible below the table.

Step 12 Select the **Fee ID** link to review the reason for the approval or rejection. **Note:** The Fee Status column indicates the status of the waiver request.

The screenshot shows the 'Fee List' table with the 'Fee ID' column highlighted in a red box. The table contains the following data:

| Fee Type | Fee Reason | Division | Fee ID | Date Assessed | Fee Amount | Fee Status |
|--|---|-------------|---------------------------------|---------------|------------|------------|
| Admin Fee - Retired Annuitant Late Fee | Admin Fee - Retired Annuitant Late Fee | | 100000017247764 | 08/03/2023 | \$0.00 | Closed |
| Admin Fee - Retired Annuitant Late Fee | Admin Fee - Retired Annuitant Late Fee | | 100000017308299 | 10/05/2023 | \$0.00 | Closed |
| Admin Fee - Late Payroll Reporting | Missing report 02/03/2024 - 02/16/2024 fees | Agency Name | 100000017489274 | 03/19/2024 | \$0.00 | Waived |
| GASB 68 Reporting Services Fee | GASB 68 Reporting Services Fee | | 100000017504898 | 04/11/2024 | \$0.00 | Closed |
| GASB 68 Reporting Services Fee | GASB 68 Reporting Services Fee | | 100000017504899 | 04/11/2024 | \$0.00 | Closed |
| Admin Fee - Retired Annuitant Late Fee | Admin Fee - Retired Annuitant Late Fee | | 100000017530951 | 05/03/2024 | \$0.00 | Closed |
| Admin Fee - Late Payroll Reporting | Missing report 03/30/2024 - 04/12/2024 fees | Agency Name | 100000017545962 | 05/14/2024 | \$0.00 | Waived |

You have completed this scenario.

Scenario 3: Request a Compensation Compliance Analysis

You will submit a request to have a CalPERS analyst review your labor agreement.

Step Actions (21 steps)

Part I: Submit a Compensation Compliance Analysis

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

Step 2 Select the **Request Compensation Compliance Analysis** left-side link.




Step 3 Within the Compensation Compliance Analysis Request History section, select the **Add New** button.



| Topic | Request ID | Submitted By | Date Submitted |
|--|------------|--------------|----------------|
| Multi-Item Labor Agreement/Policy Review | 3 | I. Duck /B | 09/10/2025 |
| Multi-Item Labor Agreement/Policy Review | 2 | I. Duck /B | 09/08/2025 |

Step 4 From the Topic drop-down menu, select the topic for your request.



▼ Compensation Compliance Analysis Request

Select a topic for your request. If you need to refer to an existing (or upload new) supporting document, click the Add Document button.

Topic:* Multi-Item Labor Agreement/Policy Review ▼

- Multi-Item Labor Agreement/Policy Review
- Section Labor Agreement/Policy Review
- Out of Class Validation Inquiry
- Publicly Available Pay Schedule Review
- Compensation Settlement Agreement/Policy Review
- Side Letter/Resolution Document Review
- Inquiry

Note: Choose Inquiry for general questions related to compensation compliance without a review of specific written labor policies.

Step 5 Complete the Question field.



Question:*

0/2000 characters.

Step 6 Are you referencing documents in your request? **Note:** All requests must include referenced documentation except for Inquiry requests.

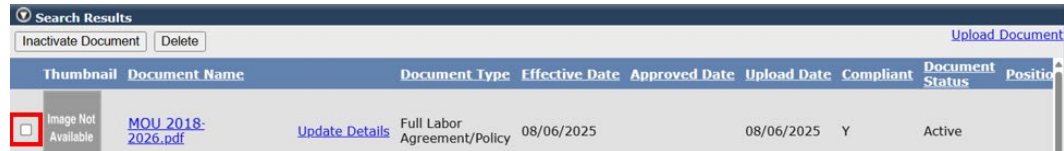
Yes: Continue to step 7.

No: Select the **Submit** button, then skip to step 19.

Step 7 Did you select Inquiry from the Topic drop-down menu?
Yes: Select the **Choose File** button, then continue to step 8.
No: Select the **Add Document** button, then skip to step 9.

Step 8 Select the file from your computer, then skip to step 18.

Step 9 Is the document you are referencing in the Search Results section?
Yes: Select the check box for the document, then continue to step 10.



No: Within the Document Search section, choose the type of document you will upload from the Document Type drop-down menu, then skip to step 11.

Employer: Agency Name
Division:
Effective Date: to
Approved Date:
Document Type: **Document Status:** Active
Bargaining Unit: Compliant: Yes No
Search Clear

Step 10 At the bottom left, select the **Return** button, then skip to step 18.

Step 11 At the top-right of the Search Results section, select the **Upload Document** link.



Step 12 Select the **Choose File** button.

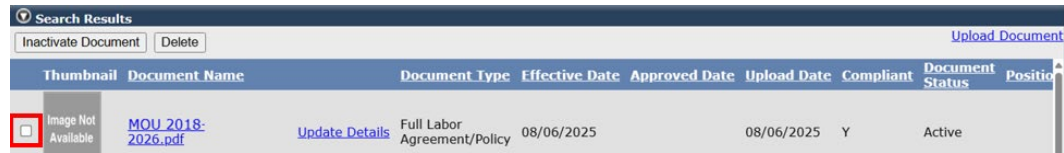
Employer: Agency Name **Document Type:** Full Labor Agreement/Policy
Path: Choose File No file chosen
Document Name:
Effective Date: **Position Title:**
Approval Date: **Bargaining Unit:**
Compliant: Yes No
Notes:
Save Cancel

Step 13 Select the file from your computer.

Step 14 Within the Upload Compensation Review Supporting Document section, complete all other applicable fields.

Step 15 Select **Save**. The document will now be in the Search Results section.

Step 16 Within the Search Results section, select the check box for the document.



| Thumbnail | Document Name | Document Type | Effective Date | Approved Date | Upload Date | Compliant | Document Status | Position |
|---|-----------------------------------|--------------------------------|-----------------------------|---------------|-------------|-----------|-----------------|----------|
| <input checked="" type="checkbox"/> Image Not Available | MOU 2018-2026.pdf | Update Details | Full Labor Agreement/Policy | 08/06/2025 | 08/06/2025 | Y | Active | |

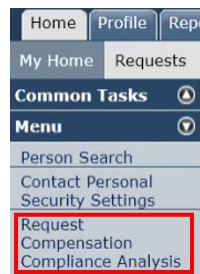
Step 17 At the bottom left, select the **Return** button.

Step 18 Select the **Submit** button.

Part II: Review the Request

Step 19 Select the **Home** global navigation tab.

Step 20 Select the **Request Compensation Compliance Analysis** left-side link.



| | | |
|---|----------|------|
| Home | Profile | Repe |
| My Home | Requests | |
| Common Tasks | | |
| Menu | | |
| Person Search | | |
| Contact Personal Security Settings | | |
| Request Compensation Compliance Analysis | | |

Step 21 Within the Compensation Compliance Analysis Request History section, review the status of your request under the Status column.

Click the Add New button to submit a new request. To re-open a completed request, click the Topic link and click the Re-Open Request button at the bottom of the request details page.



| Topic | Request ID | Submitted By | Date Submitted | Status | Status Date |
|--|------------|--------------|----------------|-----------|-------------|
| Multi-Item Labor Agreement/Policy Review | 3 | J. Test /B | 11/17/2025 | Submitted | 11/17/2025 |
| Inquiry | 2 | J. Test /B | 11/17/2025 | Submitted | 11/17/2025 |

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.

- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > Employer Education > myCalPERS Student Guides & Resources (*under Resources heading*)
- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > Employer Education > Business Rules & myCalPERS Classes
- [Self-Paced Online Classes](#) (log in to myCalPERS, select the **Education** global navigation tab, then the **Classes** local navigation link)
 - Business Rules
 - The Importance of Accurately Reporting Payroll
 - Special Compensation for Public Agencies & Schools
 - myCalPERS
 - Copy Forward an Earned Period Report
 - Maintain Payroll Records
 - Manage Records in a Payroll Report
 - Report a Zero Payroll Record
 - Reporting & Adjusting Special Compensation
 - Reporting Earnings Over the Compensation Limit
 - Request Extension for an Earned Period Report
 - Adjustment Reports
 - View Service & Transaction History
 - Service Credit Purchase & Arrears
 - Out-of-Class Reporting
- [myCalPERS Technical Requirements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [Technical Resources](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > Technical Resources
- [Special Compensation Reportability Table](#)
Pathway: CalPERS website > Employers > Special Compensation Reportability Table
- [Public Agency & Schools Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [Circular Letters](#)
Pathway: CalPERS website > Employers > Circular Letters

- [Public Employees' Retirement Law \(PERL\)](#)

Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)

- [myCalPERS Reports Catalog](#)

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Reports Catalog

Some common reports that are run for payroll:

- Collective Outstanding Payroll Error Report
- Collective Outstanding Payroll Exception Report
- Collective Outstanding Payroll Records by Participant Report
- Confirmation of No Payroll Contributions Reportable Report
- Contribution Summary for a Fiscal Year Report
- Priority Unposted Payroll Report
- Reported Compensation by Calendar Year Detail Report
- Reported Compensation by Calendar Year Summary Report
- Reported Member Summary Report
- Reported Member Detail Report
- Automatic Permanent Separation-Potential Appointments Report
- Automatic Permanent Separation – Completed Appointments Report
- To review a list of employees at risk of permanent separation due to unposted payroll:
 - Business Partner Info Report
 - Participant Appointment Details Report
 - Business Partner On Leave Report

CalPERS Contacts

Email

- To contact the [Employer Educators](#) for questions and inquiries, 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 [CalPERS Membership Unit](#) for questions regarding membership eligibility or if a non-contributory employee does not have the Earned Period No Contribution and No Service in the Transaction Type drop-down list, 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 select the **Submit Inquiry** link to submit a question or request.