myCalPERS Retirement Contract

Student Guide

October 30, 2026

CalPERS

Introduction

This student guide will assist you with reviewing and amending your retirement contract.

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.

System Access

If myCalPERS does not allow you to perform these scenarios, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

Follow these steps to ensure your CalPERS education experience is comprehensive and well-structured:

1. Take Business Rules classes. Business Rules summarize the laws defined by the California Public Employees' Retirement Law (PERL).
2. Review the Introduction to myCalPERS for Business Partners (PDF) student guide.
3. Attend a myCalPERS instructor-led class.
4. Review the self-paced online classes.

To access the classes, log in to your myCalPERS business partner account and then select the **Education** global navigation tab.

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Unit 1: Review Your Agency's Retirement Contract

Within this unit, you will review your contract benefits and employer rates by member category and benefit level.

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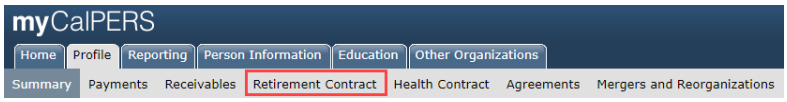
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Scenario 1: Review Your Contract Benefits

Step Actions (9 steps)

Step 1 — From the homepage, select the **Profile** global navigation tab.

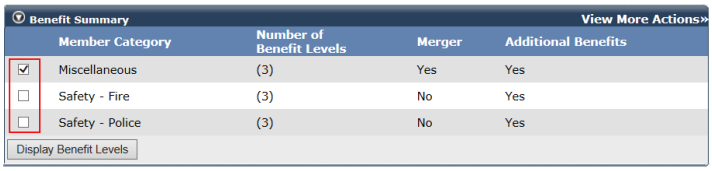
Step 2 — Select the **Retirement Contract** local navigation link.



Step 3 — Within the Retirement Contract Information section, select the **View Benefit Information** link.

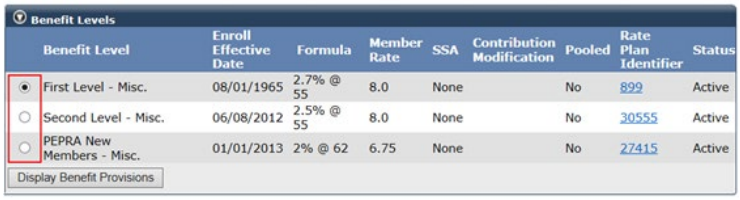


Step 4 — Within the Benefit Summary section, select the appropriate **Member Category** check boxes.



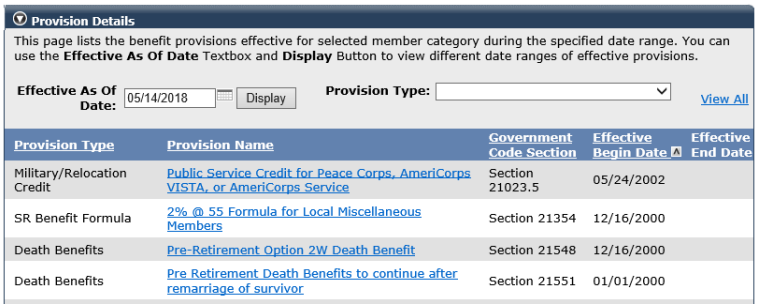
Step 5 — Select the **Display Benefit Levels** button.

Step 6 — Within the Benefit Levels section, select a **Benefit Level** radio button.



Step 7 — Select the **Display Benefit Provisions** button.

Step 8 — Review the Provision Details section.



Step 9 — Repeat steps 4-8 to review another benefit level's provisions.

You have completed this scenario.

Scenario 2: Review Retirement Contract Merger Information

Step Actions (6 steps)

Step 1 From the homepage, select the **Profile** global navigation tab.

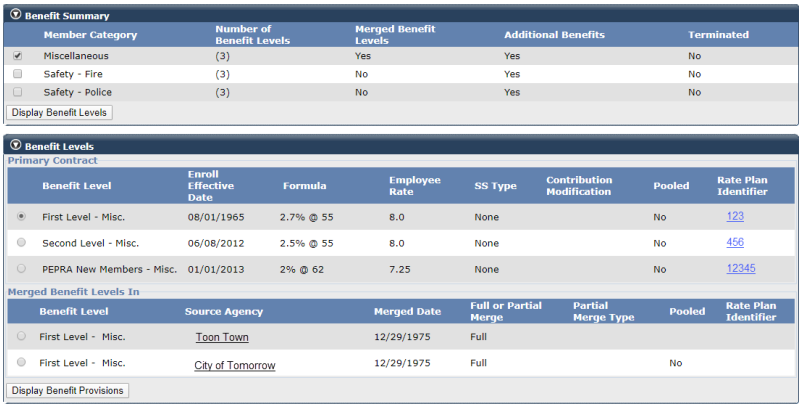
Step 2 Select the **Retirement Contract** local navigation link.



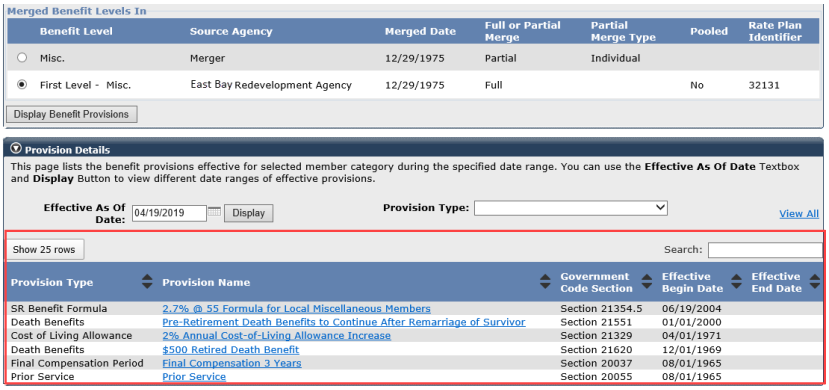
Step 3 Within the Retirement Contract Information section, select the **View Benefit Information** link.



Step 4 Within the Benefit Levels section, review the merger information.



Step 5 Select a **Benefit Level** radio button.



Step 6 Select the **Display Benefit Provisions** button to review the details.

You have completed this scenario.

Scenario 3: Review Your Employer Rate

Employer contributions are determined by annual valuations. These valuations are based on the benefit formulas the agency provides and the employee groups covered. Refer to unit 2 on how to access your valuation report. Visit the Public Agency Required Employer Contributions page to review your agency's contribution rate(s).

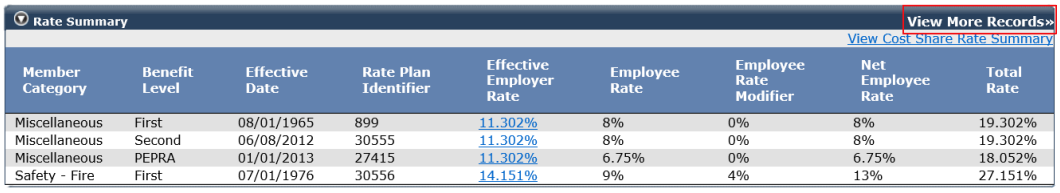
Step Actions (9 steps)

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select **Retirement Contract** local navigation link.



Step 3 Within the Rate Summary section, select the **View More Records>>** link.



Member Category	Benefit Level	Effective Date	Rate Plan Identifier	Effective Employer Rate	Employee Rate	Employee Rate Modifier	Net Employee Rate	Total Rate
Miscellaneous	First	08/01/1965	899	11.302%	8%	0%	8%	19.302%
Miscellaneous	Second	06/08/2012	30555	11.302%	8%	0%	8%	19.302%
Miscellaneous	PEPRA	01/01/2013	27415	11.302%	6.75%	0%	6.75%	18.052%
Safety - Fire	First	07/01/1976	30556	14.151%	9%	4%	13%	27.151%

Step 4 Within the Rate Summary section, review the employer rates for each member category and benefit level.

Rate Summary

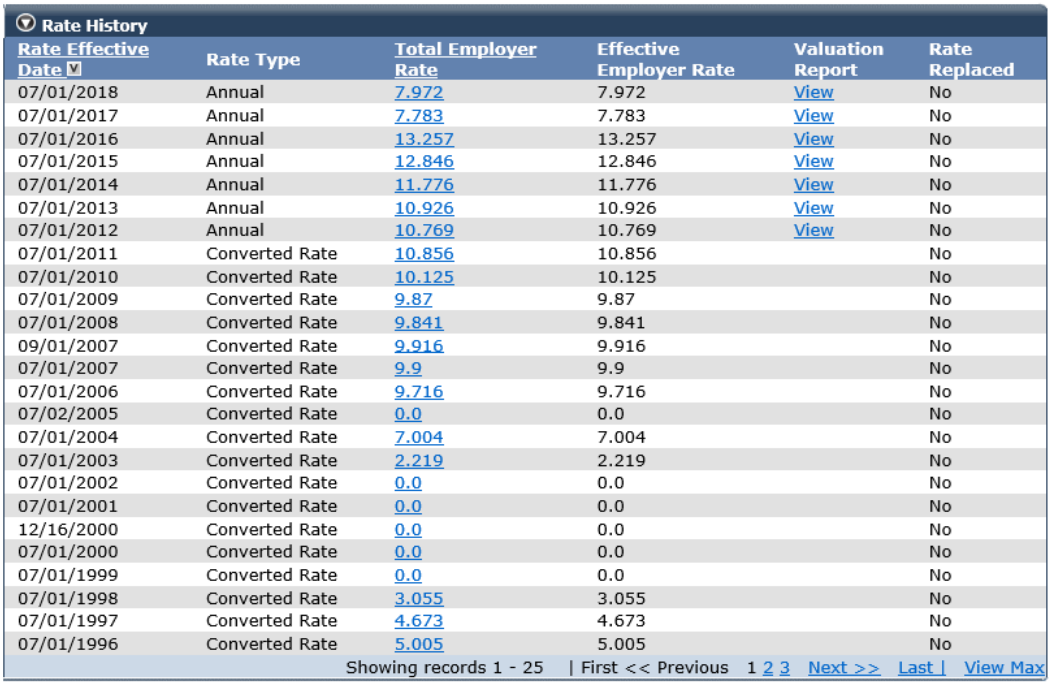
Member Category	Benefit Level	Effective Date	Rate Plan Identifier	Effective Employer Rate	Employee Rate	Employee Rate Modifier	Net Employee Rate	Total Rate
Miscellaneous	First	06/01/1948	161	7.783%	7%	0%	7%	14.783%
Miscellaneous	PEPRA	01/01/2013	26088	7.783%	6.25%	0%	6.25%	14.033%
Safety - County Peace Officer	First	06/01/1948	30266	16.959%	9%	0%	9%	25.959%
Safety - County Peace Officer	Second	01/09/1982	30265	16.959%	9%	0%	9%	25.959%
Safety - County Peace Officer	Third	11/05/2011	30267	16.959%	9%	0%	9%	25.959%
Safety - County Peace Officer	PEPRA	01/01/2013	25137	16.959%	10.75%	0%	10.75%	27.709%
Safety - Fire	First	06/01/1948	162	16.959%	9%	0%	9%	25.959%

Step 5 Do you want to review the employer rate history?

Yes: Select the appropriate **rate** link under the Effective Employer Rate column and continue to step 6.

No: You have completed this scenario.

Step 6 Review the Rate History section.



Rate History

Rate Effective Date	Rate Type	Total Employer Rate	Effective Employer Rate	Valuation Report	Rate Replaced
07/01/2018	Annual	7.972	7.972	View	No
07/01/2017	Annual	7.783	7.783	View	No
07/01/2016	Annual	13.257	13.257	View	No
07/01/2015	Annual	12.846	12.846	View	No
07/01/2014	Annual	11.776	11.776	View	No
07/01/2013	Annual	10.926	10.926	View	No
07/01/2012	Annual	10.769	10.769	View	No
07/01/2011	Converted Rate	10.856	10.856		No
07/01/2010	Converted Rate	10.125	10.125		No
07/01/2009	Converted Rate	9.87	9.87		No
07/01/2008	Converted Rate	9.841	9.841		No
09/01/2007	Converted Rate	9.916	9.916		No
07/01/2007	Converted Rate	9.9	9.9		No
07/01/2006	Converted Rate	9.716	9.716		No
07/02/2005	Converted Rate	0.0	0.0		No
07/01/2004	Converted Rate	7.004	7.004		No
07/01/2003	Converted Rate	2.219	2.219		No
07/01/2002	Converted Rate	0.0	0.0		No
07/01/2001	Converted Rate	0.0	0.0		No
12/16/2000	Converted Rate	0.0	0.0		No
07/01/2000	Converted Rate	0.0	0.0		No
07/01/1999	Converted Rate	0.0	0.0		No
07/01/1998	Converted Rate	3.055	3.055		No
07/01/1997	Converted Rate	4.673	4.673		No
07/01/1996	Converted Rate	5.005	5.005		No

Showing records 1 - 25 | First << Previous 1 2 3 Next >> Last | View Max

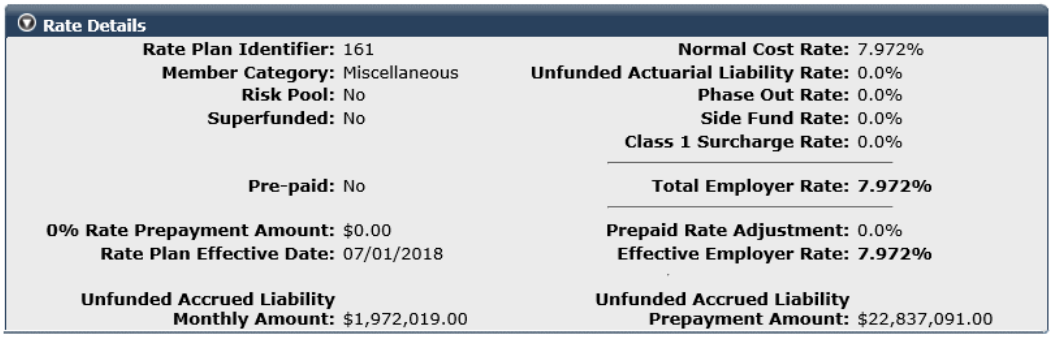
Step 7 To view more history, select the **View Max** link at the bottom right.

Step 8 Do you want to review more details for each rate?

Yes: Select the appropriate **rate** link under the Total Employer Rate column to review rate details and continue to step 9.

No: You have completed this scenario.

Step 9 Review the Rate Details section.



Rate Details

Rate Plan Identifier:	161	**Normal Cost Rate:**	7.972%
Member Category:	Miscellaneous	**Unfunded Actuarial Liability Rate:**	0.0%
Risk Pool:	No	**Phase Out Rate:**	0.0%
Superfunded:	No	**Side Fund Rate:**	0.0%
		Class 1 Surcharge Rate:	0.0%
Pre-paid:	No	**Total Employer Rate:**	**7.972%**
0% Rate Prepayment Amount:	$0.00	**Prepaid Rate Adjustment:**	0.0%
Rate Plan Effective Date:	07/01/2018	**Effective Employer Rate:**	**7.972%**
Unfunded Accrued Liability Monthly Amount:	$1,972,019.00	**Unfunded Accrued Liability Prepayment Amount:**	$22,837,091.00

You have completed this scenario.

Scenario 4: Review Your Exclusions

The Exclusions section displays classification(s) or groups of employees not covered by your retirement contract.

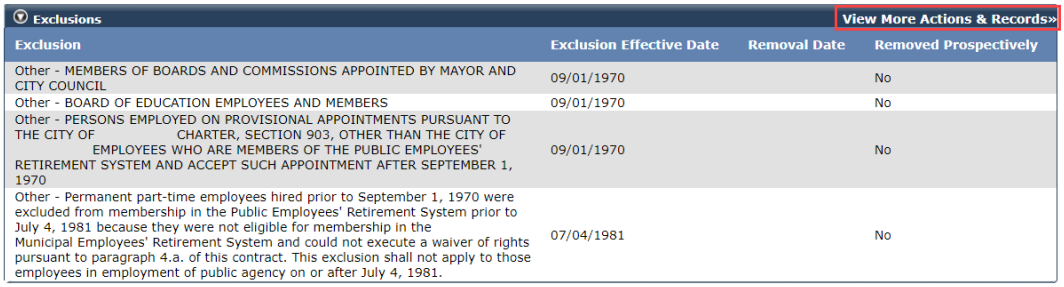
Step Actions (4 steps)

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Exclusions section, select the **View More Actions & Records>>** link.



Exclusion	Exclusion Effective Date	Removal Date	Removed Prospectively
Other - MEMBERS OF BOARDS AND COMMISSIONS APPOINTED BY MAYOR AND CITY COUNCIL	09/01/1970		No
Other - BOARD OF EDUCATION EMPLOYEES AND MEMBERS	09/01/1970		No
Other - PERSONS EMPLOYED ON PROVISIONAL APPOINTMENTS PURSUANT TO THE CITY OF CHARTER, SECTION 903, OTHER THAN THE CITY OF EMPLOYEES WHO ARE MEMBERS OF THE PUBLIC EMPLOYEES' RETIREMENT SYSTEM AND ACCEPT SUCH APPOINTMENT AFTER SEPTEMBER 1, 1970	09/01/1970		No
Other - Permanent part-time employees hired prior to September 1, 1970 were excluded from membership in the Public Employees' Retirement System prior to July 4, 1981 because they were not eligible for membership in the Municipal Employees' Retirement System and could not execute a waiver of rights pursuant to paragraph 4.a. of this contract. This exclusion shall not apply to those employees in employment of public agency on or after July 4, 1981.	07/04/1981		No

Step 4 Review the expanded Exclusions section.



Exclusion	Exclusion Effective Date	Removal Date	Removed Prospectively
Other - MEMBERS OF BOARDS AND COMMISSIONS APPOINTED BY MAYOR AND CITY COUNCIL	09/01/1970		No
Other - BOARD OF EDUCATION EMPLOYEES AND MEMBERS	09/01/1970		No
Other - PERSONS EMPLOYED ON PROVISIONAL APPOINTMENTS PURSUANT TO THE CITY OF CHARTER, SECTION 903, OTHER THAN THE CITY OF EMPLOYEES WHO ARE MEMBERS OF THE PUBLIC EMPLOYEES' RETIREMENT SYSTEM AND ACCEPT SUCH APPOINTMENT AFTER SEPTEMBER 1, 1970	09/01/1970		No
Other - Permanent part-time employees hired prior to September 1, 1970 were excluded from membership in the Public Employees' Retirement System prior to July 4, 1981 because they were not eligible for membership in the Municipal Employees' Retirement System and could not execute a waiver of rights pursuant to paragraph 4.a. of this contract. This exclusion shall not apply to those employees in employment of public agency on or after July 4, 1981.	07/04/1981		No
Other - Fire employees hired prior to July 1, 1976 who will remain members of the City of Fire and Police Retirement System and who did not waive their rights under the plan as of October 13, 2001.	10/13/2001		No
Other - Police employees hired prior to July 1, 1976 who will remain members of the City of Fire and Police Retirement System and who did not waive their rights under that plan as of June 21, 2003.	06/21/2003		No
Other - Miscellaneous employees hired prior to September 1, 1970 who remained members of the Municipal Employees Retirement System and who did not waive their rights under that plan as of June 19, 2004.	06/19/2004		No
Other - Miscellaneous EMPLOYEES, OTHER THAN ELECTIVE OFFICERS, WHO ENTERED PUBLIC AGENCY SERVICE PRIOR TO SEPTEMBER 1, 1970 AND WHO HAVE NOT EXECUTED AND FILED, IN ACCORDANCE WITH RESOLUTIONS OF THE CITY COUNCIL, A WAIVER OF RIGHTS UNDER THE MUNICIPAL EMPLOYEE RETIREMENT SYSTEM PRIOR TO SEPTEMBER 1, 1970, OR IN THE PERIODS FEBRUARY 15, 1973 THROUGH MARCH 15, 1973, INCLUSIVE, OR NOVEMBER 24, 1975 THROUGH DECEMBER 19, 1975, INCLUSIVE, OR MAY 15, 1981 THROUGH JUNE 15, 1981, INCLUSIVE, THE EXCLUSION OF A MEMBER EXECUTING AND FILING SUCH WAIVER IN THE PERIOD MAY 15, 1981, THROUGH JUNE 15, 1981, INCLUSIVE, SHALL CEASE AND HIS MEMBERSHIP SHALL BE EFFECTIVE ON JULY 4, 1981.	09/01/1970	06/20/2004	No
Other - Police officers hired prior to 7/1/1976.	07/01/1976	06/22/2003	No
Other - Fire fighters hired prior to 7/1/1976.	07/01/1976	10/14/2001	No
Other - POLICE OFFICERS	09/01/1970	07/02/1976	No
Other - FIRE FIGHTERS	09/01/1970	07/02/1976	No

You have completed this scenario.

Unit 2: Annual Actuarial Valuation Report

Actuarial valuation reports are available in August for the following fiscal year.

Your agency's actuarial valuation reports can be accessed on the Public Agency Actuarial Valuation Reports page.

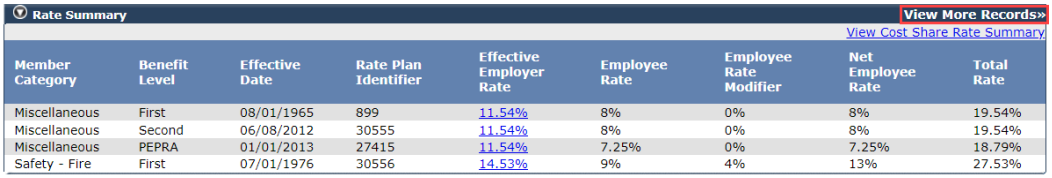
Step Actions (5 steps)

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.

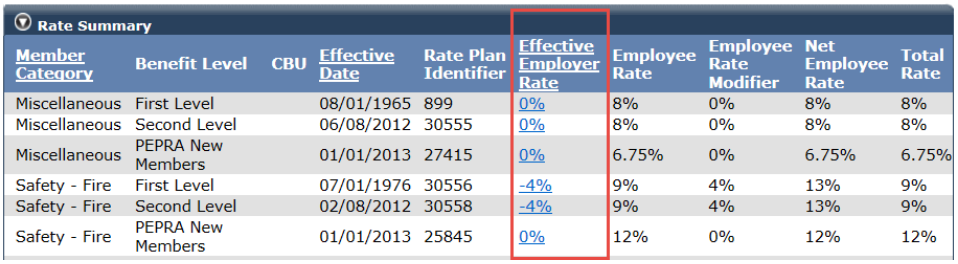


Step 3 Within the Rate Summary section, select the **View More Records>>** link.



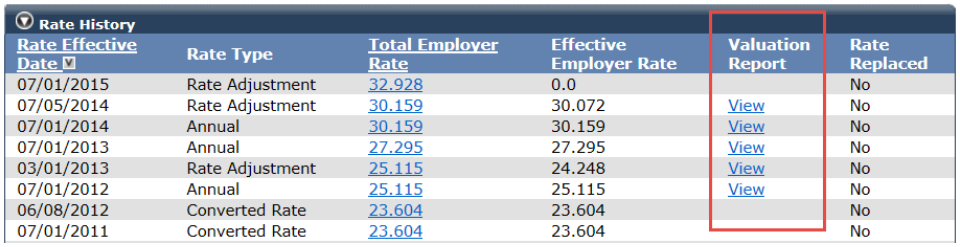
Member Category	Benefit Level	Effective Date	Rate Plan Identifier	Effective Employer Rate	Employee Rate	Employee Rate Modifier	Net Employee Rate	Total Rate
Miscellaneous	First	08/01/1965	899	11.54%	8%	0%	8%	19.54%
Miscellaneous	Second	06/08/2012	30555	11.54%	8%	0%	8%	19.54%
Miscellaneous	PEPRA	01/01/2013	27415	11.54%	7.25%	0%	7.25%	18.79%
Safety - Fire	First	07/01/1976	30556	14.53%	9%	4%	13%	27.53%

Step 4 Select the appropriate **rate** link under the Effective Employer Rate column.



Member Category	Benefit Level	CBU	Effective Date	Rate Plan Identifier	Effective Employer Rate	Employee Rate	Employee Rate Modifier	Net Employee Rate	Total Rate
Miscellaneous	First Level		08/01/1965	899	0%	8%	0%	8%	8%
Miscellaneous	Second Level		06/08/2012	30555	0%	8%	0%	8%	8%
Miscellaneous	PEPRA New Members		01/01/2013	27415	0%	6.75%	0%	6.75%	6.75%
Safety - Fire	First Level		07/01/1976	30556	-4%	9%	4%	13%	9%
Safety - Fire	Second Level		02/08/2012	30558	-4%	9%	4%	13%	9%
Safety - Fire	PEPRA New Members		01/01/2013	25845	0%	12%	0%	12%	12%

Step 5 Select the valuation report **View** link for the appropriate rate effective date.



Rate Effective Date	Rate Type	Total Employer Rate	Effective Employer Rate	Valuation Report	Rate Replaced
07/01/2015	Rate Adjustment	32.928	0.0		No
07/05/2014	Rate Adjustment	30.159	30.072	View	No
07/01/2014	Annual	30.159	30.159	View	No
07/01/2013	Annual	27.295	27.295	View	No
03/01/2013	Rate Adjustment	25.115	24.248	View	No
07/01/2012	Annual	25.115	25.115	View	No
06/08/2012	Converted Rate	23.604	23.604		No
07/01/2011	Converted Rate	23.604	23.604		No

You have completed this scenario.

Unit 3: Cost Share

Your agency may add cost sharing to your retirement contract based on member categories, bargaining units, or benefit levels. As a contracting agency, cost sharing permits employees to share a portion of their employer's pension cost.

Access the Public Agency & Schools Reference Guide (PDF) for more information.

Contact CalPERS by sending an email to **pensioncontracts@calpers.ca.gov** before following the steps in this unit. A pension contract analyst will contact you to provide further instructions.

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Scenario 1: Add a Collective Bargaining Unit (CBU)

Step Actions (7 steps)

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

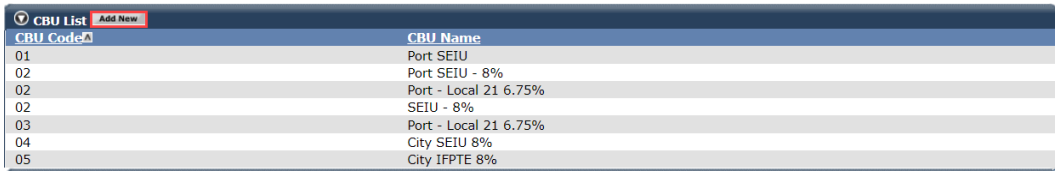
Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Select the **Maintain CBU** left-side navigation link.



Step 4 Select the **Add New** button in the CBU List section.



Step 5 Complete the CBU Details section.



Step 6 Do you need to add another collective bargaining unit?

Yes: Select the **Save & Add Another** button and return to step 5.

No: Continue to step 7.

Step 7 Select the **Save** button.

You have completed this scenario.

Scenario 2: Associate an Employee to a Collective Bargaining Unit (CBU)

System Logic

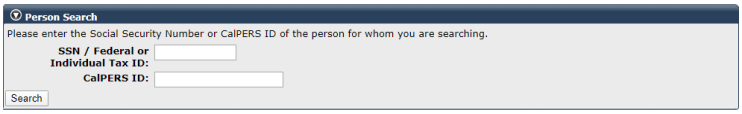
Each employee within a CBU that will have cost sharing must be associated to that CBU in myCalPERS.

Step Actions (8 steps)

Step 1 From the homepage, select the **Person Information** global navigation tab.



Step 2 Complete the Person Search section.

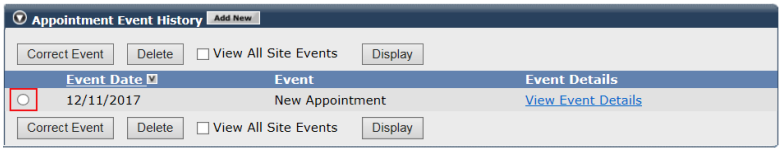


Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active employer link.

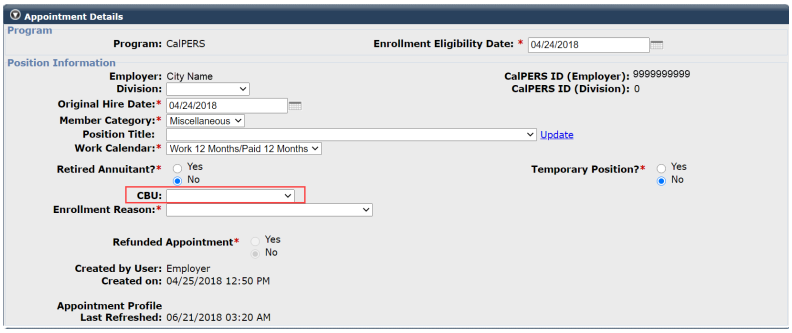


Step 5 Select the radio button of the most recent New Appointment or Appointment Change event.



Step 6 Select the **Correct Event** button.

Step 7 Within the Appointment Details section, update the CBU field.



Step 8 Select the **Save** button.

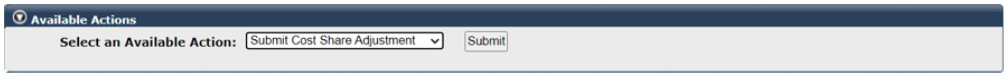
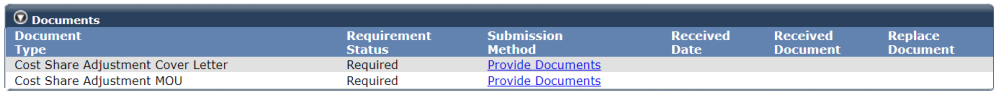
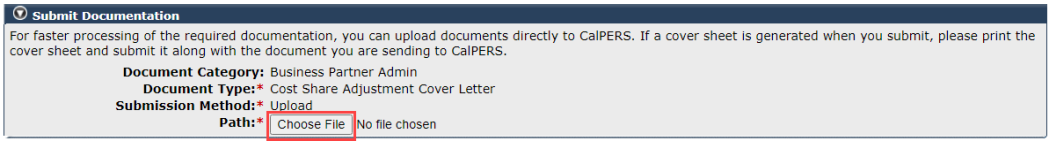
You have completed this scenario.

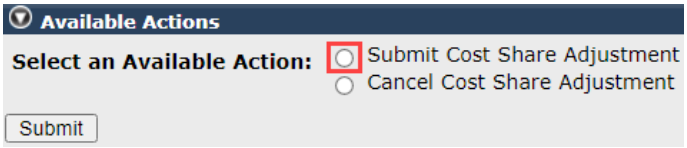
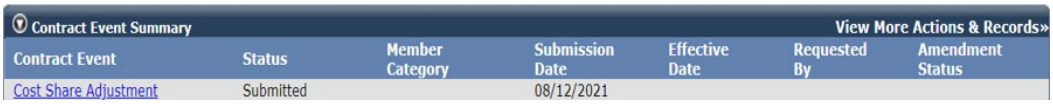
Scenario 3: Submit Cost Share Adjustment Memorandum of Understanding (MOU)

System Logic

- This optional benefit does not require an approved actuarial valuation before amending the retirement contract.
- Ensure copies of the **Cost Share Adjustment Cover Letter** and the **Cost Share Adjustment MOU** are uploaded separately.

Step Actions (14 steps)

Step 1	From the homepage, select the **Profile** global navigation tab.
Step 2	Select the **Retirement Contract** local navigation link. 
Step 3	At the bottom of the page within the Available Actions section, select the Submit Cost Share Adjustment option from the drop-down list. 
Step 4	Select the **Submit** button.
Step 5	Within the Documents section, select a **Provide Documents** link. 
Step 6	Within the Submit Documentation section, select the **Choose File** button. 
Step 7	Select your cover letter or MOU.
Step 8	Select the **Open** button.
Step 9	Select the **Submit** button.
Step 10	Repeat steps 5-9 to upload your other document (cover letter or MOU).

Step 11	Within the Available Actions section, select the **Submit Cost Share Adjustment** radio button. 
Step 12	Select the **Submit** button.
Step 13	Within the Contract Event Summary section, verify that the cost share adjustment displays Submitted under the Status column. 
Step 14	A CalPERS pension contract analyst will contact you for the next steps in the process. **You have completed this scenario.**

Unit 4: Review Retirement Contract Amendment Documents

After you have worked with a pension contract analyst to amend your contract, your initial contract amendment documents will be created and in myCalPERS within 30 calendar days.

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Scenario 1: Download and Submit Initial Contract Amendment Documents 16

Scenario 2: Submit Final Contract Amendment Documents 18

Scenario 3: Verify Amendment Approval Through myCalPERS 20

Scenario 1: Download and Submit Initial Contract Amendment Documents

CalPERS will notify your agency (based on your agency's preferred communication method) that the Initial Contract Amendment documents are available through myCalPERS.

1. Download the Amendment Resolution of Intention Letter which provides instructions on completing a list of required documents and uploading them in myCalPERS.
2. Do not upload the cost share ballot(s) but save them at your agency in case of a future CalPERS review.
3. Complete and upload the Certification of Employee Election – Cost Share document.

Step Actions (12 steps)

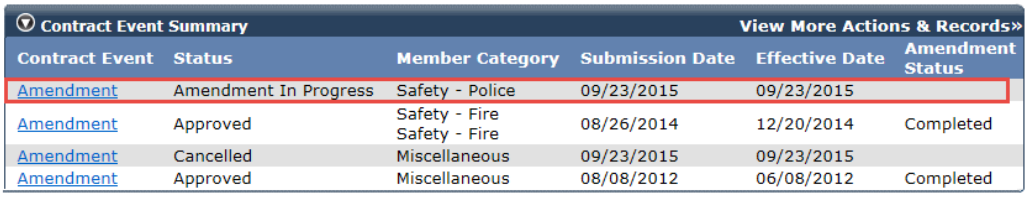
Download Required Documents

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.

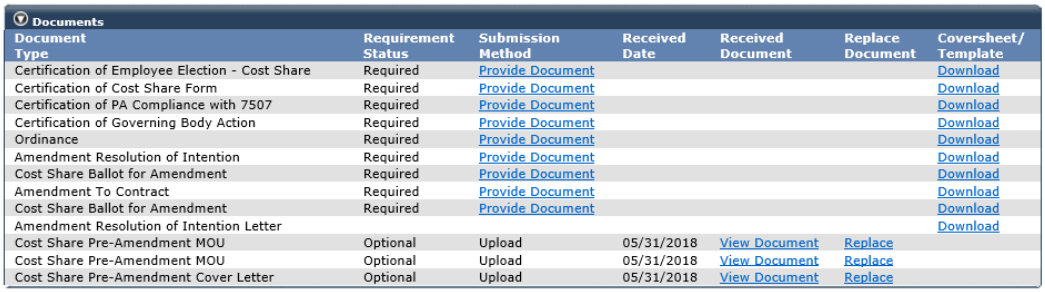


Step 3 Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.



Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status
Amendment	Amendment In Progress	Safety - Police	09/23/2015	09/23/2015	
Amendment	Approved	Safety - Fire Safety - Fire	08/26/2014	12/20/2014	Completed
Amendment	Cancelled	Miscellaneous	09/23/2015	09/23/2015	
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012	Completed

Step 4 Within the Documents section, select each **Download** link and print each document.



Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/ Template
Certification of Employee Election - Cost Share	Required	Provide Document				Download
Certification of Cost Share Form	Required	Provide Document				Download
Certification of PA Compliance with 7507	Required	Provide Document				Download
Certification of Governing Body Action	Required	Provide Document				Download
Ordinance	Required	Provide Document				Download
Amendment Resolution of Intention	Required	Provide Document				Download
Cost Share Ballot for Amendment	Required	Provide Document				Download
Amendment To Contract	Required	Provide Document				Download
Cost Share Ballot for Amendment	Required	Provide Document				Download
Amendment Resolution of Intention Letter						Download
Cost Share Pre-Amendment MOU	Optional	Upload	05/31/2018	View Document	Replace	
Cost Share Pre-Amendment MOU	Optional	Upload	05/31/2018	View Document	Replace	
Cost Share Pre-Amendment Cover Letter	Optional	Upload	05/31/2018	View Document	Replace	

Complete Required Documents

Step 5 Follow the instructions in the Amendment Resolution of Intention Letter**.**

Step 6 Scan the completed documents to your computer.

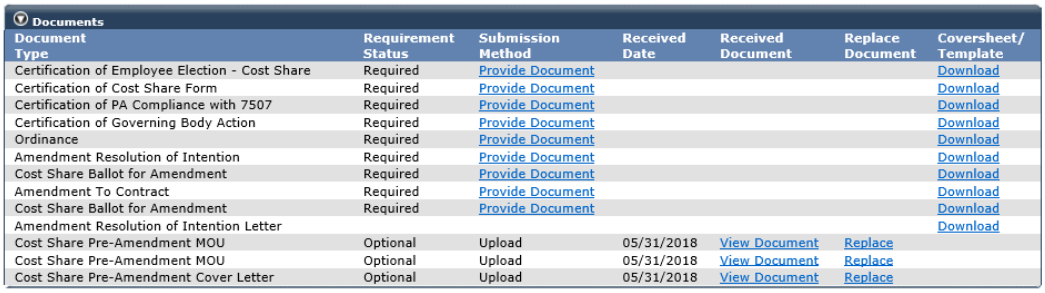
Upload Required Documents

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

Step 8 Select the **Retirement Contract** local navigation link.

Step 9 Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.

Step 10 Within the Documents section, complete each required document type by selecting each **Provide Document** link.



Documents

Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/ Template
Certification of Employee Election - Cost Share	Required	Provide Document				Download
Certification of Cost Share Form	Required	Provide Document				Download
Certification of PA Compliance with 7507	Required	Provide Document				Download
Certification of Governing Body Action	Required	Provide Document				Download
Ordinance	Required	Provide Document				Download
Amendment Resolution of Intention	Required	Provide Document				Download
Cost Share Ballot for Amendment	Required	Provide Document				Download
Amendment To Contract	Required	Provide Document				Download
Cost Share Ballot for Amendment	Required	Provide Document				Download
Amendment Resolution of Intention Letter						Download
Cost Share Pre-Amendment MOU	Optional	Upload	05/31/2018	View Document	Replace	
Cost Share Pre-Amendment MOU	Optional	Upload	05/31/2018	View Document	Replace	
Cost Share Pre-Amendment Cover Letter	Optional	Upload	05/31/2018	View Document	Replace	

Submit Required Documents

Step 11 Select the **Submit Initial Contract Amendment Documents** radio button.



Available Actions

Select an Available Action:*
- Submit Initial Contract Amendment Documents
- Submit Final Contract Amendment Documents
- Cancel Amendment

Submit

Step 12 Select the **Submit** button.

You have completed this scenario.

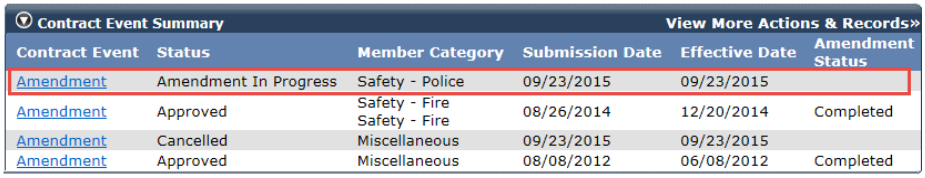
Scenario 2: Submit Final Contract Amendment Documents

After CalPERS receives the Initial Contract Amendment documents, within 10 business days, we will overnight mail a packet to your agency with the following:

- Instructional cover letter which explains which documents that must be submitted through myCalPERS and to return the original documents to CalPERS by mail
- **Note:** Original signatures are required on all contract documents.
- Certification of Final Action of Governing Body, Form CON-5
- Two copies of the blue Amendment to Contract documents
- Pre-paid return envelope

Step Actions (13 steps)

Download

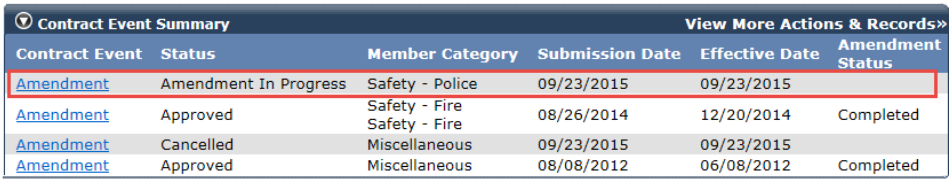
Step 1	Select the **Profile** global navigation tab.
Step 2	Select the **Retirement Contract** local navigation link. 
Step 3	Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link. 
Step 4	Within the Documents section, select the **Download** link for the Ordinance (city or county) or final resolution (all other public agencies).
Step 5	Print the document.

Complete

Step 6	Complete the Ordinance (city or county) or the final resolution (all other public agencies), Amendment to Contract, and Certification of Final Action of Governing Body, Form CON-5 documents.
Step 7	Scan the completed documents to your computer.

Upload

Step 8	Select the **Profile** global navigation tab.
Step 9	Select the **Retirement Contract** local navigation link.
Step 10	Select the appropriate Contract Event **Amendment** link.



Contract Event Summary — View More Actions & Records»

Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status
Amendment	Amendment In Progress	Safety - Police	09/23/2015	09/23/2015	
Amendment	Approved	Safety - Fire Safety - Fire	08/26/2014	12/20/2014	Completed
Amendment	Cancelled	Miscellaneous	09/23/2015	09/23/2015	
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012	Completed

Step 11	Within the Submit Documentation section, complete each required document type by selecting each **Provide Document** link.

Submit

Step 12	Select the **Submit Final Contract Amendment Documents** radio button.



Step 13	Select the **Submit** button. **You have completed this scenario.**

Scenario 3: Verify Amendment Approval Through myCalPERS

CalPERS will review all submitted documents. If the review is successful, we will approve the amendment and send both amendment documents to the appropriate authorized person.

Scenario

You will verify your agency's amendment status in myCalPERS.

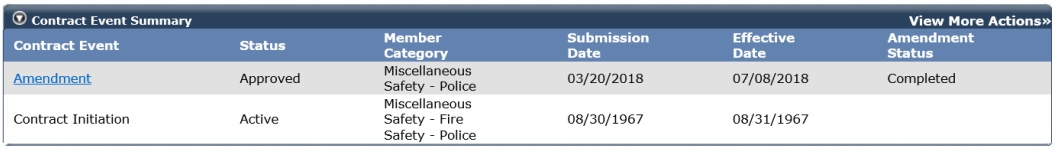
Step Actions (3 steps)

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

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Contract Event Summary section, verify that the amendment displays Approved under the Status column.



Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status
Amendment	Approved	Miscellaneous Safety - Police	03/20/2018	07/08/2018	Completed
Contract Initiation	Active	Miscellaneous Safety - Fire Safety - Police	08/30/1967	08/31/1967	

You have completed this scenario.

Unit 5: Employer Paid Member Contributions (EPMC)

Contact CalPERS before following the steps in this unit. A pension contract analyst will contact you to provide further instructions.

Follow the step actions to:

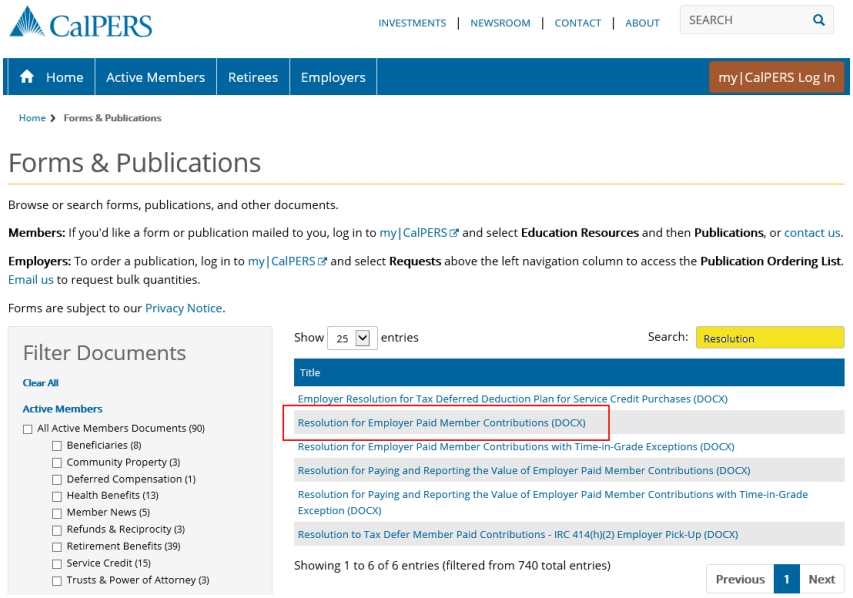
- Adopt a resolution for EPMC for the first time
- Revise a resolution for EPMC on file by increasing or decreasing the EPMC amount

Step Actions (30 steps)

Download the CalPERS Resolution

Step 1 From the CalPERS website, locate the Resolution for Employer Paid Member Contributions document.

Pathway: CalPERS website > Employers > Forms & Publications > Search box: Resolution



Step 2 Select the **Resolution for Employer Paid Member Contributions (DOCX)** link.

Complete the Resolution

Step 3 Complete the Resolution for Employer Paid Member Contributions document, which must include the governing body's signature.

Step 4 Save the completed and approved resolution document to your computer.

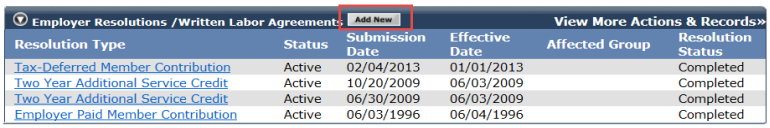
Upload Resolution

Step 5 From the homepage, select the **Profile** global navigation tab.

Step 6 Select the **Retirement Contract** local navigation link.

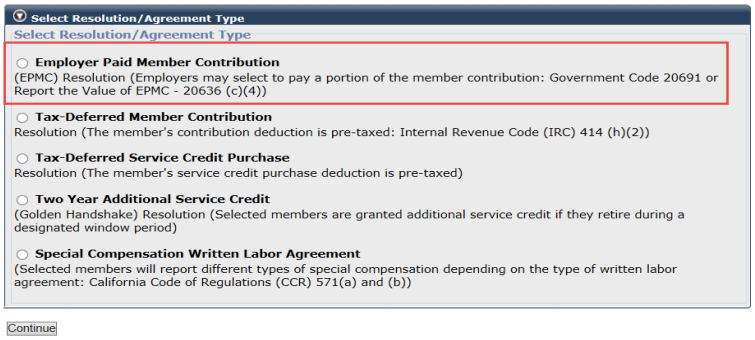


Step 7 Within the Employer Resolutions/Written Labor Agreements section, select the **Add New** button.



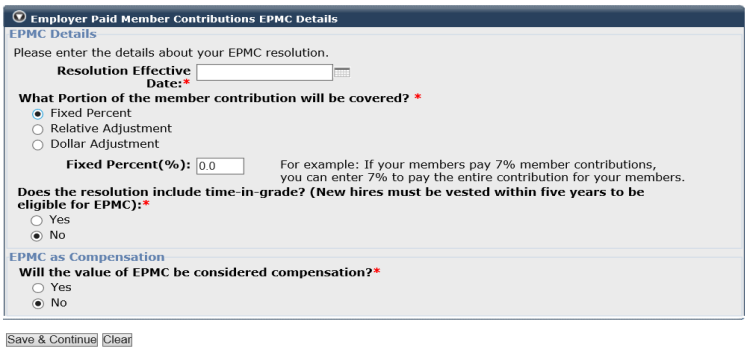
Resolution Type	Status	Submission Date	Effective Date	Affected Group	Resolution Status
Tax-Deferred Member Contribution	Active	02/04/2013	01/01/2013		Completed
Two Year Additional Service Credit	Active	10/20/2009	06/03/2009		Completed
Two Year Additional Service Credit	Active	06/30/2009	06/03/2009		Completed
Employer Paid Member Contribution	Active	06/03/1996	06/04/1996		Completed

Step 8 Select the **Employer Paid Member Contribution** radio button.



Step 9 Select the **Continue** button.

Step 10 Complete the Employer Paid Member Contributions EPMC Details section.

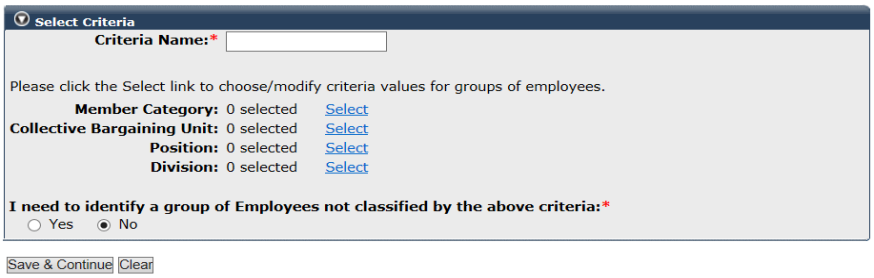
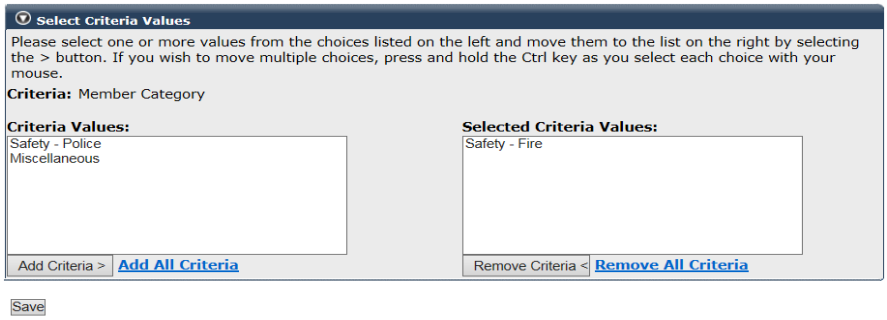
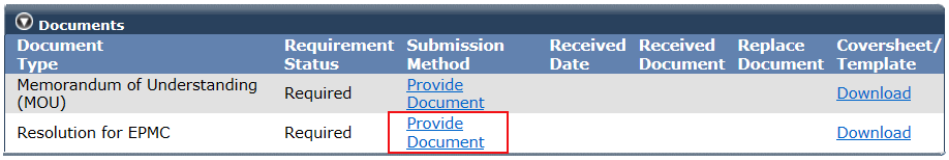
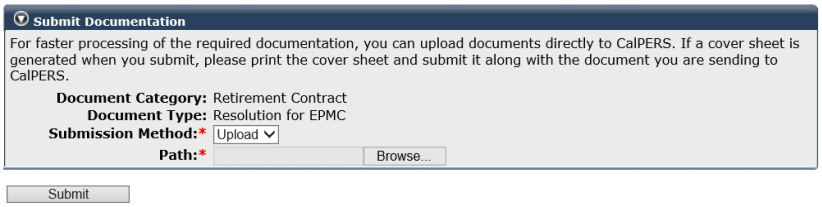


Step 11 Select the **Save & Continue** button.

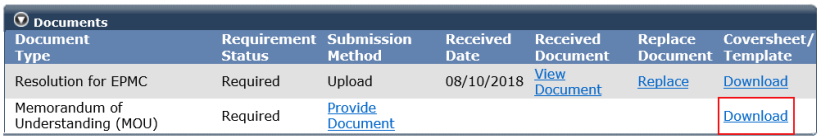
Step 12 Within the Identify Covered Employees section, select a radio button.



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

Step 14	Will this resolution cover all employees? **Yes:** Skip to step 19. **No:** Complete the Select Criteria section. 
Step 15	Within the Select Criteria Values section, select one or all items in the Criteria Values box. 
Step 16	Select the **Add Criteria >** button.
Step 17	Select the **Save** button.
Step 18	Select the **Save & Continue** button.
Step 19	Within the Documents section, select the Resolution for EPMC **Provide Document** link. 
Step 20	Within the Submit Documentation section, choose the submission method for sending the approved resolution. 
Step 21	Select the **Submit** button to upload the completed resolution document.

Step 22 Within the Documents section, select the Memorandum of Understanding (MOU) **Download** link.

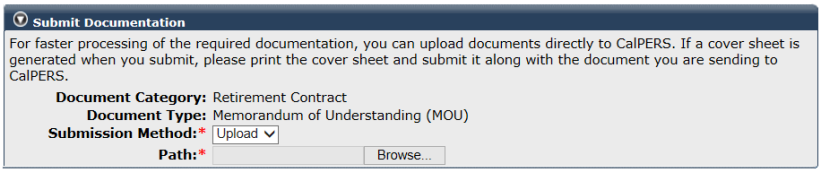


Step 23 Save the MOU to your computer.

Step 24 Close the MOU.

Step 25 Select the Memorandum of Understanding (MOU) **Provide Document** link.

Step 26 Complete the Submit Documentation section to attach the MOU.



Step 27 Select the **Submit** button.

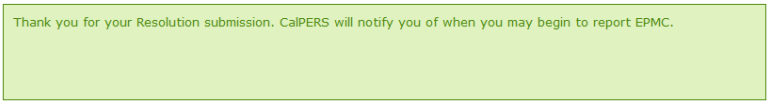
Submit Resolution

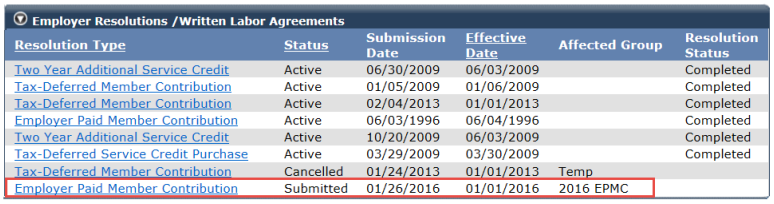
Step 28 Select the **Submit Resolution** radio button.



Step 29 Select the **Submit** button.

Step 30 Verify that your resolution displays a Submitted status.





You have completed this scenario.

Unit 6: Pay and Report the Value of Employer Paid Member Contributions (EPMC)

Contact CalPERS before following the steps in this unit. A CalPERS pension contract analyst will contact you to provide further instructions.

System Logic

Follow the step actions in this scenario to:

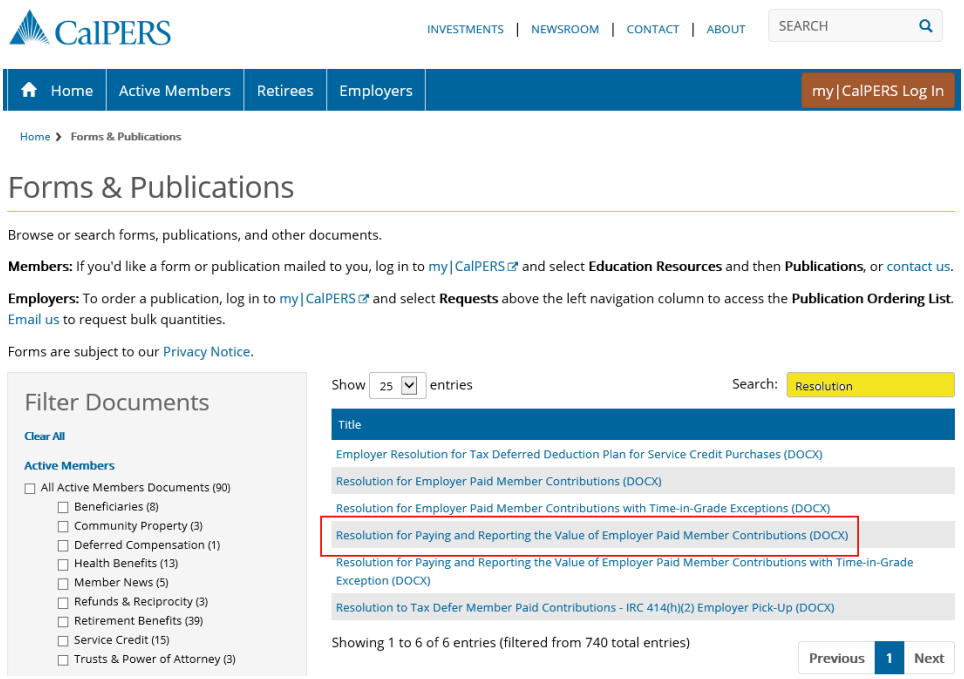
- Adopt a resolution for Paying and Reporting the Value of Employer Paid Member Contributions (EPMC) resolution for the first time
- Revise a resolution for Paying and Reporting the Value of EPMC on file by increasing or decreasing the EPMC amount

Step Actions (30 steps)

Download the CalPERS Resolution

Step 1 From the CalPERS website, locate the Resolution for Paying and Reporting the Value of Employer Paid Member Contributions (DOCX)

Pathway: CalPERS website > Employers > Forms & Publications > Search box: Resolution



Step 2 Select the **Resolution for Paying and Reporting the Value of Employer Paid Member Contributions (DOCX)** document link.

Complete Resolution

Step 3 Complete the **Resolution for Paying and Reporting the Value of Employer Paid Member Contributions** document, which must include your agency's governing body's signature.

Step 4 Scan the completed and approved resolution document to your computer.

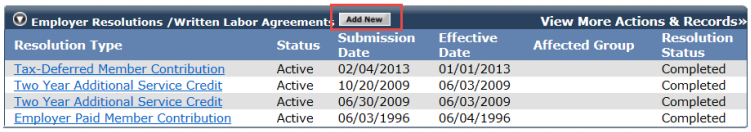
Upload Resolution

Step 5 From the homepage, select the **Profile** global navigation tab.

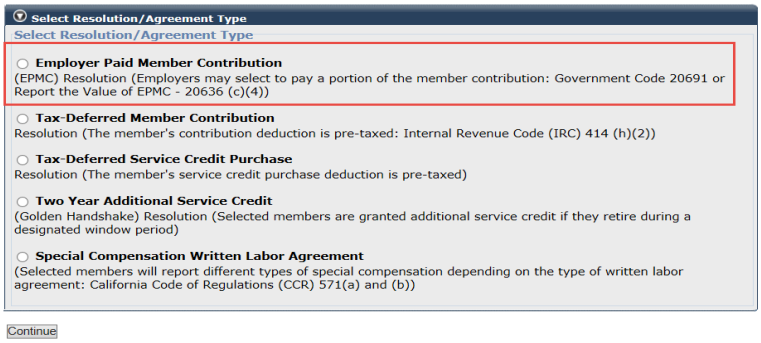
Step 6 Select the **Retirement Contract** local navigation link.



Step 7 Within the Employer Resolutions/Written Labor Agreements section, select the **Add New** button.



Step 8 Select the **Employer Paid Member Contribution** radio button.



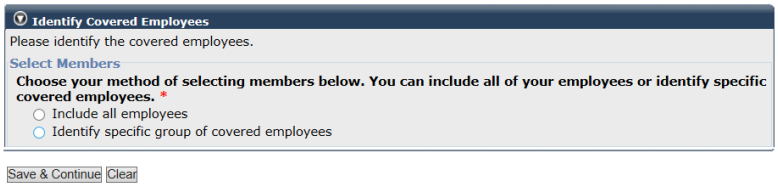
Step 9 Select the **Continue** button.

Step 10 Complete the Employer Paid Member Contributions EPMC Details section.



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

Step 12 Complete the Identify Covered Employees section.

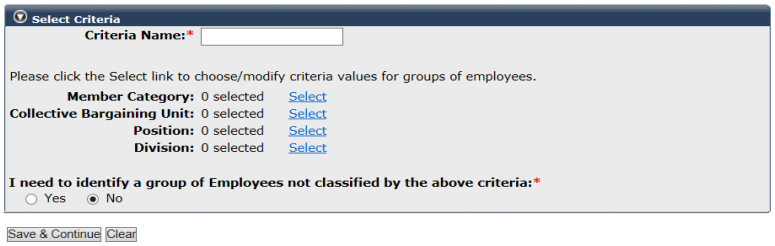


Step 13 Select the **Save & Continue** button.

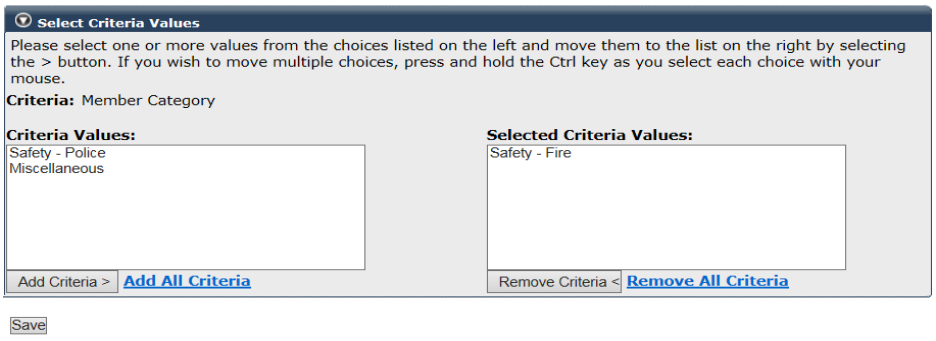
Step 14 Will this resolution cover all employees?

Yes: Skip to step 19.

No: Complete the Select Criteria section, and then continue to step 15.



Step 15 Select one or all items in the Criteria Values box.

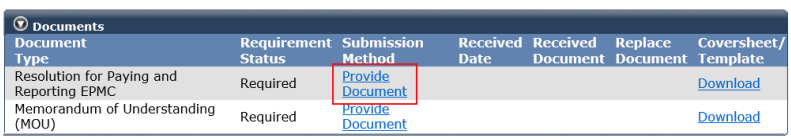


Step 16 Select the **Add Criteria >** button.

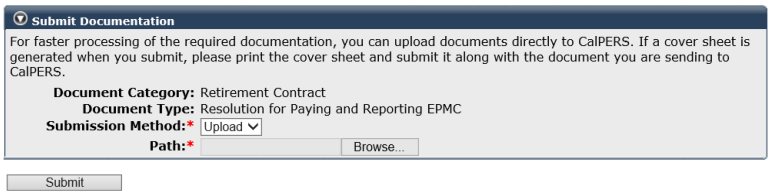
Step 17 Select the **Save** button.

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

Step 19 Within the Documents section, select the Resolution for Paying and Reporting EMPC **Provide Document** link.

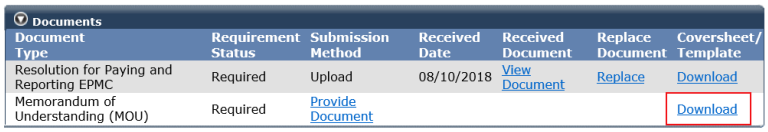


Step 20 Complete the Submit Documentation section to attach the recently approved and scanned resolution document.



Step 21 Select the **Submit** button to upload the completed resolution document.

Step 22 Select the Memorandum of Understanding (MOU) **Download** link.



Step 23 Save the MOU in PDF.

Step 24 Close the MOU.

Step 25 Select the Memorandum of Understanding (MOU) **Provide Document** link.

Step 26 Complete the Submit Documentation section to attach the MOU.

Step 27 Select the **Submit** button to upload the MOU.

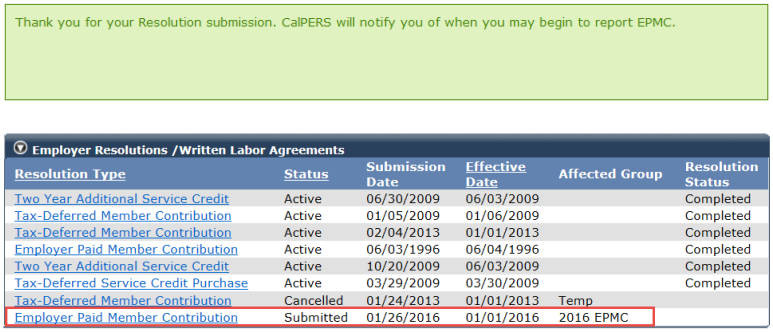
Submit Resolution

Step 28 Select the **Submit Resolution** radio button.



Step 29 Select the **Submit** button.

Step 30 Verify that the resolution displays a Submitted status.



You have completed this scenario.

Unit 7: Two Years Additional Service Credit (Golden Handshake)

Contact CalPERS before following the steps in this unit and a pension contract analyst will contact you to provide further instructions.

Contents

Scenario 1: Request Contract Amendment for Two Years Additional Service Credit 30

Scenario 2: Receive Initial Contract Amendment Documents 32

Scenario 3: Receive Final Contract Amendment Documents 34

Scenario 4: Verify Amendment Approval 36

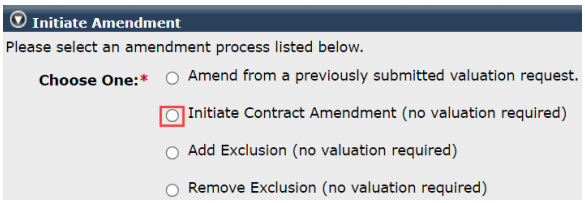
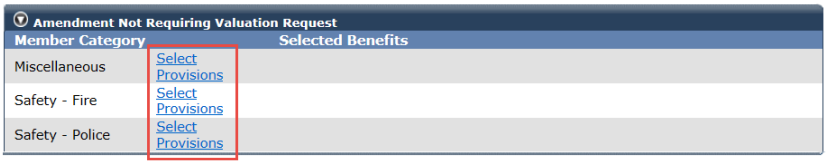
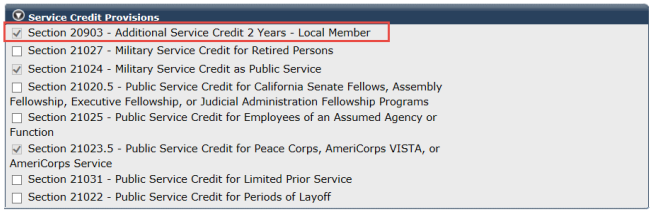
Scenario 5: Request a Golden Handshake Window Period 36

Scenario 1: Request Contract Amendment for Two Years Additional Service Credit

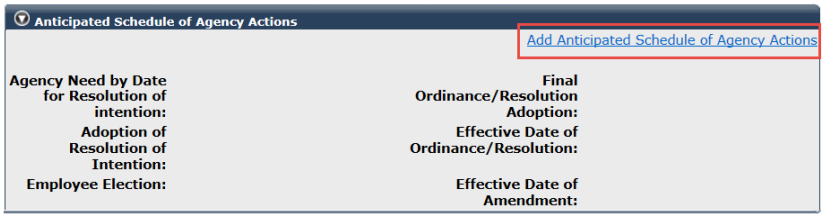
System Logic

Only one contract amendment can be submitted at a time.

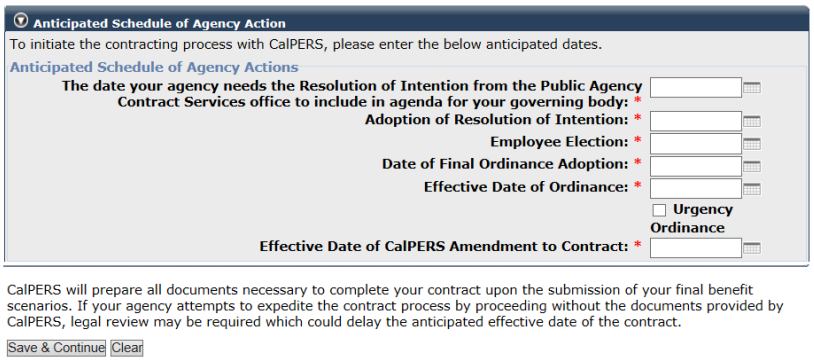
Step Actions (16 steps)

Step 1	From the homepage, select the **Profile** global navigation tab.
Step 2	Select the **Retirement Contract** local navigation link. 
Step 3	At the bottom of the page, within the Available Actions section, select the *Request Amendment to Contract* option from the drop-down list. 
Step 4	Select the **Submit** button.
Step 5	Select the **Initiate Contract Amendment (no valuation required)** radio button. 
Step 6	Select the **Continue** button.
Step 7	Within the Amendment Not Requiring Valuation Request section, select the **Select Provisions** link for the appropriate member category. 
Step 8	Within the Service Credit Provisions section, select the appropriate check box. 

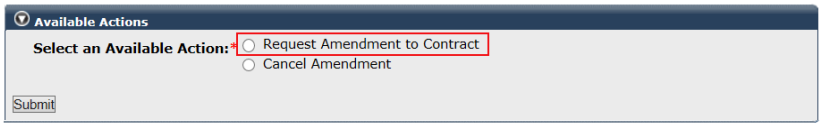
Step 9	Select the **Save & Continue** button.
Step 10	If you would like to add additional benefits to another member category, repeat steps 7-9.
Step 11	Select the **Continue** button, located below the Amendment Not Requiring Valuation Request section.
Step 12	Within the Anticipated Schedule of Agency Actions section, select the **Add Anticipated Schedule of Agency Actions** link.



Step 13	Complete the Anticipated Schedule of Agency Action section. Refer to unit 7 for more details.



Step 14	Select the **Save & Continue** button.
Step 15	Within the Available Actions section, select the **Request Amendment to Contract** radio button.



Step 16	Select the **Submit** button. **You have completed this scenario.**

Scenario 2: Receive Initial Contract Amendment Documents

To request a contract amendment, contact CalPERS by sending an email to **pensioncontracts@calpers.ca.gov** before following the steps in this unit. A pension contract analyst will contact you to provide further instructions.

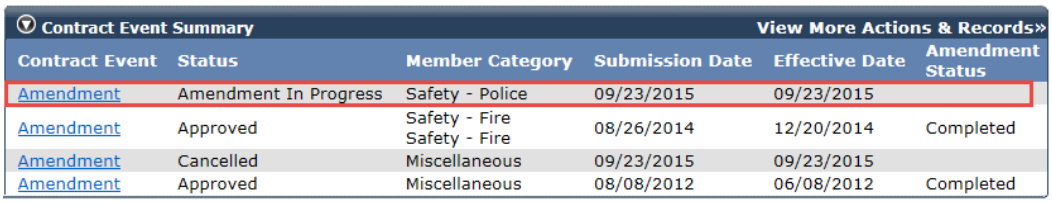
CalPERS will notify your agency (based on your preferred communication method) that the Initial Contract Amendment documents are available in myCalPERS.

Scenario

You will download the **Amendment Resolution of Intention Letter** which includes detailed instructions on completing the required documents and uploading them in myCalPERS.

Step Actions (12 steps)

Download Required Documents

Step 1	From the homepage, select the **Profile** global navigation tab.
Step 2	Select the **Retirement Contract** local navigation link. 
Step 3	Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link. 
Step 4	Select the **Download** link for each document type.

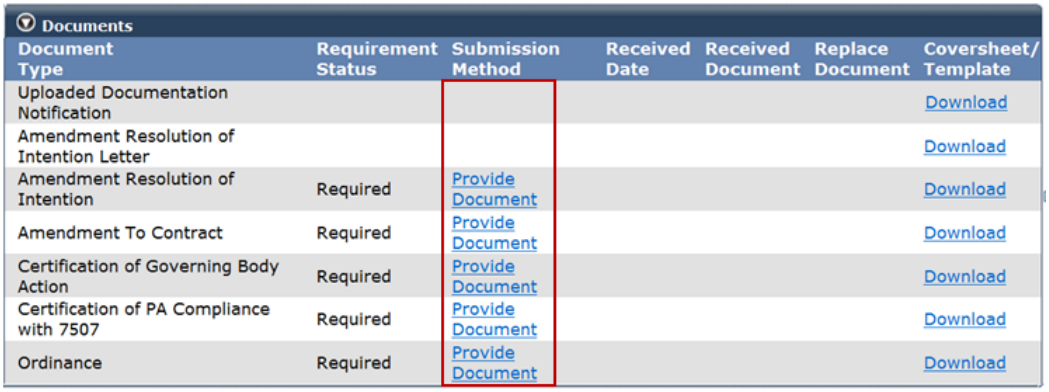
Complete Required Documents

Step 5	Follow the instructions in the Amendment Resolution of Intention Letter.
Step 6	Complete each document before scanning and saving to your computer.

Upload Required Documents

Step 7	Select the **Profile** global navigation tab.
Step 8	Select the **Retirement Contract** local navigation link.
Step 9	Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.

Step 10 Within the Documents section, select each **Provide Document** link.

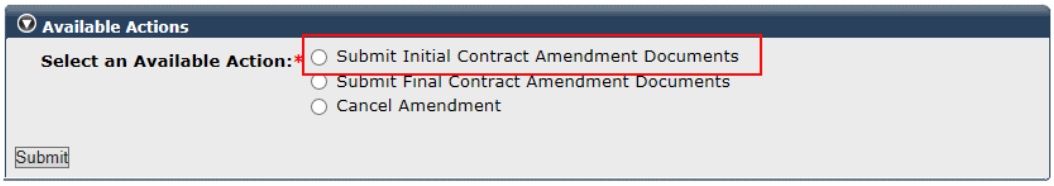


Documents

Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/ Template
Uploaded Documentation Notification						Download
Amendment Resolution of Intention Letter						Download
Amendment Resolution of Intention	Required	Provide Document				Download
Amendment To Contract	Required	Provide Document				Download
Certification of Governing Body Action	Required	Provide Document				Download
Certification of PA Compliance with 7507	Required	Provide Document				Download
Ordinance	Required	Provide Document				Download

Submit Required Documents

Step 11 Select the **Submit Initial Contract Amendment Documents** radio button.



Step 12 Select the **Submit** button.

You have completed this scenario.

Scenario 3: Receive Final Contract Amendment Documents

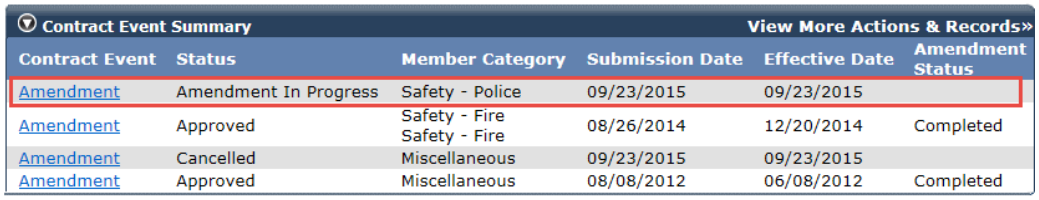
After CalPERS receives the Initial Contract Amendment documents, we will overnight mail a packet which will include the following:

- A pre-paid envelope
- Certification of Final Action of Governing Body, Form CON-5
- Two copies of the blue Amendment to Contract
- An instructional cover letter:
  - The following documents must be submitted in myCalPERS, and the original documents must be returned to CalPERS by mail:
    - » Amendment to Contract, two original executed sets
    - » Ordinance (city or county) or the final resolution (all other public agencies)
    - » Certification of Final Action of Governing Body, Form CON-5
  - Original signatures are required on all contracts.

Step Actions (12 steps)

Download Required Documents

Step 1	From the homepage, select the **Profile** global navigation tab.
Step 2	Select the **Retirement Contract** local navigation link.
Step 3	Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.



Contract Event Summary — View More Actions & Records»

Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status
Amendment	Amendment In Progress	Safety - Police	09/23/2015	09/23/2015	
Amendment	Approved	Safety - Fire Safety - Fire	08/26/2014	12/20/2014	Completed
Amendment	Cancelled	Miscellaneous	09/23/2015	09/23/2015	
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012	Completed

Step 4	Within the Documents section, select the **Download** link for the Ordinance (city or county) or the final resolution (all other public agencies), and then print the document.

Complete Required Documents

Step 5	Complete the Ordinance (city or county) or the final resolution (all other public agencies), Amendment to Contract, and Certification of Final Action of Governing Body, Form CON-5 documents.
Step 6	Scan the completed documents to your computer.

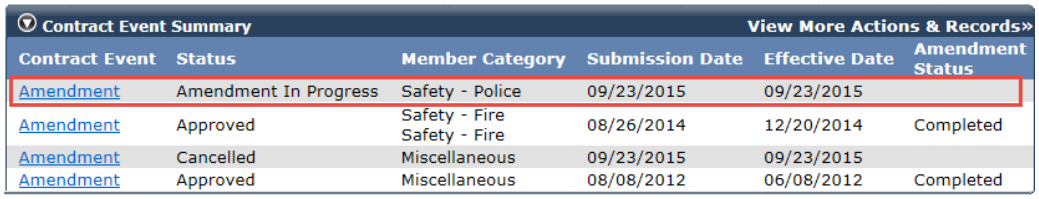
Upload Required Documents

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

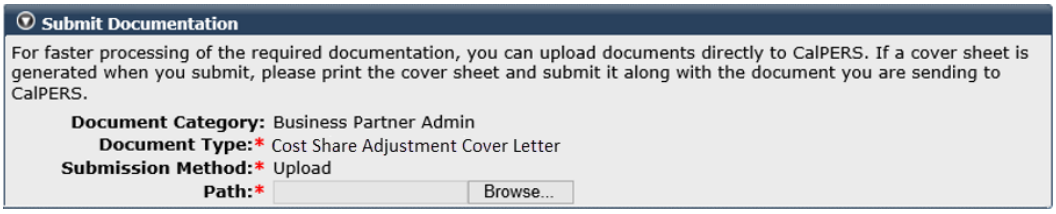
Step 8 Select the **Retirement Contract** local navigation link.



Step 9 Select the appropriate Contract Event **Amendment** link.

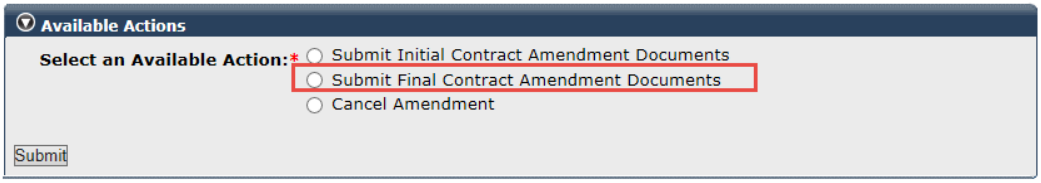


Step 10 Within the Submit Documentation section, select each **Provide Document** link.



Submit Required Documents

Step 11 Select the **Submit Final Contract Amendment Documents** radio button.



Step 12 Select the **Submit** button.

You have completed this scenario.

Scenario 4: Verify Amendment Approval

CalPERS will review all submitted documents. If the review is successful, we will approve the amendment and send both Amendment to Contract documents to the authorized people.

Process and Employer Notification

1. A CalPERS pension contract analyst receives the signed hard copy documents and reviews them for approval within five business days.
2. Upon approval, the contract amendment is activated in myCalPERS with the effective date.
3. The documents are reviewed and then signed by the CalPERS Pension Contracts & Prefunding Programs Division chief. An executed copy is sent to your agency.
4. You may check the status of the amendment to determine if approved. If there are issues with documents, a pension contract analyst will contact your agency and provide guidance.

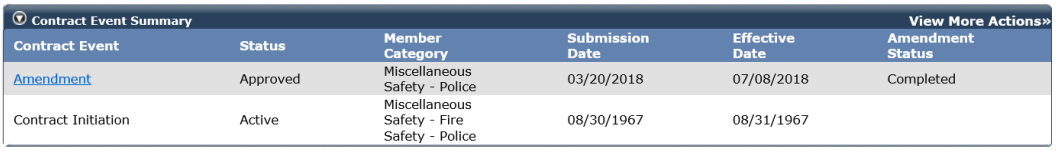
Step Actions

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Contract Event Summary section, verify that the amendment displays Approved under the Status column.



Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status
Amendment	Approved	Miscellaneous Safety - Police	03/20/2018	07/08/2018	Completed
Contract Initiation	Active	Miscellaneous Safety - Fire Safety - Police	08/30/1967	08/31/1967	

You have completed this scenario.

Scenario 5: Request a Golden Handshake Window Period

A public agency must contract for Section 20903 Two Years Additional Service Credit, also known as Golden Handshake (GHS), to open a GHS window period.

Send an email to **pensioncontracts@calpers.ca.gov** to add this benefit by a contract amendment. A pension contract analyst will contact you with further instructions.

You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the CalPERS website 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 select the **Classes** local navigation link)
  - Business Rules
    - Retirement Contracts for Public Agencies & Schools
  - myCalPERS
    - Navigate Your Retirement Contract Benefits
    - Add a Position Title
- myCalPERS Technical Requirements
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- Circular Letters
  Pathway: CalPERS website > Employers > Circular Letters
- Public Agency & Schools Reference Guide (PDF)
  Pathway: CalPERS website > Employers > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- Public Employees' Retirement Law (PERL)
  Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)
- Forms & Publications
  Pathway: CalPERS website > Employers > Forms & Publications > Search Box: Resolution

  – Employer Resolution for Tax Deferred Deduction Plan for Service Credit Purchases
  – Resolution for Employer Paid Member Contributions
  – Resolution for Employer Paid Member Contributions with Time-in-Grade Exceptions
  – Resolution for Paying and Reporting the Value of Employer Paid Member Contributions
  – Resolution for Paying and Reporting the Value of Employer Paid Member Contributions with Time-in-Grade Exception
  – Resolution to Tax Defer Member Paid Contributions - IRC 414(h)(2) Employer Pick-Up

- Pension Contract Amendments & Agency Updates
  Pathway: CalPERS website > Employers > Contracts > Pension Contract Amendments & Agency Updates
- Optional Benefits Listing (PERS-CON-40) (PDF)
  Pathway: CalPERS website > Employers > Forms & Publications > Optional Benefits Listing (PERS-CON-40) (PDF)
- Public Agency Required Employer Contributions
  Pathway: CalPERS website > Employers > Actuarial Services > Employer Contributions > Public Agency Required Employer Contributions
- Public Agency Actuarial Valuation Reports
  Pathway: CalPERS website > Employers > Actuarial Services> Public Agency Actuarial Valuation Reports
- myCalPERS Reports Catalog
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Reports Catalog

  Some common reports that are run for retirement contracts:

  – Business Partner Info Report
  – Contract Detail Report

CalPERS Contacts

Email

- To contact the employer education teams for questions and training requests, email **calpers_employer_communications@calpers.ca.gov**.
- To contact a pension contract analyst, email **pensioncontracts@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**.

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.