myCalPERS Retirement Enrollment

Student Guide

December 19, 2025

Introduction

This student guide will assist you with adding, modifying, and reconciling retirement appointments. You must report an employee's retirement enrollment and ongoing appointment information to CalPERS in a timely manner. An appointment is a continuous term of employment with a single employer, from the point of membership eligibility until permanent separation. Changes to an appointment status such as a permanent separation, leave of absence, or member category are reportable events.

State agency (references specific for this guide):

- State agency refers to a central-state agency that reports personnel, payroll, and retirement information in Personnel Information Management System (PIMS).
- This includes California State Universities (CSUs).

What's New

- Unit 2, scenario 2 has new questions when adding a retired annuitant appointment.
- Two scenarios for state agency appointments that don't update myCalPERS from PIMS.
  - Unit 3, scenario 9 (update a site change for an employee's appointment that has a transfer between two state agencies).
  - Unit 5 (correct the transactions that are in the preprocessing area).

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

Training Opportunities

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

Contents

Unit 1: Person Search Tool

In this unit, you will learn how to use the Person Search tool to verify membership status and confirm appointment information.
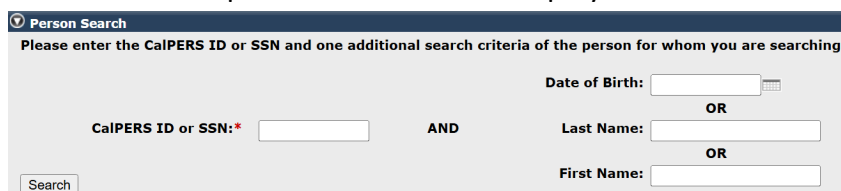
Contents

Scenario 1: Verify CalPERS Membership

You have a new employee whose appointment does not qualify for membership, so you will check their membership status. If they are already a member (have member contributions), you must add their new appointment in myCalPERS within 90 days; otherwise, your agency will pay all arrears contributions (member and employer) and an administrative fee of $500.

Step Actions (7 Steps)

Step 1	Select the **Person Information** global navigation tab.
Step 2	Enter the employee's CalPERS ID or SSN plus complete one field on the right. The birth date is preferred in case the employee had a name change.
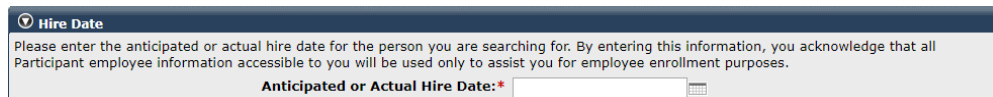
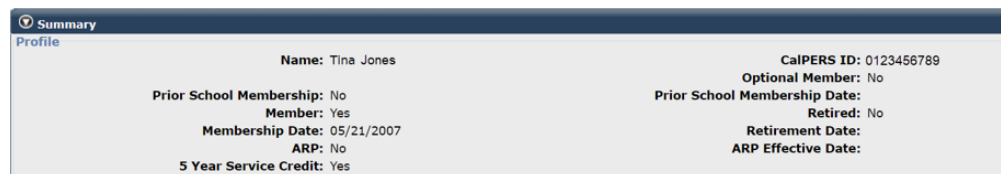| Step 3	Select the **Search** button.
Step 4	Did the Search Results section display *No results found.*?
	Yes: They are not a member. Save a screenshot that includes the date in the upper right corner. This serves as proof that as of today, the employee was not a member. You have completed this scenario.
	No: Continue to step 5.
Step 5	Enter the appropriate date in the Anticipated or Actual Hire Date field.

Step 6	Select the **Continue** button.
Step 7	Review the Summary section to verify CalPERS membership.

Member: **Yes** (has member contributions, may/may not be actively working)

Member: **No** (no member contributions on file, e.g., prior member who refunded, dependent on health benefits, beneficiary, etc. Provide the employee with a Notice of Exclusion From CalPERS Membership (PDF) form.

You have completed this scenario.

Scenario 2: Verify a School Employee's Eligibility for Retirement System Election

This scenario is only for school employers.

You have a new employee who is entering a certificated position or position performing creditable service. Using the steps in scenario 1, verify their CalPERS membership eligibility for the Retirement System Election (ES372) process.

The Eligibility for Retirement System Election as of Today field:

Yes: The employee has:

- Five years of service credit in CalPERS or
- Previous CalPERS-covered employment within 120 days of the new position hire date with a school employer, Board of Governors of the Community Colleges, or State Department of Education.

No: The employee has:

- Less than five years of CalPERS service credit and
- Not previously worked in a CalPERS-covered position with a school employer, the Board of Governors of the Community Colleges, or the State Department of Education within 120 days.

The indicator:

- Does not provide direction on the CalSTRS criteria if the position mandatorily qualifies for CalPERS membership upon hire. Ensure the position meets the criteria.
- Only provides eligibility as of the current date. Verify the eligibility indicator on the date of hire to determine ES372 eligibility.
- Does not take into consideration if a member refunded or retired from CalPERS. It may reflect Yes even if they are ineligible due to being refunded or retired. Verify the employee's status before making a final determination.

You have completed this scenario.

Scenario 3: Review Retirement Appointment Details

You may access employee appointment information specific to your agency. Verify your employee's retirement appointment details, as this ensures the accuracy of their appointment (start date, enrollment level, etc.) and historical information (service credit, member funds on deposit, and membership date). Review the following:

- Name (must match their legal document (driver license, Social Security card, etc.)
- Appointment Event History and Appointment Details
- Membership Information
- Reciprocal Self-Certification Information
- Retired Annuitant Information
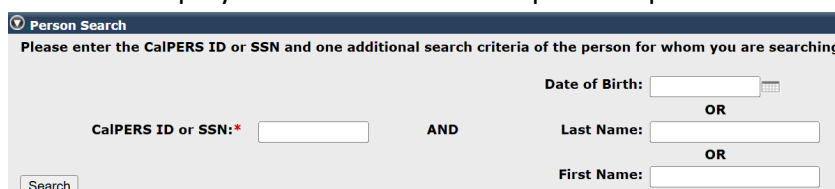- Retired Annuitant Special Criteria

System Logic

For an appointment with a future effective date, not all the employee's profile page will display until their enrollment date; however, you can review their appointment details.

Step Actions (5 Steps)

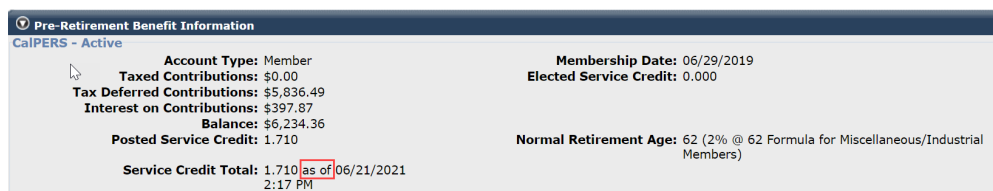| Step 1	Select the **Person Information** global navigation tab.
Step 2	Enter the employee's CalPERS ID or SSN plus complete one field on the right.

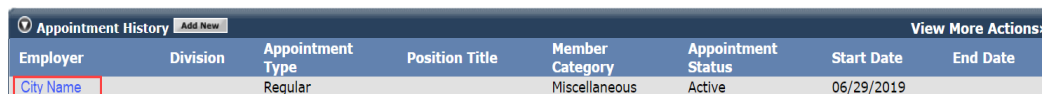| Step 3	Select the **Search** button.
Step 4	Within the Pre-Retirement Benefit Information section, verify the service credit and member contributions.

Note: The service credit total will reflect the current date and time even though the totals are when payroll was last posted.

Step 5	Within the Appointment History section, select the appropriate **Employer** link to review your employee's current active appointment and event details.

Appointment Event History

The employee's appointment events begin with a new appointment and end with a permanent separation. In between may be appointment changes, site changes (state employee transfer between state agencies), or begin and/or end leaves of absence. If there is a long list of events, you may need to select the View All Site Events check box to display older events.

Select a **View Event Details** link to review the event history (when the event was created or updated and who made the change).

	Event Date	Event	Event Details
○	05/12/2019	Appointment Change	View Event Details
○	07/10/2014	End Leave	View Event Details
○	02/16/2014	Begin Leave	Family Medical Leave
○	12/05/2011	New Appointment	View Event Details

Appointment Event History — Add New

Extended Appointment History
Appointment Detail Change Report
Appointment Event Details

Correct Event | Delete | ☐ View All Site Events | Display

Appointment Details

Appointment Details

Programs
Program: CalPERS
Membership Status: Active
Membership Date: 12/05/2011
Enrollment Eligibility Date: 12/05/2011

Position Information
Employer: City Name
Original Hire Date: 12/05/2011
CalPERS ID (Employer): 0987654321
Member Category: Safety - Fire
Transit Worker: No
Work Calendar: Work 12 Months/Paid 12 Months
Position Title:
CBU: -
Temporary Position: No
Is member subject to local Alternate No
Retirement Plan
(Gov Code Section 20306)?
Retired Annuitant: No
Enrollment Reason:
Appointment ID: 91619490
Contributing Appointment: Yes
Contributing Appointment Date: 12/05/2011
Appointment Status: Active
Leave Type:
Years Prior Service:
Enrollment Level: Classic
Formula Name: 3% @ 55 Formula for State Peace Officer/Firefighter or Local Safety Member
Member Base Rate: 9.0
Cost Share: 4.0
Contribution Modification:

The member category, enrollment level, and membership date determine the member's base rate and formula.

- **Membership Date**: The date the member became eligible for CalPERS membership.
- **Member Category**: Based on their position at your agency, this is entered when processing a new retirement enrollment or if it's changed.
- **Enrollment Level**: Classic or PEPRA New is based on the membership date and if they have reciprocal membership in the Reciprocal Self-Certification Form Information section.
- **Member Base Rate**: Member's enrollment level, formula, and possible collective bargaining unit (CBU) determine their base rate (contribution rate/percentage of their reportable earnings that is paid to CalPERS).
- **Formula Name**: This includes the member's category, benefit level, and normal retirement age. This formula is used when CalPERS calculates the member's retirement.

Membership Information

This is based on your agency's contract and the member's appointment details. This includes CalPERS and CalSTRS election, Social Security, '59 survivor benefits, optional member election, and certificated employees (school employers).

Reciprocal Self-Certification Form Information

Completion of the Reciprocal Self-Certification Form (myCalPERS 1187) does not establish reciprocity; this form is used for enrollment purposes only to determine Classic or PEPRA membership. To establish reciprocity, the employee must download the [When You Change Retirement Systems (PUB 16) (PDF)](#) publication to obtain the Confirmation of Intent to Establish Reciprocity When Changing Retirement Systems (CalPERS 1006) form and submit the form to CalPERS or make the request using their myCalPERS account.

Enter the required information from the completed Reciprocal Self-Certification Form in this section of the employee's appointment. The dates with other system and other factors determine the member's enrollment level under your agency.

- **Reciprocal Member Indicator**: This indicates if the member has or doesn't have reciprocity with an eligible retirement system.
- **Most Recent Reciprocal System:** Name of the system the member was with prior to entering our system.
- **Earliest Qualifying Reciprocal Membership Date:** Membership date with reciprocal system.
- **Most Recent Reciprocal Permanent Separation Date**: Separation date from the reciprocal system.
- **Retired Reciprocal Member Indicator:** If Yes, you will be prompted to enter the date the member retired with their reciprocal system.
- **Refunded Reciprocal Member Indicator:** If Yes, you will be prompted to enter the date the member refunded from their reciprocal system.

Note: If a member is placed in the Classic enrollment level based on the information provided on the form, they must establish reciprocity with the reciprocal system within one year. Failure to do so will trigger an audit, which may result in the member's appointment reverting from Classic to PEPRA. Your agency will be responsible for any resulting payroll adjustments.

Retired Annuitant Information

This includes the retired annuitant (RA) type, 180-day exception, and 180-day exception reason.

Retired Annuitant Information

Retired Annuitant Type:	Extra Help
180-Day Exception?	Yes
180-Day Exception Reason:	Appointed by governing body

Retired Annuitant Special Criteria

Displays if the RA was hired with an earnings limit or due to an executive order.

Retired Annuitant Special Criteria

Earnings Limit?	No
Executive Order?	Yes
Executive Order Number:	B-53-18 Shasta Lake, Mendocino and Siskiyou
Executive Begin Date:	12/30/2020
Executive End Date:	02/05/2021

You have completed this scenario.

Unit 2: New Appointments

In this unit, you will learn how to add a new appointment for eligible employees and retired annuitants.

- **Public Agencies and Schools**: Follow the steps in this unit to manually enter all new appointments in myCalPERS.
- **State Agencies**: After adding a new appointment in PIMS, it should update in myCalPERS in 1-2 days. If it does not update myCalPERS within two days, it will be in the Preprocessing Area section. Refer to Unit 5: Preprocessing Area (State Agencies) on how to review the information. If you need to manually enter a new appointment in myCalPERS, refer to the steps in this unit. You must have the Business Partner Retirement Enrollment access role.

Contents

Scenario 1: Add a New Retirement Enrollment

Enroll qualifying employees in CalPERS membership within 90 days. If they are not enrolled timely, CalPERS will assess $500 in administrative costs and arrears contributions (member and employer). Process a CalPERS retirement enrollment by completing the following:

- Verify if the employee has an existing myCalPERS account
- Confirm demographics and update if necessary (name must match their name on their Social Security card)
- Report appointment details
- Indicate reciprocal self-certification if it is applicable

Step Actions (23 Steps)
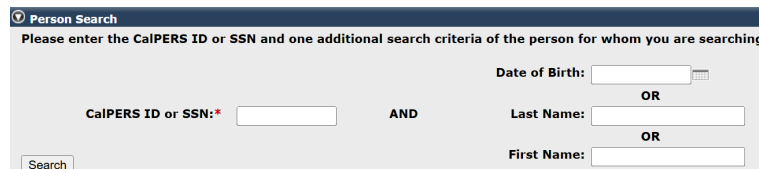
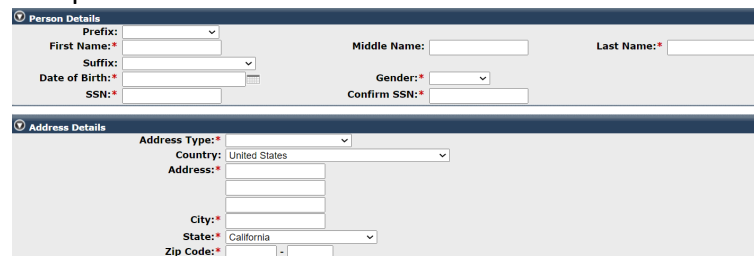|	
Step 1	Select the **Reporting** global navigation tab.
Step 2	Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list. **Create or Edit Report** Method:* [Add Retirement Enrollment ▽] [Continue]
Step 3	Select the **Continue** button.
Step 4	Enter the employee's CalPERS ID or SSN plus complete one field on the right. **Person Search** Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching. Date of Birth: [ ] OR CalPERS ID or SSN:* [ ] AND Last Name: [ ] OR First Name: [ ] [Search]
Step 5	Select the **Search** button.
Step 6	What displayed next? • **Search Results section shows "No results found":** Continue to step 7. • **Appointment Details page:** Skip to step 14.
Step 7	Within the Search Results section, select the **Add New** button. **Search Results** [Add New] CalPERS ID Name Date of Birth No results found.
Step 8	Complete the Person Details and Address Details sections. **Person Details** Prefix: [ ] First Name:* [ ] Middle Name: [ ] Last Name:* [ ] Suffix: [ ] Date of Birth:* [ ] Gender:* [ ] SSN:* [ ] Confirm SSN:* [ ] **Address Details** Address Type:* [ ] Country: [United States] Address:* [ ] [ ] City:* [ ] State:* [California] Zip Code:* [ ] - [ ]

Step 9	Complete the Address and Communication Details sections.

Step 10	Select the **Primary** radio button for one phone number and an email address.
Step 11	Select the **Save & Continue** button.
Step 12	If multiple addresses display, select the radio button for the correct address.
Step 13	Select the **Confirm** button.
Step 14	Select the **Save & Continue** button.
Step 15	Complete the Appointment Details section.

Step 16	Complete the questions which are based on your agency type (state, school, or public agency) and the member category.

Step 17	Continue completing questions in the Membership Informtion section. If the member is not subject to Social Security, upload the SSA-1945 form.
Step 18	On the Reciprocal Self-Certification Form (myCalPERS 1187) section 1, did the member indicate that they have membership in a defined benefit plan? **Yes**: In the Reciprocal Self-Certification Form Information section, select the **Yes** radio button. **No**: Skip to step 21.
Step 19	Complete the Reciprocal Self-Certification form Information section using the information the Reciprocal Self-Certification Form (myCalPERS 1187).
Step 20	Skip to step 22.
Step 21	In the Reciprocal Self-Certification Form Information, select the **No** radio button.
Step 22	Select the **Save** button.
Step 23	Did the following message display? **Yes**: Select the **Save** button. **You have completed this scenario.** **No**: **You have completed this scenario.**

Scenario 2: Add a Retired Annuitant Appointment

Retired annuitant (RA) is the general term for a CalPERS retiree employed by a CalPERS-contracted agency. An RA's appointment must be entered within 30 days of their hire date; otherwise, a $200 fee will be assessed for each month the appointment is late. If the RA retired from your agency, myCalPERS will require the original hire date at your agency. When a new RA appointment is entered in myCalPERS, employers and RAs will receive information regarding the rules and regulations about post-retirement CalPERS employment. Add a retired annuitant appointment by doing the following:

- Verify the retiree worked for your agency or another CalPERS agency.
- Verify they retired more than 180 days from their RA appointment date.
- Confirm demographics. You can make changes after the RA appointment is updated (name must match their legal verification document).
- Report appointment details.
- Determine if they are exempt from the 180-day wait period.
- Identify the retired annuitant type.
- Determine the retiree's normal retirement age (bona fide separation requirement).

Note: If an RA is reinstating from retirement, process a new membership appointment**.**

Step Actions (19 Steps)

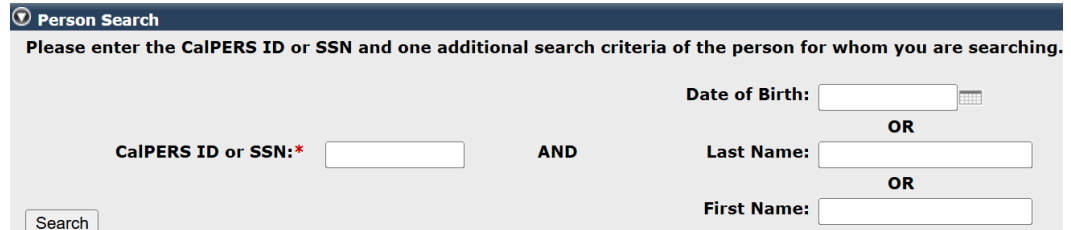|	
Step 1	Did the retired annuitant previously work for your agency? **Yes**: Select the **Person Information** global navigation tab. **No**: Skip to step 6.
Step 2	Enter the employee's CalPERS ID or SSN plus complete one field on the right.
Step 3	Select the **Search** button.
Step 4	Within the Appointment History section, select the **Add New** button.
Step 5	Skip to step 11.

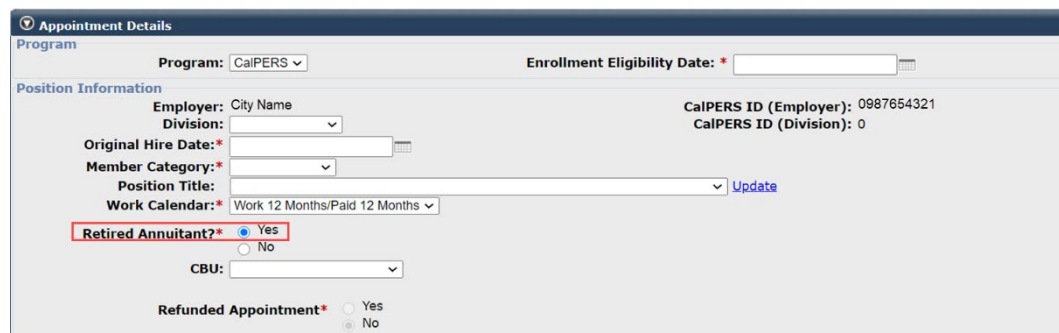| Step 6	Select the **Reporting** global navigation tab.
Step 7	Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.
Step 8	Select the **Continue** button.
Step 9	Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Step 10	Select the **Search** button.
Step 11	Complete the Appointment Details section.

If they retired from your agency, enter their original hire date at your agency. Refer to unit 1, Review Retirement Appointment Details for more information.
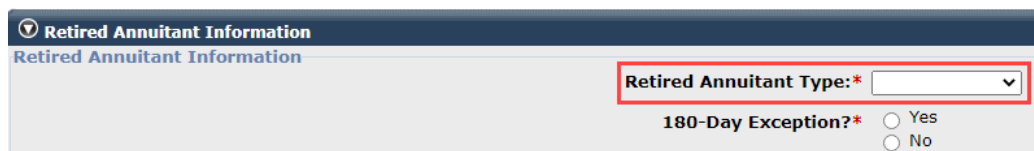
Step 12	Within the Retired Annuitant Information section, does this appointment have a 180-day exception?

- **Has a 180-day exception**: Select the **Yes** radio button, then choose from the 180-Day Exception Reason drop-down list. If *Appointed by a governing body* is the reason, you must select the **Choose File** button to upload your 180-day exception resolution.

- **Does not have a 180-day exception**: Select the **No** radio button (this includes returning due to an Executive Order), and then continue to step 13.

Note: RAs working under an executive order must be entered but will be exempt from work-hour limitations and the 180-day break in service requirements.

Step 13   Select from the Retired Annuitant Type drop-down list.
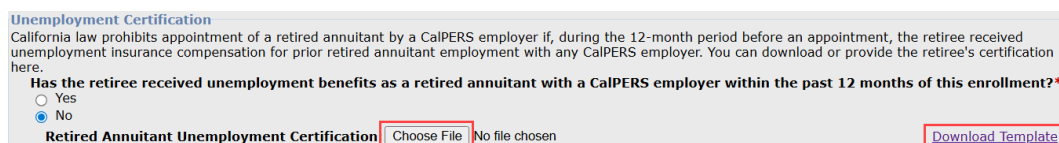
Note: For the Vacant Position type, you must select the **Choose File** button to upload the Resolution for Hiring a Retiree in an Interim Appointment.

Step 14   Within the Unemployment Certification sub-section, has the retiree received unemployment benefits as a retired annuitant with a CalPERS employer within the past 12 months of this enrollment?

Yes: Select the **Yes** radio button, then read the dialogue box that displays.

No: Select the **No** radio button, then select the **Download Template** link for the Unemployment Insurance Compensation Certification Form. After the employee completes this form, save a copy, then select the **Choose File** button to upload the form.

Sample of the template page 1 (CalPERS Privacy Information on page 2):

Step 15	Within the Retired Annuitant Hiring Questionnaire sub-section, select the **Download Template** link. Complete the questionnaire, and then save it in the employee's file.
	Optional: You may select the **Choose File** button to submit it to CalPERS.

Retired Annuitant Hiring Questionnaire
Here you can download and/or provide the questionnaire to assist with ensuring compliant hiring practices with the California Public Emoloyees' Retirement Law (PERL).
Retired Annuitant Hiring Questionnaire: [Choose File] No file chosen   [Download Template]

Step 16	Within the Additional Supporting Documents sub-section, select the **Choose Files** button to upload one or more documents.

Additional Supporting Documents
You may provide additional documents supporting this retired annuitant appointment here (such as employment, payroll, duty statements, resolutions, etc.). You may use the Choose File button multiple times if you have multiple documents to provide.
Additional Supporting Retired Annuitant Documentation: [Choose Files] No file chosen

Step 17	The Retired Annuitant Special Criteria section displays.

Retired Annuitant Special Criteria
Retired Annuitant Special Criteria
Earnings Limit?* ○ Yes ◉ No
Executive Order?* ○ Yes ○ No

Step 18	Select the **Save** button at bottom left.

Step 19	Verify the Appointment Details section is correct.

Appointment Details
Program
Program: CalPERS
Membership Status: Retired
Membership Date: 04/05/2014
Enrollment Eligibility Date: 12/06/2025

Position Information
Employer: City Name
Original Hire Date: 09/25/2013
CalPERS ID (Employer): 9876543210

Member Category: Miscellaneous
Transit Worker: No
Work Calendar: Work 12 Months/Paid 12 Months

Position Title:
CBU: -
Temporary Position: No
Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?

Retired Annuitant: Yes
Health Only: No
Enrollment Reason:
Contributing Appointment: No
Appointment Status: Active
Years Prior Service:
Appointment ID: 94163924

Leave Type:

Created by User: Employer
Created on: 11/06/2025 03:36 PM

Appointment Profile Last Refreshed: 11/06/2025 03:36 PM
Last Refreshed by: Employer
Refunded Appointment: No

Retired Annuitant Information
Retired Annuitant Type: Extra Help
180-Day Exception? No
180-Day Exception Reason:

Has the retiree received unemployment benefits within the past 12 months of this enrollment? No

Retired Annuitant Special Criteria
Earnings Limit? No
Executive Order? No

You have completed this scenario.

Unit 3: Maintain Enrollment

In this unit, you will learn how to update and maintain your employees' accounts, enrollments, and appointments.

Contents

Scenario 1: Update Demographic Information

Public agency, school, and non-central state employers can update employee demographics in myCalPERS. State agencies update demographic information in PIMS.

Before correcting demographic information, your employee must provide a verification document. Refer to the Public Agency & Schools Reference Guide (PDF) or the State Reference Guide (PDF) for a list of acceptable documentation.
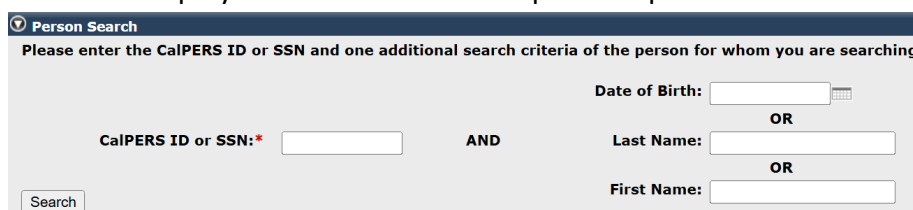
System Logic
- Name changes/corrections will impact payroll reporting.
- For CalPERS health enrollees, demographic changes are sent to their health carrier.
- A letter will be mailed to the member advising them of any demographic changes.

Step Actions (6 Steps)

Step 1	Select the **Person Information** global navigation tab.
Step 2	Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Step 3	Select the **Search** button.
Step 4	Within the Summary section, select the **Update Personal Information** link.

Step 5	Complete the Maintain Personal Information Details section.

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

Scenario 2: Update Employee Contact Information
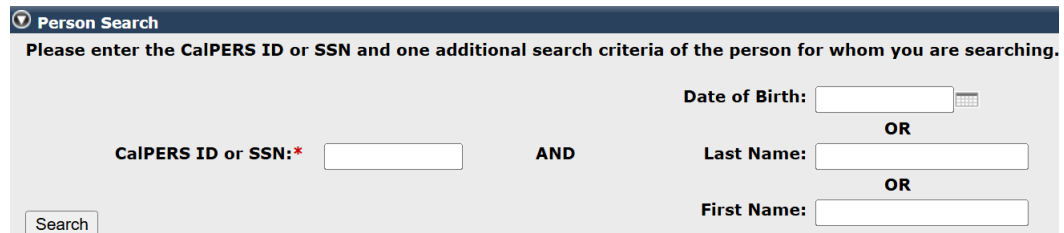
Public agency, school, and non-central state employers can update employee phone, email, or addresses in myCalPERS. State agencies update contact information in PIMS.

Step Actions (8 Steps)

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

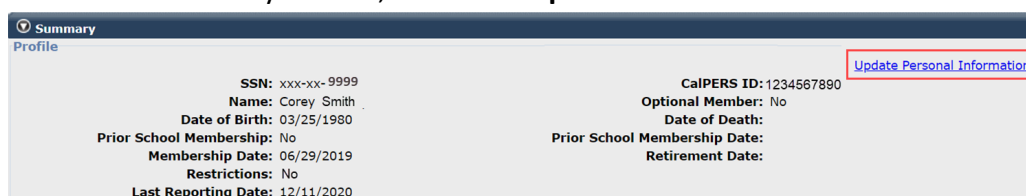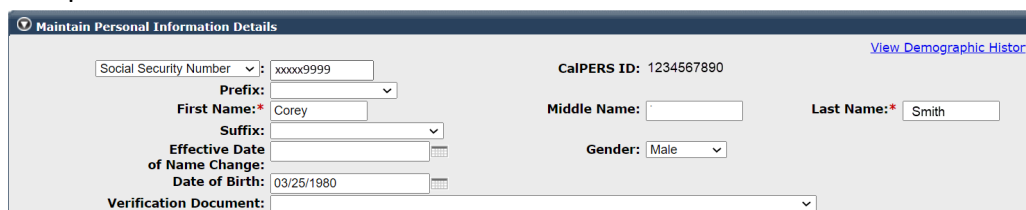| Step 2	Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Step 3	Select the **Search** button.

Step 4	Within the Summary section, select the appropriate **Update** link.

Step 5	Complete the Maintain Communication Details section.

Step 6	Select the **Save** button.

Step 7	Did you update the employee's address?
	Yes: Confirm the address.
	No: You have completed this scenario.

Step 8	Select the **Save** button.
	You have completed this scenario.

Scenario 3: Correct Retirement Appointment Events

You can correct retirement appointment events (new appointments, permanent separations, leave of absence, and appointment changes).

System Logic
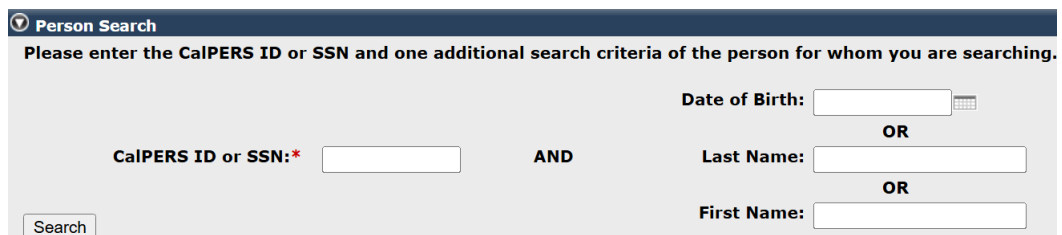
Corrections to appointment information may affect the member's health enrollment and/or payroll.

Step Actions (8 Steps)
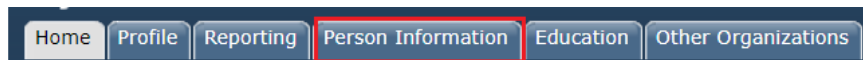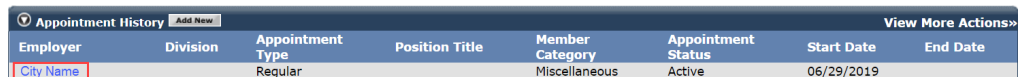
Step 1   Select the **Person Information** global navigation tab.

Step 2   Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Step 3   Select the **Search** button.

Step 4   Select the appropriate active **Employer** link.

Note: For state agencies and CSUs, select the appropriate **Employer** link within the Site Change History section after you complete step 4.

Step 5   Within the Appointment Event History section, select the radio button of the appointment event to correct.

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

Step 7   Correct the information.

Step 8   Select the **Save** button.

You have completed this scenario.

Scenario 4: Delete a Retirement Appointment

On a rare occasion, you may need to delete a retirement appointment. This can only be completed if the appointment does not have health and/or payroll history. If they have either, contact CalPERS for assistance.

System Logic
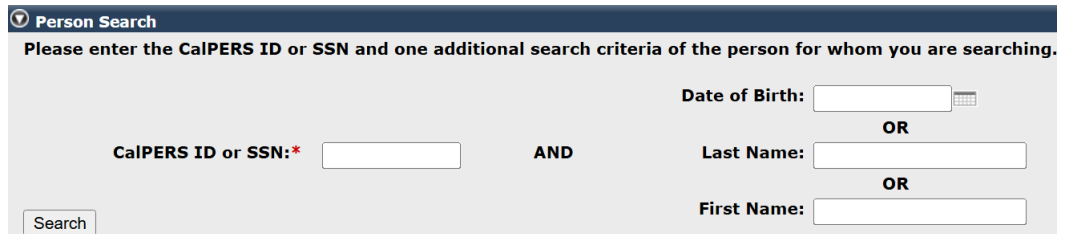
The demographic information and CalPERS ID will remain in myCalPERS; however, there will be no appointment information affiliated with your agency.

Step Actions (6 Steps)

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

| Home | Profile | Reporting | Person Information | Education | Other Organizations |

Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Person Search

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

Date of Birth: [   ]

OR

CalPERS ID or SSN:* [   ]   AND   Last Name: [   ]

OR

First Name: [   ]

Search

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **View More Actions** link or **Appointment History** left-side link.

Appointment History Add New							View More Actions»
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5 Within the Appointment History section, select the radio button for the appointment.

Appointment History Add New							
Delete							
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
○ City Name		Regular		Miscellaneous	Active	06/29/2019	
Delete							

Step 6 Select the **Delete** button.

You have completed this scenario.

Scenario 5: Process a Leave of Absence

If an employee goes on a leave of absence, e.g., unpaid leave or FMLA, a Begin Leave event should be entered. It is recommended that you add a future End Leave event when the Begin Leave event is entered. Refer to unit 3, scenario 3 if the End Date event needs to be changed.

System Logic

For public agencies and schools, health benefits will cancel for employees placed on a leave of absence unless it is due to Family Medical Leave Act or Maternity/Paternity leave.

Step Actions (8 Steps)

Step 1	Select the **Person Information** global navigation tab.
Step 2	Enter the employee's CalPERS ID or SSN plus complete one field on the right.
Step 3	Select the **Search** button.
Step 4	At the bottom of the page, select the appropriate active **Employer** link.

Step 5	Within the Appointment Event History section, select the **Add New** button.
Step 6	Complete the Appointment Event Details section.

The **Begin Leave** event is the day after the last day on payroll, even if it is a weekend or holiday.

Step 7	Select the **Save** button.
Step 8	Do you want to add the End Leave event? **Yes**: Return to step 5 and enter the **Event Date** field with the date the employee will return to work. **No**: **You have completed this scenario.**

Scenario 6: Process an Appointment Change

Changes can occur throughout an employee's career with your agency. The following appointment changes can be made:

- Member category
- Collective bargaining unit (CBU)
- Position title
- Work calendar

Best Practices

If you make an appointment change that affects the employee's base rate, notify your agency's payroll department.

Step Actions (7 Steps)

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

Step 2	Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Step 3	Select the **Search** button.

Step 4	In the Appointment History section, select the appropriate active **Employer** link.

Step 5	Within the Appointment Event History section, select the **Add New** button.

Step 6	Complete the Appointment Event Details section.

Step 7	Select the **Save** button.
	You have completed this scenario.

Scenario 7: Process a Permanent Separation

The permanent separation date is the day after the employee's last day with your agency, which is often the day after the last day on payroll, even if it falls on a weekend or a holiday.

System Logic for a Permanent Separation

- A refunded appointment will not allow for a Permanent Separation event to be deleted.
- This will affect the employee's payroll reporting and health enrollment.
- This will deactivate the employee's myCalPERS employer system access. Refer to the myCalPERS System Access Administration (PDF) student guide for information.
- Employees with no posted payroll within the last six months or zero-posted records for twelve months will automatically be permanently separated through a monthly process.
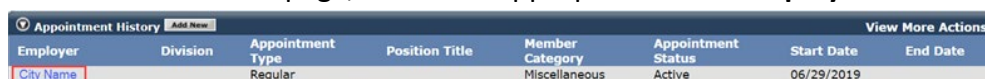
Step Actions (7 Steps)

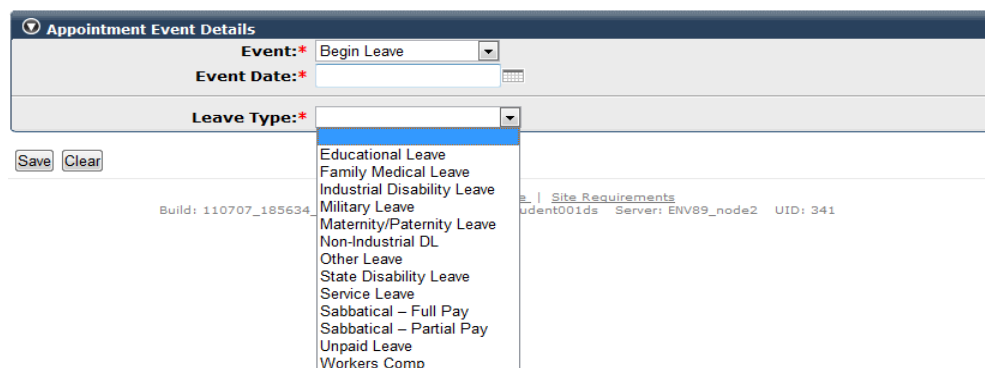| Step 1	Select the **Person Information** global navigation tab.
Step 2	Enter the employee's CalPERS ID or SSN plus complete one field on the right.
Step 3	Select the **Search** button.
Step 4	Within the Appointment History section, select the appropriate **Employer** link.

Step 5	Within the Appointment Event History section, select the **Add New** button.

Step 6	Complete the Appointment Event Details section.

The unused sick leave and/or unused educational leave field:

- Will only display if your agency contracts for the optional benefit.
- Is only converted into service credit if the separation reason is Retirement.
- Can be entered in days or hours.

Step 7	Select the **Save** button. The member will be mailed an Options at Separation letter advising of their options as an inactive member.
	You have completed this scenario.

Scenario 8: Delete an Appointment Event

Maintaining employee appointment details is essential for data integrity. You must remove an inaccurate appointment event from an employee's appointment history.

System Logic
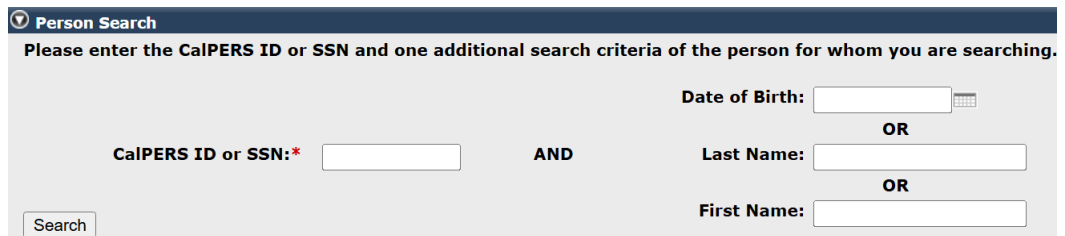
- You are unable to delete a retirement appointment using this scenario. Refer to unit 3, scenario 4 to delete an appointment.
- Deleting an appointment event may impact payroll reporting, so notify your payroll department of any changes.

Step Actions (6 Steps)

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

| Home | Profile | Reporting | Person Information | Education | Other Organizations |

Step 2   Enter the employee's CalPERS ID or SSN plus complete one field on the right.

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

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

Search
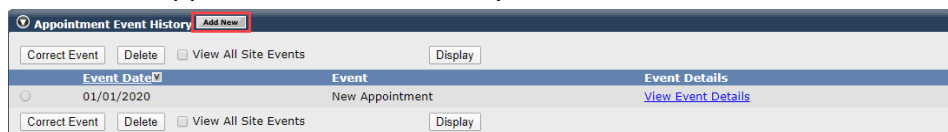
Step 3   Select the **Search** button.

Step 4   Within the Appointment History section, select the appropriate active **Employer** link.
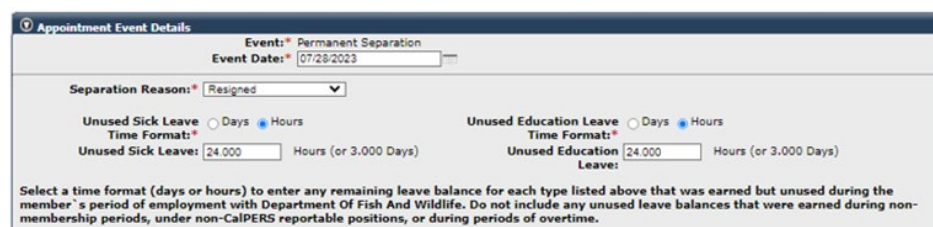
Appointment History Add New   View More Actions»

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5   Select the radio button of the event you wish to delete.

Appointment Event History Add New

Correct Event Delete ☐ View All Site Events   Display

	Event Date▽	Event	Event Details
◉	12/31/2021	End Leave	
○	05/01/2021	Begin Leave	Unpaid Leave
○	12/05/2011	New Appointment	View Event Details

Correct Event Delete ☐ View All Site Events   Display

Step 6   Select the **Delete** button.

You have completed this scenario.

Scenario 9: Process a Site Change (State Agencies)

All state agencies are divisions under one employer (State of California). In myCalPERS, a permanent separation and new enrollment are not created if the employee is transferring between state agencies within one month. Their appointment history becomes updated to reflect the new agency on the same appointment which is a site change.

Why does someone need to process a site change?

Occasionally on a state transfer, a site change does not update myCalPERS from PIMS, which leaves the employee's position number (13-digit SCO number that defines the agency, unit, classification, and serial number) incorrect in myCalPERS. The new agency will not be able to review or process health transactions for the employee until this is corrected.
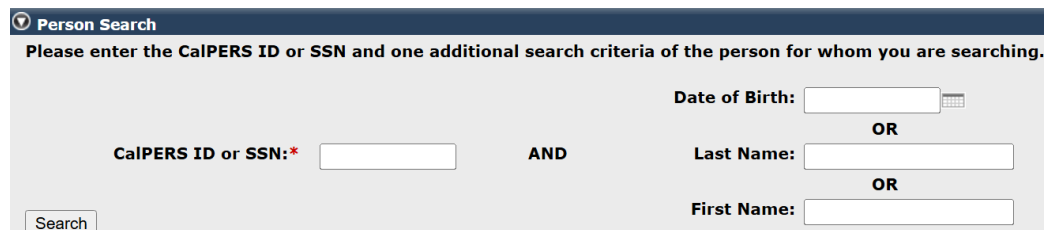
Scenario

Your former employee transferred to another state agency. Their appointment with their new agency is in PIMS; however, it's not in myCalPERS. The new agency contacted you to request a site change, so the employee's appointment is reflected correctly in myCalPERS.

Step Actions (12 Steps)

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

Step 3	Select the **Search** button.

Step 4	Within the Appointment History section, select the appropriate active **State of California** link.
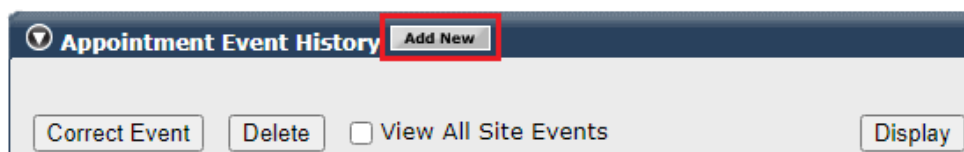
Step 5	Within the Site Change History section, select your division link.

Step 6   Within the Appointment Event History section, select the **Add New** button.

Step 7   Within the Appointment Event Details section, select Site Change from the Event drop-down list.

Step 8   Enter the event date, and then choose the **Select** link.

Step 9   Within the Divisions section, select the radio button of the new division. You may also search by the division name or CalPERS ID.

Step 10   At the bottom left, choose the **Select** button.

Step 11   Select the **Update Appointment Details** link to ensure all other information is correct.

Step 12   After verifying and/or updating the appointment, select the **Save** button.

You have completed this scenario.

Unit 4: Retirement Appointment Reconciliation

In this unit, you will learn how to use the Retirement Appointment Reconciliation (RAR) tool to identify appointments with unposted payroll records for your agency. Of those appointments with missing payroll, you may delete the appointment or maintain the following events:

- Permanent Separation
- Begin Leave
- End Leave

System Logic

- You may select multiple appointments to maintain.
- myCalPERS will update the RAR page on the last day of each month.
- Maintaining appointments within the RAR page automatically updates the list.
- Transactions completed outside the RAR page, e.g., updating the appointment within the employee's profile page, will update the list the following business day.
- On Leave appointments with the following will be excluded from the list:

  - Appointments without an End Leave event will be excluded for six months.
  - Appointments with an End Leave event will be excluded for the entire leave.

- Active employees with no posted payroll within the last six months will automatically be permanently separated through a monthly process.

Refer to the [myCalPERS Retirement Appointment Reconciliation (PDF)](#) student guide for additional information.

Contents

Scenario 1: Add an Appointment Event

You may add Permanent Separation, Begin Leave, or End Leave events.

Step Actions (7 Steps)

Step 1	Select the **Reporting** global navigation tab.
Step 2	Select the **Retirement Appointment Reconciliation** local navigation link.
Step 3	In the Participants With Unposted Payroll section, select the check box for each employee who has an appointment that needs to be maintained.
Step 4	Select the **Maintain Enrollment** button.
Step 5	Complete the Appointment Event Details section. • The Begin Leave event is the day after the last day at your agency, even if it is a weekend or holiday. • The End Leave event is entered as the date the employee returns to work. • The permanent separation date must be entered as at least one day after the last day at your agency, even if the date falls on a weekend or a holiday.
Step 6	Select the **Save & Go to Next** button if needed. **Note:** If the Event type is Begin Leave, you may select the **Save & Add Event** button to add an End Leave event for this employee.
Step 7	Did you select more than one check box? **Yes:** Return to step 5. **No: You have completed this scenario.**

Scenario 2: Delete a Retirement Appointment

You can delete the entire appointment if necessary. This is rare but sometimes an appointment was updated in error or a new employee never worked.

System Logic

You are unable to delete an appointment that has payroll and/or health benefits attached. Contact CalPERS for assistance.

Step Actions (7 Steps)

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

Step 2	Select the **Retirement Appointment Reconciliation** local navigation link.
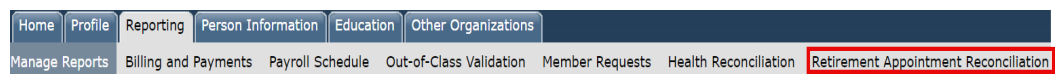
Step 3	In the Participants With Unposted Payroll section, select the check box for each employee who has an appointment that needs to be deleted.

Step 4	Select the **Maintain Enrollment** button.

Step 5	Select the **Delete Appointment** button.

Step 6	Select the **Save & Go to Next** button if needed.

Step 7	Did you select more than one check box?
	Yes: Return to step 5.
	No: You have completed this scenario.

Unit 5: Preprocessing Area (State Agencies)

In this unit, state agency employers will learn how to review and correct transactions that are in the preprocessing area in myCalPERS.

Each night, PIMS generates an XML file to send new information to myCalPERS. If an error occurs during the transfer, the information will not post to an employee's account. This information will remain in the Preprocessing Area section of myCalPERS.

Within the preprocessing area, each set of information is listed as a transaction. Open each transaction individually to identify where the information was last in myCalPERS. After you review the transaction details and the employee's personnel file, resolve the errors promptly to ensure CalPERS has accurate and up-to-date information.

- If the information in the preprocessing area is correct, complete the transaction by using the steps in Unit 2: New Appointments or Unit 3: Maintain Enrollment.
- If the information is incorrect, delete the transaction from the preprocessing area, then use the steps in Unit 2: New Appointments or Unit 3: Maintain Enrollment to manually resolve any remaining discrepancies between myCalPERS and PIMS.

Preprocessing Retirement Enrollment Error Types

You must rectify the following preprocessing error types:

- Appointment changes
- New Appointments
- Begin and End Leave
- Site Changes
- Permanent Separation

Contents

Scenario: Correct a Preprocessing Error

You will review and/or correct appointments that did not update in myCalPERS.

Note: You must have the myCalPERS *Business Partner Retirement Enrollment* access role to correct preprocessing errors.

Step Actions (7 Steps)

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

Step 2   Select the **Preprocessing Area** left-side link.

Step 3   Are there Retirement Enrollment errors (Yes in the Error column)?

Yes: Continue to step 4.

No: You have completed this scenario.

Step 4   Select the **Retirement Enrollment** link.

Step 5   Within the Search Preprocessing Data section, enter an employee's CalPERS ID to display all errors for that employee, and then select the **Search** button.

> **Note:** You may select the **Generate Error Report** button to run the Retirement Enrollment Preprocessing Errors report for an explanation of the error codes.

Step 6   Select the check box corresponding to the error, then select the **Add to Process List** button.

Step 7   After doing your research, is the transaction an error?

> **Yes**: Select the **Process** radio button, and then select the **Continue** button to update the information in myCalPERS. If necessary, refer to Units 2 and 4 on processing the transaction.

> **No**: Select the **Delete** radio button, and then select the **Continue** button. If necessary, refer to Units 2 and 3 to manually enter the transaction in myCalPERS so that it matches with PIMS.

> Selecting the **None** radio button will return you to step 6.

> **You have completed this scenario.**

myCalPERS/PIMS Field Equivalents

Below is a list of myCalPERS data terms and their equivalent terms in PIMS.

Refer to the CalPERS State Reference Guide (PDF) and the SCO Personnel Action Manual: Section 2 – PAR Items, Lines 1-7 (PDF) for more information.

myCalPERS Data	Employment History (USPS Legacy) Fields
Appointment End Date	Appointment Effective Date (Separation Transactions)
Appointment ID	Position Number
Appointment Sequence Number	Position Sequence Number
Appointment Start Date	Appointment Effective Date (Appointment Transactions)
Appointment Status (Active)	Pay Status (Active)
Enrollment Level (PEPRA New, Classic, Super Classic)	E-level Indicator (PEPRA, Classic, Super Classic)
CalPERS ID or Person ID	Social Security Number
CBU	CBID
Division	State Department
Division CalPERS ID	State Department Agency Number
Error Record Create Date	Entry Date
Event Date	Effective Date
First Name, Last Name, Middle Initial	First Name, Last Name, Middle Initial
Member Base Rate	Retirement Rate (Employee)
Member Category	Retirement Category
Position Title	Class Title
Retirement Plan	Retirement System
Social Security Contribution Modification	Exclusion Amount
State External Position Number	Position Number

Transaction Types

myCalPERS Event Types and Employment History Transaction Codes

- **New Appointment (NAP)** = A01, A02, A03, A04, A09, A10, A11, A12, A13, A14, A20, A21, A22, A30, A31, A32, A33, A34, A35, A50, A52, A56, A57, A58, A59, A60, A61, A63, A64, A65, A68, A98, A99, 405, 505, or R01
- **Appointment Change (ACH)** = A01, A02, A03, A04, A09, A10, A11, A12, A13, A14, A20, A21, A22, A30, A31, A32, A33, A34, A35, A50, A52, A54, A56, A57, A58, A59, A60, A61, A63, A64, A65, A68, A98, A99, 120, 122, 126, 130, 440, or 505 (*including corrections*)
- **Site Change (STC)** = A01, A02, A03, A04, A09, A10, A11, A12, A13, A14, A20, A21, A22, A30, A31, A32, A33, A34, A35, A50, A52, A54, A56, A57, A58, A59, A60, A61, A63, A64, A65, A68, A98, A99, 120, 122, 126, 130, or 505 (*including corrections*)
- **Begin Leave (BEL)** =
  - CSU Record:
    - **CSU Transaction Code** = S42, S43, S44, S45, S46 S58, S59, S60, S61, S62, S63, S64, S65, S85, or 645 or
    - **Transaction Code** = 565 and Job Injury Code = 1, 2, 5, or 7 or
    - **Transaction Code** = S49 and Job Injury Code = 8 or 9
  - Civil Service Record:
    - **Civil Service Transaction Code** = S49, S50, S51, S52, S53, S54, S55, S56, S57, or S85 or
    - **Transaction Code = 565 and Job Injury Code** = 2 or 5
- **End Leave (ENL)** =
  - CSU Record:
    - **CSU Transaction Code** = A58, A57, A58, A59, or A68 or
    - **Transaction Code** = 565 and Job Injury Code = 3, 4, or 6
  - Civil Service Record:
    - **Transaction Code** = A03, A30, A31, A32, A33, A34 or A35 or
    - **Transaction Code** = 565 and Job Injury Code = 4 or 6
- **Permanent Separation (PSP)** = S01, S02, S03, S04, S05, S10, S20, S21, S30, S31, S32, S33, S34, S35, S40, S41, S70, S71, S80, S90, S95, or S99
- **Address Change (ADC)** = E01, E04
- **Profile Change (PRC)** = E01, E05, E07, or 440
- **Address Change (ADC) & Profile Change (PRC)** = E01
- **New Judge Appointment (NJA)** = A01, A02, A03, A04, A09, A10, A11, A12, A13, A14, A20, A21, A22, A30, A31, A32, A33, A34, A35, A50, A52, A56, A57, A58, A59, A60, A61, A63, A64, A6, A68, A98, A99, or 505 (*for JRS Retirement System*)
- **Left Bench (LFB)** = S01, S02, S03, S04, S05, S10, S20, S21, S30, S31, S32, S33, S34, S35, S40, S41, S70, S71, S80, S90, S95, or S99 (*for JRS Retirement System*)

myCalPERS Error Codes

Appointment Change

- **COI00035** - The Member must be enrolled in Tier 2 within the last 90 days to select Tier 2.
- **ENI00028** - A CalPERS ID is required on all transactions except new enrollments. Please search for the person by their SSN and birthdate to obtain their CalPERS ID and update this information in your system. You can then either enter the transaction manually on the person's account or submit another enrollment file with the correct CalPERS ID.
- **ENI00045** - The event occurs on or after the appointment has been separated. Verify and update the event date.
- **ENI00046** - The Event Date may not be moved to a date on or before the New Appointment Event. Verify and update the event date.
- **ENI00055** - A Site Change Event and an Appointment Change Event for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
- **ENI00064** - Two Appointment Change Events for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
- **ENI00067** - An Appointment Change or Site Change Event cannot occur on the same date as a New Appointment Event. Verify and update the Event Date or review the Enrollment Eligibility Date of the New Appointment Event for accuracy.
- **ENI00086** - No appointment was found for this employee at this employer. Please submit a New Appointment Event first.
- **ENI00092** - This member's provisions have been overridden. Contact CalPERS to resolve the appointment transaction for this member's account.

Begin Leave

- **CRB00099** - The reported appointment ID - XXXXXXXX does not match the Participants record.
- **ENI00029** - The event correction or deletion was not applied because the corresponding event to be corrected or deleted does not exist.
- **ENI00045** - The event occurs on or after the appointment has been separated. Verify and update the event date.
- **ENI00060** - A Begin Leave Event cannot be deleted when a corresponding End Leave Event exists. Please review the Member's appointment history and remove the corresponding End Leave event first, or if you are trying to correct the Begin Leave date, submit a Begin Leave Correction Event.
- **ENI00061** - Two Begin Leave events cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.

End Leave

- **ENI00048** - Two End Leave Events for the same appointment may not occur on the same day. Verify and update the event date.
- **ENI00052** - A Begin Leave Event must occur before the End Leave Event. Verify and update the Event Date or submit a corresponding Begin Leave Event before submitting this End Leave Event.
- **ENI00053** - Only another End Leave event was found within the Member's appointment history prior to the Event Date entered below. A Begin Leave Event must occur between two End Leave Events. Verify and update the Event Date or submit a corresponding Begin Leave Event before submitting this End Leave Event.

General

- **BE22803** - Other erred transaction(s) for this person prevented this transaction from processing. Please review and correct the other erred transaction(s) for this person before continuing.
- **ENI00029** - The event correction or deletion was not applied because the corresponding event to be corrected or deleted does not exist.

New Appointment

- **COI00057** - The Social Security Number (SSN) submitted is invalid per Social Security Administration specifications. Please review and re-submit the enrollment with an SSN that does not begin with 9, 666 or contain all zeroes in any one section.
- **COI00081** - The Appointment Identifier is invalid. Verify and update your entry.
- **COR00015** - The address provided is missing the County and could not be verified by the address validation process and may be undeliverable. Please review the address if changes are required or verify that the address can be submitted as-is on the next screen, Confirm Address.
- **COR00043** - The Employee is retired and receiving benefits. If the employee is returning to CalPERS-covered service as a Retired Annuitant, be sure to select Yes for the Retired Annuitant question. Otherwise, contact CalPERS because this may be an illegal hire.
- **CRB00099** - The reported appointment ID - XXXXXXXX does not match the Participants record.
- **CTR00033** - The CalPERS ID XXXXXXXXXX is incorrect. Verify and update your entry.
- **ENI00005 -** The Social Security Number provided is associated with an existing member with conflicting information. Verify and update your entry.
- **ENI00022** - The enrollee must be either subject to Social Security or participating in '59 Survivor benefits. Please select one.
- **ENI00033** - The appointment cannot be deleted because there are additional events associated with it. Verify and update your entry.
- **ENI00091** - The Appointment cannot be deleted because there is a New Enrollment Event associated to it. Verify and update your entry.
- **GEI00056** - Enter a valid ZIP Code for the state of CA.
- **INI00021** - The SSN must not be used for subsequent enrollment requests. CalPERS ID must be used.

Permanent Separation

- **ENI00046** - The Event Date may not be moved to a date on or before the New Appointment Event. Verify and update the event date.
- **ENI00047** - Two Permanent Separation Events for the same appointment may not occur. Verify and update the event date.
- **ENI00085 -** The appointment has contributions reported after the event date of the permanent separation event. Extend the Event Date past the contribution reporting date or back out the contributions to continue.

Site Change

- **ENI00045 -** The event occurs on or after the appointment has been separated. Verify and update the event date.
- **ENI00054 -** Two Site Change Events for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
- **ENI00055** - A Site Change Event and an Appointment Change Event for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
- **ENI00067** - An Appointment Change or Site Change Event cannot occur on the same date as a New Appointment Event. Verify and update the Event Date or review the Enrollment Eligibility Date of the New Appointment Event for accuracy.

Miscellaneous

Contact CalPERS for assistance with the following errors:

- **BE22802** - An error for which there is no standard message has occurred. Please report Exception event id: XXXXXXXXXX to CalPERS for assistance.
- **COI00179** - The appointment is marked as refunded. Please contact CalPERS if changes are required.
- **ENI00092** - This member's provisions have been overridden. Contact CalPERS to resolve the appointment transaction for this member's account.

Contact SCO for assistance with the following error:

- **ENI00085** - The appointment has contributions reported after the event date of the permanent separation event. Extend the Event Date past the contribution reporting date or back out the contributions to continue. – *If backing out contributions, must contact SCO for assistance.*

SCO and CalPERS Resources

Obtain more information by visiting the SCO Website at **www.sco.ca.gov**.

Retirement Enrollment Preprocessing Toolkit
Pathway: SCO website > State and Local > State Departments > Human Resources > Statewide Civil Service Retirement Program > *Retirement Enrollment Preprocessing Toolkit heading*

CalPERS Resources

Obtain more information by visiting the CalPERS website at **www.calpers.ca.gov**.

- Business Rules & myCalPERS Classes
  Pathway: CalPERS website > Employers > Employer Education > myCalPERS Student Guides & Resources *(under Resources heading)*
- myCalPERS Student Guides & Resources
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guide
- Self-Paced Online Classes (log in to myCalPERS, select the **Education** global navigation tab, then the **Classes** local navigation link)
  - Business Rules
    - Qualifications for California State Universities (CSU)
    - Qualifications for Public Agencies, State Agencies & Schools
    - Requirements for Public Agencies & Schools
    - Working After Retirement
  - myCalPERS
    - Add a New Appointment
    - Edit Reciprocal Information
    - Enrolling a Retired Annuitant
    - Add Appointment Events
    - Out-of-Class Reporting
    - Reconcile by Appointments
  - myCalPERS Technical Requirements
    Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
  - Public Agency & Schools Reference Guide (PDF)
    Pathway: CalPERS website > Employers > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)

- [State Reference Guide (PDF)](#)
  Pathway: CalPERS website > Employers > Reference & Health Guides > State Reference Guide (PDF)
- [SCO Personnel Action Manual: Section 2 – PAR Items, Lines 1-7 (PDF)](#)
  Pathway: State Controller's Office website > State and Local > State Departments > Human Resources > Personnel Administration > Personnel Action Manual (PAM) > Section 2 – PAR Items, Lines 1 - 7
- [myCalPERS System Enhancements](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS   System Enhancements
- [Email Subscriptions](#)
  Pathway: CalPERS website > (scroll to the bottom) Subscribe
- [Circular Letters - CalPERS](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law (PERL)](#)
  Pathway: CalPERS website > About > Laws, Legislation & Regulations> Public Employees' Retirement Law (PERL)
- [myCalPERS Employer Reports (Cognos) Catalog](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

  – Automatic Permanent Separation-Potential Appointments Report (PDF)
  – Benefit Recipients by Employer Report (PDF)
  – Business Partner On Leave Report (PDF)
  – CalPERS ID and Appointment ID Report (PDF)
  – Confirmation of No Payroll Contributions Reportable Report (PDF)
  – Overtime Appointment Identifier Report (PDF)
  – Participant Appointment Details Report (PDF)
  – Participant Enrollment History Report (PDF)
  – Participant Pension Enrollment Data Report (PDF)
  – Participant Undeliverable Address Report (PDF)
  – Retired Annuitant Hours Worked Report (PDF)
  – Retired Annuitant Late Fee Status Report (PDF)
  – Retirement Appointment Reconciliation Report (PDF)
  – Separated Retirement Reconciliation Appointments Report (PDF)

CalPERS Contacts

Email

- To contact the [Employer Education Team](#) for questions and requests, email **calpers_employer_communications@calpers.ca.gov**.
- To contact the [Employer Account Management Division](#) for questions related to Retirement Appointment Reconciliation, email **employertechnicalsupport@calpers.ca.gov**.
- To contact the [Employer Account Management Division](#) for questions about membership, email **membership_reporting@calpers.ca.gov**.
- To contact the [Membership and Post Retirement Employment Determinations Team](#) for post-employment questions, email **working_after_retirement@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, then select the **Submit Inquiry** link to submit a question or request.