

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).

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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.

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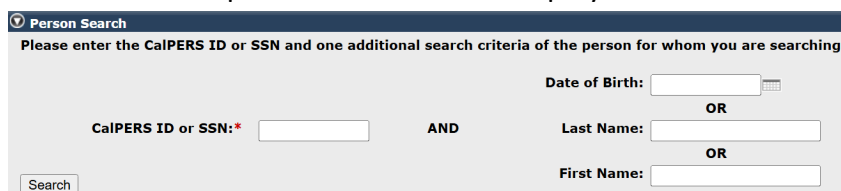
Scenario 1: Verify CalPERS Membership

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.



The screenshot shows the 'Person Search' form. It has a title bar 'Person Search' and a subtitle 'Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.' The form contains a 'CalPERS ID or SSN:*' field, an 'AND' separator, and three optional fields: 'Date of Birth:', 'Last Name:', and 'First Name:'. Each optional field has a dropdown arrow and is preceded by 'OR'. A 'Search' button is at the bottom left.

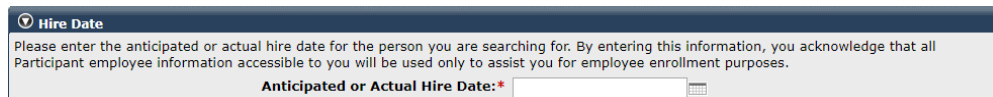
Step 3 Select the **Search** button.

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.

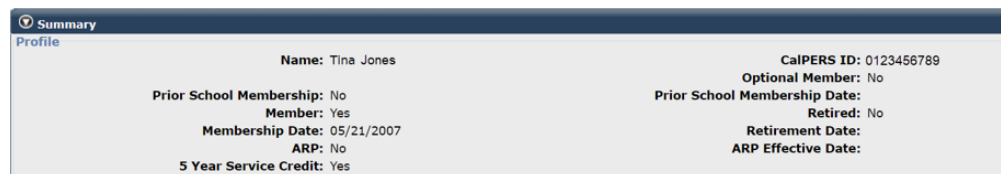
Step 5 Enter the appropriate date in the Anticipated or Actual Hire Date field.



The screenshot shows the 'Hire Date' form. It has a title bar 'Hire Date' and a subtitle 'Please enter the anticipated or actual hire date for the person you are searching for. By entering this information, you acknowledge that all Participant employee information accessible to you will be used only to assist you for employee enrollment purposes.' The form contains a single field 'Anticipated or Actual Hire Date:*' with a dropdown arrow.

Step 6 Select the **Continue** button.

Step 7 Review the Summary section to verify CalPERS membership.



The screenshot shows the 'Summary' section. It has a title bar 'Summary' and a subtitle 'Profile'. The form displays the following information:

Name: Tina Jones	CalPERS ID: 0123456789
Prior School Membership: No	Optional Member: No
Member: Yes	Prior School Membership Date:
Membership Date: 05/21/2007	Retired: No
ARP: No	Retirement Date:
5 Year Service Credit: Yes	ARP Effective Date:

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.

Summary	
Profile	
Name: Paula Pers	CalPERS ID: 0123456789
Prior School Membership: No	Optional Member: No
Member: Yes	Prior School Membership Date:
Membership Date: 01/28/2019	Retired: No
ARP: No	Retirement Date:
5 Year Service Credit: Yes	ARP Effective Date:
Eligibility for Retirement System Election as of Today: Yes	

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

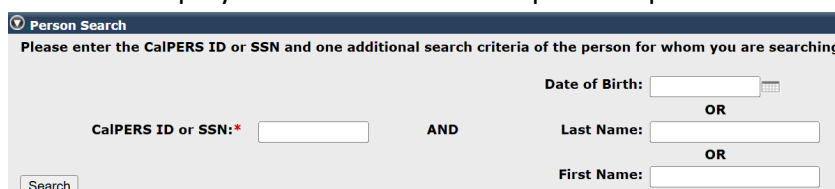
System Logic

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.



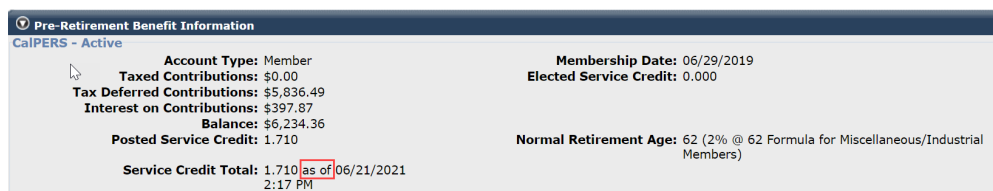
The screenshot shows a 'Person Search' form with the following fields and options:

- CalPERS ID or SSN:** A text input field with a red asterisk indicating it is required.
- AND:** A label between the CalPERS ID/SSN field and the name fields.
- Date of Birth:** A date input field.
- Last Name:** A text input field.
- First Name:** A text input field.
- Search:** A button at the bottom left.

There are 'OR' labels between the Date of Birth and Last Name fields, and between the Last Name and First Name fields, indicating that only one of these fields needs to be filled.

Step 3 Select the **Search** button.

Step 4 Within the Pre-Retirement Benefit Information section, verify the service credit and member contributions.

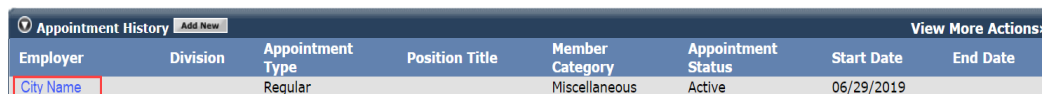


The screenshot shows the 'Pre-Retirement Benefit Information' section for a CalPERS - Active member. The information displayed is as of 06/21/2021 2:17 PM.

Field	Value
Account Type	Member
Taxed Contributions	\$0.00
Tax Deferred Contributions	\$5,836.49
Interest on Contributions	\$397.87
Balance	\$6,234.36
Posted Service Credit	1.710
Service Credit Total	1.710
Membership Date	06/29/2019
Elected Service Credit	0.000
Normal Retirement Age	62 (2% @ 62 Formula for Miscellaneous/Industrial Members)

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 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	

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).

Appointment Event History Add New		
Correct Event Delete <input type="checkbox"/> View All Site Events Display		
Extended Appointment History Appointment Detail Change Report Appointment Event Details		
Event Date	Event	Event Details
<input type="radio"/> 05/12/2019	Appointment Change	View Event Details
<input type="radio"/> 07/10/2014	End Leave	View Event Details
<input type="radio"/> 02/16/2014	Begin Leave	Family Medical Leave
<input type="radio"/> 12/05/2011	New Appointment	View Event Details
Correct Event Delete <input type="checkbox"/> View All Site Events Display		

Appointment Details

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

Reciprocal Self-Certification Form Information	
You are required to provide and process the Reciprocal Self-Certification form for every new enrollment in CalPERS. The data provided in this section must be entered based on the self-certified data by the member. You must keep a copy of the form in your records for auditing purposes. For direction on how to process the form, visit our employer reference guide. The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant.	
Reciprocal Member Indicator: Yes	
Most Recent Reciprocal Agency: San Bernardino County Employees' Retirement Association (SBCERA)	
Earliest Qualifying Reciprocal Membership	Date: 08/01/2016
Most Recent Reciprocal Permanent	Separation Date: 12/03/2022
Retired Reciprocal Member Indicator: No	
Reciprocal Retirement Date : N/A	
Refunded Reciprocal Member Indicator: No	
Reciprocal Refunded Date: N/A	

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 PEPPRA. 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.

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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)

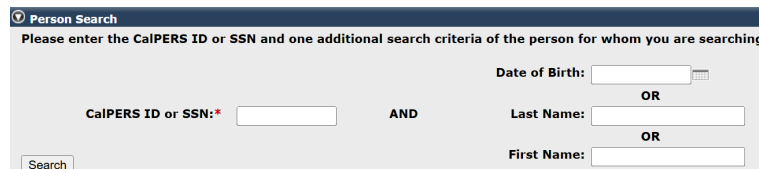
Step 1 Select the **Reporting** global navigation tab.

Step 2 Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.



Step 3 Select the **Continue** button.

Step 4 Enter the employee's CalPERS ID or SSN plus complete one field on the right.



Step 5 Select the **Search** button.

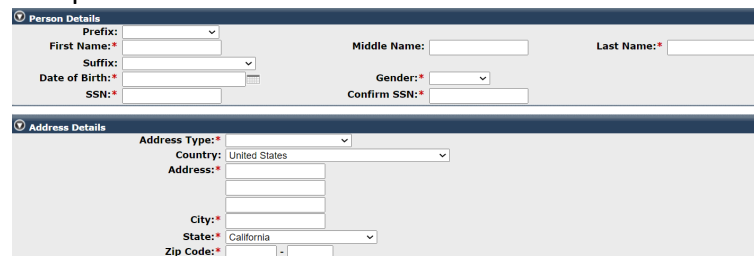
Step 6 What displayed next?

- **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.



Step 8 Complete the Person Details and Address Details sections.



Step 9 Complete the Address and Communication Details sections.

The screenshot shows two sections of a form. The first section, titled "Address Details", contains fields for "Address Type" (a dropdown menu), "Country" (a dropdown menu with "United States" selected), "Address" (three stacked text input fields), "City" (a text input field), "State" (a dropdown menu with "California" selected), and "Zip Code" (two stacked text input fields separated by a hyphen). The second section, titled "Communication Details", contains a table with five columns: "Primary", "Phone Type", "Phone Number", "Extension", and "International". There are six rows of radio buttons for "Work", "Fax", "TTY", "Cellular", "Home", and "Other". Below this table are two more rows of radio buttons for "Email".

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.

The screenshot shows the "Appointment Details" section of a form. It includes a "Program" dropdown menu with "CalPERS" selected, an "Enrollment Eligibility Date" field, and a "Position Information" section. The "Position Information" section contains fields for "Employer" (a dropdown menu with "City Name" selected), "Division" (a dropdown menu), "Original Hire Date" (a date picker), "Member Category" (a dropdown menu), "Position Title" (a dropdown menu with an "Update" link), "Work Calendar" (a dropdown menu with "Work 12 Months/Paid 12 Months" selected), "Retired Annuitant?" (radio buttons for "Yes" and "No"), "CBU" (a dropdown menu), "Enrollment Reason" (a dropdown menu), and "Refunded Appointment" (radio buttons for "Yes" and "No").

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

The screenshot shows the "Membership Information" section of a form. It includes a "Member Information" section with two questions: "Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?" and "Is the member subject to Social Security?". Both questions have radio buttons for "Yes" and "No". Below these questions is an "Optional Member Election" section with a question: "Optional Member?". This question also has radio buttons for "Yes" and "No".

- Step 17 Continue completing questions in the Membership Information section.
If the member is not subject to Social Security, upload the SSA-1945 form.

The screenshot shows the 'Membership Information' section of a web form. It contains two questions: 'Is the member subject to local Alternate Retirement Plan (Gov Code Section 20306)?' and 'Is the member subject to Social Security?'. Both questions have radio buttons for 'Yes' and 'No', with 'No' selected for both. Below these questions are two text input fields: 'SSA Exclusion Reason:' with a dropdown menu showing 'Other', and 'SSA Other Reason:'. At the bottom, there is a link 'SSA-1945 Form: Provide Document' and a paragraph of text explaining the requirement for the SSA-1945 form under Section 419(c) of Public Law 108-203.

- 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).

The screenshot shows the 'Reciprocity' section of a web form. It contains several fields: 'Reciprocal Member Indicator:' with radio buttons for 'Yes' and 'No'; 'Most Recent Reciprocal Agency:' with a dropdown menu; 'Earliest Qualifying Reciprocal Membership Date:' with a date picker; 'Most Recent Reciprocal Permanent Separation Date:' with a date picker; 'Retired Reciprocal Member Indicator:' with radio buttons for 'Yes' and 'No'; and 'Refunded Reciprocal Member Indicator:' with radio buttons for 'Yes' and 'No'. A paragraph of text at the top explains that the information is used to determine retirement enrollment level and that the employer must sign and retain the completed form.

- Step 20 Skip to step 22.

- Step 21 In the Reciprocal Self-Certification Form Information, select the **No** radio button.

This screenshot is similar to the previous one, but it highlights the 'No' radio button for the 'Reciprocal Member Indicator:' field with a red box.

- Step 22 Select the **Save** button.

- Step 23 Did the following message display?

The appointment you have entered is more than 90 days in the past of membership eligibility. Please review and confirm the date entered is correct and save your changes.

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.

Person Search

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

CalPERS ID or SSN:* AND Date of Birth:

OR

Last Name:

OR

First Name:

Search

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **Add New** button.

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	11/28/2020

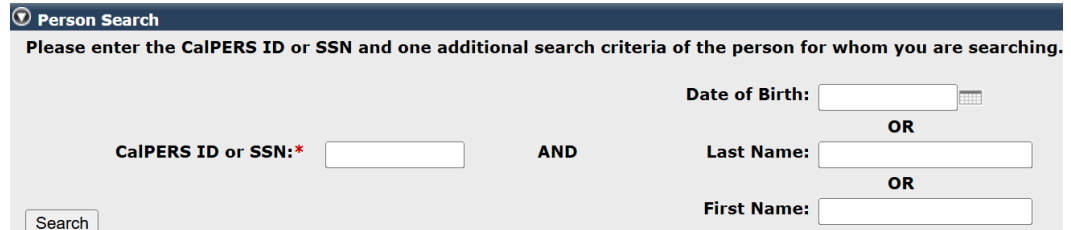
Step 5 Skip to step 11.

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.

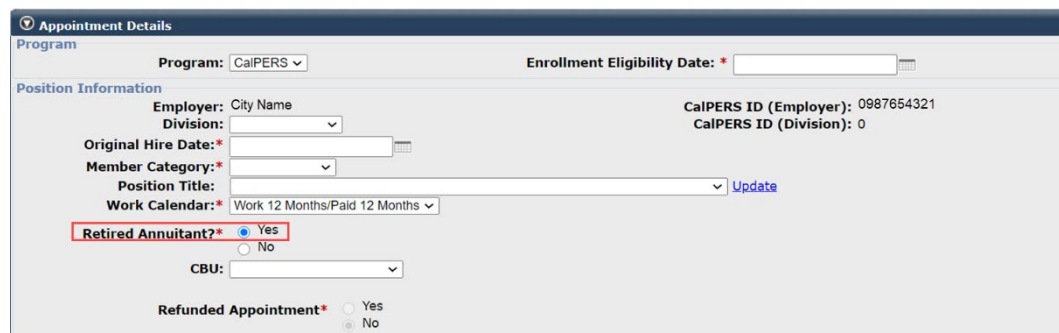
Step 8 Select the **Continue** button.

Step 9 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

A screenshot of the 'Person Search' form. It has a title bar 'Person Search' and a subtitle 'Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.' The form contains three input fields: 'CalPERS ID or SSN:*' (required), 'Date of Birth:' (with a calendar icon), and 'Last Name:' (with a 'First Name:' field below it). There are 'AND' and 'OR' labels between the fields. A 'Search' button is at the bottom left.

Step 10 Select the **Search** button.

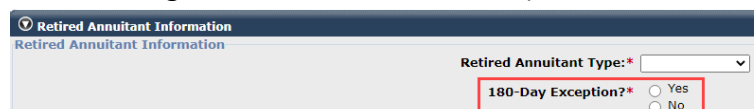
Step 11 Complete the Appointment Details section.

A screenshot of the 'Appointment Details' form. It has a title bar 'Appointment Details' and a subtitle 'Program'. The form contains several fields: 'Program:' (dropdown), 'Enrollment Eligibility Date: *' (with a calendar icon), 'Employer: City Name', 'Division:' (dropdown), 'Original Hire Date: *' (with a calendar icon), 'Member Category: *' (dropdown), 'Position Title:' (dropdown), 'Work Calendar: *' (dropdown), 'Retired Annuitant? *' (radio buttons for Yes and No), 'CBU:' (dropdown), and 'Refunded Appointment *' (radio buttons for Yes and No). There are also 'CalPERS ID (Employer): 0987654321' and 'CalPERS ID (Division): 0' displayed. An 'Update' link is next to the 'Position Title:' dropdown.

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.

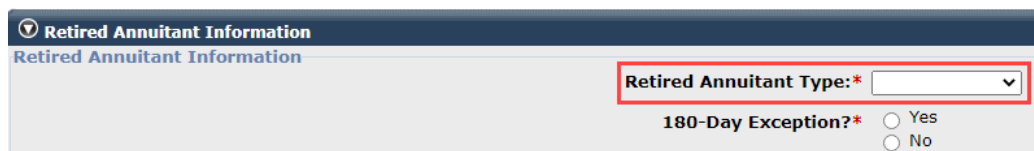
Step 12 Within the Retired Annuitant Information section, does this appointment have a 180-day exception?

- **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.

A screenshot of the 'Retired Annuitant Information' form. It has a title bar 'Retired Annuitant Information' and a subtitle 'Retired Annuitant Information'. The form contains two fields: 'Retired Annuitant Type: *' (dropdown) and '180-Day Exception? *' (radio buttons for Yes and No). The '180-Day Exception? *' field is highlighted with a red box.

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.



Retired Annuitant Information

Retired Annuitant Information

Retired Annuitant Type:*

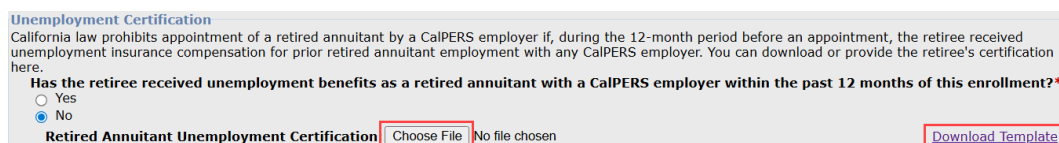
180-Day Exception?* ☐ Yes ☐ No

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.



Unemployment Certification

California law prohibits appointment of a retired annuitant by a CalPERS employer if, during the 12-month period before an appointment, the retiree received unemployment insurance compensation for prior retired annuitant employment with any CalPERS employer. You can download or provide the retiree's certification here.

Has the retiree received unemployment benefits as a retired annuitant with a CalPERS employer within the past 12 months of this enrollment?*

☐ Yes ☒ No

Retired Annuitant Unemployment Certification No file chosen

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



State of California
California Public Employees' Retirement System
www.calpers.ca.gov

Unemployment Insurance Compensation Self-Certification Form

California law prohibits the appointment of a retired annuitant (RA) by a CalPERS employer if, during the 12-month period prior to an appointment, the retiree received any unemployment insurance compensation for prior retired annuitant employment with a CalPERS employer. A retiree who accepts an appointment after receiving unemployment insurance compensation as described shall terminate that employment on the last day of the current pay period and shall not be eligible for reappointment for a period of 12 months following the last day of employment.

Sign and Certify

☐ I, _____, certify that I have not received unemployment insurance benefits for prior retired annuitant work with any CalPERS employer in the 12 months prior to my start date as an RA.

Name	CalPERS ID
Signature	Date

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 Employees' 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
Member Category: Miscellaneous
Transit Worker: No
Position Title: CBU: -
CalPERS ID (Employer): 9876543210
Work Calendar: Work 12 Months/Paid 12 Months
Temporary Position: No
Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?
Appointment ID: 94163924
Retired Annuitant: Yes
Health Only: No
Enrollment Reason:
Contributing Appointment: No
Appointment Status: Active
Years Prior Service:
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 No within the past 12 months of this enrollment?

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.

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Scenario 3: Correct Retirement Appointment Events	22
Scenario 4: Delete a Retirement Appointment	23
Scenario 5: Process a Leave of Absence	24
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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.

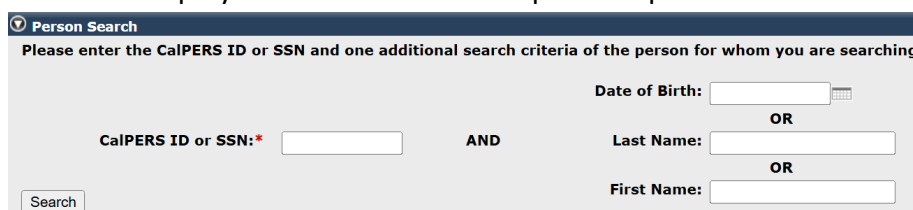
System Logic

- 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.



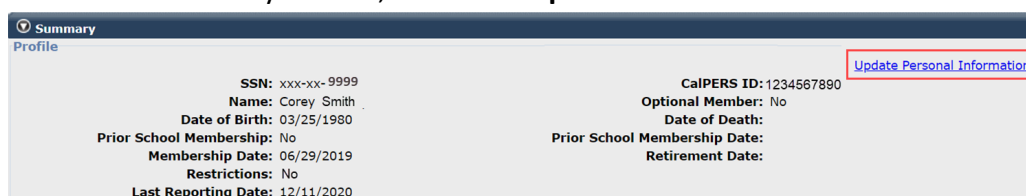
Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND

Date of Birth: OR
Last Name: OR
First Name:

Step 3 Select the **Search** button.

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



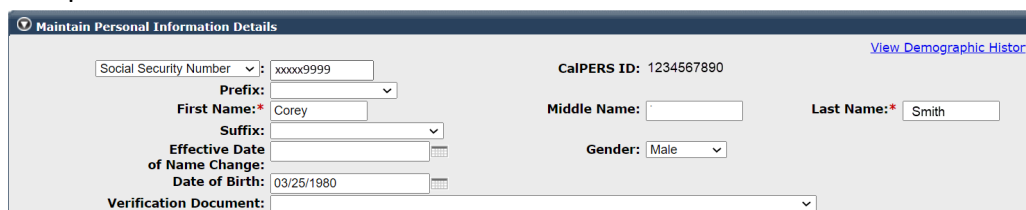
Summary
Profile

SSN: xxx-xx-9999
Name: Corey Smith
Date of Birth: 03/25/1980
Prior School Membership: No
Membership Date: 06/29/2019
Restrictions: No
Last Reporting Date: 12/11/2020

CalPERS ID: 1234567890
Optional Member: No
Date of Death:
Prior School Membership Date:
Retirement Date:

[Update Personal Information](#)

Step 5 Complete the Maintain Personal Information Details section.



Maintain Personal Information Details [View Demographic History](#)

Social Security Number: xxxxx9999
Prefix:
First Name:* Corey
Suffix:
Effective Date:
Date of Birth: 03/25/1980
Verification Document:

CalPERS ID: 1234567890
Middle Name:
Gender: Male
Last Name:* Smith

Step 6 Select the **Save** button.

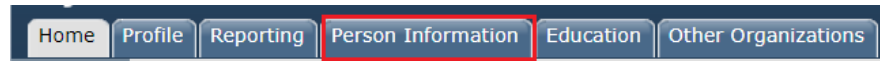
You have completed this scenario.

Scenario 2: Update Employee Contact Information

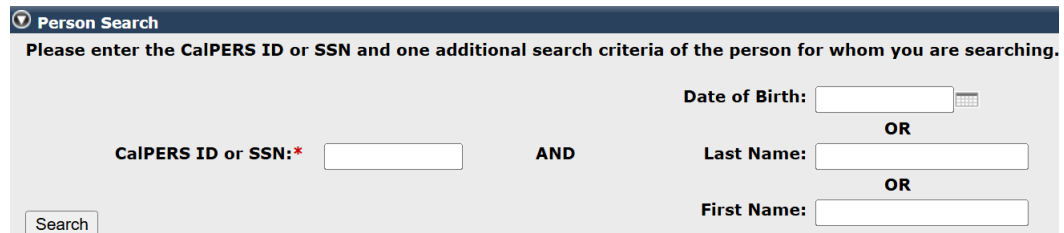
Public agency, school, and non-central state employers can update employee phone, email, or addresses in myCalPERS. State agencies update contact information in PIMS.

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.

A 'Person Search' form with a dark blue header. Below the header, it says 'Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.' The form has four input fields: 'CalPERS ID or SSN:*' (with a red asterisk), 'Date of Birth:' (with a calendar icon), 'Last Name:', and 'First Name:'. Between the SSN and Date of Birth fields is an 'AND' operator. Between the Date of Birth and Last Name fields is an 'OR' operator. Between the Last Name and First Name fields is another 'OR' operator. A 'Search' button is located at the bottom left of the form.

Step 3 Select the **Search** button.

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

A 'Summary' page for a person's profile. The page has a dark blue header with 'Summary' and 'Profile' links. The main content area is divided into two sections: 'Profile' and 'Communication'. The 'Profile' section contains fields for SSN, Name, Date of Birth, Prior School Membership, Membership Date, Restrictions, Last Reporting Date, CalPERS ID, Optional Member status, Date of Death, Prior School Membership Date, and Retirement Date. The 'Communication' section contains fields for Preferred Communication, Primary Phone Number, Primary Email Address, Mailing Address, Physical Address, and Undeliverable Date. There are 'Update' links for 'Update Personal Information', 'Update' (for Primary Phone Number), 'Update' (for Primary Email Address), 'Update' (for Mailing Address), and 'Update' (for Physical Address). The 'Update' links for the communication details are highlighted with red rectangular borders.

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

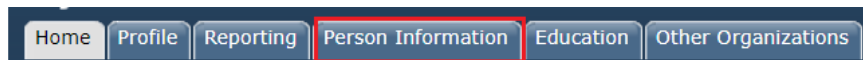
You can correct retirement appointment events (new appointments, permanent separations, leave of absence, and appointment changes).

System Logic

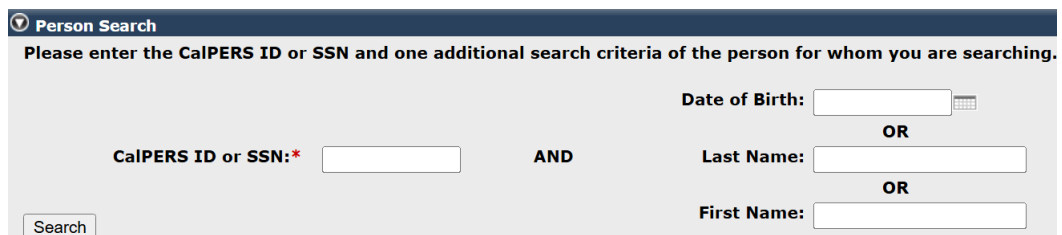
Corrections to appointment information may affect the member's health enrollment and/or payroll.

Step Actions (8 Steps)

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

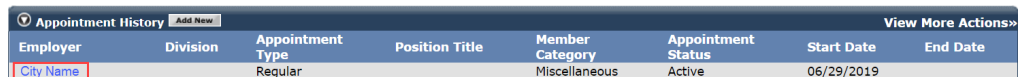


Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

A search form titled 'Person Search'. It contains a text input field for 'CalPERS ID or SSN' with an asterisk, followed by 'AND', and then three more input fields: 'Date of Birth', 'Last Name', and 'First Name'. There are 'OR' labels between the 'Date of Birth' and 'Last Name' fields, and between the 'Last Name' and 'First Name' fields. A 'Search' button is at the bottom left. The 'CalPERS ID or SSN' field is highlighted with a red rectangular border.

Step 3 Select the **Search** button.

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



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

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.

A section titled 'Appointment Event History'. It contains a table with two rows of event data. The first row has a radio button selected, which is highlighted with a red rectangular border. The table has columns for 'Event Date', 'Event', and 'Event Details'. Below the table are buttons for 'Correct Event', 'Delete', 'View All Site Events', and 'Display'.

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

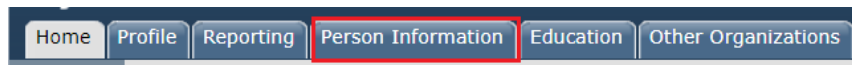
On a rare occasion, you may need to delete a retirement appointment. This can only be completed if the appointment does not have health and/or payroll history. If they have either, contact CalPERS for assistance.

System Logic

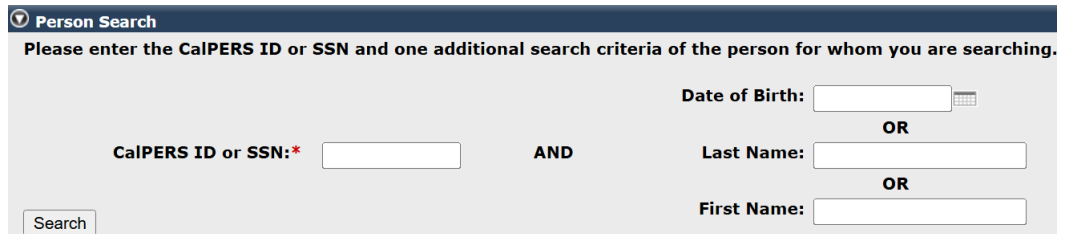
The demographic information and CalPERS ID will remain in myCalPERS; however, there will be no appointment information affiliated with your agency.

Step Actions (6 Steps)

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



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

A 'Person Search' form with a dark blue header. Below the header, it says 'Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.' There are four input fields: 'CalPERS ID or SSN:*' (with a red asterisk), 'Date of Birth:' (with a calendar icon), 'Last Name:', and 'First Name:'. Between the first and second fields is an 'AND' operator. Between the second and third fields is an 'OR' operator. Between the third and fourth fields is another 'OR' operator. A 'Search' button is at the bottom left.

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	
<input checked="" type="radio"/> 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.

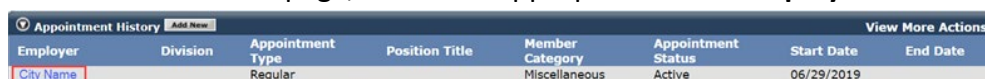
Step Actions (8 Steps)

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.

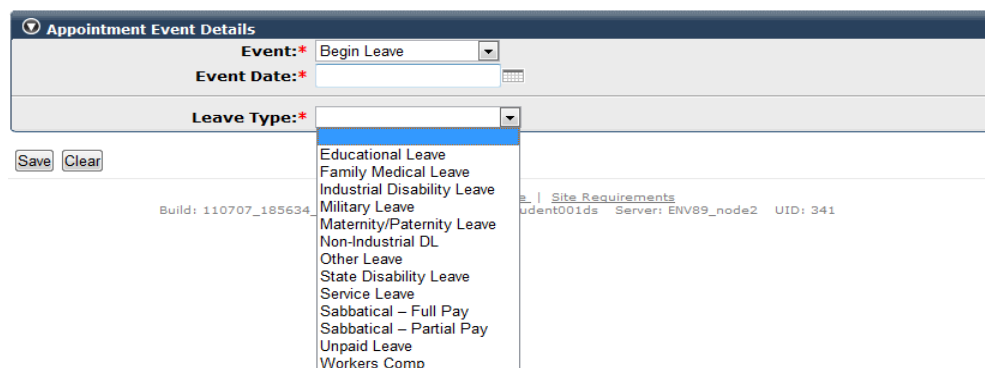
Step 4 At the bottom of the page, select the appropriate active **Employer** link.



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 Event History section, select the **Add New** button.

Step 6 Complete the Appointment Event Details section.



Appointment Event Details

Event: Begin Leave

Event Date:

Leave Type:

Save Clear

Educational Leave
Family Medical Leave
Industrial Disability Leave
Military Leave
Maternity/Paternity Leave
Non-Industrial DL
Other Leave
State Disability Leave
Service Leave
Sabbatical - Full Pay
Sabbatical - Partial Pay
Unpaid Leave
Workers Comp

Build: 110707_185634 Site Requirements
udent001ds Server: ENV89_node2 UID: 341

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.

The screenshot shows the 'Person Search' form. It has a title bar 'Person Search' and a subtitle 'Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.' Below this, there are three search criteria: 'CalPERS ID or SSN:*' with a text input field, 'AND' with a dropdown menu, and 'Date of Birth:' with a date picker. There are also 'OR' options for 'Last Name:' and 'First Name:', each with a text input field. A 'Search' button is at the bottom left.

Step 3 Select the **Search** button.

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

The screenshot shows the 'Appointment History' table. It has a title bar 'Appointment History' and a subtitle 'Add New'. The table has columns: Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. The first row is highlighted with a red box around the 'City Name' link in the Employer column.

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 Event History section, select the **Add New** button.

Step 6 Complete the Appointment Event Details section.

The screenshot shows the 'Appointment Event Details' form. It has a title bar 'Appointment Event Details'. Below the title bar, there are two fields: 'Event:*' with a dropdown menu and 'Event Date:*' with a date picker. A dropdown menu is open for the 'Event' field, showing options: 'Site Change', 'Appointment Change', 'Begin Leave', 'End Leave', 'To Local ARP', 'From Local ARP', and 'Permanent Separation'. There are 'Save' and 'Clear' buttons at the bottom left. At the bottom right, there is a footer with text: 'Build: 110707_185634', 'Use | Site Requirements', 'student001ds', 'Server: ENV89_node2', and 'UID: 341'.

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.

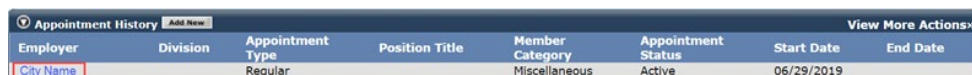
Step Actions (7 Steps)

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.

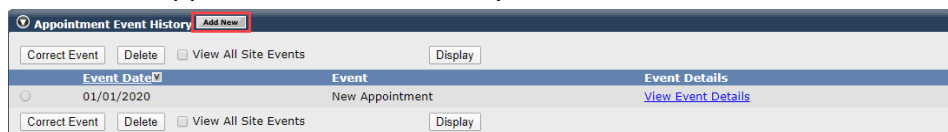
Step 3 Select the **Search** button.

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



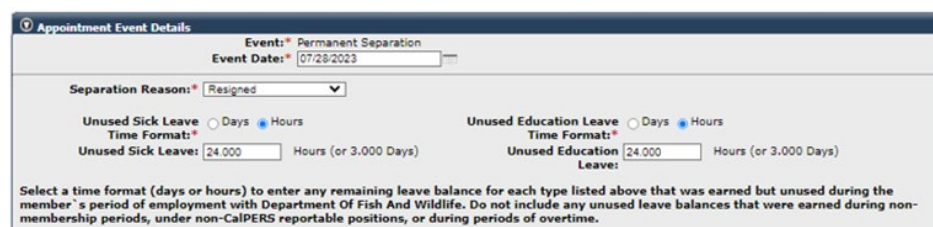
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

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



Event Date	Event	Event Details
01/01/2020	New Appointment	View Event Details

Step 6 Complete the Appointment Event Details section.



Event: Permanent Separation
Event Date: 07/28/2023

Separation Reason: Resigned

Unused Sick Leave: 24,000 Hours (or 3,000 Days)
Unused Education Leave: 24,000 Hours (or 3,000 Days)

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

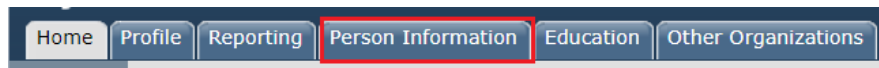
Maintaining employee appointment details is essential for data integrity. You must remove an inaccurate appointment event from an employee's appointment history.

System Logic

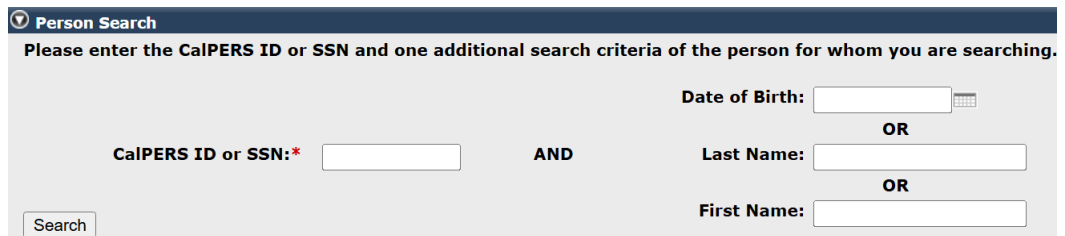
- You are unable to delete a retirement appointment using this scenario. Refer to unit 3, scenario 4 to delete an appointment.
- Deleting an appointment event may impact payroll reporting, so notify your payroll department of any changes.

Step Actions (6 Steps)

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

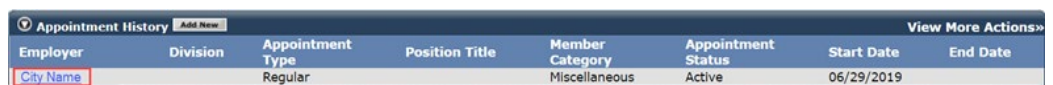


Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

A search form titled 'Person Search'. It contains a text input field for 'CalPERS ID or SSN' which is highlighted with a red box. To the right of this field are three more input fields: 'Date of Birth', 'Last Name', and 'First Name', each preceded by an 'OR' label. A 'Search' button is located at the bottom left of the form.

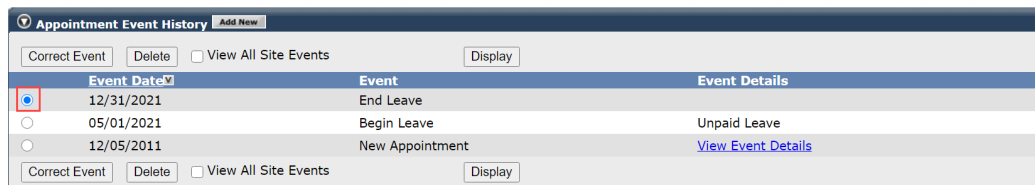
Step 3 Select the **Search** button.

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



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.

A form titled 'Appointment Event History'. It contains a table with three columns: 'Event Date', 'Event', and 'Event Details'. The first row has a radio button selected (highlighted with a red box) for the date '12/31/2021' and event 'End Leave'. The other two rows have unselected radio buttons for '05/01/2021 Begin Leave' and '12/05/2011 New Appointment'. There are buttons for 'Correct Event', 'Delete', 'View All Site Events', and 'Display' at the top and bottom of the table.

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.

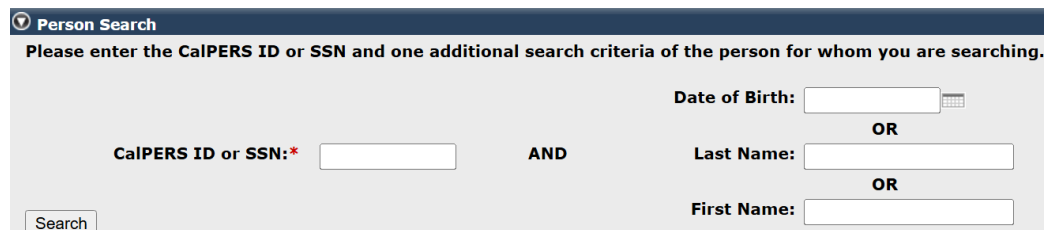
Scenario

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.



The form is titled "Person Search" and includes a sub-header: "Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching." It features three input fields: "CalPERS ID or SSN:*" (required), "Date of Birth:" (with a calendar icon), and "Last Name:". There are "AND" and "OR" operators between the fields. A "First Name:" field is also present. A "Search" button is at the bottom left.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active **State of California** link.

Appointment History <small>Add New</small>					
Appt ID	Employer	Division	Appointment Type	Position Title	Member Category
12345678	State of California	State Controller Office	Regular	ASSOCIATE GOVERNMENTAL PROGRAM ANALYST	State Miscellaneous

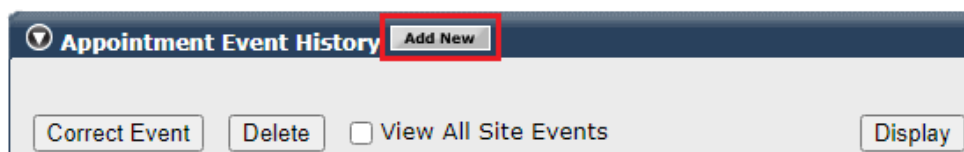
Step 5 Within the Site Change History section, select your division link.



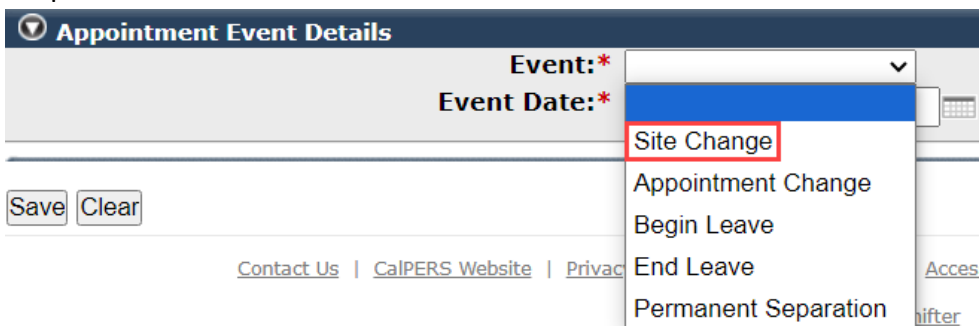
The table is titled "Site Change History" and shows the "Employer: State of California". It has two columns: "Division" and "Position Title". The "Division" column contains the link "State Agency", which is highlighted with a red box. The "Position Title" column contains "ASSOCIATE GOVERNMENTAL PROGRAM ANALYST".

Site Change History	
Employer: State of California	
Division	Position Title
State Agency	ASSOCIATE GOVERNMENTAL PROGRAM ANALYST

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



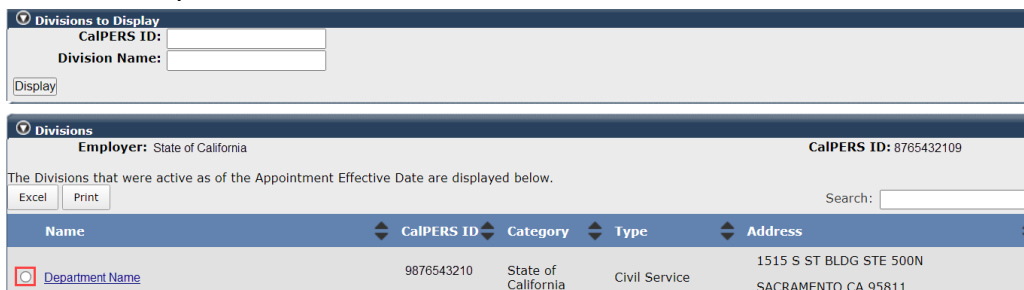
Step 7 Within the Appointment Event Details section, select Site Change from the Event drop-down list.



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.



Name	CalPERS ID	Category	Type	Address
<input checked="" type="radio"/> Department Name	9876543210	State of California	Civil Service	1515 S ST BLDG STE 500N SACRAMENTO CA 95811

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.

Appointment Event Details

Event:* Site Change

Event Date:*

Division: Department Name [Select](#)

Update Appointment Details

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

Appointment Details

Member Category: State Miscellaneous

Work Calendar: Work 12 Months/Paid 12 Months

CBU: R01 - Rank & File/ Admin, Financial & Staff Svc

Position Title: [Select](#)

Is the member subject to Social Security?*

☒ Yes

☐ No

Tier: 1st Tier

Is the member participating in '59 Survivor benefits?*

☐ Yes

☐ No

External Position Number:

Appointment Sequence Number: 01

Membership Information

Optional Member Election

Optional Member?*

☐ Yes

☐ No

Save **Clear**

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.....	32
Scenario 2: Delete a Retirement Appointment	33

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.

Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Last Reported Earned Period	Payroll Past Due	Unposted Payroll Periods
<input checked="" type="checkbox"/>	0123456789 Jones, Jason L.	01234	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input checked="" type="checkbox"/>	1234567890 Pham, Chi Thao A.	2345	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input type="checkbox"/>	2345678901 Smith, Boyd B.	9876	Active	Active	No	11/14/2020 - 11/27/2020	Yes	Review

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

Step 5 Complete the Appointment Event Details section.

Participant CalPERS ID: 1234567890
Name: Pham, Chi Thao A.
Member Category: Miscellaneous
Enrolled in Health: Yes
Health Payment Method: Standard

Appt ID: 2345
Start Date: 9/03/1962
Appt Status: Active
Last Reported Earned Period: 11/14/2020-11/27/2020

[View Appointment History](#)
[View Transaction History](#)

Event: *
Event Date: *

Delete Appointment Skip Appointment

- 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.

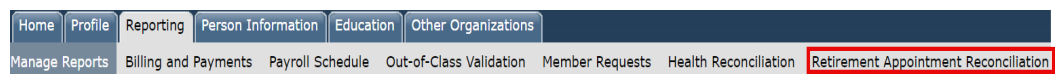
System Logic

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.

A screenshot of a web application showing a table titled 'Participants With Unposted Payroll'. The table has columns: Participant CalPERS ID, Name, Appt ID, Appt Status, Member Account Status, Retired Annuitant, Last Reported Earned Period, Payroll Past Due, and Unposted Payroll Periods. There are three rows of data. The first row is for Jones, Jason L. (Appt ID: 01234), the second for Pham, Chi Thao A. (Appt ID: 2345), and the third for Smith, Boyd B. (Appt ID: 9876). Each row has a checkbox in the first column, and all three checkboxes are selected (checked). The table also includes a 'Maintain Enrollment' button, a 'Show 25 entries' dropdown, and pagination controls (First, Previous, 1, Next, Last).

Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Last Reported Earned Period	Payroll Past Due	Unposted Payroll Periods
<input checked="" type="checkbox"/>	0123456789 Jones, Jason L.	01234	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input checked="" type="checkbox"/>	1234567890 Pham, Chi Thao A.	2345	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input checked="" type="checkbox"/>	2345678901 Smith, Boyd B.	9876	Active	Active	No	11/14/2020 - 11/27/2020	Yes	Review

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

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

A screenshot of a web application showing the 'Appointment Event Details (1 of 3)' form. The form displays information for a participant with CalPERS ID 2345678901, Name Smith, Boyd B., Member Category Miscellaneous, Enrolled in Health Yes, and Health Payment Method Standard. It also shows Appt ID 9876, Start Date 9/03/1962, Appt Status Active, and Last Reported Earned Period 11/14/2020-11/27/2020. There are links for 'View Appointment History' and 'View Transaction History'. At the bottom, there are two buttons: 'Delete Appointment' and 'Skip Appointment'. The 'Delete Appointment' button is highlighted with a red rectangular box.

Participant CalPERS ID: 2345678901
Name: Smith, Boyd B.
Member Category: Miscellaneous
Enrolled in Health: Yes
Health Payment Method: Standard

Appt ID: 9876
Start Date: 9/03/1962
Appt Status: Active
Last Reported Earned Period: 11/14/2020-11/27/2020

[View Appointment History](#)
[View Transaction History](#)

Event: *
Event Date: *

[Delete Appointment](#) [Skip Appointment](#)

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

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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)?

Preprocessing Area	
Preprocessed Data	Error
Affected Subscriber List	No
Census	No
Direct Authorization	No
Health Carrier Rate Data	No
Health Carrier ZIP Code Plan Relationship Data	No
Health Enrollment	No
Medical Group Assignment List	No
Non-PERS Health Eligibility and Appointment Data	Yes
Out-of-Class Appointments	No
Payroll - CalPERS Review	No
Payroll Reporting	Yes
Reciprocal Salary	No
Retirement Enrollment	Yes

Yes: Continue to step 4.

No: You have completed this scenario.

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

Preprocessing Area	
Preprocessed Data	Error
Affected Subscriber List	No
Census	No
Direct Authorization	No
Health Carrier Rate Data	No
Health Carrier ZIP Code Plan Relationship Data	No
Health Enrollment	No
Medical Group Assignment List	No
Non-PERS Health Eligibility and Appointment Data	No
Out-of-Class Appointments	No
Payroll - CalPERS Review	No
Payroll Reporting	No
Reciprocal Salary	No
Retirement Enrollment	Yes

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.

Process	Name	CalPERS ID	Event Date	Event	Division	Program	Preprocessed Status	Error
<input checked="" type="checkbox"/>	Solo, Hannah	1234567890	03/17/2021	Appointment Change	State Controller Office	CalPERS	Error	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.
<input type="checkbox"/>	Solo, Hannah	1234567890	05/01/2023	Appointment Change	State Controller Office	CalPERS	Error	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.

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.

Order	Action	Name	CalPERS ID	Event Date	Event	Preprocessed Status
1	<input checked="" type="radio"/> Process <input type="radio"/> Delete <input type="radio"/> None	Solo, Hannah	1234567890	03/17/2021	Appointment Change	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.

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.

Order	Action	Name	CalPERS ID	Event Date	Event	Preprocessed Status
1	<input type="radio"/> Process <input checked="" type="radio"/> Delete <input type="radio"/> None	Solo, Hannah	1234567890	03/17/2021	Appointment Change	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.

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 XXXXXXXXXXXX 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: XXXXXXXXXXXX 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](http://www.sco.ca.gov) 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](http://www.calpers.ca.gov) 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.