# OPEB Census Report Information

**December/2025**

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# Data Element Definitions for Public Employees' Medical and Hospital Care Act (PEMHCA) Employers' OPEB Census Report Information

## Overview

This document outlines the data elements within a myCalPERS OPEB Data Extract. Business Partners (the requesting public agency and/or school) who participate in a CalPERS Health Plan under Public Employees' Medical & Hospital Care Act (PEMHCA) may extract census data for Other Post-Employment Benefits (OPEB) purposes. An Active report and a Retired report will be generated for each OPEB Data Extract requested. Descriptions and values populated are outlined for each data element.

For purposes of this data extract, Retired members are defined as employees whom have separated directly from the requesting public agency/school and have an active benefit stream. Also, for purposes of this data extract, Active members are defined as employees whom have an active appointment within myCalPERS under the requesting public agency/school.

The data elements provided in this report are unaudited. It is recommended to review the data elements in this extraction with the public agency's /school's records to verify the accuracy of the data.

# OPEB Census Data Elements

| Data Element Name | Description / List of values |
|---|---|
| Effective Date | The as-of date the information was requested. |
| Member CalPERS ID | The assigned 10-digit ID number used to uniquely identify the member in myCalPERS.<br><br>If the primary subscriber is a survivor, this will still be the member's CalPERS ID.<br><br>The Retired report includes only those members who retired directly from the requesting public agency/school and their survivors. |
| Survivor CalPERS ID | The CalPERS ID of the primary survivor if the member is deceased.<br><br>If the member is not deceased, this is left blank. |
| Gender | The gender of the member or survivor.<br><br>• Female = F<br>• Male = M<br>• Nonbinary = N<br>• Unknown = U |
| Last Name | The last name of the member or survivor |
| First Name | The first name of the member or survivor. |
| Birth Date | The date of birth of the member or survivor. |
| Health Eligibility Zip Code | The zip code used for health eligibility determination as of the extract date. |
| Employer CalPERS ID | A unique 10-digit identifier created by myCalPERS to identify the reporting organization.<br><br>For Superior Courts and School Districts, the Employer CalPERS ID is the associated County or County Schools CalPERS ID. |

| Data Element Name | Description / List of values |
|---|---|
| Division CalPERS ID | The CalPERS ID of the agency's Division. If there is no Division this will be the same as the Employer CalPERS ID. In the case of County Superior Courts or School Districts this is the court or district CalPERS ID. |
| Employer Name | The name associated to the above Employer CalPERS ID. |
| Division Name | The name associated to the above Division CalPERS ID. |
| Status | The status of the member or survivor.<br><br>• Active<br>• Retired<br>• Survivor |
| Employee Category | The Employee Category the member currently belongs to or belonged to at the time of retirement/separation from the requesting agency. Examples include but are not limited to:<br><br>• Miscellaneous<br>• Safety |
| Enrollment Level | Indicates if the member's retirement benefit provisions are defined under PEPRA or Classic Membership. |
| Original Hire Date | The original hire date of the member with the requesting public agency/school. |
| Appointment Start Date | The appointment start date of the member with the requesting public agency/school. |
| Separation Date | The member's date of separation from the requesting public agency/school. |
| Retirement Date | The Member's date of retirement. For a pre-retirement death survivor, this field will be their benefit effective date. |
| Retirement Type | Contains a description of the member's retirement type such as the following:<br><br>• Service Retirement = Service Retired<br>• Disability Retirement = Disability Retired<br>• Industrial Disability Retirement = Industrl Disabilty<br>• Pre-Retirement Death Survivor = Pre-Retirement Death |

| Data Element Name | Description / List of values |
|---|---|
| Retirement System | The retirement system the member currently belongs to or belonged to at the time of retirement/separation from the requesting public agency/school. Examples include:<br><br>• California Public Employees' Retirement System = PER<br>• California State Teachers' Retirement System = STR<br>• Other = OTH |
| Program Type | Contains a description of the member's program type such as the following:<br><br>• CalPERS<br>• Health<br>• Health, CalPERS |
| Option Code | The member's retirement benefit option. This field is not populated for survivor records. The following lists the values which will be populated:<br><br>• Court Ordered Option 4/1 = CO1<br>• Court Ordered Option 4/2W = CO2<br>• Court Ordered Option 4/3W = CO3<br>• Court Ordered Community Property Specific Dollar = COD<br>• Court Ordered Community Property Specific Percentage = COP<br>• Court Ordered Option 4/UA = COU<br>• Option 1 = O1<br>• Option 2 = O2<br>• Option 2w = O2W<br>• Option 3 = O3<br>• Option 3w = O3W<br>• Option 4 - 2w & 1 = O42<br>• Option 4 - 3w & 1 = O43<br>• Option 4 - Reduced Allowance for a Fixed Period of Time = O4A<br>• Option 4 - Specific Dollar to Beneficiary = O4D<br>• Option 4 - Multiple Lifetime Beneficiaries = O4M<br>• Option 4 - Specific Percent to Beneficiary = O4P<br>• Option 4 - Reduction on Death of Retiree or Beneficiary = O4R |

| Data Element Name | Description / List of values |
|---|---|
| Option Code (cont.) | • Option 1 Balance = OPB<br>• Option 2w - Pro rata = P2W<br>• Option 3w - Pro rata = P3W<br>• Option 4 - 2w & 1 - Pro rata = P42<br>• Option 4 - 3w & 1 - Pro rata = P43<br>• Court Ordered Option 4/2W - Pro rata = PC2<br>• Court Ordered Option 4/UA - Pro rata = PCU<br>• Option 1 - Pro rata = PO1<br>• Option 2 - Pro rata = PO2<br>• Option 3 - Pro rata = PO3<br>• Unmodified Allowance - Pro rata = PUA<br>• Refund of Contributions and Interest = RCI<br>• PERS Retired Death Benefit = RDB<br>• Survivor Continuance = SC<br>• Unmodified Allowance = UMA |
| Total Service | The member's total years of service credit with all CalPERS employers excluding additional retirement service credit (ARSC) and any other service amount not eligible for health vesting. |
| Employer Service | The member's years of service credit with the requesting agency excluding ARSC and any other service amount not eligible for health vesting.<br><br>For school districts, employer service is kept at the County Schools level. |
| Medical Group | The Medical Group under which the individual is receiving health benefits.<br><br>If the participant's Medical Plan shows "Not Enrolled" or "Ineligible", this field will be blank. |
| Medical Plan | The name of the health plan in which the member or survivor is enrolled.<br><br>If a member or survivor was not enrolled in a health plan as of the extract date, "NOT ENROLLED" will be populated.<br><br>If a retired member or survivor is not eligible to receive health benefits based on not retiring within 120 days of separation (G.C. 22760), "INELIGIBLE" will be populated. |

| Data Element Name | Description / List of values |
|---|---|
| Medical Party Type | A description denoting the number of individuals currently enrolled in the member or survivor's health plan.<br><br>• Medical plan is single person coverage = SINGLE<br>• Medical plan is two-person coverage = 2_PARTY<br>• Medical plan is three or more-person coverage = FAMILY |
| Medical Coverage Type | A description of the member's or survivor's and dependent's medical coverage type (Basic and/or Medicare coverage combinations).<br><br>• Single party with basic coverage = MED_SELF_B<br>• Two party, both with basic coverage = MED_SELF_B_AND_1_B<br>• Family, subscriber with basic coverage, one dependent with basic coverage, and one or more dependents with Medicare coverage = MED_SELF_B_AND_1_B_AND_1P_M<br>• Two party, subscriber with basic coverage and one dependent with Medicare coverage = MED_SELF_B_AND_1_M<br>• Family, all with basic coverage = MED_SELF_B_AND_2P_B<br>• Family, subscriber with basic coverage and two or more dependents with Medicare coverage = MED_SELF_B_AND_2P_M<br>• Single party with Medicare coverage = MED_SELF_M<br>• Two party, subscriber with Medicare coverage and one dependent with basic coverage = MED_SELF_M_AND_1_B<br>• Two party, both with Medicare coverage = MED_SELF_M_AND_1_M<br>• Family, subscriber with Medicare coverage, one dependent with Medicare coverage, and one or more dependents with basic coverage = MED_SELF_M_AND_1_M_AND_1P_B<br>• Family, subscriber with Medicare coverage and two or more dependents with basic coverage = MED_SELF_M_AND_2P_B<br>• Family, all with Medicare coverage = MED_SELF_M_AND_2P_M |
| Medical Employer Contribution | The monthly amount of the health premium paid by the requesting public agency/school. |
| Medical Member/ Survivor Contribution | The monthly amount of the health premium paid by the member. |

| Data Element Name | Description / List of values |
|---|---|
| Number of Dependents | The number of eligible dependents currently enrolled in the member's or survivor's health plan, including the spouse/domestic partner and eligible children as of the extract date. |
| Spouse/ Domestic Partner Flag | Indicates whether the member or survivor has a spouse/domestic partner as a covered dependent. |
| Spouse/ Domestic Partner Gender | The gender of the member's or survivor's covered spouse/domestic partner. |
| Spouse/ Domestic Partner Birth Date | The birth date of the member's or survivor's covered spouse/domestic partner. |
| Dependent Information | Multiple fields that contain the gender and birth date of all eligible dependents currently enrolled in the member's or survivor's health plan, excluding the spouse/domestic partner. |

# Explanations of Blank Fields

| Description | Fields |
|---|---|
| Fields that will not be populated for Active Records | • Survivor CalPERS ID<br>• Retirement Date (unless Retirement Date is equal to Effective Date + 1 day)<br>• Separation Date (unless the member is still enrolled in a health plan as of the extract date)<br>• Retirement Type<br>• Option Code |

| Description | Fields |
|---|---|
| Field that will not be populated for Retired/Survivor records | • Original Hire Date<br>• Appointment Start Date |
| Fields that may not be populated if Medical Plan is "NOT ENROLLED" or "INELIGIBLE" for both Active and Retired/Survivor records | • Medical Party Type<br>• Medical Coverage Type<br>• Medical Group<br>• Eligibility Zip Code<br>• Medical Employer Contribution<br>• Number of Dependents<br>• Spouse/Domestic Partner Flag<br>• Spouse/Domestic Partner Gender<br>• Spouse/Domestic Partner Birth Date<br>• Dependent Information |
| Fields that may not be populated if Retirement System is "STR" or "OTH" for both Active and Retired/Survivor records (Non-PERS members) | • Employee Category<br>• Total Service<br>• Employer Service<br>• Option Code<br>• Retirement Date<br>• Retirement Type |

## Scenarios that may have an effect on the data

| Scenario | Data Impact |
|---|---|
| Members with Community Property transfer service credits | For these members, converted community property transfer service credit has been included in either Employer Service or Total Service. |

| Scenario | Data Impact |
|---|---|
| Agencies with individuals who retired or died near the extract date | In some cases, these retiree or survivor records may not be included in this extract due to delays in processing retirement or death benefits.<br><br>If retiree records are included, the data for these individuals may reflect health coverage information as it was when they were active. In these cases, the Medical Employer Contribution field may not reflect the actual premium amount paid by the employer. |
| Agencies with members who died between the "as of" date and the day the data extract was pulled from myCalPERS | For these members, certain fields such as Option Code may be incorrect or missing. |
| There are active records with Employer Service = 0 | The following are some scenarios that can cause employer service to show as "0".<br><br>• A hire date close to the extract date may mean that payroll/service information was not recorded by the extract date.<br>• An individual could show as active on myCalPERS, but there is no payroll or service information posted.<br>• Active participants with Retirement System other than PERS, will not have either service field (Total or Employer) populated.<br>• Duplicate records for the same individual on myCalPERS may show one record with service and one record with no service.<br><br>Please review all information for Active PERS records with zero employer service. |
| Duplicate Records | You may find individuals shown more than once in the data extract. This could be due to the following scenarios:<br><br>• A person could have been entered in our systems twice (for example, with two different Social Security Numbers). In this case, they would have two different myCalPERS Id's.<br>• A person could have been on myCalPERS with two active employment appointments for the same agency. In this case, the two records would have the same myCalPERS Id. |

| Scenario | Data Impact |
|---|---|
| Mergers | • If your agency has had one or more mergers, to the extent possible, we have included individuals associated with those mergers.<br>• We suggest that you check to verify that all eligible participants are accounted for in this data extract.<br>• Depending on when a member retired and how his employment information is represented in myCalPERS, the Employer Service for a retiree may only include the service that the member had while working for the successor agency and may not include the service from the merged agency (although **all** service should be included in the Total Service field). |
| Agencies with Non-PERS Members (including School Districts) | The following points apply if your public agency or school:<br><br>• Has a non-PERS PEMHCA contract or<br>• Has individuals who are only covered under a health plan (and not covered under PERS retirement) and/or<br>• Has participants whose retirement system was extracted as "OTHER" or "STRS"<br><br>1. For both Active and Retired records:<br>    a. Non-PERS Members can be identified by the fact that the Employee Category field will be blank. The Retirement System field may show "STR" (State Teachers Retirement System) or "OTH" (Other Retirement System).<br>2. For Active records:<br>    a. For Active Non-PERS members, service data elements will not be populated.<br>    b. Due to limited employment information for Non-PERS participants, we recommend reviewing participants indicated as "Not Enrolled" to verify their employment status and their eligibility to be covered for health.<br>3. For Retired records:<br>    a. For Non-PERS retired members, retirement type, retirement date, service and option code will not be populated since these fields refer to PERS retirement.<br><br>**Possible Missing Records:**<br>Every effort has been made to capture as much data as possible about Non-PERS members. However, due to the limited information about non-PERS members on our system, it is possible that some of these members may not be included in this data extract (for example if they never enrolled in health or are not currently enrolled). |

| Scenario | Data Impact |
|---|---|
| Terminated Medical Groups | • If your agency has one or more terminated medical groups, it is possible that members of these medical groups may still exist in the data extract as "Not Enrolled".<br>• Due to the lack of information on terminated medical groups we cannot identify these individuals for you. We recommend you discuss the subject of individuals in terminated medical groups with your actuary. |
| Missing Active or Retired File | • If there is no Active File attached, it is because there are no active members for your agency as of extract date who are covered under a PEMHCA contract.<br>• If there is no Retired File attached, it is because there are no retired members for your agency as of the extract date who are covered under a PEMHCA contract. |

CalPERS