

myCalPERS Out-of-Class Reporting

Student Guide

April 24, 2026



Introduction

Using myCalPERS, employers are responsible for reporting out-of-class hours worked in vacant positions.

myCalPERS allows you to:

- Verify out-of-class hours to report
- Submit out-of-class records for employees who meet out-of-class hours worked criteria
- Review penalties that have been assessed in accordance with Gov. Code section 20480
- Associate labor agreements and salary schedules to out-of-class records
- Review and pay out-of-class receivables and administrative penalties

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

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

Step 1: Take [Business Rules](#) classes.

Step 2: Review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide.

Step 3: Attend a [myCalPERS](#) instructor-led class.

Step 4: Review the [self-paced online classes](#).

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

Contents

Unit 1: Out-of-Class Reporting.....	3
Unit 2: Maintaining Supporting Documents.....	14
CalPERS Resources	20
CalPERS Contacts	21

Unit 1: Out-of-Class Reporting

An out-of-class appointment is an appointment to an upgraded position or higher classification by an employer or governing board or body that is vacant position for a limited duration.

A vacant position is a position that is **vacant during recruitment** for a permanent appointment. A vacant position does not refer to a position that is temporarily available due to another employee's leave of absence.

Employer Notifications

CalPERS will mail up to two notification letters to all contracting public agency and school employers to their preferred address in myCalPERS.

Annual Notice – (Last week of June)

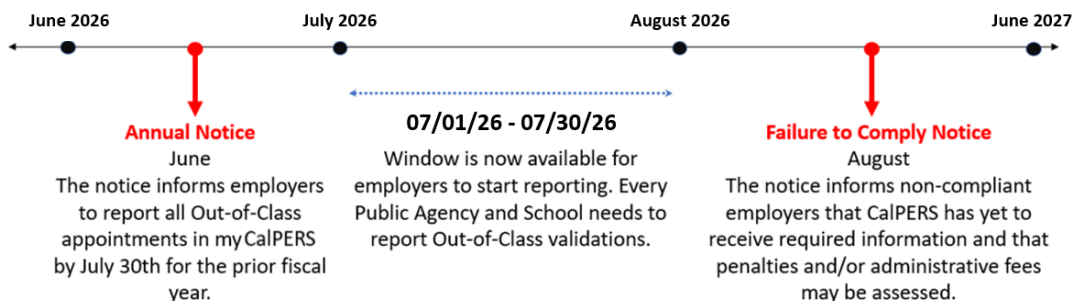
The notice informs employers to report all out-of-class appointments in myCalPERS by July 30 for the prior fiscal year.

Failure to Comply Notice – (August 1)

This notice informs non-compliant employers that report payroll directly to CalPERS that we have not received the required information. Penalties and/or administrative fees may be assessed.

Out-of-Class Reporting Timeline

- **Last week of June 2026:** Annual Notice sent.
- **July 1-30, 2026:** Window is now available for employers to start reporting. Every Public Agency and School needs to report out-of-class validations.
- **August 1, 2026:** Failure to Comply Notification sent.



Penalties

Penalties incurred with reporting out-of-class appointments that exceed 960 hours are anticipated to be generated the following June after the out-of-class review period. For example, reporting out-of-class appointments for fiscal year 2025/2026 completed by July 30, 2026 will be invoiced June 2027.

Employers who violate this provision must make payments to CalPERS equal to three times the amount of the difference between member and employer contributions for the out-of-class appointment and the member and employer contributions reported to the system for the member's permanent position. The penalty shall be applied for the entire period(s) the member served in an out-of-class appointment. In addition, the employer will be responsible for a \$200 fee to cover administrative expenses.

Penalties paid are not normal contributions or additional contributions that are credited to an employee's individual PERS account. The employee shall bear no liability, obligation, or expense because of the unlawful actions of the employer.

Contents

Scenario 1: Report No Out-of-Class Appointments	5
Scenario 2: Report Out-of-Class Appointments.....	6
Scenario 3: Out-of-Class File Upload.....	12

Scenario 1: Report No Out-of-Class Appointments

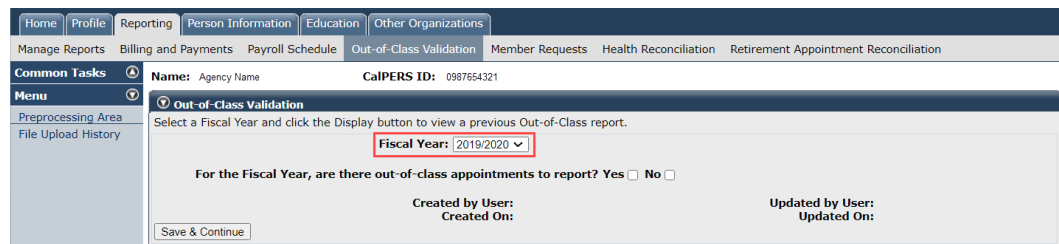
Using the out-of-class validation process, you will report that there are no out-of-class appointments for the fiscal year by July 30.

Step Actions (6 steps)

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

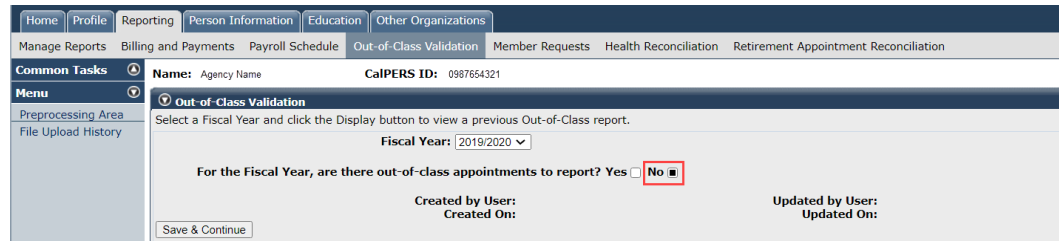
Step 2 Select the **Out-of-Class Validation** local navigation link.

Step 3 Within the Out-of-Class Validation section, select from the Fiscal Year drop-down list.



The screenshot shows the 'Out-of-Class Validation' form. The 'Fiscal Year' dropdown menu is highlighted with a red box and set to '2019/2020'. The form includes a 'Name' field with 'Agency Name' and a 'CaPERS ID' of '0987654321'. Below the dropdown, there is a question: 'For the Fiscal Year, are there out-of-class appointments to report? Yes No '. The 'No' checkbox is currently unselected. At the bottom, there is a 'Save & Continue' button and fields for 'Created by User', 'Created On', 'Updated by User', and 'Updated On'.

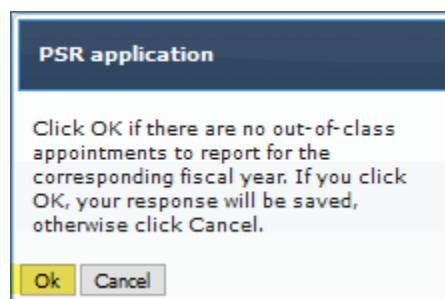
Step 4 Within the Out-of-Class Validation section, select the **No** check box.



The screenshot shows the 'Out-of-Class Validation' form. The 'No' checkbox is now selected and highlighted with a red box. The 'Fiscal Year' dropdown remains set to '2019/2020'. The 'Save & Continue' button and other fields are visible at the bottom.

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

Step 6 Select the **Ok** button.



The screenshot shows a dialog box titled 'PSR application'. The text inside reads: 'Click OK if there are no out-of-class appointments to report for the corresponding fiscal year. If you click OK, your response will be saved, otherwise click Cancel.' At the bottom, there are two buttons: 'Ok' and 'Cancel'.

You have completed this scenario.

Scenario 2: Report Out-of-Class Appointments

CalPERS requires employers to verify the amount of out-of-class hours worked for each qualified out-of-class appointment by July 30.

Scenario

Using the out-of-class validation process, you will:

- Verify there are out-of-class hours to report
- Submit records for employees who meet the out-of-class hours worked criteria
- Review penalties that were assessed in accordance with Gov. Code section 20480
- Associate labor agreements and salary schedules to out-of-class records

System Logic

Begin and end dates must be within the selected fiscal year.

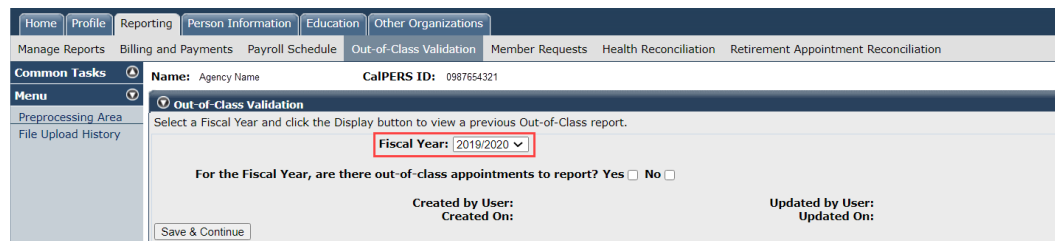
Step Actions (36 steps)

Out-of-Class Validation

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

Step 2 Select the **Out-of-Class Validation** local navigation link.

Step 3 Within the Out-of-Class Validation section, select from the Fiscal Year drop-down list.

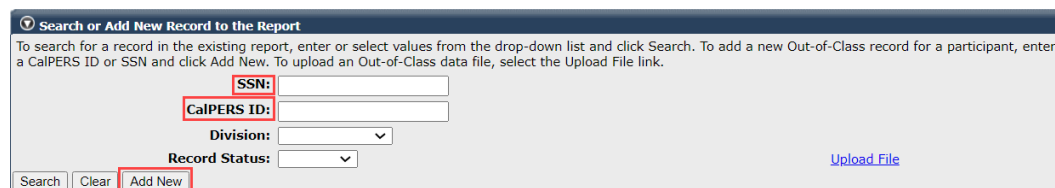


Step 4 Within the Out-of-Class Validation section, keep the **Yes** check box checked.

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

Step 6 Within the Search or Add New Record to the Report section, enter the employee's **SSN** or **CalPERS ID** in the appropriate field.

Step 7 Select the **Add New** button.



Step 8 Within the Out-of-Class Appointment Validation section, is the Out-of-Class Appointment a vacant position?

Yes: Select the **Yes** check box, then skip to step 10

No: Select the **No** check box. An error message will display: Due to the position not being vacant and recruited for, the record does not meet the criteria for an Out-of-Class appointment and does not require further validation information.

Step 9 Select the **Return to View Records** link to either add a new person or update the report status to **No** if no additional record is required.

You have completed this scenario.

Step 10 Within the Out-of-Class Appointment Validation section, is the Out-of-Class Appointment in a recruitment?

Yes: Select the **Yes** check box, then skip to step 12

No: Select the **No** check box. An error message will display: Due to the position not being vacant and recruited for, the record does not meet the criteria for an Out-of-Class appointment and does not require further validation information

Step 11 Select the **Return to View Records** link to either add a new person or update the report status to **No** if no additional record is required.

You have completed this scenario.

Step 12 Within the Maintain Record Details section, complete the **Begin** and **End Date** fields.

Step 13 Select the appropriate **Appointment** radio button.

Active Appointment

Step 14 Within the Active Appointment subsection, complete all appropriate fields for the member's original appointment before working in an out-of-class appointment.

Note: Within the **Total Earnings** field, enter what the employee would have earned if they worked in the original position during the out-of-class-period.

Out-of-Class Appointment

Step 15 The Out-of-Class Assignment subsection's **Pay Rate** field refers to the pay rate assigned to the employee's temporary out-of-class (OOC) position while working in the acting/out-of-class appointment. This pay rate must align with the employer's publicly available salary schedule. Depending on how the employee was compensated for the out-of-class assignment, this section should be completed in one of two ways:

- **If the Employee Was Paid an Increased Pay Rate:** Continue to step 16.
- **If the Employee Was Paid Temporary Upgrade Pay (TUP):** Skip to step 18.

Employee Was Paid an Increased Pay Rate

Step 16 Within the Out-of-Class Assignment subsection:

- Enter the increased pay rate in the **Pay Rate** field.
- Total all earnings from the increased pay rate and enter them in the **Total Earnings** field.
- Do not enter anything in the **Total Paid Additional Compensation for the Out-of-Class Appointment** field, as all compensation is already included in the increased pay rate and reflected in the Out-of-Class Total Earnings.

Active Appointment

Position Title: * Office Clerk
Pay Rate Type: * Hourly
Total Earnings: * 25000.00
Pay Rate: * 25.00

Member Contributions: Employer Contributions:

Out-of-Class Assignment

For Total Earnings, if the member is placed into the Out-of-Class appointment and receiving compensation of the position pursuant to the publicly available pay schedule, report the payrate and earnings of the Out-of-Class appointment for the position. For Total Paid Additional Compensation for the Out-of-Class appointment, report any additional compensation associated with the Out-of-Class appointment if the member is not placed into the Out-of-Class appointment and receiving compensation of the position pursuant to the publicly available pay schedule.

Position Title: * Staff Services Manager I
Pay Rate Type: * Hourly
Total Earnings: * 30000.00
Pay Rate: * 30.00
Total Paid Additional Compensation for the Out-of-Class Appointment: *

Member Contributions: Employer Contributions:

Step 17 Skip to step 19.

Employee Was Paid Temporary Upgrade Pay (TUP)

Step 18 Within the Out-of-Class Assignment subsection:

- Enter the **Pay Rate** as the same amount that was entered in the Active Appointment subsection's **Pay Rate** field.
- Enter the **Total Earnings** as the same amount that was entered in the Active Appointment subsection's **Total Earnings** field.
- Calculate the total TUP amount and enter it in the **Total Paid Additional Compensation for the Out-of-Class Appointment** field.

Active Appointment

Position Title: * Office Clerk
Pay Rate Type: * Hourly
Total Earnings: * 25000.00
Pay Rate: * 25.00

Member Contributions: Employer Contributions:

Out-of-Class Assignment

For Total Earnings, if the member is placed into the Out-of-Class appointment and receiving compensation of the position pursuant to the publicly available pay schedule, report the payrate and earnings of the Out-of-Class appointment for the position. For Total Paid Additional Compensation for the Out-of-Class appointment, report any additional compensation associated with the Out-of-Class appointment if the member is not placed into the Out-of-Class appointment and receiving compensation of the position pursuant to the publicly available pay schedule.

Position Title: * Staff Services Manager I
Pay Rate Type: * Hourly
Total Earnings: * 25000.00
Pay Rate: * 25.00
Total Paid Additional Compensation for the Out-of-Class Appointment: 1250.00

Member Contributions: Employer Contributions:

Note: For PEPRAs members, TUP is not pensionable and should not be reported in payroll for pensionable purposes; however, it must still be recorded in the annual out-of-class report to accurately assess any penalties pursuant to Gov. Code 20480.

Out-of-Class Hours Reported

Step 19 Within the Out-of-Class Hours Reported subsection, complete the **Total Out-of-Class Hours Worked for this Period** field. Include vacation, sick leave, or overtime hours the employee received paid compensation.

Out-of-Class Hours Reported

Report all Out-of-Class hours worked and any additional hours reported for which the participant received compensation (i.e. Vacation or Sick Leave).

Total Out-of-Class Hours Worked for this Period: * 80

Review Penalties

Step 20 Within the Penalty subsection, select the **Calculate** button.

Penalty

Select the Calculate button to verify hours reported and to calculate any Out-of-Class penalties that may apply. Once calculated, you can select Save & Exit to return to the Out-of-Class summary page.

Penalty: _____

Calculate Clear

Associate Labor Agreements/Salary Schedules

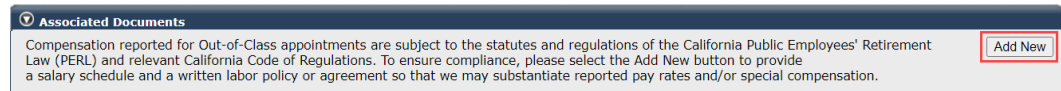
Step 21 Do you need to provide a salary schedule or written labor policy/agreement?

Yes: Continue to step 22.

No: Skip to step 36.

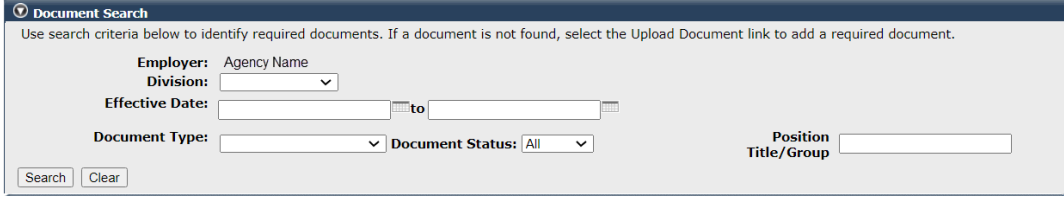
Note: The salary schedule/written labor agreement must be submitted for all employees who have worked more than 960 hours in a fiscal year.

Step 22 Within the Associated Documents section, select the **Add New** button.



The screenshot shows a section titled "Associated Documents" with a dark blue header. Below the header, there is a paragraph of text: "Compensation reported for Out-of-Class appointments are subject to the statutes and regulations of the California Public Employees' Retirement Law (PERL) and relevant California Code of Regulations. To ensure compliance, please select the Add New button to provide a salary schedule and a written labor policy or agreement so that we may substantiate reported pay rates and/or special compensation." In the top right corner of this section, there is a red-bordered button labeled "Add New".

Step 23 Within the Document Search section, populate the fields as necessary.



The screenshot shows a "Document Search" section with a dark blue header. Below the header, there is a paragraph of text: "Use search criteria below to identify required documents. If a document is not found, select the Upload Document link to add a required document." The search criteria include: "Employer: Agency Name", "Division: [dropdown]", "Effective Date: [calendar] to [calendar]", "Document Type: [dropdown]", "Document Status: All [dropdown]", and "Position Title/Group: [text input]". At the bottom left, there are "Search" and "Clear" buttons.


Step 24 Select the **Search** button.

Step 25 Do you need to upload a new document?

Yes: Continue to step 26.

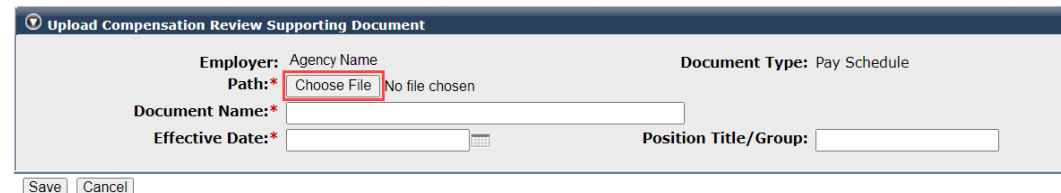
No: Skip to step 34.

Step 26 In the Search Results section, select the **Upload Document** link.



The screenshot shows a "Search Results" section with a dark blue header. Below the header, there are two buttons: "Associate to Appointment" and "Inactivate Document". In the top right corner, there is a red-bordered link labeled "Upload Document".

Step 27 Within the Upload Compensation Review Supporting Document section, select the **Browse** button.



The screenshot shows an "Upload Compensation Review Supporting Document" section with a dark blue header. Below the header, there are several fields: "Employer: Agency Name", "Document Type: Pay Schedule", "Path: [Choose File] No file chosen", "Document Name: * [text input]", "Effective Date: * [calendar]", and "Position Title/Group: [text input]". At the bottom left, there are "Save" and "Cancel" buttons.

Step 28 Select the supporting PDF document.

Step 29 Select the **Open** button.

Step 30 Within the Upload Compensation Review Supporting Document section, complete the Position Title/Group field.

Upload Compensation Review Supporting Document

Employer: Agency Name Document Type: Pay Schedule

Path: Choose File | No file chosen

Document Name: *

Effective Date: *

Position Title/Group: *

Save Cancel

Step 31 Select the **Save** button.

Step 32 Within the Search Results section, select appropriate document check boxes.

Search Results

Associate to Appointment Inactivate Document Upload Document

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
<input checked="" type="checkbox"/> PaySchedule.01122019.pdf	Pay Schedule	01/01/2018	03/12/2019	Active	

Step 33 Select the **Associate to Appointment** button.

Search Results

Associate to Appointment Inactivate Document Upload Document

Step 34 Select the **Return** button in the bottom left corner.

Step 35 Select the **Save & Exit** button.

Step 36 Within the Records Present in the Report section, your out-of-class record displays.

Records Present in the Report

Only records with a status of Reported, Reviewed-Invalid, or Error can be deleted. Please contact the CalPERS Customer Contact Center for assistance deleting records with any other status type.

Select All Delete

Show 25 entries

Showing 1 to 9 of 9 entries

First Previous 1 Next Last

SSN	CalPERS ID	Business Partner	Name	Out-of-Class Position Title	Reporting Period	Total FY Hours Worked	Penalty	Record Status
<input type="checkbox"/> xxx-xx-9999	0123456789	Agency Name	Emily Jones	SSM I	01/09/2019 - 03/09/2019	280.0	0.00	Reported

You have completed this scenario.

Scenario 3: Out-of-Class File Upload

You will report your out-of-class validations through file upload.

Step Actions (14 steps)

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

Step 2 Select the **Out-of-Class Validation** local navigation link.

Step 3 Within the Out-of-Class Validation section, select from the **Fiscal Year** drop-down list.

The screenshot shows the 'Out-of-Class Validation' section. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, Member Requests, Health Reconciliation, and Retirement Appointment Reconciliation. The 'Out-of-Class Validation' sub-tab is active. The main content area has a header with 'Name: Agency Name' and 'CalPERS ID: 0987654321'. Below this is a section titled 'Out-of-Class Validation' with instructions: 'Select a Fiscal Year and click the Display button to view a previous Out-of-Class report.' A dropdown menu for 'Fiscal Year' is set to '2019/2020'. Below the dropdown is a question: 'For the Fiscal Year, are there out-of-class appointments to report?' with 'Yes' checked and 'No' unchecked. At the bottom, there are fields for 'Created by User', 'Created On', 'Updated by User', and 'Updated On', and a 'Save & Continue' button.

Step 4 Within the Out-of-Class Validation section, keep the **Yes** check box checked.

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

Step 6 Within the Search or Add New Record to the Report section, select the **Upload File** link.

The screenshot shows the 'Search or Add New Record to the Report' section. It contains instructions: 'To search for a record in the existing report, enter or select values from the drop-down list and click Search. To add a new Out-of-Class record for a participant, enter a CalPERS ID or SSN and click Add New. To upload an Out-of-Class data file, select the Upload File link.' Below the instructions are input fields for 'SSN', 'CalPERS ID', 'Division' (a dropdown menu), and 'Record Status' (a dropdown menu). There are 'Search', 'Clear', and 'Add New' buttons. A yellow 'Upload File' link is highlighted.

Step 7 Within the Upload File section, select the **Browse** button.

The screenshot shows the 'Upload File' section. It contains instructions: 'Select Browse to locate a file to upload prior to selecting the Upload File button.' Below the instructions is a 'Path:' field with a 'Browse...' button and the text 'No file selected.' At the bottom, there is an 'Upload File' button.

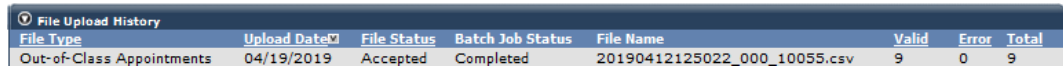
Step 8 Select the CSV document.

Step 9 Select the **Upload File** button.

Step 10 After your out-of-class appointment has been uploaded and has a Ready file status, select the **F5** key on your keyboard to refresh your totals.

File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
Out-of-Class Appointments	04/19/2019	Ready		20190412125022_000_10055.csv			

Step 11 Your file has been validated and displays the number of records in the Valid and Error columns.



A screenshot of a table titled "File Upload History". The table has columns for File Type, Upload Date, File Status, Batch Job Status, File Name, Valid, Error, and Total. The data row shows "Out-of-Class Appointments" uploaded on "04/19/2019" with a status of "Accepted" and "Completed", resulting in 9 valid records, 0 errors, and a total of 9 records.

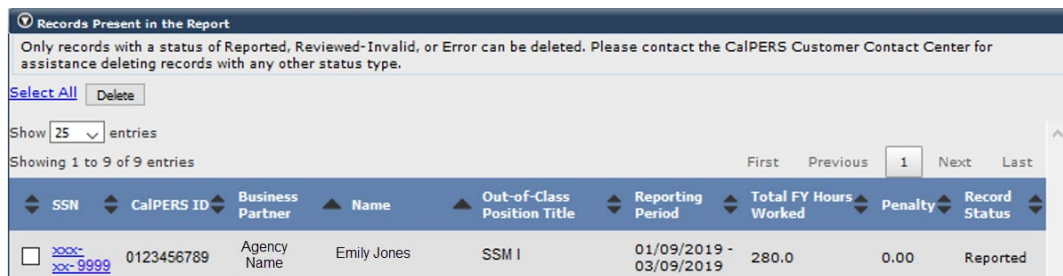
File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
Out-of-Class Appointments	04/19/2019	Accepted	Completed	20190412125022_000_10055.csv	9	0	9

Review Your Reported Out-of-Class Appointments

Step 12 Select the **Reporting** global navigation tab.

Step 13 Select the **Out-of-Class Validation** local navigation link.

Step 14 Within the Records Present in the Report section, your out-of-class record displays.



A screenshot of the "Records Present in the Report" section. It includes a warning message about deleting records, a "Select All" button, a "Delete" button, and a "Show 25 entries" dropdown. Below this is a table with columns: SSN, CalPERS ID, Business Partner, Name, Out-of-Class Position Title, Reporting Period, Total FY Hours Worked, Penalty, and Record Status. The first record shown is for Emily Jones, an SSM I, with a reporting period from 01/09/2019 to 03/09/2019, 280.0 total FY hours worked, and a reported status.

SSN	CalPERS ID	Business Partner	Name	Out-of-Class Position Title	Reporting Period	Total FY Hours Worked	Penalty	Record Status
xxx-xxx-9999	0123456789	Agency Name	Emily Jones	SSM I	01/09/2019 - 03/09/2019	280.0	0.00	Reported

You have completed this scenario.

Unit 2: Maintaining Supporting Documents

In this unit, you will learn how to maintain your supporting documents used for out-of-class validations.

Contents

Scenario 1: Upload New Supporting Documents	15
Scenario 2: Update Supporting Document Details	17
Scenario 3: Inactivate Supporting Documents	18
Scenario 4: Reactivate Supporting Documents	19

Scenario 1: Upload New Supporting Documents

You will upload a new salary schedule or written labor policy/agreement.

Step Actions (10 steps)

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

Step 2 Select the **Maintain Employer Supporting Documents** left-side navigation link.

The screenshot shows the CalPERS Reporting interface. The top navigation bar includes 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Below this, there are tabs for 'Management Reports', 'Billing and Payments', 'Payroll Schedule', 'Out-of-Class Validation', 'Member Requests', 'Health Reconciliation', and 'Retirement Appointment Reconciliation'. The 'Common Tasks' section shows 'Name: Agency Name' and 'CalPERS ID: 0987654321'. The 'Menu' section on the left lists various options, with 'Maintain Employer Supporting Documents' highlighted in a red box. The main content area shows a 'Create or Edit Report' section with a 'Method' dropdown and a 'Continue' button. Below that is a 'Work On Existing Payroll Reports' section with a 'Program' dropdown set to 'CalPERS', 'Fiscal Year' dropdown, and 'Report Status' and 'Report Type' dropdowns. A table of payroll reports is displayed below, with columns for 'Schedule Name', 'Earned Period / Adjustment Date', 'Status', 'Report Type', 'Due Date', 'Submit Date', 'Initial Record Posted Date', 'Report Posted Date', and 'Test Report'. The 'Maintain Employer Supporting Documents' link is highlighted in the left navigation menu.

Step 3 Within the Document Search section, complete all necessary fields.

The screenshot shows the 'Document Search' form. It includes the following fields: 'Employer: Agency Name', 'Division: [dropdown]', 'Effective Date: [calendar] to [calendar]', 'Document Type: [dropdown]', 'Document Status: All [dropdown]', and 'Position Title/Group: [text input]'. There are 'Search' and 'Clear' buttons at the bottom left. The form is titled 'Document Search' and includes a note: 'Use search criteria below to identify required documents. If a document is not found, select the Upload Document link to add a required document.'

Step 4 Select the **Search** button.

Step 5 In the Search Results section, select the **Upload Document** link.

The screenshot shows the 'Search Results' section. It includes an 'Inactivate Document' button and an 'Upload Document' link highlighted in a red box.

Step 6 Within the Upload Compensation Review Supporting Document section, select the **Choose File** button.

The screenshot shows the 'Upload Compensation Review Supporting Document' form. It includes the following fields: 'Employer: Agency Name', 'Document Type: Pay Schedule', 'Path: [Choose File] No file chosen', 'Document Name: [text input]', 'Effective Date: [calendar]', and 'Position Title/Group: [text input]'. There are 'Save' and 'Cancel' buttons at the bottom left. The 'Choose File' button is highlighted in a red box.

Step 7 Select the supporting PDF document.

Step 8 Select the **Open** button.

Step 9 Complete the Upload Compensation Review Supporting Document section, including the Position Title/Group field.

The screenshot shows a web form titled "Upload Compensation Review Supporting Document". The form contains the following fields and controls:

- Employer:** Agency Name
- Document Type:** Pay Schedule
- Path:** Choose File | Payroll Schedule.pdf
- Document Name:** * [Text input field]
- Effective Date:** * [Date picker]
- Position Title/Group:** [Text input field]
- Buttons:** Save, Cancel

Step 10 Select the **Save** button.

You have completed this scenario.

Scenario 2: Update Supporting Document Details

You will update supporting document details such as the type, effective date, status, and position title/group.

Step Actions (7 steps)

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

Step 2 Select the **Maintain Employer Supporting Documents** left-side navigation link.

The screenshot shows the CalPERS Reporting interface. The left navigation menu has 'Maintain Employer Supporting Documents' highlighted. The main content area shows 'Work On Existing Payroll Reports' with a table of payroll reports. The table has columns for Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, and Test Report. The 'Maintain Employer Supporting Documents' link is highlighted in the left navigation menu.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020	11/30/2020	No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020	11/16/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020	11/03/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020	11/03/2020	No
	10/31/2020 - 11/13/2020	Posted	Payroll - Earned Period	12/13/2020	11/25/2020	11/30/2020	11/30/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No

Step 3 Within the Document Search section, complete all necessary fields.

The screenshot shows the 'Document Search' form. It includes fields for Employer (Agency Name), Division, Effective Date (to), Document Type, Document Status (All), and Position Title/Group. There are 'Search' and 'Clear' buttons.

Step 4 Select the **Search** button.

Step 5 Within the Search Results section, locate the appropriate supporting document, then select the **Update Details** link.

The screenshot shows the 'Search Results' section. It includes a table with columns: Document Name, Document Type, Effective Date, Upload Date, Document Status, and Position Title/Group. The document 'PaySchedule.01122019.pdf' is listed with an 'Update Details' link.

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
<input type="checkbox"/> PaySchedule.01122019.pdf	Pay Schedule	01/12/2019	02/20/2019	Active	

Step 6 Update the Upload Compensation Review Supporting Document section.

The screenshot shows the 'Upload Compensation Review Supporting Document' form. It includes fields for Employer (Agency Name), Document Type (Pay Schedule), Path (Choose File), Document Name, and Effective Date. There are 'Save' and 'Cancel' buttons.

Step 7 Select the **Save** button.

You have completed this scenario.

Scenario 3: Inactivate Supporting Documents

You will inactivate a supporting document.

Step Actions (6 steps)

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

Step 2 Select the **Maintain Employer Supporting Documents** left-side navigation link.

The screenshot shows the CalPERS Reporting interface. The left sidebar contains a 'Menu' section with various navigation links. The 'Maintain Employer Supporting Documents' link is highlighted with a red box. The main content area displays a table of payroll reports with columns for Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, and Test Report.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020	11/30/2020	No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020	11/16/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020	11/03/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020		No
	10/31/2020 - 11/13/2020	Posted	Payroll - Earned Period	12/13/2020	11/25/2020	11/30/2020	11/30/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No

Step 3 Within the Document Search section, complete all necessary fields.

The screenshot shows the 'Document Search' form. It includes fields for Employer (Agency Name), Division (dropdown), Effective Date (range), Document Type (dropdown), Document Status (dropdown), and Position Title/Group (text input). There are 'Search' and 'Clear' buttons at the bottom.

Step 4 Select the **Search** button.

Step 5 Within the Search Results section, select appropriate document check box(s).

The screenshot shows the 'Search Results' section. It includes a table with columns for Document Name, Document Type, Effective Date, Upload Date, Document Status, and Position Title/Group. The 'Pay Schedule' document is selected with a checkbox.

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
<input checked="" type="checkbox"/> Pay Schedule	Pay Schedule	03/18/2021	03/18/2021	Active	

Step 6 Select the **Inactivate Document** button.

The screenshot shows the 'Search Results' section. The 'Inactivate Document' button is highlighted with a red box. The table below shows the 'Pay Schedule' document.

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
<input type="checkbox"/> Pay Schedule	Pay Schedule	03/18/2021	03/18/2021	Active	

You have completed this scenario.

Scenario 4: Reactivate Supporting Documents

You will reactivate a supporting document.

Step Actions (6 steps)

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

Step 2 Select the **Maintain Employer Supporting Documents** left-side navigation link.

The screenshot shows the 'Reporting' tab selected in the top navigation bar. The left sidebar contains a 'Menu' with 'Maintain Employer Supporting Documents' highlighted in red. The main content area shows the 'Work On Existing Payroll Reports' section with a table of reports.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020	11/30/2020	No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020	11/16/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020	11/03/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020		No
	10/31/2020 - 11/13/2020	Posted	Payroll - Earned Period	12/13/2020	11/25/2020	11/30/2020	11/30/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No

Step 3 Within the Document Search section, complete all necessary fields.

The screenshot shows the 'Document Search' form with the following fields filled out:

- Employer: Agency Name
- Division: [Dropdown]
- Effective Date: [Date] to [Date]
- Document Type: [Dropdown]
- Document Status: All
- Position Title/Group: [Text]

Step 4 Select the **Search** button.

Step 5 Within the Search Results section, find the appropriate inactive supporting document, then select the **Update Details** link.

The screenshot shows the 'Search Results' table with one row:

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
<input type="checkbox"/> PaySchedule.01122019.pdf	Pay Schedule	01/12/2019	02/20/2019	Active	

Step 6 Select the **Reactivate Document** button.

The screenshot shows the 'Upload Compensation Review Supporting Document' form with the following fields filled out:

- Employer: Agency Name
- Document Name: Pay Schedule
- Effective Date: 12/28/2019
- Document Type: Pay Schedule
- Position Title/Group: [Text]

The 'Reactivate Document' button is highlighted with a red box.

You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at www.calpers.ca.gov.

- [Data Element Definitions Out-of-Class Validation Reporting \(PDF\)](#)
Pathway: CalPERS website > Employers > Technical Resources > Employers (+) Reporting Out-of-Class Hours Worked (section) > Data Element Definitions Out-of-Class Validation Reporting (PDF)
- [Out-of-Class Reporting Frequently Asked Questions \(PDF\)](#)
Pathway: CalPERS website > Employers > Technical Resources > Employers (+) Reporting Out-of-Class Hours Worked (section) > Government Code Section 20480: Out-of-Class Reporting Frequently Asked Questions (PDF)
- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > Employer Education > myCalPERS Student Guides & Resources (*under Resources header*)
- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > Employer Education > Business Rules & myCalPERS Classes
- [Self-Paced Online Classes](#) (log in to myCalPERS, select the **Education** global navigation tab, then the Classes local navigation link)
 - Business Rules
 - The Importance of Accurately Reporting Payroll
 - myCalPERS
 - Out-of-Class Reporting
- [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)
- [Circular Letters](#)
Pathway: CalPERS website > Employers > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)
- [myCalPERS Reports Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Resources > myCalPERS Reports Catalog

CalPERS Contacts

Email

- To contact the [employer educators](#) for questions and inquiries, email **calpers_employer_communications@calpers.ca.gov**.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.
- To contact [CalPERS Membership Unit](#) for questions regarding membership eligibility or if a non-contributory employee does not have the Earned Period No Contribution and No Service in the Transaction Type drop-down list, email **membership_reporting@calpers.ca.gov**.

Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

Submit Inquiry

You can send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation folder and select the **Submit Inquiry** link to submit a question or request.

Compensation Compliance Analysis

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

Refer to the [myCalPERS Payroll Reporting](#) student guide (Unit 8, Scenario 3: Request a Compensation Compliance Analysis) for more information.

Users should no longer contact the Audit Compliance and Resolution Unit at **mou_review@calpers.ca.gov** for compensation compliance questions.