

School Employer Advisory Committee

August 26, 2026

Housekeeping (1 of 2)

Webinar is being recorded

Attendee mics are muted

Meeting materials available on www.calpers.ca.gov

Email: CalPERS_SEAC@calpers.ca.gov

Housekeeping (2 of 2)

For questions, use:

- Q&A
 - Type questions to the panel
- Raise hand
 - Let the moderator know you'd like to speak

Note: Chat is read-only. We use it to share links with you.



Agenda (1 of 2)

Legislation Updates – Melissa Ilusorio

Leaves of Absence and Direct Pay – Sabila Iyyaz

Pay Rates and Effective Dates – Jennifer Sandness

Member Self-Service (MSS) Registration Report – Angel George

Working After Disability Retirement for Disability Retirees –
Mackenzie Prior

Break – 10 minutes

Agenda (2 of 2)

Vacation Payout – Kenneth Noss

Unused Sick Leave Reporting – Tim Herrback

CalPERS/CalSTRS Elections and Classic Benefit Validation –
Tan Duy Tran

State Social Security Administrator New Fees and Invoice Changes –
Shawn Fitzpatrick

Roundtable – Brad Hanson, Heather Porter, and Dianne Cooper

Legislation Updates

Melissa Ilusorio
Legislative Affairs Division

Legislation Updates Questions

Leaves of Absence and Direct Pay

Sabila Iyyaz

Health Account Management Division

Direct Pay

Off-pay status

100% of premiums

Pay directly to health plan

FMLA/CFRA exception

New myCalPERS Functionality

Updated leave type

- Family Medical Leave/California Family Rights Act

New leave types

- Pregnancy Disability Leave
- Disability Retirement Determination

New functionality to keep employees on active health while on off-pay status

Appointment Event Details	
Event:*	Begin Leave
Event Date:*	
Leave Type:*	Disability Retirement Determination
☒ Select to keep employee on the active billing roster	

Common Leave Types

Leave Type	Corresponding Transaction
Family Medical Leave/California Family Rights Act	Chg to deduct – FMLA/CFRA
Pregnancy Disability Leave	Chg to deduct – PDL
Industrial Disability Leave	Cancel due to off-pay status
Military Leave	
Non-Industrial Disability Leave	
Other Leave	
State Disability Leave	
Unpaid Leave	
Workers' Compensation	

Leaves of Absence and Direct Pay Questions

Pay Rates and Effective Dates

Jennifer Sandness

Employer Account Management Division

Focus for Today

How to report pay rates for certificated employees

Effective dates – pay schedules and written labor policies

Reporting Base Pay Rates

Certificated

Full-time base monthly rate of pay

Service credit

- Government (Gov.) Code 20962

Final compensation

- Based on consecutive 12 or 36 months, full time
- Do not report hours for additional work

Examples of noncompliant pay rates

- Part-time rates (not based on full time)
- Overtime rates

Effective Dates

Pay Schedules and Written Labor Policies

Purpose of effective date

Month, Day, and Year

Examples – does not qualify as “effective date”

- Revision date
- Fiscal year
- Month/Year
- Board approval/adoption date

Pay Rates and Effective Dates Questions

Member Self-Service (MSS) Registration Report

Angel George
Employer Account Management Division

MSS Registration Report

Background

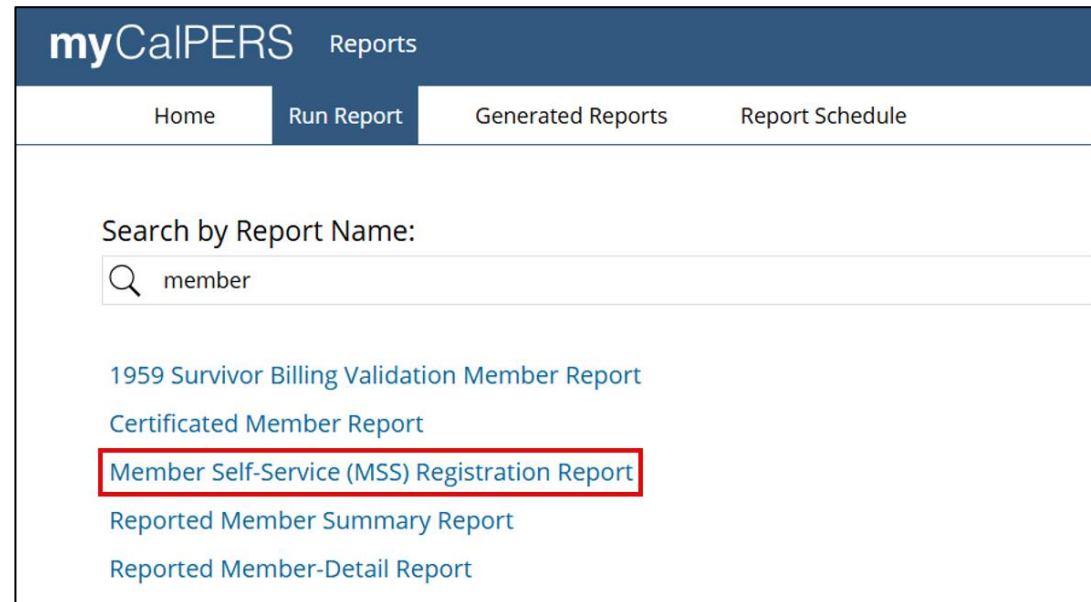
- 2025 Educational Forum employer feedback to support MSS targeted outreach and onboarding
- Method to identify active employees who have registered for an MSS account
- As a result, a new report was developed to support this need

New myCalPERS report

- Available August 17
- Includes active employees only
- Role: Business Partner Employer Inquiry

Access myCalPERS Reports

Common Links left-side navigation menu > Reports link
myCalPERS Reports > Run Report tab > Select report



The screenshot displays the myCalPERS Reports interface. At the top, there is a dark blue header with the myCalPERS logo and the word 'Reports'. Below this is a navigation bar with four tabs: 'Home', 'Run Report' (which is highlighted), 'Generated Reports', and 'Report Schedule'. The main content area shows a search section titled 'Search by Report Name:' with a search input field containing the text 'member'. Below the search field, a list of reports is displayed. The reports are: '1959 Survivor Billing Validation Member Report', 'Certificated Member Report', 'Member Self-Service (MSS) Registration Report' (which is highlighted with a red rectangular box), 'Reported Member Summary Report', and 'Reported Member-Detail Report'.

Report Parameters (1 of 2)

Business Partner CalPERS ID and Name

- Select/deselect all
 - Displays for county schools only
 - Blank field for districts

MSS Registration

- All, Yes, or No

Member Self-Service (MSS) Registration Report ⓘ

The purpose of this report is to identify whether active employees of an organization have registered for an MSS account.

MCP Release: 13.0
Report Version: 13.0.10
SPS Number: SP55076

Business Partner CalPERS ID and Name *

☒ ABC County Schools - 1234567890
☐ Dove Unified School District - 1111111112
☐ XYZ City Unified School District - 2222222223
☐ Zibi City Unified School District - 3333333334

[Select All](#) [Deselect All](#)

MSS Registration: *

☒ All
☐ Yes
☐ No

Next

Report Parameters (2 of 2)

Run options

- Online runs in the background

Member Self-Service (MSS) Registration Report ⓘ

Report Parameters ^

Business Partner CalPERS ID and Name ABC County Schools - 1234567890,
Dove Unified School District - 1111111112,
XYZ City Unified School District - 2222222223,
Zibi City Unified School District - 3333333334,

MSS Registration: All

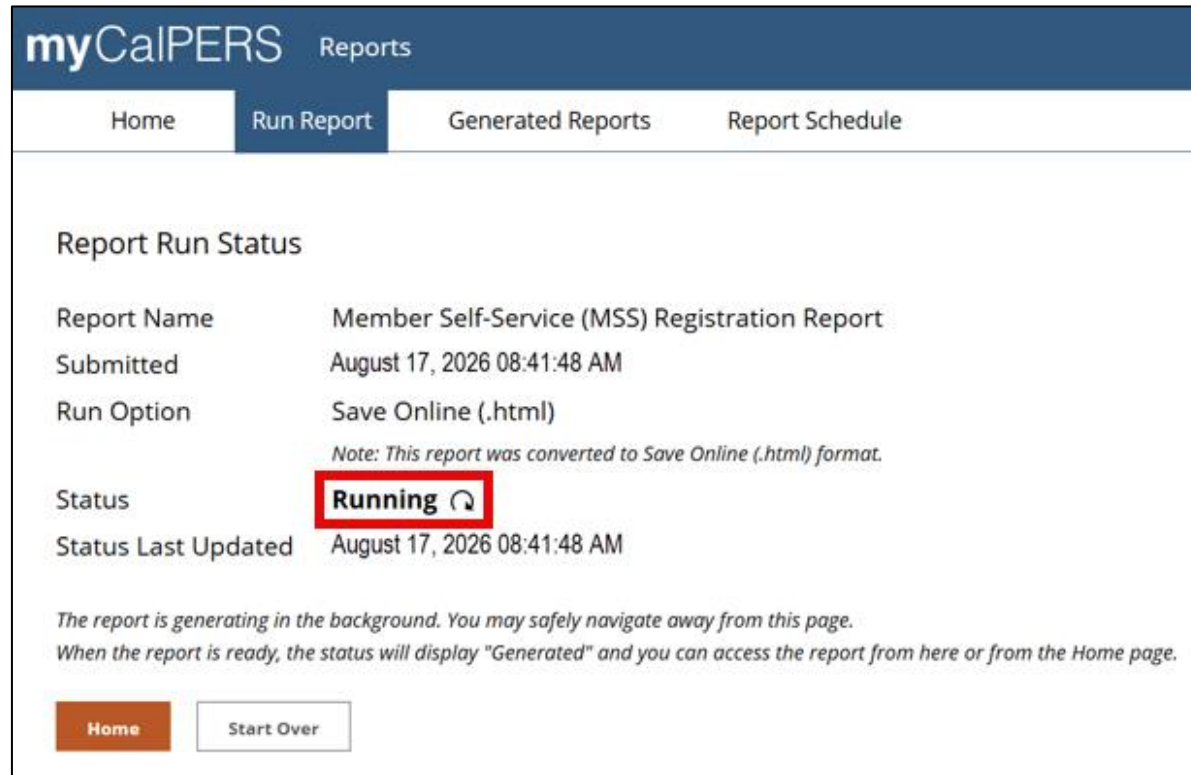
Run Option: ⓘ ☐ Download (.xls) ☐ Download (.csv) ☒ Online (.html)

Run Report

Back

Report Status

“Running” will change to “Generated” when it’s ready for download



The screenshot shows the 'myCalPERS Reports' interface. The 'Run Report' tab is active. Under 'Report Run Status', the report 'Member Self-Service (MSS) Registration Report' is shown as 'Running'. The status 'Running' is highlighted with a red box and a refresh icon. The report was submitted on August 17, 2026, at 08:41:48 AM, with the 'Save Online (.html)' option. A note indicates the report was converted to this format. At the bottom, there are 'Home' and 'Start Over' buttons.

myCalPERS Reports			
Home	Run Report	Generated Reports	Report Schedule
Report Run Status			
Report Name	Member Self-Service (MSS) Registration Report		
Submitted	August 17, 2026 08:41:48 AM		
Run Option	Save Online (.html)		
	<i>Note: This report was converted to Save Online (.html) format.</i>		
Status	Running ↻		
Status Last Updated	August 17, 2026 08:41:48 AM		
<i>The report is generating in the background. You may safely navigate away from this page. When the report is ready, the status will display "Generated" and you can access the report from here or from the Home page.</i>			
Home		Start Over	

Sample Report

Sort order

Member Self-Service (MSS) Registration Report

Run Date: 08/17/2026 10:15:54

Business Partner	Run Date	MSS Registration
All	07/26/2026	All

CalPERS ID	Participant Name	Employer CID	Employer Name	MSS Registration Flag
2123456789	ANZA, JULIE	1234567890	ABC County Schools	Y
3123456789	BART, JOHN	1234567890	ABC County Schools	Y
4123456789	GEORGIA, DAWN	1111111112	Dove Unified School District	N
5123456789	TAYLOR, JOE	1111111112	Dove Unified School District	N
7123456789	DILL, SUE	2222222223	XYZ City Unified School District	N
7123456790	POTTER, JIM	2222222223	XYZ City Unified School District	N
7123456791	VINDA, SAM	2222222223	XYZ City Unified School District	N
8123456791	ELLIS, RUBY	3333333334	Zibi City Unified School District	Y

myCalPERS Technical Support Resources

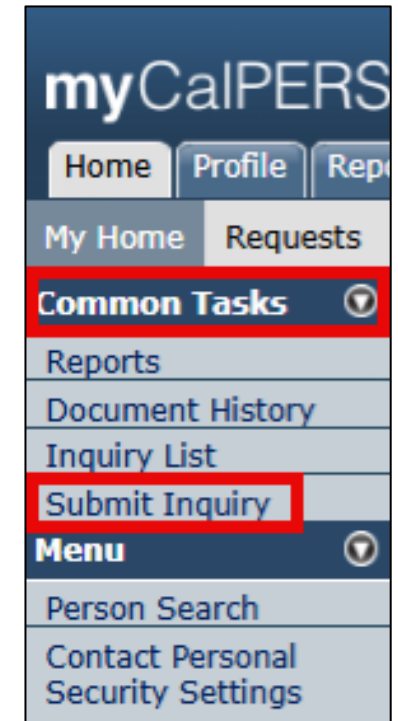
Submit an inquiry in myCalPERS

- Select **Submit Inquiry** in the Common Tasks left-side navigation menu

Email: EmployerTechnicalSupport@calpers.ca.gov

Phone: **888 CalPERS** (or 888-225-7377)

- Monday – Friday, 8:00 a.m. to 5:00 p.m.



Member Self-Service (MSS) Registration Report Questions

Working After Retirement for Disability Retirees

Mackenzie Prior

Disability and Survivor Benefits Division

Working After Retirement Agenda

Position types

General requirements

Retired annuitant (Gov. Code 21233)

Permanent employment (Gov. Code 21232)

CalPERS vs. CalSTRS

Unlawful employment

Consequences

Two Types of Employment

Retired annuitant (RA)

- Multiple positions allowed
- 960-hour limit
- No pre-approval required

Permanent position

- Full or part time
- CalPERS written pre-approval required
- Cannot be concurrently employed

General Requirements

Bona fide separation

180-day wait period may apply

Restrictions for retirees below normal retirement age

No employment if unemployment benefits were received for
CalPERS employment within the prior 12 months

Retired Annuitant Employment

Temporary/limited-duration positions

No CalPERS pre-approval required

Must not violate disability work restrictions

Cannot work in the same position retired from

960-hour annual limit

No earnings limit

No additional employment benefits

Permanent Employment (Gov. Code 21232)

CalPERS written pre-approval required before employment begins

Permanent part- or full-time positions allowed

Subject to earnings limitations

Not subject to the 960-hour limit

Cannot simultaneously hold an RA or other permanent CalPERS employment

CalPERS vs. CalSTRS

CalSTRS (Certificated)

- Teaching/certificated positions
- No CalPERS review required

CalPERS (Classified)

- Substitute teacher, yard duty, and other classified positions
- Temporary = RA review
- Permanent = Gov. Code 21232 CalPERS written pre-approval required

Examples of Unlawful Employment

Working in a permanent position without CalPERS written pre-approval

Exceeding the 960-hour limit in an RA position

Moving from RA to permanent employment without CalPERS written pre-approval

Violating bona fide separation requirements

Consequences of Unlawful Employment

Mandatory reinstatement from retirement

Repayment of retirement benefits

Retirement contributions owed

Potential loss of cost-of-living adjustment (COLA)

Potential impact to health benefits

Employer administrative fees and contributions

Key Takeaways

Temporary and permanent employment have different rules

Permanent employment requires CalPERS written pre-approval

Disability work restrictions must always be honored

Unlawful employment can have significant financial consequences

Working After Retirement for Disability Retirees Questions

Break

Vacation Payout

Kenneth Noss
Employer Account Management Division

Purpose of This Training

Provide guidance on proper reporting of vacation pay for classified school members

Help school employers avoid common reporting errors

Ensure compliance with the Public Employees' Retirement Law (PERL)

Why Vacation Pay Reporting Matters

Incorrect reporting can delay member retirement benefits

Non-compliance may create financial liability for employers and members

Accurate reporting supports fair and lawful retirement calculations

Reporting Vacation Pay

Reportable only when used as time excused from work

Must reflect services performed during normal working hours

Must align with duty calendars or schedules

What Is Not Reportable

Vacation payouts added to contract days and prorated over the year

Lump-sum payments for unused vacation

Vacation pay reported beyond duty calendars and/or contracted schedules

Common Reporting Errors

Adding vacation pay to contract days and spreading it over the year

Reporting as a lump sum at the end of a fiscal year

Reporting beyond normal work schedules

Including vacation cash-outs as part of final settlement pay

Correct Reporting Practices

Report vacation pay only when time off from work is taken

Ensure vacation hours do not exceed scheduled hours

Align reported compensation with duty calendars

Impacts of Non-Compliance

Administrative holds on member accounts

Corrections to reported compensation

Potential overpayments or employer liabilities

Next Steps for Employers

Review payroll and reporting practices

Discontinue prorating vacation payouts

Ensure vacation reporting complies with PERL requirements

Reference [Circular Letter 200-023-26](#)

Vacation Pay Questions

Unused Sick Leave Reporting

Tim Herrback

Retirement Benefit Services Division

Topics We Will Be Discussing

Reporting unused sick leave

Certification of separation of employment

Reporting Unused Sick Leave at Retirement (1 of 3)

How to report unused sick leave (USL)

Gov. Code section 20963.5

- Retirement date must be within four months after separation from employment
- Only report hours/days accrued during the normal course of work as a CalPERS member
- Sick leave can be transferred between school employers
- Refer to Education Code sections 44979, 45202, 87783, or 88202

Reporting Unused Sick Leave at Retirement (2 of 3)

Requirements for reporting USL

- Must be defined in employer's MOU or labor agreement
- Cannot include USL hours cashed out by the employee
- Cannot include other leave credits (e.g., annual leave, vacation, COVID)
- Must be certified by the employer

USL is excluded from a retirement calculation when:

- Employer fails to report separation timely
- Separation date is more than 120 days after retirement date
- Retirement date is prior to separation date
- Sick leave accrual is not clearly defined within a MOU/labor agreement

Reporting Unused Sick Leave at Retirement (3 of 3)

CalPERS conversion of sick leave credits

- Divide hours by eight (8) to determine number of days to report
- Each day of USL = 0.004 years of service credit
- 2000 hours (250 days) = 1 year of service credit

Refer to [Circular Letter 200-033-22 \(PDF\)](#) published June 1, 2022

Certification of Separation of Employment (1 of 2)

Timely reporting of separation date

- Ensures members receive entitled benefits
 - Ability to elect desired retirement date
 - Unused sick leave included within calculation
 - COLA eligibility
 - Continuation of health benefits (if applicable)
- Risk of improper reporting
 - May delay a member's retirement benefit
 - May result in repayment of overpaid benefits
 - May require cancellation of retirement

Certification of Separation of Employment (2 of 2)

Most common issues related to separation from employment

- No separation date reported at time of retirement
- Separation date entered for only one active appointment
- Incorrect separation date reported to CalPERS
 - Separation date is after member's retirement date
 - Not reported as the day after last day worked and/or compensated
 - Board notification date instead of day after last day compensated
 - Contract end date instead of day after last day compensated

Refer to [Circular Letter 200-015-16 \(PDF\)](#) for proper reporting of separation dates

Reporting Payroll for Final Month Worked (1 of 2)

Gov. Code section 20630

- Compensation must be reported in the period earned, regardless of when paid

Gov. Code section 20631

- A contracting employer may report an amount equal to a uniformly applied percentage of salary (equal payments), if there is an agreement for this process in a written labor agreement
 - Education (Ed.) Code 45040 and 88164 allow for equal payments and covers the written labor agreement requirement

Reporting Payroll for Final Month Worked (2 of 2)

Reporting compensation as earned for mid-month separations

- Report mid-month (Example: June)
 - Report exact earnings for days worked
- Adjust the remaining balance
 - Subtract the earnings for days worked in June from the total annual compensation
 - Remaining annual balance evenly distributed over prior months of the school year
- Alternative option
 - Report separation date as first of following month and align retirement date to be equal to or after separation date (Example: July 1)

Report as Earned Mid-Month Example

Scenario: 11-month employee (August – June)

- \$60,000.00 annual earnings
- June 4 separation = 4 days worked, member works 215 days per year
- $\$60,000.00 / 215 = \279.07 per day
- $\$279.07 \times 4 = \$1,116.28$ (June earnings)
- $\$60,000.00 - \$1,116.28 = \$58,883.72$
- $\$58,883.72 / 10 = \$5,888.37$
- Earnings:
 - August – May: \$5,888.37
 - June: \$1,116.28
 - Total: \$60,000.00

Mid-Month Separation Calculator

Annual salary: \$60,000.00

Year-months worked: 11.00

Workdays: 215.00

Daily pay rate: \$279.07

Mid-month workdays: 4.00

Mid-month earnings: \$1,116.28

Monthly earnings balance: \$5,888.37

Unused Sick Leave Reporting Questions

CalPERS/CalSTRS Elections and Classic Benefit Validation

Tan Duy Tran
Employer Account Management Division

CalPERS/CalSTRS Elections

Retirement System Elections

A choice of coverage between retirement systems

Eligible members make their election with the [Retirement System Election \(ES 0372\) \(PDF\)](#) form

Elections are made per position and are irrevocable

Election Eligibility Requirements

Electing CalPERS for a CalSTRS creditable position

- New position requires membership in CalSTRS on date of hire, **and**
- Five years **or** active within 120 days of a school employer (not CSU)

Electing CalSTRS for a position not performing CalSTRS creditable service

- Already a CalSTRS member
- New position requires membership in another California public retirement system (e.g., CalPERS) on the date of hire

CalSTRS Reportable Positions

Positions must be performing creditable service (Ed. Code 22119.5)

Examples:

- Teachers
- Counselors
- Nurses
- Librarians
- School Superintendent

CalPERS Reportable Positions

Custodial

Some office personnel

Cafeteria

School employees otherwise not eligible for CalSTRS coverage

Employer and Employee Responsibilities

Employers must provide eligible members with the [Retirement System Election \(ES 0372\) \(PDF\)](#) form within 10 days of hire

Employers are no longer required to send a copy of the ES 0372 to the other retirement system

Once a member signs the form, it must be received by the elected system within 60 days of the member's hire date

Employers are required to retain a copy

Coverage is effective the first day of employment in that position

Join CalSTRS? Join CalPERS?

Which retirement system will work for you?

Differences include:

- Retirement formula
- Vesting requirements
- Retirement benefit calculation
- Member contributions

More information in the CalSTRS publication [Join CalSTRS? Join CalPERS?](#)

Classic Benefit Validation

Classic Benefit Validation Topics

What is the Classic Enrollment Validation?

Who receives the form

End to end process

Employer responsibilities

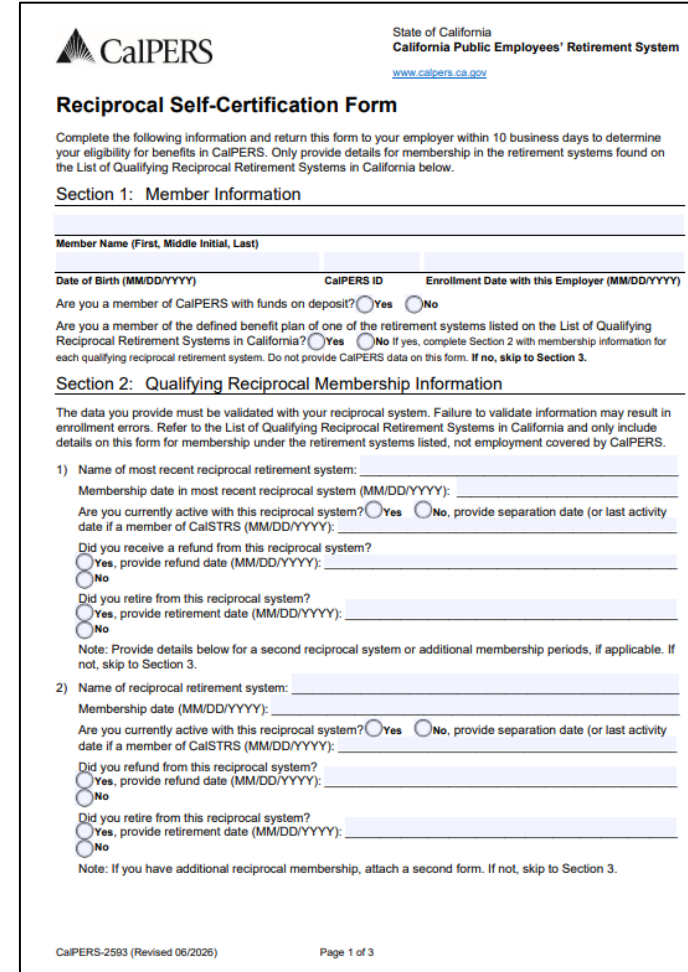
Resources

What is the Classic Enrollment Validation?

Purpose and initiation

Potential changes

Proactive measures



The image shows a "Reciprocal Self-Certification Form" from the State of California's CalPERS (California Public Employees' Retirement System). The form is titled "Reciprocal Self-Certification Form" and includes instructions to complete the information and return it to the employer within 10 business days to determine eligibility for benefits. It is divided into two main sections: "Section 1: Member Information" and "Section 2: Qualifying Reciprocal Membership Information".

Section 1: Member Information

Member Name (First, Middle Initial, Last): _____

Date of Birth (MM/DD/YYYY): _____ CalPERS ID: _____ Enrollment Date with this Employer (MM/DD/YYYY): _____

Are you a member of CalPERS with funds on deposit? ☐ Yes ☐ No

Are you a member of the defined benefit plan of one of the retirement systems listed on the List of Qualifying Reciprocal Retirement Systems in California? ☐ Yes ☐ No If yes, complete Section 2 with membership information for each qualifying reciprocal retirement system. Do not provide CalPERS data on this form. If no, skip to Section 3.

Section 2: Qualifying Reciprocal Membership Information

The data you provide must be validated with your reciprocal system. Failure to validate information may result in enrollment errors. Refer to the List of Qualifying Reciprocal Retirement Systems in California and only include details on this form for membership under the retirement systems listed, not employment covered by CalPERS.

1) Name of most recent reciprocal retirement system: _____

Membership date in most recent reciprocal system (MM/DD/YYYY): _____

Are you currently active with this reciprocal system? ☐ Yes ☐ No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): _____

Did you receive a refund from this reciprocal system? ☐ Yes, provide refund date (MM/DD/YYYY): _____ ☐ No

Did you retire from this reciprocal system? ☐ Yes, provide retirement date (MM/DD/YYYY): _____ ☐ No

Note: Provide details below for a second reciprocal system or additional membership periods, if applicable. If not, skip to Section 3.

2) Name of reciprocal retirement system: _____

Membership date (MM/DD/YYYY): _____

Are you currently active with this reciprocal system? ☐ Yes ☐ No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): _____

Did you refund from this reciprocal system? ☐ Yes, provide refund date (MM/DD/YYYY): _____ ☐ No

Did you retire from this reciprocal system? ☐ Yes, provide retirement date (MM/DD/YYYY): _____ ☐ No

Note: If you have additional reciprocal membership, attach a second form. If not, skip to Section 3.

CalPERS-2593 (Revised 06/2026) Page 1 of 3

Reciprocal Self-Certification Form (1 of 3)

Section 1: Member Information

Jane Eliza Doe

Member Name (First, Middle Initial, Last)

4/1/1990

6118166146

12/1/2023

Date of Birth (MM/DD/YYYY)

CalPERS ID

Enrollment Date with this Employer (MM/DD/YYYY)

Are you a member of CalPERS with funds on deposit? ☒ Yes ☐ No

Are you a member of the defined benefit plan of one of the retirement systems listed on the List of Qualifying Reciprocal Retirement Systems in California? ☒ Yes ☐ No If yes, complete Section 2 with membership information for each qualifying reciprocal retirement system. Do not provide CalPERS data on this form. If no, skip to Section 3.

Reciprocal Self-Certification Form (2 of 3)

Section 2: Qualifying Reciprocal Membership Information

The data you provide must be validated with your reciprocal system. Failure to validate information may result in enrollment errors. Refer to the List of Qualifying Reciprocal Retirement Systems in California and only include details on this form for membership under the retirement systems listed, not employment covered by CalPERS.

1) Name of most recent reciprocal retirement system: Fresno County Employees' Retirement System

Membership date in most recent reciprocal system (MM/DD/YYYY): 1/15/2010

Are you currently active with this reciprocal system? ☐ Yes ☒ No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): 11/15/2023

Did you receive a refund from this reciprocal system?
☐ Yes, provide refund date (MM/DD/YYYY): N/A
☒ No

Did you retire from this reciprocal system?
☐ Yes, provide retirement date (MM/DD/YYYY): N/A
☒ No

Note: Provide details below for a second reciprocal system or additional membership periods, if applicable. If not, skip to Section 3.

2) Name of reciprocal retirement system: N/A

Membership date (MM/DD/YYYY): N/A

Are you currently active with this reciprocal system? ☐ Yes ☐ No, provide separation date (or last activity date if a member of CalSTRS (MM/DD/YYYY): _____

Did you refund from this reciprocal system?
☐ Yes, provide refund date (MM/DD/YYYY): _____
☐ No

Did you retire from this reciprocal system?
☐ Yes, provide retirement date (MM/DD/YYYY): _____
☐ No

Note: If you have additional reciprocal membership, attach a second form. If not, skip to Section 3.

Reciprocal Self-Certification Form (3 of 3)

Section 3: Sign and Certify

I understand that I am subject to the applicable laws and regulations of each system where I have membership. I also understand that completing this form will only determine my enrollment eligibility in CalPERS. It is not a request to establish reciprocity.

I certify that the information on this form has been verified with the qualifying reciprocal retirement system as true and correct and any information found to be incorrect may require corrections to my CalPERS account including, but not limited to, my retirement enrollment level or formula and adjustments to my member contributions. CalPERS may make any necessary corrections to my account to ensure I am properly enrolled and eligible to receive the correct retirement benefits.

Jane E. Doe
Member Signature

12/1/2023

Date

Who Receives the Classic Validation Form?

Members enrolled in classic benefits after one year of employment

- If member establishes reciprocity in the first year, then the letter and form will not be generated

Impact of non-completion

- A hold will be placed on the member's account

Proactive measures

- Members are encouraged to provide accurate information during the initial enrollment process to avoid delays or issues

Process

Letter and form are sent to the member requesting verification of reciprocal system membership

Verification is completed by either of the following:

- Establish reciprocity
- Ask their previous reciprocal system to complete the form

Once the validation is complete, the hold will be released

Employer Responsibilities

[Reciprocal Self-Certification Form \(CalPERS-2593\) \(PDF\)](#)

If enrollment changes are needed, complete adjustments

Be familiar with this process in case you get questions

Refer questions to CalPERS

Contact Resources

Member Elections Team: Member_Election_Team@calpers.ca.gov

CalPERS Phone: **888 CalPERS** (or **888-225-7377**)

CalPERS/CalSTRS Elections and Classic Benefit Validation Questions

State Social Security Administrator New Fees and Invoice Changes

Shawn Fitzpatrick

Pension Contracts and Prefunding Programs Division

Annual Information Request Overview

State Social Security Administrator (SSSA) role

Requesting access to and navigating myCalPERS

Annual Information Request (AIR)

Locating the AIR and invoice

Invoice Changes and Updates

Resources

State Social Security Administrator (SSSA)

The Social Security Administration (SSA) requires each state to designate an administrator of Section 218 Agreements

SSSA has oversight and responsibility statewide, including all public employers and their retirement systems



SSSA Role

Establish Section 218 Agreements for employers

Supervise employee elections

Administer and maintain California's Section 218 Agreement

Liaison between SSA, Internal Revenue Service (IRS), public entities, and stakeholders

Conduct the AIR

Accessing myCalPERS

New myCalPERS Users

Contact SSSA via:

- Email: sssa@calpers.ca.gov
- Phone: (916) 795-0810

[Social Security and Medicare Agreement Guide to myCalPERS
\(PDF, 1.25 MB\)](#)

myCalPERS System Access Role

Users with the Business Partner Social Security role:

- Receive SSSA correspondence
- Request new or modify existing Section 218 Agreements
- Upload documents
- Respond to AIR

Navigating myCalPERS

CalPERS Website



myCalPERS Login Screen

myCalPERS

Username (required)

Password (required)

[Show Password](#)

 Log In

Register for an Account

Members can register for a myCalPERS account to view health information, plan for retirement, enroll in educational classes or schedule appointments.

Employers and business partners must contact us to register for a myCalPERS account.

Member Registration

myCalPERS Homepage

The screenshot displays the myCalPERS homepage with a top navigation bar containing tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. The 'Home' tab is highlighted with a red box. Below this is a sub-navigation bar with 'My Home' and 'Requests'. A left sidebar contains a 'Common Tasks' section with a 'Menu' dropdown and links for 'Person Search' and 'Contact Personal Security Settings'. The main content area features a 'Welcome' message, an 'Upcoming Scheduled Maintenance' notice for August 22-23, 'Employer News' for direct authorization vendors, and 'Cognos Reports'. A 'My Messages' section at the bottom lists two messages from 08/13/2018 regarding board elections and open enrollment. The right sidebar includes a 'CalPERS MARKET VALUE' widget, a 'Forms and Publications Center', 'QUICK LINKS' to the CalPERS website, and a 'New Online Reference Guide!' with a 'Go Now' button.

Home Profile Reporting Person Information Education Other Organizations

My Home Requests

Common Tasks

Menu

Person Search

Contact Personal Security Settings

Welcome

Upcoming Scheduled Maintenance
my|CalPERS will be unavailable as follows:

- From 8:00 p.m. on August 22 until 1:00 a.m. on August 23 (PT)

Users will be unable to access my|CalPERS during system maintenance. We apologize for the inconvenience.

Employer News

For Direct Authorization Vendors, Health Plan Business Partners, and Dental Plan Carriers:

- [2018 Important Dates for Direct Authorization Vendors \(PDF\)](#)
- [Direct Authorization Vendor User Guide \(PDF, 4.43 MB\)](#)
- [my|CalPERS Enhancements Presentation \(PPT, 3.65 MB\)](#)

Cognos Reports

- Visit [my|CalPERS Employer Reports \(Cognos\)](#) to view the updated list of available reports.
- View [my|CalPERS Cognos Reports Browser Requirements \(PDF\)](#) to ensure your browser is properly configured.
- View [my|CalPERS Employer Reports \(Cognos\) \(PDF, 2 MB\)](#) for instructions on how to generate reports.

My Messages

Date	Message
08/13/2018	2018 CalPERS Public Agency Member Board Election Toolkit The board election is coming up on August 31 and ballots are in the mail. Help get the word out with our easy-to-use toolkit at www.calpers.ca.gov/page/about/board/board-elections/employer-toolkit .
08/13/2018	Open Enrollment for Employers Web Page Now Available The 2018 Open Enrollment for Employers web page is now available. Find information to assist your

CalPERS MARKET VALUE
\$360.74 billion
Reflects market value as of close on 08/21/2018
[View By Asset Class >>](#)

Forms and Publications Center >>

QUICK LINKS
CalPERS Quick Picks
[CalPERS website](#)
[Edit Quick Links >>](#)

New Online Reference Guide!
Learn how to conduct business with CalPERS.
[Go Now](#)

Business Partner Profile

Home

Profile

Reporting

Person Information

Education

Pension Outlook

Other Organizations

Summary

Payments

Receivables

Retirement Contract

Health Contract

Agreements

Mergers and Reorganizations

Common Tasks

Menu

Contacts

View BP Relationships

Divisions

View Service Relationships

Health Invoice History

Findings

SSA Annual Information Request

Summary

Profile

CalPERS ID:

Federal Tax ID:

Category: Public Agency

County:

Division Of:

Status: Active

Name: ABC City

Regional Office:

Governing Body: City Council

Merged Agency: No

[Request Update](#)

Addresses

Physical: 1 MAIN ST
SACRAMENTO, CA 95814

Mailing:

Undeliverable: No

Undeliverable: No

Communication Information

Preferred Communication: Mail

Primary Email:

Primary Phone Number: (916) 555-1212

Contacts

Add New

View More Actions>

Contact Type	Name	System Admin	Primary	Phone Number
General		Y	Y	

Business Relationships

Add New

View More Actions>

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

View More Actions>

Contract/ Agreement Type	Contract/ Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Social Security Agreement (218)		Active	03/18/2020	01/01/2000		
SIP - 457 Agreement		Work In Progress	03/19/2020	03/19/2020		
Social Security Agreement (218)		Cancelled	03/19/2020	01/01/2000		

AIR Form and Invoices

What is the AIR Form?

Employment tax survey

Updates the SSSA Section 218 coverage database

AIR Process Overview

Completed electronically in myCalPERS

Issued in monthly batches

Issued to employers alphabetically

30-day reminder

Employers may receive a follow-up email or phone call

Locating AIR Form in myCalPERS (1 of 2)

The screenshot displays the myCalPERS web interface. At the top, a navigation bar includes tabs for Home, Profile, Reporting, Person Information, Education, Pension Outlook, and Other Organizations. Below this is a secondary bar with tabs for Summary, Payments, Receivables, Retirement Contract, Health Contract, Agreements, and Mergers and Reorganizations. On the left side, a 'Common Tasks' menu lists various options, with 'SSA Annual Information Request' highlighted by a red rectangle. The main content area, titled 'Profile', contains personal and organizational details. It includes fields for CalPERS ID, Federal Tax ID, Category (Public Agency), County, and Division Of. It also shows Status (Active), Name (ABC City), Regional Office, Governing Body (City Council), and Merged Agency (No). A 'Request Update' link is present. Below these details are sections for 'Addresses' (Physical and Mailing) and 'Communication Information' (Preferred Communication and Primary Email/Phone Number).

Navigation	Profile Information	Addresses	Communication Information
Home	CalPERS ID: [Redacted]	Physical: 1 MAIN ST SACRAMENTO, CA 95814	Preferred Communication: Mail
Profile	Federal Tax ID: [Redacted]	Mailing: [Redacted]	Primary Email: [Redacted]
Reporting	Category: Public Agency	Undeliverable: No	Primary Phone Number: (916) 555-1212
Person Information	County: [Redacted]		
Education	Division Of: [Redacted]		
Pension Outlook	Status: Active		
Other Organizations	Name: ABC City		
	Regional Office: [Redacted]		
	Governing Body: City Council		
	Merged Agency: No		

Locating AIR Form in myCalPERS (2 of 2)

[Home](#)
[Profile](#)
[Reporting](#)
[Person Information](#)
[Education](#)
[Pension Outlook](#)
[Other Organizations](#)

[Summary](#)
[Payments](#)
[Receivables](#)
[Retirement Contract](#)
[Health Contract](#)
[Agreements](#)
[Mergers and Reorganizations](#)

Common Tasks

Menu

Contacts

View BP Relationships

Divisions

View Service Relationships

Health Invoice History

Findings

SSA Annual Information Request

Name:
CalPERS ID:

SSA 218 - Annual Information Request

Request Date	Status	Receivable Status
03/04/2019	Not Submitted	N/A

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[DataSource Shifter](#) | [Time Shifter](#) | [Developer Console](#) | [Data Search Tool](#) | [Batch Analysis Tool](#)

 Build: v8.7 Baseline: 200318_085612_v8.7_Int.5388 UID: 1553

 Username: tgohl Datasource: env91_s1ds Schema owner: ENV91_S1_PSRAPPXA Server: ENV91_node3

 Last imported dataset name: 2020/03/05 00:01:03 FULL UNMASKED

 Current patch level: UNKNOWN Database: MYC91_S1.CALPERS.CA.GOV

 Action class :

 psr.web.mvc.common.contract.agreements.ssa.SsaAnnualInformationRequestListAction

 JSP : contracts/agreements/ssaAnnualInformationRequestList.jsp

 SQL query executed by this page: 1 in 0.053 seconds with 1 rows received.

 Duplicate queries executed by this page: 0 in 0.000 seconds with 0 rows received.

 Action execution time: 0.079 seconds



CalPERS

Upcoming Changes

Annual Information Request – does not change

Invoice will be issued on first business day of September each year

Fee amounts updated (next slide)

Invoices are still sent to the County Office of Education

Name of school is listed in invoice

Fees for Fiscal Year 2026-27

Number of Employees	FY 2026-27
1–4	\$40
5–9	\$60
10–19	\$70
20–49	\$90
50–99	\$110
100–249	\$220
250–499	\$330
500–999	\$440
1,000 and over	\$550

Resources

Employer Resources

Social Security website:

- [State and Local Government Employers – Information](#)

IRS website:

- [Tax information for federal, state, and local governments](#)

CalPERS website:

- [Social Security & Medicare](#) webpage
- [Social Security and Medicare Agreement Guide to myCalPERS \(PDF, 1.28 MB\)](#)

SSSA Contact Information

Email: sssa@calpers.ca.gov

Phone: (916) 795-0810

Mail: CalPERS

State Social Security Administrator

P.O. Box 720720

Sacramento, CA 94229

Upcoming Webinars

Social Security Benefits Explained presented by Federal Social Security

- Wednesday, September 30, 2026
10:00 – 11:00 a.m.

Worker Classification joined with CalPERS

- Wednesday, December 16, 2025
10:00 – 11:00 a.m.

Register on the [Social Security & Medicare Webinars](#) webpage

State Social Security Administrator New Fees and Invoice Changes Questions

Roundtable

Brad Hanson, Heather Porter, and Dianne Cooper
Employer Account Management Division

Thank You