

# School Employer Advisory Committee

May 19, 2026

# Housekeeping (1 of 2)

Webinar is being recorded

Attendee mics are muted

Meeting materials available on [www.calpers.ca.gov](http://www.calpers.ca.gov)

Email: [CalPERS\\_SEAC@calpers.ca.gov](mailto: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 Update – Andrea Peters

Separations – Aidan Brown

Educational Incentives – Kenneth Noss

Employment Certification Enhancement – Natalie Spencer

Break – 10 minutes

# Agenda (2 of 2)

Employer Toolkit – Tom Hinds

Ensuring Timely and Accurate Retirement Benefits – Tim Herrback

Compliance with Two-Years Additional Service Credit (Golden Handshake) Provision – Andy Nguyen

myCalPERS Registration Project – Brad Hanson

Round Table – Brad Hanson, Heather Porter, and Dianne Cooper

# Legislation Update

Andrea Peters  
Legislative Affairs Division

# Separations

Aidan Brown

Employer Account Management Division

# Permanent Separation Dates

Should be entered as the day following the employee's last day worked or the day after the last day on payroll

Must be reported for **all** employees who end employment

# Retired Annuitant Separations

## Upcoming System Enhancement – August 2026

If a retired annuitant appointment has missing payroll or zero payroll reported for 12 consecutive months, myCalPERS will automatically enter a permanent separation date

myCalPERS will send a warning notification of separation at nine months

Notification confirming the separation will be sent to both the member and employer after 12 months

# Missing Separation Dates After Retirement

If a member retires with a non-separated appointment, myCalPERS will generate a notification to both the retiree and employer

- First notification – two months after retirement
  - A notification is sent advising of the missing separation date and potential suspension of benefits
- Second and final notification – four months after retirement
  - A final notification is issued advising benefits will be suspended until the separation date is reported in myCalPERS

# Separation Dates After Retirement

If the member's separation date recorded in myCalPERS falls after the retirement date, adjustments to the retiree's retirement benefit may be required

- Notification is sent to the employer confirming the reported separation date
- If the employer confirms the separation date falls after the retirement date, the retirement date will be adjusted accordingly, and any overpayment will be collected on the next warrant

# Separations Questions

# Educational Incentives

Kenneth Noss

Employer Account Management Division

# Educational Incentives Objectives

Educate on proper reporting of Educational Pay types

Highlight differences between Undergraduate/Graduate/Doctoral Credit and Educational Incentive Pay

Provide tools to ensure compliance with CalPERS regulations

# Common Educational Pay Types for Schools

## Undergraduate/Graduate/Doctoral Credit

- **Definition:** Compensation for employees required to obtain a specified degree for their job classification.
- **Example:** An Assistant Superintendent is required to hold a Master's degree.

## Educational Incentive Pay

- **Definition:** Compensation for completing courses, certificates, or degrees that enhance job performance.
- **Example:** A school office manager earning a certificate in office administration.

# Key Compliance Requirements

Both types of Educational Pay **must**:

- Meet California Code of Regulations (CCR) section 571 (classic members) or CCR section 571.1 (PEPRA members) definitions
- Be supported by a Written Labor Policy (WLP) or Publicly Available Pay Schedule (PAPS)
- Have conditions of payment clearly documented

# Compliant Special and Pensionable Compensation Checklist (1 of 2)

For compensation outside normal pay rate

Available to all employees in the group or class

Classic: Must be contained in a WLP

PEPRA: Must be contained in a WLP or PAPS

# Compliant Special and Pensionable Compensation Checklist (2 of 2)

For normally required duties during normal working hours

Paid periodically and reported as earned

Complies with definition in CCR section 571 or 571.1

Conditions of payment documented (eligibility and amount)

# Compliant Written Labor Policy Checklist

Duly approved in a public meeting during an open session

All compensation listed conforms with PERL definitions

Contains all conditions of payment

Immediately available for public review

Contains effective and revision dates

Identifies all covered employees (group or class)

Cannot reference another document to identify compensation

Retained for public inspection for no less than five years

# Governing Body Approval Checklist (1 of 2)

Advance public notice provided (agenda posted at least 72 hours before regular meeting or 24 hours before special meeting)

Meeting is open to the public

Pay schedule and/or WLP discussed in open forum

Governing body took a formal vote to approve

Approved documents and meeting minutes retained for at least five years

# Governing Body Approval Checklist (2 of 2)

Documents posted at employer's office or website following approval

Immediately accessible for public review during normal business hours

Any amendments go through Brown Act approval process

Revisions re-posted with updated revision date

# Educational Incentive Pay Requirements

## Enhancement of Job Performance

- Must directly enhance the employee's ability to perform their job
- Must relate to the employee's current job classification

## Written Labor Policy or Agreement

- Must clearly explain eligibility requirements and acceptable courses, degrees, and/or certificates
- Cannot reference another document for additional provisions

## Group or Class of Employment

- Must be available to all employees in a valid group or class
- No additional eligibility requirements that exclude employees

# Top Errors in Reporting Educational Pays

Including required education as Educational Incentive Pay

Reporting as a lump sum or misclassifying under the wrong category

Adding extra eligibility requirements that exclude employees

Non-compliant labor policies referencing other documents

# Recommendations for Compliance

## Best Practices

- Review and update policies to meet definitions in CCR sections 571 and 571.1
- Ensure group or class compliance
- Report Educational Pays separately and in the pay period it is earned
- Maintain documentation (e.g., certificates, coursework, etc.)

# Educational Pays in Action

## Example 1: Undergraduate/Graduate/Doctoral Credit

- A school administrator required to hold a Master's degree receives compensation for obtaining the degree

## Example 2: Educational Incentive Pay

- A school custodian earning a certificate in HVAC systems to enhance job performance

# Examples of Compliant Language (1 of 2)

## Undergraduate/Graduate/Doctoral Credit

- **Definition:** Compensation for employees required to obtain a specified degree for their job classification
- Sample compliant language:
  - Employees in the job classifications of Superintendent, Assistant Superintendent and School Management are required to hold a Bachelor's degree as a condition of employment. Employees who have obtained a Bachelor's degree, as required for their job classification, will receive additional compensation equal to 5% of their base pay. This compensation is paid every pay period and reported to CalPERS as earned. Eligibility for this compensation is limited to employees in the specified job classifications where the degree is a requirement for employment.

# Examples of Compliant Language (2 of 2)

## Educational Incentive Pay

- **Definition:** Compensation for completing courses, certificates, or degrees that enhance job performance
- Sample compliant language:
  - Administrative support staff employees are eligible for Educational Incentive Pay for completing approved courses, certificates, or degrees that enhance their ability to perform their job duties. Eligible programs include office management certifications, advanced computer training, and business administration certifications and degrees. The employer will maintain a system to evaluate and approve acceptable courses, degrees and certifications. Employees who complete approved programs will receive additional compensation equal to 3% of their base pay. This compensation is paid every pay period and reported to CalPERS as earned.

# Educational Incentives Resources

[Compliance in Compensation Reporting](#) webpage

[Circular Letter 200-046-25](#) – Educational Incentive Pay

Audit Compliance and Resolution Unit 1

- [Circular Letter 200-018-26](#) – Compensation Compliance Analysis Requests
- [MOU\\_Review@calpers.ca.gov](mailto:MOU_Review@calpers.ca.gov)

# Education Incentives Questions

# Employment Certification Enhancements

Natalie Spencer

Employer Account Management Division

# Employment Certification Enhancement Topics

Updates to Employment Certification pages

Updates to student guide

Testing

# Current View – Employment Information Panel

**Employment Information**

**Participant:** \* [REDACTED]

**Participant's Email Address:** PSR\_TEST@calpers.ca.gov

**Business Partner:** [REDACTED]

**Dates of Employment:** \*

From: 08/01/2024 [calendar icon] To: 08/14/2025 [calendar icon]

**Is the participant requesting to purchase Service Credit?\***  Yes  No

**Employment Category:** \* [dropdown menu]

**Primary Position Title as displayed on your publicly available pay schedule during the dates of employment entered above: \*** [text input]

**Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS?\***  Yes  No [View Exclusions](#)

**Time Base:\***

Full Time  Part Time

Intermittent  Indeterminate

On Call  Work(ed) As Needed

**Appointment Tenure:\***

Permanent

Indeterminate

Seasonal

Temporary

**Months per Year:\***

8 Months  9 Months  10 Months

11 Months  12 Months

**Please upload the participant's hiring document:**

[Return](#)

# Employment Certification Enhancements

## Seeking your feedback

- Optimization of the Employment Certification page
- Improvements in the student guide

## Looking for testers

Interested or have ideas? Email us at

[Membership\\_reporting@calpers.ca.gov](mailto:Membership_reporting@calpers.ca.gov) by June 19, 2026

# Employment Certification Enhancement Questions

Break

# Employer Toolkit

Thomas Hinds

Customer Education & Outreach Division

# The Tools

[Employer Education](#) webpage

Classes & Webinars for Employers

[Business Rules & myCalPERS Classes](#) webpage

[myCalPERS Reports Catalog](#) webpage

# Classes & Webinars for Employers (1 of 3)

New Webpage

Organized by Contact Type

# Classes & Webinars for Employers (2 of 3)

The screenshot displays the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', a 'Log in to myCalPERS' button, and a language selection dropdown set to 'Select Language' with a note 'Powered by Google Translate'. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers' (highlighted), and 'Investments'. A search bar is located on the right side of the navigation bar. The main content area is a dark blue grid with four columns of links. The 'Employers' column is highlighted, and the 'Employer Education' link is highlighted in a light blue box.

Actuarial Resources	Benefit Programs	Contracts	Policies & Procedures
<a href="#">Governmental Accounting Standards Board (GASB)</a>	<a href="#">California Employers' Pension Prefunding Trust (CEPPT) Fund</a>	<a href="#">Health Program Contracts</a>	<a href="#">Affordable Care Act (ACA) Guidance</a>
<a href="#">Managing the Unfunded Accrued Liability</a>	<a href="#">California Employers' Retiree Benefit Trust (CERBT) Fund</a>	<a href="#">New Pension Contracts</a>	<a href="#">Circular Letters</a>
<a href="#">Pension Outlook Overview</a>	<a href="#">CalPERS 457 Plan</a>	<a href="#">Pension Contract Agency Eligibility</a>	<a href="#">Compliance in Compensation Reporting</a>
<a href="#">Public Agency Actuarial Valuation Reports</a>	<a href="#">Health Benefits</a>	<a href="#">Pension Contract Amendments &amp; Agency Updates</a>	<a href="#">Employment Certification</a>
<a href="#">Required Employer Contributions</a>	<a href="#">Retirement Benefits (Employers)</a>	<a href="#">Pension Contracts Frequently Asked Questions</a>	<a href="#">Health Procedures</a>
<a href="#">Risk Pooling</a>	<a href="#">Social Security &amp; Medicare</a>	<a href="#">Pension Contracts Inactive Agencies</a>	<a href="#">Pension Reform Impacts</a>
<a href="#">Summary of Valuation Results Overview</a>		<b>myCalPERS Technical Requirements</b>	<a href="#">Reference &amp; Health Guides</a>
		<a href="#">myCalPERS Reports Catalog</a>	<b>Resources</b>
		<a href="#">Special Compensation Reportability</a>	<a href="#">Forms &amp; Publications</a>
			<a href="#">Employer Education</a>

# Classes & Webinars for Employers (3 of 3)


## Classes & Webinars

Name	Description	Format
Classes & Webinars for Employers	<p>Whether you're new to your role, or just need a refresher, find training opportunities tailored to your job responsibilities. These will help you confidently navigate CalPERS' processes, daily transactions, and more complex tasks.</p> <p>Classes are organized by contact type, so you know which training to enroll in and when to complete it.</p>	In Person & Online

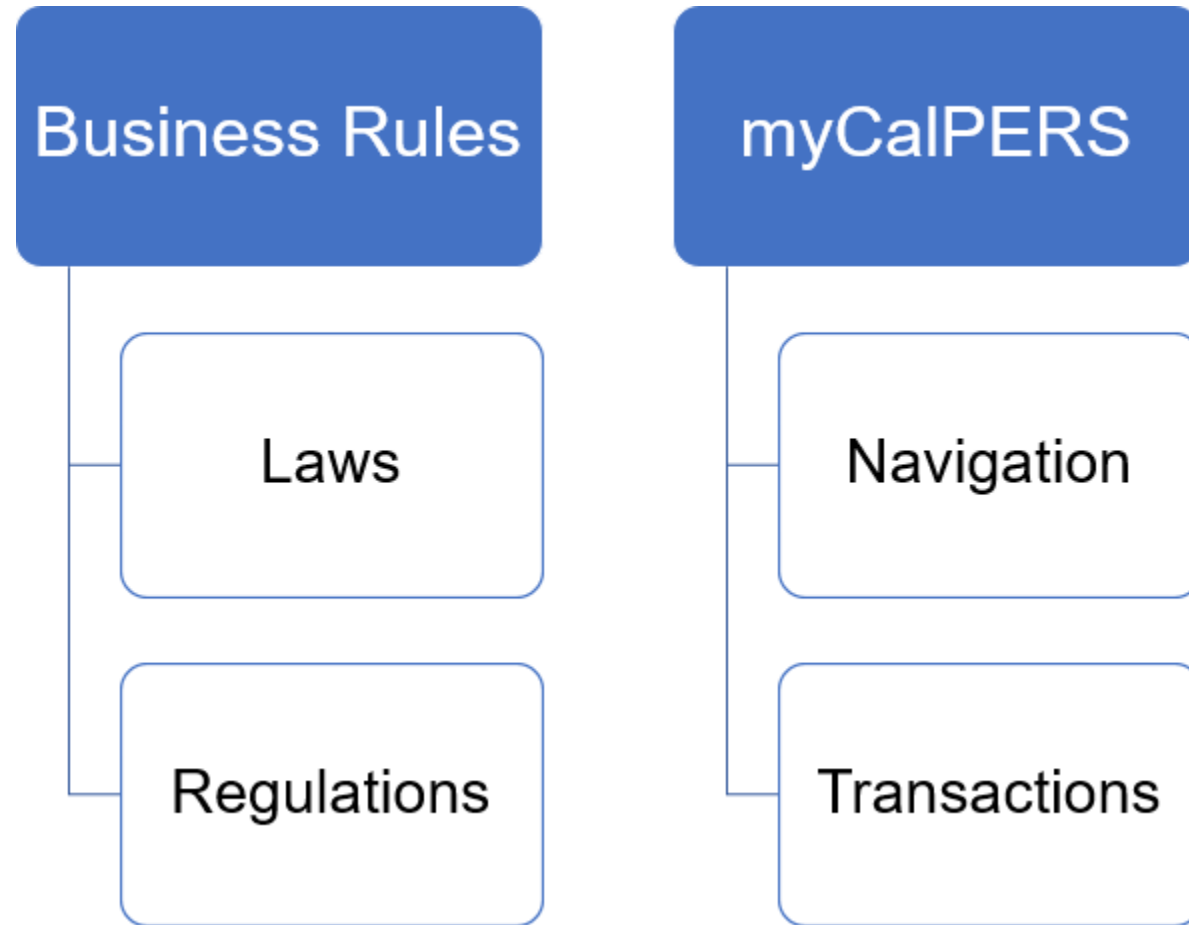
# Classes & Webinars by Contact Type

General

Contact who conducts business with CalPERS

Classes & Webinars	Format	Guides & Resources
<p>Start by completing <a href="#">Business Rules</a> classes in this order:</p> <ol style="list-style-type: none"><li>1. Business Rules</li><li>2. Business Rules: Health</li><li>3. Advanced Compensation</li><li>4. Advanced Membership</li></ol>	<p>In-Person/Virtual (Enroll using <a href="#">myCalPERS</a> )</p>	<p>Reference &amp; Health Benefits Guides:</p> <ul style="list-style-type: none"><li>• <a href="#">Public Agency &amp; Schools Reference Guide (PDF, 2.2 MB)</a></li><li>• <a href="#">State Reference Guide (PDF, 2.3 MB)</a></li><li>• <a href="#">Public Agency &amp; Schools Health Benefits Guide (PDF)</a></li><li>• <a href="#">State Health Benefits Guide (PDF)</a></li></ul>

# Business Rules & myCalPERS Classes



# Employer Education Delivery and Resources

## Instructor-Led Classes

Virtual and  
in person

Live and  
interactive

## Online Classes

24/7 access

Self-paced

## Resources

Business Rules  
Reference and  
Health Guides

myCalPERS  
student guides

# Specials

Tailored training

Flexible scheduling

Free

# myCalPERS Reports Feature

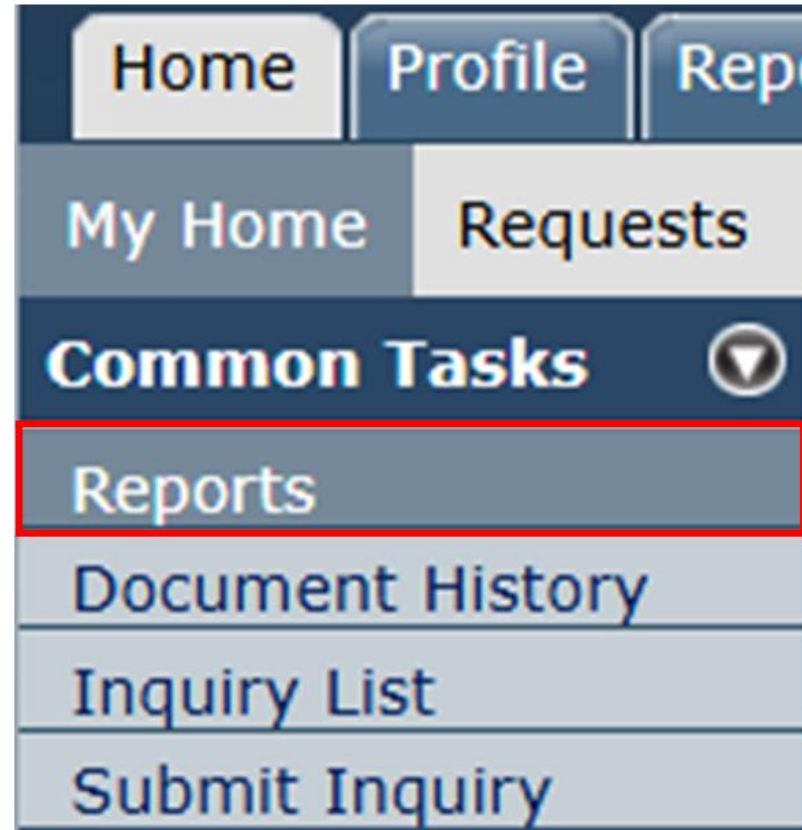
## Cognos Reports

- IBM
- Cluttered
- Weaker search tool
- Manual shortcuts
- Longer to run

## myCalPERS Reports

- CalPERS
- Streamlined
- Stronger search tool
- Automatic shortcuts
- Faster to run

# Access myCalPERS Reports



# myCalPERS Reports Homepage

myCalPERS Reports
 Welcome Business Partner en 248 env96ds ▼

Home
Run Report
Generated Reports

### Recent Activity ⓘ

Title	Format <span style="font-size: 0.8em;"> ⓘ</span>	Status	Submit Date
Employer Health Enrollee Report - External Report	Download (.csv)	<a href="#">Generated</a>	April 08, 2026 1:34 PM
Employer Health Event Transactions Report	Download (.xls)	<a href="#">Generated</a>	April 08, 2026 1:31 PM
Employer Health Event Transactions Report	Save Online (.html)	<a href="#">Generated</a>	April 08, 2026 1:30 PM
Confirmation of No Payroll Reportable Report	Download (.xls)	<a href="#">Generated</a>	April 08, 2026 1:13 PM

### Frequent Reports

- Retired Annuitant Hours Worked Report
- Reported Compensation by Calendar Year Summary Report
- Employer Health Event Transactions Report
- Confirmation of No Payroll Reportable Report
- Parent-Child Relationship Dependents with Expiring Certification Report

# myCalPERS Run Report Tab

The screenshot displays the myCalPERS Reports interface. At the top, the myCalPERS logo and 'Reports' are on the left, and 'Welcome Business Partner en 248' with a dropdown menu showing 'env96ds' is on the right. Below this is a navigation bar with three tabs: 'Home', 'Run Report' (which is active and highlighted in dark blue), and 'Generated Reports'. The main content area features a search section with the text 'Search by Report Name:' and a search input field containing a magnifying glass icon. Below the search field is a list of report titles in blue text: '1959 Survivor Billing Validation Member Report', 'Advanced Disability Pension Payments Deduction Register Report', 'Arrears Receivable Detail Report', 'Arrears Receivable Summary Report', 'Automatic Permanent Separation - Completed Appointments Report', 'Automatic Permanent Separation - Potential Appointments Report', and 'Benefit Recipients By Employer Report'.

# myCalPERS Generated Reports Tab

myCalPERS Reports
 Welcome Business Partner en 248 env96ds v

Home
Run Report
Generated Reports

Generated by: User i

Search:

Title	Format	Status	Last Submit Date	Run History
Employer Health Enrollee Report - External Report	Download (.csv)	<a href="#" style="color: #1a3d54; text-decoration: underline;">Generated</a>	Apr 08, 2026 01:34 PM	<a href="#" style="color: #1a3d54; text-decoration: underline;">View History</a>
Employer Health Event Transactions Report	Download (.xls)	<a href="#" style="color: #1a3d54; text-decoration: underline;">Generated</a>	Apr 08, 2026 01:31 PM	<a href="#" style="color: #1a3d54; text-decoration: underline;">View History</a>
Confirmation of No Payroll Reportable Report	Download (.xls)	<a href="#" style="color: #1a3d54; text-decoration: underline;">Generated</a>	Apr 08, 2026 01:13 PM	<a href="#" style="color: #1a3d54; text-decoration: underline;">View History</a>
Reported Compensation by Calendar Year	Download (.csv)	<a href="#" style="color: #1a3d54; text-decoration: underline;">Generated</a>	Apr 08, 2026 01:08 PM	<a href="#" style="color: #1a3d54; text-decoration: underline;">View History</a>

# Employer Toolkit Review

Explore the new Classes & Webinars for Employers webpage

Visit the [Business Rules & myCalPERS Classes](#) webpage

Register for the new myCalPERS Reports class

# Contact Us

Email our employer educators at

[calpers\\_employer\\_communications@calpers.ca.gov](mailto:calpers_employer_communications@calpers.ca.gov)

# Employer Toolkit Questions

# Ensuring Timely and Accurate Retirement Benefits

Tim Herrback

Retirement Benefit Services Division

# Retirement Benefits Topics

Why retirement benefits may be delayed

Certification of separation of employment

Reporting unused sick leave

Post-retirement adjustments

# Delayed Retirement Benefits (1 of 2)

## Potential Causes

### Incorrect information within myCalPERS

- Errors in the member's or dependent's name, date of birth, or address at time of enrollment

### Missing documentation

- Part-time conversion request form
- Reciprocal information when reciprocity is requested
  - Position title
  - MOU and/or Labor Agreement

# Delayed Retirement Benefits (2 of 2)

## Potential Causes

### Employer payroll reporting

- Incorrect payroll record end dates
- Delayed or unposted payroll transactions
- Discrepancies requiring a compliance review
  - Excessive service credit
  - Fluctuating pay rate types
  - Lump-sum special compensation reporting

# Separation of Employment Certification (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
  - Cost-of-Living Adjustment (COLA) eligibility
  - Continuation of health benefits (if applicable)
- Risk of improper reporting
  - May affect member's retirement benefits
  - Can result in overpaid benefits due to unlawful employment
  - May require cancellation of retirement and/or repayment of benefits

# Separation of Employment Certification (2 of 2)

## Most common separation date issues

- No separation date reported at time of retirement
- Separation date entered for only one active appointment
- Incorrect separation date reported to CalPERS
  - Same day as retirement date instead of day after last day paid
  - Board notification date instead of day after last day paid
  - Contract end date instead of day after last day paid

Refer to [Circular Letter 200-015-16 \(PDF\)](#) for guidance on reporting separation dates in myCalPERS

# Reporting Unused Sick Leave at Retirement (1 of 3)

## How to report unused sick leave (USL)

- Government (Gov.) Code section 20963.5
  - Retirement date must be within four months of separation from employment
  - Only report hours/days accrued during the normal course of work
  - 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 excluded from a retirement calculation when:

- Employer fails to report separation timely
- Separation date is more than 120 days from retirement 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

- Divided hours by eight 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

# Post-Retirement Adjustments (1 of 2)

## Reasons post-retirement adjustments occur

- Retirement date is equal or prior to last posted payroll record end date
  - Delays employer posting of payroll records
  - May create overpayments when retirement date is changed
- Payroll corrections after retirement
- USL not reported timely or accurately
- Separation date is missing or incorrect

## Missing separation date notifications

- Sent to both employer and member
- Letters sent at 60- and 120-days post-retirement
- Retiree warrants held after 120 days if not separated

# Post-Retirement Adjustments (2 of 2)

Example	Payroll Record Dates	Retirement Date	Separation Date	Notes
Payroll vs. separation date discrepancy	4/01/2025 – 4/30/2025	6/06/2025	7/01/2025	Verified all payroll posted. District indicated the separation date was last day of school year.
Half month of earnings reported	5/01/2025 – 5/14/2025	5/15/2025	8/15/2025	District indicated the separation date keyed was day separation was reported to the board.
Full month of earnings/service reported	6/01/2025 – 6/06/2025	6/07/2026	7/01/2025	District indicated equalized payments and payroll end date adjusted due to retirement date.

# Ensuring Timely and Accurate Retirement Benefits Questions

# Compliance with Two-Years Additional Service Credit (Golden Handshake) Provision

Andy Nguyen

Pension Contracts and Prefunding Programs

# Two-Years Additional Service Credit for School Employers (1 of 2)

Gov. Code Section 20904

## Benefits:

- Offer an additional two-years of service credit for eligible school members who retire during a designated period
- Reduces staffing and provides immediate payroll saving

## Eligible school members:

- Must be employed by the school during the designated period
- Did not receive any unemployment insurance payments during the designated period

# Two-Years Additional Service Credit for School Employers (2 of 2)

Gov. Code Section 20904

Requirements for County Superintendent of Schools:

- Must certify the Golden Handshake offering will result in a net saving to the district
- Must certify the Golden Handshake offering will result in a reduction in the workforce with at least one vacancy remain permanently unfilled
- Must pay off the costs of the Golden Handshake in full or over a 5-year installment payment schedule

# Common Compliance Observations for School Employers (1 of 2)

## Required Golden Handshake conditions not supported

- Permanent vacancy was not created
- Curtailment of, or change in the manner of performing, services was not supported, or
- Net savings was not supported

## Ineligible employee offered Golden Handshake benefit

- Provided the Golden Handshake to employees who received unemployment benefits during the designated period

# Common Compliance Observations for School Employers (2 of 2)

## Eligible employee not offered Golden Handshake benefit

- Did not offer the Golden Handshake benefit due to miss calculation of the net saving or eligibility provision in the labor agreement

## Certified and adopted the resolutions during or after the designated period

- Did not approve the Golden Handshake resolutions timely

# Contact Information

Email us at [pensioncontracts@calpers.ca.gov](mailto:pensioncontracts@calpers.ca.gov)

Visit our [Pension Contract Amendments & Agency Updates](#) webpage

# Compliance with Two-Years Additional Service Credit (Golden Handshake) Provision Questions

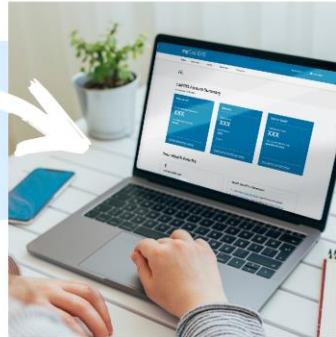
# myCalPERS Registration Project

Brad Hanson

Employer Account Management Division

# myCalPERS Registration

Activate your  
**myCalPERS**  
account today!



**myCalPERS** is the *fast, easy, and secure* way to access your CalPERS retirement and health benefits. Visit our website anytime on your computer or phone.

**Six reasons to visit today:**

- Plan for retirement
- Estimate your pension
- Track your account balances
- Update your contact information
- Manage your CalPERS health benefits
- Add or change your beneficiaries



**Getting started is easy:** Scan the QR code or go to [www.calpers.ca.gov/education-center/using-mycalpers](http://www.calpers.ca.gov/education-center/using-mycalpers)



## Benefits for your employees

- Plan for retirement
- Estimate their pension
- Update contact information

## Benefits for you

- Less work
- Greater security



# myCalPERS Registration Project Update

To ensure the project's success, we need your help in collecting members':

- Phone numbers
- Email addresses

We will be organizing a focus group to gather feedback and insights from both employers and members

# myCalPERS Registration Project Questions

# Roundtable

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

Thank you