

# School Employer Advisory Committee

August 7, 2025

# Housekeeping (1 of 2)

Webinar is being recorded

Attendee mics are muted

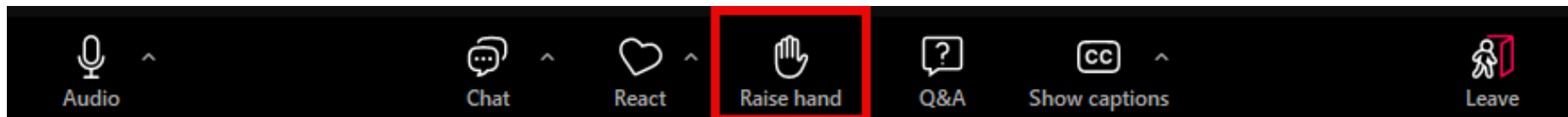
Meeting materials available on [www.calpers.ca.gov](http://www.calpers.ca.gov)

Email: [CalPERS\\_SEAC@calpers.ca.gov](mailto:CalPERS_SEAC@calpers.ca.gov)

# Housekeeping (2 of 2)

## Options to submit a question for panelist(s):

- Q&A feature
- Raise Hand feature
  - Use raise hand feature to indicate you have a question. The host will call on you to unmute your mic and pose your question.
  - While unmuted, your profile picture and name will display to the host and panelists
  - Only your name will display to the other attendees
  - Select **Lower Hand** to lower, if needed. **Note:** This will not mute your mic if you're unmuted.



# Agenda (1 of 2)

myCalPERS Technical Support Resources – Mai Khang

Charter Schools – Andy Nguyen

Service Prior to Membership (SPM) and Arrears – Veronica Silva-Gil and Tad Baker

Special and Pensionable Compensation – Kenneth Noss

Break – 10 minutes

# Agenda (2 of 2)

Post-Retirement Employment – Courtney McGourty

Permanent Separations – Andrew Harris

CalPERS Employer and Member Education Resources – Vernon Thomson

myCalPERS System Registration – Brad Hanson

Roundtable – Brad Hanson

# myCalPERS Technical Support Resources

Mai Khang

Employer Account Management Division

# Technical Support Overview

System Access Administrator (SAA) Resources

Technical Troubleshooting

Test Environment

Cognos Reports

# System Access Administrator (SAA)

Tasks an SAA handle include:

- Assigning usernames and passwords
- Deactivating users
- Assigning appropriate access roles
- Maintaining agency and business partner contact information



# System Access Administrator Resources

[System Access Administrators  
webpage](#)

[myCalPERS System Access  
Administration \(PDF, 2.2 MB\)](#)  
student guide



The screenshot displays the myCalPERS website interface. At the top, the CalPERS logo is on the left, and navigation links for 'Contact' and 'About' are on the right. A 'Log in to myCalPERS' button and a language selection dropdown are also present. Below the header is a main navigation bar with links for 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located on the right side of this bar. The breadcrumb trail indicates the current location: 'Home > Employers > myCalPERS Technical Requirements > System Access Administrators'. The main heading is 'System Access Administrators'. The content area explains the role of a System Access Administrator (SAA) and provides a link to the 'myCalPERS System Access Administration (PDF, 1.8 MB)' student guide. A sidebar on the right lists various resources, including 'myCalPERS Technical Requirements', 'myCalPERS Employer Reports (Cognos) Catalog', 'Special Compensation Reportability Table', 'System Access Administrators', 'System Enhancements', 'Technical Resources', and a 'Resources' section with links to the 'Education Center', 'myCalPERS', and the 'myCalPERS System Access Administration (PDF, 1.8 MB)' and 'myCalPERS System Privileges for Business Partner Roles (PDF)'.

**System Access Administrators**

To effectively conduct business through [myCalPERS](#), your organization must designate a system access administrator (SAA) to oversee and manage access privileges for all users. The SAA serves as the primary point of contact, ensuring that only authorized users have the appropriate level of access within myCalPERS. Additionally, the SAA is responsible for setting up the designated point of contact to receive important correspondence from us. Through dedicated system administrator tools, the SAA assigns unique usernames and passwords to users, resets passwords, adjusts access roles, and can lock or restrict access, as needed. This role is essential for maintaining security, operational efficiency, and clear communication between us and your organization.

**Managing myCalPERS Employer Access**

Maintaining an accurate list of contacts for your agency is necessary to ensure correct personnel receive the information they need and have the access required to perform their work.

Your agency's SAA is responsible for maintaining this contact information. The [myCalPERS System Access Administration \(PDF, 1.8 MB\)](#) student guide provides detailed information and instructions for performing these duties.

**Who/What is a Contact?**

A contact is someone representing your agency and must be added to your agency's contact list in myCalPERS by your agency's SAA.

Each contact must be assigned a contact type which identifies their duties, position titles, and/or program areas. If a contact serves multiple functions within the agency, it's appropriate to add the contact multiple times, each time

**myCalPERS Technical Requirements**

- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
- [Special Compensation Reportability Table](#)
- [System Access Administrators](#)
- [System Enhancements](#)
- [Technical Resources](#)

**Resources**

- [Education Center](#)
- [myCalPERS](#)
- [myCalPERS System Access Administration \(PDF, 1.8 MB\)](#)
- [myCalPERS System Privileges for Business Partner Roles \(PDF\)](#)

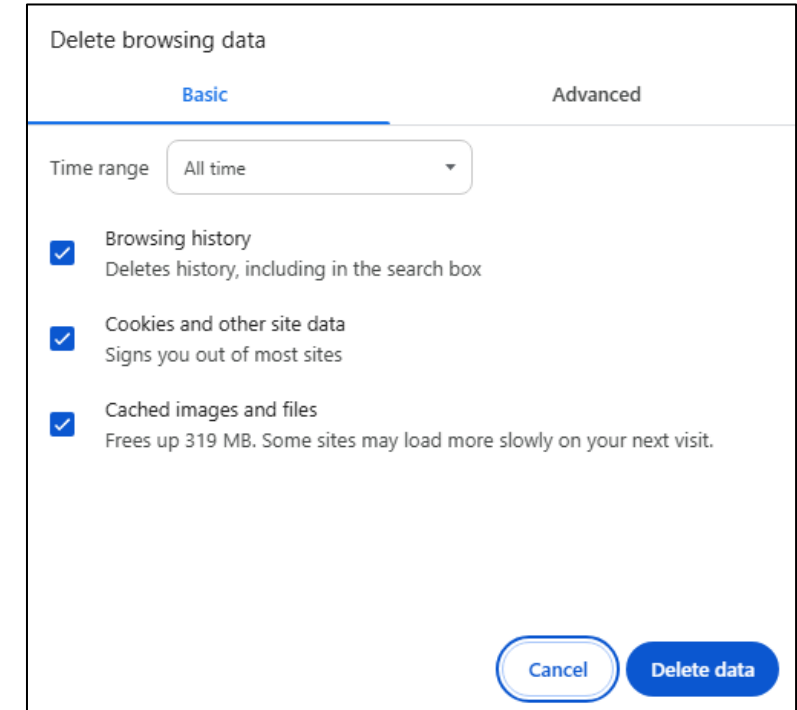
# Technical Troubleshooting

For login and connectivity issues:

- Clear cache and cookies
- Update browser

For a forgotten password:

- Request a password reset from your SAA
  - Password reset steps for SAAs can be found in the [myCalPERS System Access Administration \(PDF, 2.2 MB\)](#) student guide



# Test Environment (1 of 3)

The test environment is a clone of the live environment (production) and can be used to test file uploads

Links to access the test environment can be located on our [Technical Resources](#) webpage under File Readiness Testing

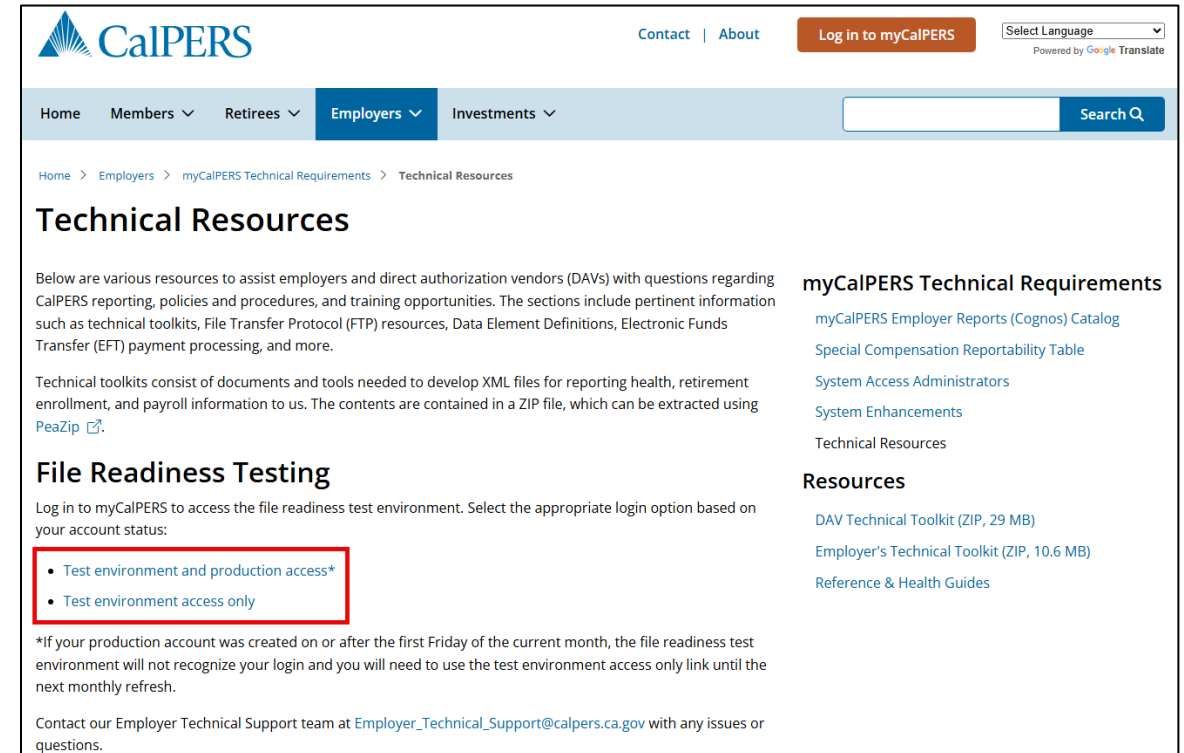
# Test Environment (2 of 3)

## Test environment and production access

- For accounts already loaded into the test environment (i.e., added prior to the most recent monthly refresh)

## Test environment access only

- For accounts created in the test environment after the most recent monthly refresh



**CalPERS** Contact | About Log in to myCalPERS Select Language  
Powered by Google Translate

Home Members Retirees Employers Investments Search

Home > Employers > myCalPERS Technical Requirements > Technical Resources

### Technical Resources

Below are various resources to assist employers and direct authorization vendors (DAVs) with questions regarding CalPERS reporting, policies and procedures, and training opportunities. The sections include pertinent information such as technical toolkits, File Transfer Protocol (FTP) resources, Data Element Definitions, Electronic Funds Transfer (EFT) payment processing, and more.

Technical toolkits consist of documents and tools needed to develop XML files for reporting health, retirement enrollment, and payroll information to us. The contents are contained in a ZIP file, which can be extracted using PeaZip.

#### File Readiness Testing

Log in to myCalPERS to access the file readiness test environment. Select the appropriate login option based on your account status:

- Test environment and production access\*
- Test environment access only

\*If your production account was created on or after the first Friday of the current month, the file readiness test environment will not recognize your login and you will need to use the test environment access only link until the next monthly refresh.

Contact our Employer Technical Support team at [Employer\\_Technical\\_Support@calpers.ca.gov](mailto:Employer_Technical_Support@calpers.ca.gov) with any issues or questions.

#### myCalPERS Technical Requirements

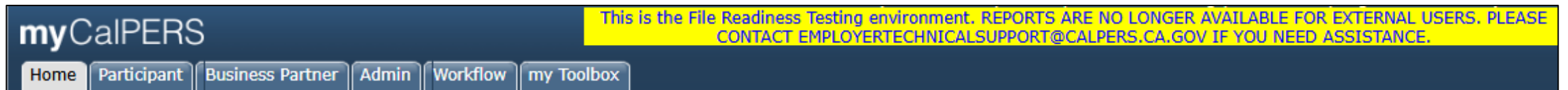
- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
- [Special Compensation Reportability Table](#)
- [System Access Administrators](#)
- [System Enhancements](#)
- [Technical Resources](#)

#### Resources

- [DAV Technical Toolkit \(ZIP, 29 MB\)](#)
- [Employer's Technical Toolkit \(ZIP, 10.6 MB\)](#)
- [Reference & Health Guides](#)

# Test Environment (3 of 3)

Tip: The presence of a yellow banner reading ‘This is the File Readiness Testing environment...’ confirms you are in the testing environment.



# Cognos Reports (1 of 3)

We have over 70 Cognos Reports

Search through the [myCalPERS Employer Reports \(Cognos\) Catalog](#) by:

- Using keywords
- Filtering for report type
- Filtering by user roles

The screenshot shows the 'myCalPERS Employer Reports (Cognos) Catalog' page. At the top is a navigation bar with links for Home, Members, Retirees, Employers (selected), and Investments. A search bar is on the right. Below the navigation bar is a breadcrumb trail: Home > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog. The main heading is 'myCalPERS Employer Reports (Cognos) Catalog'. The text explains that the Cognos application allows querying agency data and generating reports. It then states that a table lists available Cognos reports with descriptions, report types, and required user access roles. Before generating a report, it recommends: confirming the appropriate user role (only one is required), ensuring users with read-only/limited roles can access select reports, and ensuring web browser security settings are optimized. There are sections for 'Report Samples' (linking to sample PDFs) and 'Accessing Cognos Reports' (instructing users to log in to myCalPERS and select the Reports link in the Common Tasks menu). At the bottom, there is a table with columns for Report, Report Type, and User Role(s). Each column has a search input field. The 'Report' column has a 'Show 10 entries' dropdown above it.

Report	Report Type	User Role(s)
<input type="text" value="Search Report"/>	<input type="text" value="Search R"/>	<input type="text" value="Search User Role(s)"/>

# Cognos Reports (2 of 3)

The Cognos Catalog provides sample Cognos reports

Select the report name (as available) to open the sample report

### Accessing Cognos Reports

To access the Cognos reports, log in to [myCalPERS](#) and select the **Reports** link within the **Common Tasks** left-side navigation menu. Refer to the [myCalPERS Employer Reports \(Cognos\) \(PDF\)](#) student guide for additional information related to Cognos.

Show 10 entries

Report	Report Type	User Role(s)
Search Report	Search Re	Search User Role(s)
<b>Business Partner On Leave Report (PDF)</b>	Retirement Enrollments	<ul style="list-style-type: none"> <li>Appointment Management - Non-PERS and CalSTRS</li> <li>Health Enrollment</li> <li>Health Enrollment Read Only</li> <li>Payroll</li> <li>Payroll Limited</li> <li>Retirement Enrollment</li> <li>Retirement Enrollment Limited</li> </ul>

Includes participants with appointments in "On Leave" status

**Business Partner On Leave Report**

Program : CalPERS  
 Business Partner : ABC Employer- 1234567890  
 Date Range : Dec 1, 2016 - Dec 21, 2018

Participant CalPERS ID	Last Name	First Name	Middle Initial	Member Account Status	Appointment ID	Begin Leave Effective Date	End Leave Effective Date	Leave Type	Business Partner Name	BP CalPERS ID	Division	Division CalPERS ID	Last Reported Payroll Earned Period End Date	Enrolled in Health	Health Enrollment Type
9876543210	BIDARIAN	BERHANAYEHU		Terminated	92107733	03/01/2018	06/13/2018	Other Leave	ABC Employer	1234567890	Division A	2067396840	01/30/2018	N	
9876543210	Caccamo	JAYLINE		Active	91716262	01/01/2018	02/12/2018	State Disability Leave	ABC Employer	1234567890	Division G	2067396840	10/30/2018	Y	Active
9876543210	Dusendschon	Rumony	Y	Active	35213630	09/01/2017	11/01/2017	Other Leave	ABC Employer	1234567890	Division T	2067396840	10/30/2018	N	
9876543210	Fawke	PARAMVEER	N	Retired	30847320	02/27/2018	05/01/2018	State Disability Leave	ABC Employer	1234567890	Division B	2067396840	02/28/2018	Y	Active
9876543210	FLASHEY	Natekka	C	Active	92266440	02/01/2018	02/08/2018	Maternity/Paternity Leave	ABC Employer	1234567890	Division H	2067396840	10/30/2018	Y	Active
9876543210	GOYNE	Channa		Active	44555820	09/13/2018		Industrial Disability Leave	ABC Employer	1234567890	Division U	2067396840	10/30/2018	Y	Active
9876543210	GUNAWAN	Hopate	A	Active	27016310	10/04/2002		Unpaid Leave	ABC Employer	1234567890	Division R	2067396840	08/29/2002	Y	Direct Pay
9876543210	Haigo	Toreka	A	Active	92053033	08/17/2017	09/01/2017	State Disability Leave	ABC Employer	1234567890	Division M	2067396840	10/30/2018	Y	Active
9876543210	Hasham	JAGTAR		Active	12019580	04/14/2017	06/15/2017	State Disability Leave	ABC Employer	1234567890	Division P	2067396840	10/30/2018	N	
9876543210	Henson-Clement	Adhielle Jay	L	Active	18591240	08/29/2017	10/10/2017	Industrial Disability Leave	ABC Employer	1234567890	Division L	2067396840	10/30/2018	Y	Active
9876543210	Hippely	Paramjyot	K	Active	44718540	04/15/2017	06/01/2017	Family Medical Leave	ABC Employer	1234567890	Division C	2067396840	10/30/2018	Y	Active
9876543210	Kransz	roberta	J	Inactive	12540790	06/04/2018	10/23/2018	Other Leave	ABC Employer	1234567890	Division F	2067396840	06/30/2018	N	
9876543210	LUSTRE	STEPHEN	R	Active	92330106	03/18/2017	04/03/2017	Maternity/Paternity Leave	ABC Employer	1234567890	Division Z	2067396840	10/30/2018	Y	Active
9876543210	Mehrzhadeh	Okeke	R	Active	25373710	01/18/2018		Industrial Disability Leave	ABC Employer	1234567890	Division D	2067396840	10/30/2018	Y	Active
9876543210	Reikofski	Onyeoma	C	Inactive	32848810	11/01/2017	01/31/2018	Other Leave	ABC Employer	1234567890	Division Q	2067396840	04/13/2018	Y	Direct Pay
9876543210	Zian	ARGENIZ	J	Active	34892850	09/14/2018		State Disability Leave	ABC Employer	1234567890	Division O	2067396840	08/30/2018	Y	Active
9876543210	ZVESPER	CARLA A		Active	91731469	01/31/2018	05/31/2018	Other Leave	ABC Employer	1234567890	Division V	2067396840	10/30/2018	N	

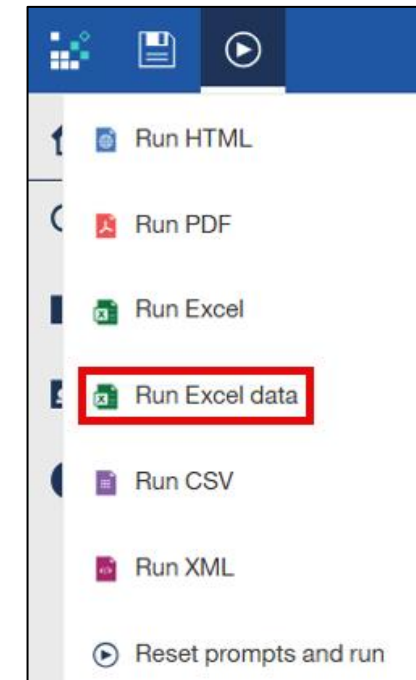
# Cognos Reports (3 of 3)

## [myCalPERS Employer Reports \(Cognos\) \(PDF\)](#) student guide

- Steps on how to:
  - Run reports in various formats
  - Run reports in the background
  - Note:** Do not change the delivery method to print or email.
  - Schedule reports

### To create a customized report:

- Select 'Run Excel data' to pull the data into an Excel spreadsheet
- Apply filters to display only the desired data





# myCalPERS Technical Support

## Contact Us

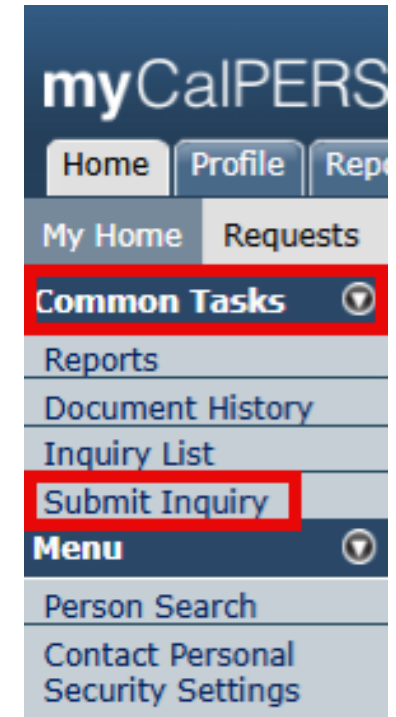
### Submit an inquiry in myCalPERS

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

Email: [EmployerTechnicalSupport@calpers.ca.gov](mailto:EmployerTechnicalSupport@calpers.ca.gov)

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

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



# myCalPERS Technical Support Resources Questions

# Charter Schools

Andy Nguyen

Pension Contracts & Prefunding Programs

# Background

CalPERS law allows for optional participation of charter schools

Charter schools can include or not include employees in CalPERS through its charter

CalPERS recently identified issues with the reporting of charter school employees to the system

Non-participating charter school employees cannot be reported under another district or county office

# Charter School Compliance Obligations

Required to continue reporting employees to CalPERS until the school is dissolved

Pay schedule must be approved and adopted by the charter school's governing body

Pay schedule must be posted for public review and retained for a minimum of five years

Memorandum of Understanding (MOU) must be approved and adopted by the charter school's governing body and publicly posted

# Appendix – Charter School Eligibility Criteria

Nonsectarian, tuition-free public school

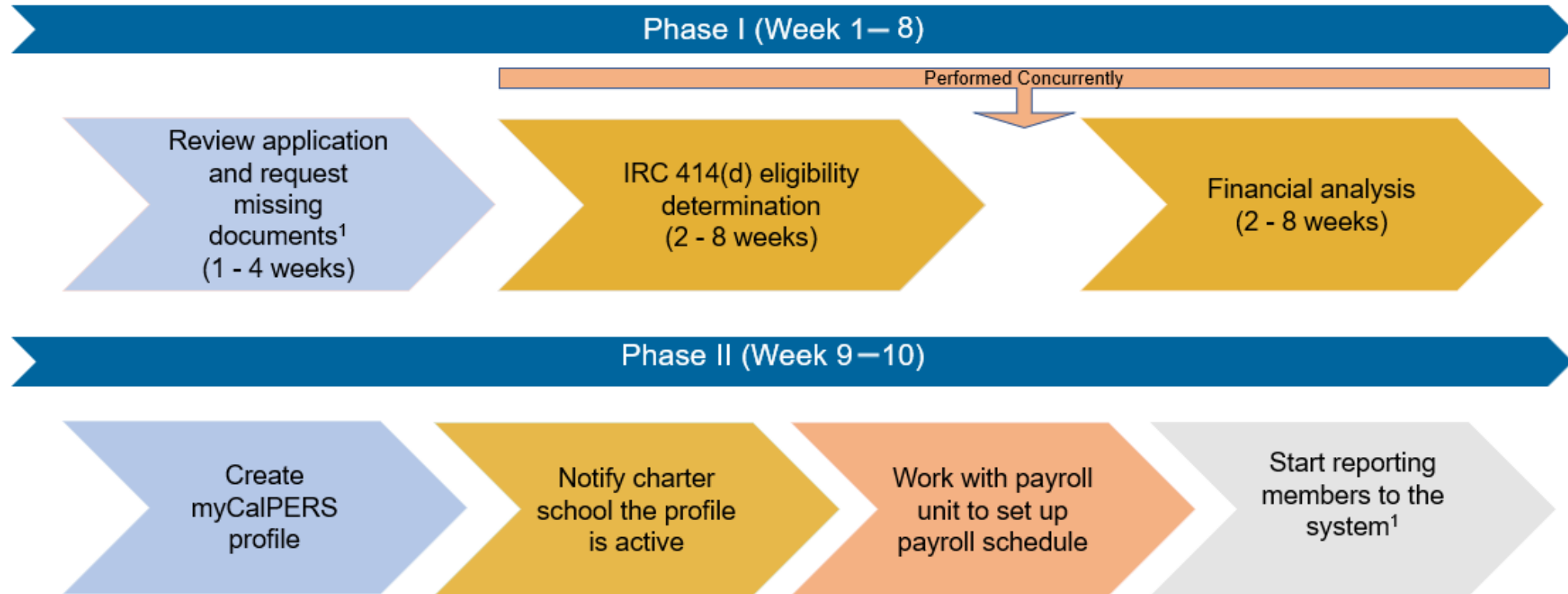
Charter School State Statute

Statutory right to participate in the system

Fiscal responsibility

Ownership of assets upon dissolution or liquidation

# Appendix – New Charter School Processing Timelines



<sup>1</sup>Timeline is dependent on the employer

# Charter School Contact Information

Pension Contracts Email: [pensioncontracts@calpers.ca.gov](mailto:pensioncontracts@calpers.ca.gov)

MOU Review Email: [MOU\\_Review@calpers.ca.gov](mailto:MOU_Review@calpers.ca.gov)

[New Pension Contracts](#) webpage



# Charter School Resources

[Public Agency & Schools Reference Guide \(PDF, 3.0 MB\)](#)

CalPERS Customer Contact Center

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

[CalPERS Website](#)

Email: [membership\\_reporting@calpers.ca.gov](mailto:membership_reporting@calpers.ca.gov)

# Charter School Questions

# Service Prior to Membership (SPM) and Arrears

Veronica Silva-Gil, EAMD

Tad Baker, MAMD

# Service Prior to Membership (SPM) and Arrears Overview

## Objective:

- Highlight the critical role employers play in certifying SPM and arrears
- Discuss the impact of accuracy and timeliness on employees, employers, and retirement systems

## Key topics:

- What is SPM
- What is arrears
- Why certifications matter

# Service Prior to Membership

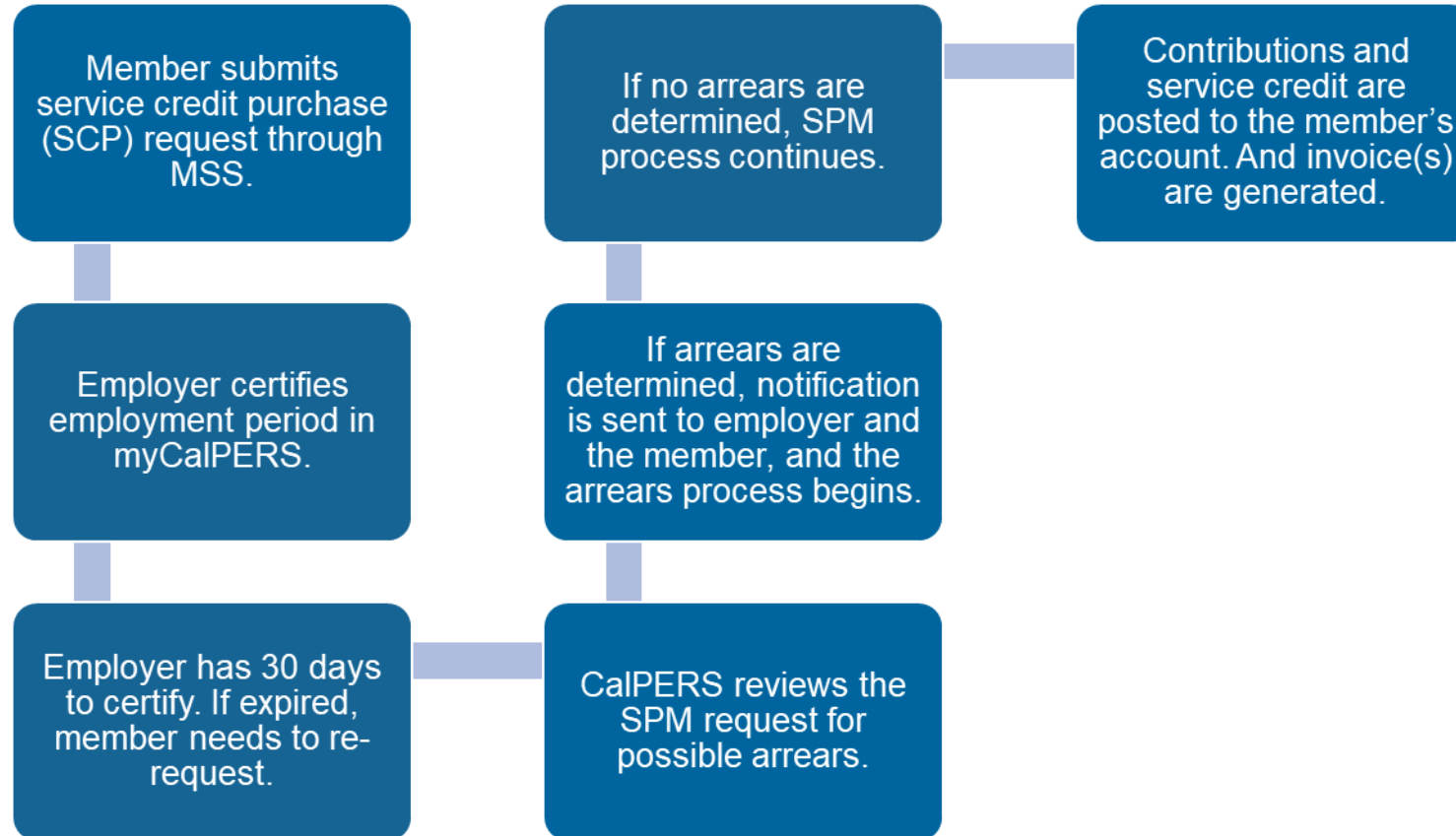
# What is Service Prior to Membership (SPM)?

Service performed by an employee before they became a CalPERS member

Importance:

- Ensures employees receive opportunity to purchase all eligible service time
- SPM needs to be completed prior to retirement
  - Members are not eligible to purchase SPM after retirement

# SPM Process



# Arrears



# Membership Arrears

## What are arrears?

- Two types:
  - Member paid
  - Employer paid

## What triggers an arrears review?

- Reporting late appointments
- Service credit purchases requests

# Employer-Paid vs. Member-Paid Arrears

## Employer-Paid Arrears

- Government Code 20283
- Late appointments
- Member and employer contributions
- Admin fee
- Cannot be passed onto the employee/member

## Member-Paid Arrears

- Government Code 20160
- Before July 1, 1994
- Only responsible for employer contributions
- 20283 “reasonably known”

# Causes of Arrears

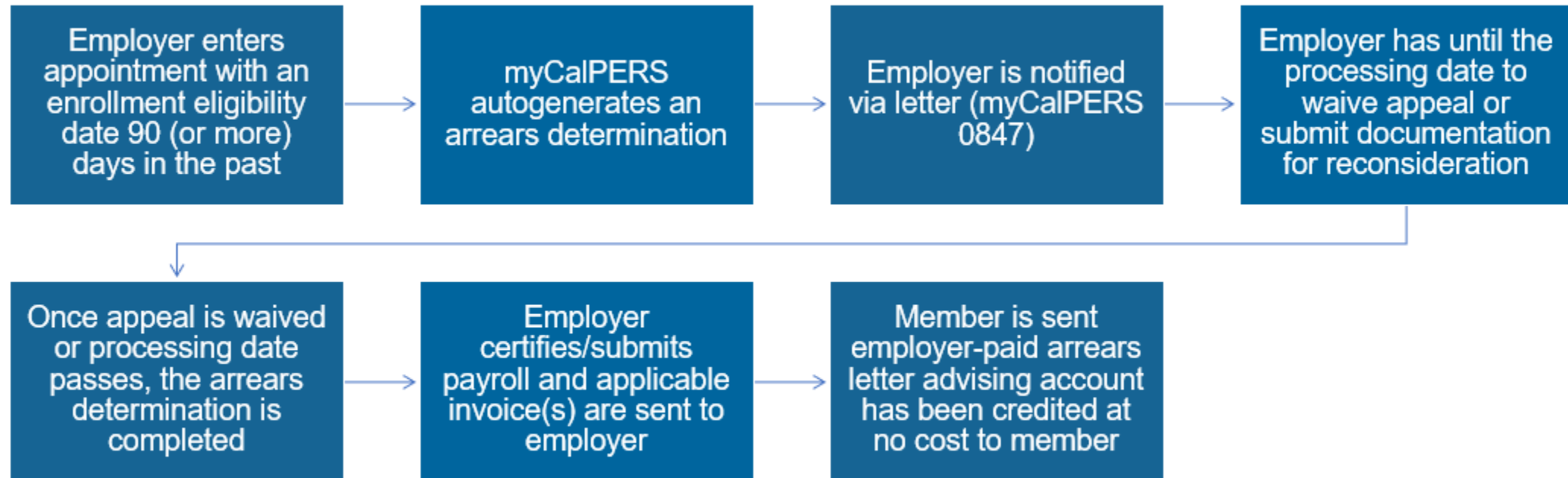
## Late Appointments

- Automated
- Employer-paid arrears

## Service Credit Purchases

- Membership Team Review
- Member-paid or employer-paid arrears

# Arrears Process for Late Appointment



# Employment Certifications

# Accurate and Timely Certifications

## Accuracy:

- Ensures employees receive proper credit for their service
- Prevents errors in retirement benefit calculations
- Reduces risk of audit findings

## Timeliness:

- Avoids delays in processing employee benefits
- Helps employees make informed decisions about their retirement
- Ensures compliance with the Public Employees' Retirement Law (PERL)

# Consequences of Inaccurate/Delayed Certifications

## Employees:

- Loss of service
- Reduced or delayed retirement benefits
- Increased financial risk
  - Unresolved membership date validation and arrears determinations
  - Higher costs

## Employers:

- Legal and financial liabilities
- Increased administrative workload due to corrections and audits

# Employer Responsibilities

Accurately verify and certify employee service records

Identify and report membership promptly

Collaborate with CalPERS to provide records upon request

## Best Practices:

- Maintain detailed employment records
- Promote early purchasing
  - Lower cost
  - Records still available
- Train staff on certification requirements
- Implement internal checks for accuracy



# SPM and Arrears Conclusion

Accurate and timely certifications are essential for ensuring fair and accurate retirement benefits

Employers play a pivotal role in maintaining compliance and supporting their employees

Investing in better processes and training benefits everyone involved

# SPM and Arrears Resources

[myCalPERS Employment Certification Functionality \(PDF, 2.0 MB\)](#)  
student guide

[Public Employees' Retirement Law \(PERL\) \(PDF, 12.2 MB\)](#)

[CalPERS Public Agency & Schools Reference Guide \(PDF, 3.0 MB\)](#)

[Circular Letter 200-065-14 \(PDF\)](#) – Common Membership  
Findings Found in CalPERS Public Employer Reviews

[Employment Certification](#) webpage

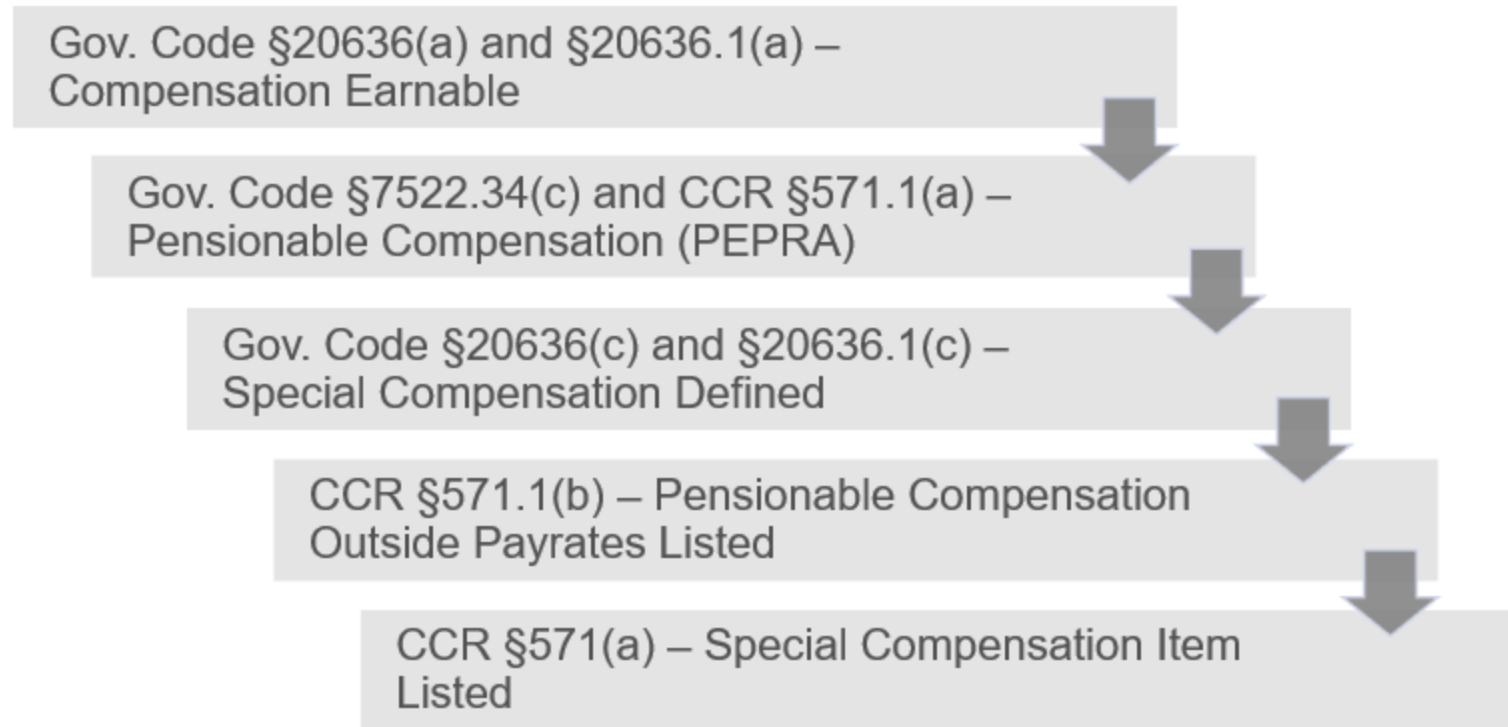
# Service Prior to Membership (SPM) and Arrears Questions

# Special and Pensionable Compensation

Kenneth Noss

Employer Account Management Division

# Special/Pensionable Compensation Compliance Flowchart



# Classic Member Special Compensation (1 of 4)

Gov. Code §20636.1(c) – Defined

Payment for special skills, knowledge, abilities, work assignments, workdays or hours, or other work conditions

Must be available to all employees in the same group or class

One person is not a group or class

# Classic Member Special Compensation (2 of 4)

Exclusive list of 104 items of special compensation

- Incentive Pays
- Educational Pays
- Premium Pays
- Special Assignment Pays
- Statutory Items

Specifically, and exclusively defined

# Classic Member Special Compensation (3 of 4)

## CCR §571(b) – Requirements

Contained in a written labor policy or agreement

Available to all members in a group or class

Part of normally required duties

Performed during normal hours of employment

Paid periodically as earned



# Classic Member Special Compensation (4 of 4)

## CCR §571(b) – Requirements

Historically consistent

Not paid exclusively in the final compensation period

Not final settlement pay (defined under CCR 570)

Does not create an unfunded liability

# PEPRA Member Pensionable Compensation (1 of 5)

CCR §571.1(a)(b) – Defined

Compensation outside of payrates

For employees that became CalPERS members after January 1, 2013

Must be available to all employees in the same group or class

- One person is not a group or class

# PEPRA Member Pensionable Compensation (2 of 5)

## CCR §571.1(b) – List

Exclusive list of 98 items of special compensation

- Excluding:
  - Bonus Pay
  - Off-Salary Schedule Pay
  - Management Incentive
  - Fair Labor Standards Act (FLSA) (Miscellaneous Members)
  - Uniform Allowance
  - Temporary Upgrade Pay
  - Value of Employer Paid Member Contributions (VEPMC)

Specifically, and exclusively defined

# PEPRA Member Pensionable Compensation (3 of 5)

## CCR §571.1(a) - Requirements

Available to all members in a group or class

Part of normally required duties

Performed during normal hours of employment

Paid periodically as earned

Historically consistent

# PEPRA Member Pensionable Compensation (4 of 5)

## CCR §571.1(a) – Requirements

Not final settlement pay (defined under CCR 570)

Does not create an unfunded liability

Paid pursuant to the publicly available pay schedule (PAPS), with items listed and conditions of payment

Cannot reference another document other than those outlined in Gov. Code §20049

# PEPRA Member Pensionable Compensation (5 of 5)

## Gov. Code § 20049 – Labor Policy

Written policy, agreement, memorandum of understanding, legislative action of the employer's governing body used by the employer to specify special compensation of represented and unrepresented employees

# Written Labor Agreement Requirements

## Written Labor Policy or Agreement Requirements

Duly approved in a public meeting pursuant to public meetings laws

Contains conditions for payment

Immediately accessible

Effective and revision dates

Does not reference another document

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

For compensation outside normal payrate

Available to all employees in the group or class

Classic: Must be contained in a Written Labor Policy (WLP)

PEPRA: Must be contained in a WLP or PAPS



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

For normally required duties during normal working hours

Paid periodically and reported as earned

Complies with definition in CCR 571 or 571.1

Conditions of payment

- Eligibility
- Amount (percentage or dollar amount)

# Compliant WLP Checklist

Duly approved in a public meeting during 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

# Special and Pensionable Compensation Questions

# Break

# Post-Retirement Employment

Courtney McGourty

Employer Account Management Division

# Post-Retirement Employment Overview

Options for employment without reinstatement

Restrictions

Consequences

Information available in myCalPERS

# Work Without Reinstatement

## Extra Help

- During an emergency, or
- Special skills to perform work of limited duration
  - Addressing a backlog of work
  - Work on a special project
  - Must have a limited duration
  - Cannot be indefinite or permanent solutions to a business need

# Restrictions (1 of 4)

## Bona fide separation

### 60-day break in service if under normal retirement age

- No verbal or written pre-arranged agreements
- Normal retirement age – highest age in listed all of retiree's formulas (max 62 years)
- Only exception is emergencies declared by the governor
  - Only allows exemption from the 60-day requirement



# Restrictions (2 of 4)

180-day wait period

Exceptions:

- Safety employment
- Resolution on file by the governing body passed in a public meeting defining the necessity of the retiree appointment prior to the 180-days (not on consent calendar)
  - Must be received and reviewed by CalPERS prior to first day of employment

# Restrictions (3 of 4)

## Hours

- 960-hour fiscal year limit
  - All CalPERS employers combined
- Only exception is from an Executive Order issued by the governor

# Restrictions (4 of 4)

## Pay

- Payrate is determined by duties performed
- Must be reported as an hourly rate based on monthly divided by 173.333
- Payrate must be on a publicly available pay schedule
- No additional benefits or compensation

# Employer Responsibility

Ensure compliance when hiring a retired annuitant with all restrictions

Ensure proper documentation justifying the need for the retiree's employment

- [Retired Annuitant Hiring Questionnaire \(CalPERS-6966\) \(PDF\)](#)

Report retired annuitant employment timely and accurately to avoid fees and accurate data

Document the retiree certified they did not receive unemployment insurance in the previous 12 months

# Consequences

## Reinstatement to active membership

- Retirement ceases
- Overpayment of benefits
- Cost-of-Living Adjustment (COLA) restarts at time of new retirement
- Potential health benefit impacts
- Contributions required for service reported during violation period

## Violation remedy – required repayment of all benefits paid during violation period

- Lump sum payment
- Actuarial Equivalent Reduction (AER)

# Information Available in myCalPERS

## Useful information in myCalPERS

- 180-day wait period – first day retiree would be eligible to work without a resolution waiver
- Warning notification if entering appointment that could be a bona fide separation violation
- Notice of hours reported for that fiscal year with any other appointment that member may have upon entering in a new appointment

## Member Self Service (MSS)

- Retirees can locate their:
  - Max normal retirement age
  - Total hours
  - 180-day return date

# Post-Retirement Employment Contact Information

CalPERS Customer Contact Center

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

[CalPERS website](#)

Email: [Working\\_After\\_Retirement@calpers.ca.gov](mailto:Working_After_Retirement@calpers.ca.gov)

# Post-Retirement Employment Questions



# Permanent Separations

Andy Harris

Employer Account Management Division

# Reporting Requirements

Employers are required to report all CalPERS-covered employment and updates timely including, but not limited to:

- Membership enrollment
- Non-contributory employment
- Permanent separation from employment
- Leave of absences

# Impacts of Not Reporting Timely

Incorrect membership enrollment

PEPRA/classic

Incorrect formula placement

Reciprocity determinations

Illegal retirements

# August 2025 System Enhancements (1 of 2)

Auto separation of appointments where zero payroll has been reported for 12 months or more

- Notification will be sent warning of potential separation to the employer at three months of zero payroll reported
- Notification will be sent warning of potential separation to the employer and member at six months of zero payroll reported
- Notification of separation to employer and member at 12 months

# August 2025 System Enhancements (2 of 2)

Upon retirement, a missing separation date on any appointment will generate notifications to both the employer and retiree

- Month two – First notification advising of missing separation date and potential suspension of benefits
- Month four – Final notification of missing separation date and advising benefits will be suspended until separation date is reported

Employers must immediately report the separation date upon notification to avoid benefit suspension for the retiree

# Not Separated

If the member is not separated from employment with your agency, they may be illegally retired

Notify CalPERS immediately if this is your situation and we will work with our benefits team to cancel their retirement

# Permanent Separations Questions

# CalPERS Employer and Member Education Resources

Vernon Thomson

Customer Education & Outreach Division



# Two Types of Education



Employer Education



Member Education

# Employer Education Class Types

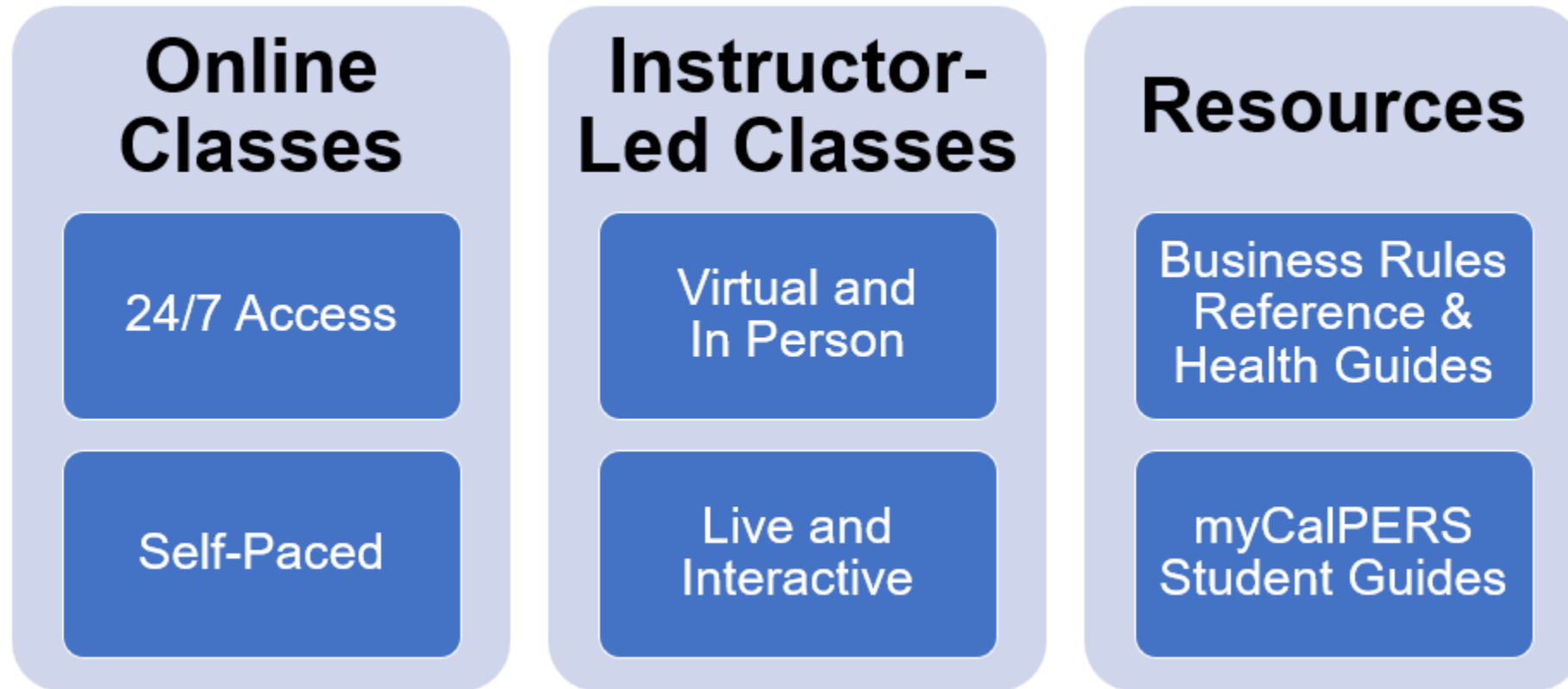
## Business Rules

- Laws
- Regulations

## myCalPERS

- Navigation
- Transactions

# Employer Education Delivery and Resources



# Business Rules Classes

## Business Rules In-Person or Virtual Instructor-Led Training

Class Day	Class Time	Delivery Method	Topic
Day 1	1:00–4:00 p.m.	In Person or Virtual	Business Rules for School Employers
Day 2	8:30–11:30 a.m.	Virtual	Business Rules for Public Agency Employers
Day 2	9:00 a.m.–12:00 p.m.	In Person	Business Rules for Public Agency Employers
Day 2	1:00–3:30 p.m.	In Person or Virtual	Business Rules: Health for Public Agency and School Employers
Day 3	8:30–10:00 a.m.	Virtual	Advanced Compensation
Day 3	9:00–10:30 a.m.	In Person	Advanced Compensation
Day 3	10:30 a.m.–12:00 p.m.	Virtual	Advanced Membership
Day 3	11:00 a.m.–12:30 p.m.	In Person	Advanced Membership

State Business Rules classes are offered periodically on day three of training or by request.

# myCalPERS Classes

## myCalPERS In-Person or Virtual Instructor-Led Training

Class Day	Class Time	Delivery Method	Topic
Day 1	8:30–11:30 a.m.	In Person or Virtual	myCalPERS Health Enrollment
Day 1	12:30–3:00 p.m.	In Person	myCalPERS Retirement Enrollment
Day 1	1:00–3:30 p.m.	Virtual	myCalPERS Retirement Enrollment
Day 2	8:30–11:00 a.m.	In Person or Virtual	myCalPERS Payroll Reporting
Day 2	12:00–2:30 p.m.	In Person	myCalPERS Payroll Adjustments
Day 2	1:00–3:30 p.m.	Virtual	myCalPERS Payroll Adjustments
Day 3	8:30–10:00 a.m.	In Person or Virtual	Employer Reports (Cognos)
Day 3	1:00–3:00 p.m. (every other month)	Virtual	myCalPERS System Access Administration

# Employer Sponsored Trainings

Tailored trainings based on your agency's contract and needs  
myCalPERS and business rules training in-person or virtually  
Flexible scheduling

# Circular Letters

## Circular Letters

Browse or search Circular Letters from 1996 to present. You can also subscribe to [Employer Bulletins](#) to receive email notifications when new Circular Letters are posted.

Show  entries

Letter No.	↕	Subject	↕	Audience	↕	Date	↕
<a href="#">200-031-25</a>		2025-26 Fees for the State Social Security Administrator Program		<ul style="list-style-type: none"> <li>Public Employers With an Existing Section 218 Agreement</li> </ul>		6/30/2025	
<a href="#">200-030-25</a>		2025-26 Public Agency 1959 Survivor Monthly Premiums		<ul style="list-style-type: none"> <li>All Public Agency Employers</li> </ul>		6/10/2025	
<a href="#">200-029-25</a>		2025-26 School 1959 Survivor Monthly Premiums		<ul style="list-style-type: none"> <li>All School Employers</li> </ul>		6/10/2025	
<a href="#">200-028-25</a>		2025-26 State 1959 Survivor Monthly Premiums		<ul style="list-style-type: none"> <li>All State Employers</li> </ul>		6/10/2025	
<a href="#">200-027-25</a>		2025-26 School Employer and Employee Contribution Rates		<ul style="list-style-type: none"> <li>All Schools Employers</li> </ul>		6/6/2025	
<a href="#">200-026-25</a>		2025-26 PEPRA Member Contribution Rates		<ul style="list-style-type: none"> <li>All Public Agency Employers</li> </ul>		6/6/2025	
<a href="#">200-025-25</a>		2025-26 State Employer and Employee Contribution Rates		<ul style="list-style-type: none"> <li>State Employers</li> </ul>		6/6/2025	

# Reference, Health, and Student Guides

[Home](#) [Members](#) [Retirees](#) [Employers](#) [Investments](#)  [Search](#)

[Home](#) > [Employers](#) > [Policies & Procedures](#) > [Reference & Health Guides](#)

## Reference & Health Guides

The reference and health guides are designed to help you in your business and health transactions with CalPERS. We encourage you to make the applicable guides available to all staff who process enrollments or convey retirement and/or health benefit information.

### Reference Guides

- [Public Agency & Schools Reference Guide \(PDF, 3 MB\)](#)
- [State Reference Guide \(PDF, 2.2 MB\)\\*](#)

### Health Benefits Guides

- [Public Agency & Schools Health Benefits Guide \(PDF\)](#)
- [State Health Benefits Guide \(PDF\)](#)

### Retirement Resource Guides

- [Disability Retirement / Industrial Disability Retirement Resource Guide \(PDF\)](#)

### Policies & Procedures

- [Affordable Care Act \(ACA\) Guidance](#)
- [Circular Letters](#)
- [Compliance in Compensation Reporting](#)
- [Employment Certification](#)
- [Health Procedures](#)
- [Pension Reform Impacts](#)
- [Reference & Health Guides](#)

### Resources

- [myCalPERS Student Guides & Resources](#)
- [Public Employees' Retirement Law \(PERL\)](#)

### Forms & Publications



# Member Resources

Member Education Center

Member Education Bulletin

CalPERS Benefits Educational Events (CBEEs)

myCalPERS Registration

Regional Office Appointments

# Education Center

[Home](#) > [Education Center](#)

## Education Center

Our Education Center has information on CalPERS free online and instructor-led classes for our members based on career stage, as well as our employers to help them conduct business with CalPERS. For members, our CalPERS Benefits Education Events (CBEEs) are held regularly throughout the state and online.

For our employers, our instructor-led and self-paced online employer classes are designed to help you understand your business-related reporting responsibilities. You'll learn how to effectively use myCalPERS and avoid late fees and administrative costs. In addition, employers are invited to our CalPERS Educational Forum offered each fall.

You can also find information on how to sign up for and use myCalPERS.



### Why Attend a CalPERS Benefits Education Event (CBEE)?

Get to know your benefits at a CBEE to stay on track toward a healthy retirement.

[Learn More](#)

### Member Education

Learn how to maximize your benefits and plan for retirement by attending our classes and events in-person and virtually.

[Member Education](#)

### Employer Education


Discover trainings and events for new and current employers to navigate policies and processes for a successful partnership with CalPERS.

[Employer Education](#)

### Using myCalPERS

Access real-time details about your CalPERS account and conduct business 24/7. Take advantage of retirement estimates, service credit purchases, health transactions, educational opportunities, and more.

# Member Education Bulletin



[About CalPERS Member Education Bulletin](#)

CalPERS Member Education Bulletins provide information regarding the latest events for members. You'll learn about our events, webinars, and instructor-led classes.

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July 1, 2025

## Member Education Bulletin

### Upcoming Educational Opportunities

**Take Charge Early – CalPERS Members: Early Career Basics Premieres July 17**

Are you or someone you know in the early stages of your career? Now is the perfect time to understand your CalPERS benefits and take control of your financial journey.

Our newest video, *CalPERS Members: Early Career Basics*, is designed to help you lay the groundwork for a secure retirement. You'll learn what your CalPERS benefits include, the different sources of retirement income, and tools and resources available to support you along the way.

Whether you're just getting started or looking to plan ahead, this video will give you the knowledge and confidence to make informed decisions throughout your career.

**Date:** Thursday, July 17, 2025  
**Location:** Online  
**Time:** 12:00 p.m.  
**Registration:** Free

# CalPERS Benefits Education Event (CBEE)

[Home](#) [Members](#) [Retirees](#) [Employers](#) [Investments](#)

[Home](#) > [Education Center](#) > [Member Education](#) > [CalPERS Benefits Education Events](#) > **CalPERS Benefits Education Event Details**

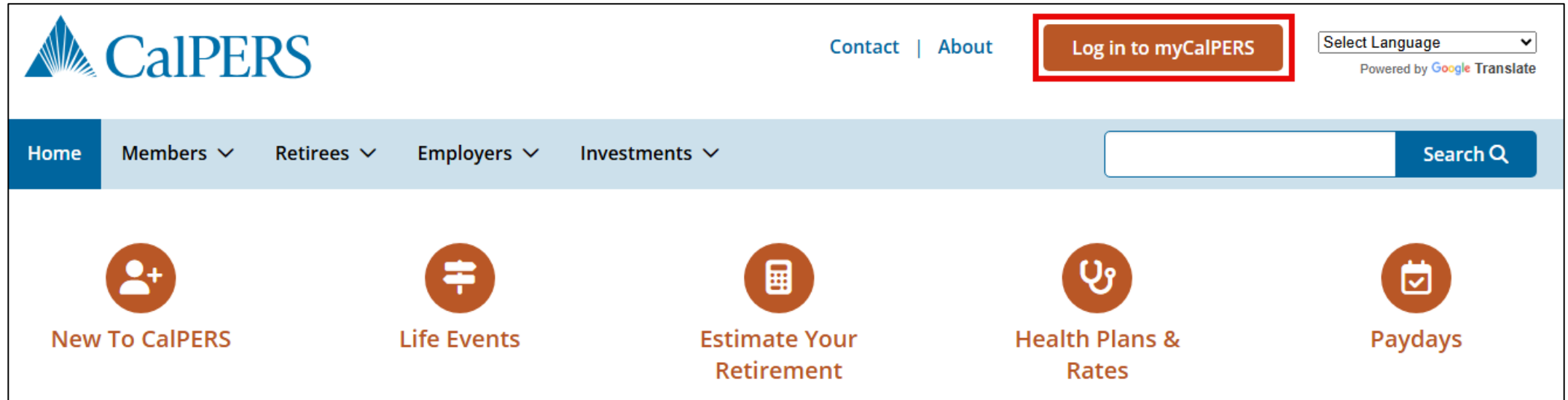
## CalPERS Benefits Education Event Details

### Upcoming Events

Our next in-person CalPERS Benefits Education Event (CBEE) will occur in early 2026, but don't miss out on our next virtual event Wednesday, August 13 and Thursday, August 14. Registration will open in mid-July.

For reminders about upcoming events and all our educational resources, [subscribe](#) to our Member Education Bulletin.

# myCalPERS Registration



# Regional Office Appointments (1 of 2)

Help your employees prepare for a CalPERS Regional Office appointment

Encourage early prep

- Ask them to register and log in to myCalPERS
- Review: retirement estimates, service credit, health information, pending items
- Encourage them to explore available educational classes and enroll in one that fits their needs
- Remind them to review their confirmation letter for key details and instructions

# Regional Office Appointments (2 of 2)

## Clarify their goals

- What needs are they trying to address
- Help them write down key questions in advance

## Day of essentials

- Valid government issued photo ID
- Cell phone
- myCalPERS login credentials
- Any forms or paperwork related to their specific request (e.g., service credit, health enrollment, retirement estimate and/or application)

# Contact Us

Email our employer educators:

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



# CalPERS Employer and Member Education Resources Questions

# myCalPERS System Registration

Brad Hanson

Employer Account Management Division

# Roundtable

Brad Hanson  
Employer Account Management Division

Thank you