

myCalPERS State Tier Election Transaction Processing

Student Guide

August 28, 2026



Introduction

This guide will assist State Controller’s Office (SCO) and non-central state agencies with reviewing and processing Retirement System Transaction (R01) request(s) in myCalPERS. R01 forms advise agencies when a CalPERS member has elected to change their tier status so that their contribution rate can be updated.

Disclaimer

- Business partner and participant information has been masked in this procedure guide.
- We strive to provide accurate information within this guide; however, the Public Employees’ Retirement Law is the authoritative source for CalPERS policies.

System Access

You must have the Business Partner Tier Transaction Reviewer access role to process the transactions in this student guide.

SCO team members must have myCalPERS access through the State of California to review and process state tier elections transactions.

If you are unable to process these scenarios, contact your agency’s system access administrator to update your myCalPERS access.

Training Opportunities

Follow these steps to ensure your CalPERS education experience is comprehensive and well-structured:

1. Take [Business Rules](#) classes.
2. Review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide.
3. Attend a [myCalPERS](#) instructor-led class.
4. Review the [self-paced online classes](#).

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

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Notifications

SCO

Every Monday, you will receive an email with a summary of First Tier Future requests in Submitted, In-Progress, and Resubmitted status.

Note: Past Tier and First Tier All R01s will continue to be submitted but will not be included in the weekly email summaries.

Non-Central State Agencies

To designate a contact who will receive notifications of new State Tier Transaction (R01) Requests, you must have a *primary* Business Partner Tier Transaction Reviewer contact type. Your agency's system access administrator can refer to the steps in the [myCalPERS System Access Administration \(PDF\)](#) student guide to add and maintain agency contacts.

You will receive an email when a new request becomes available.

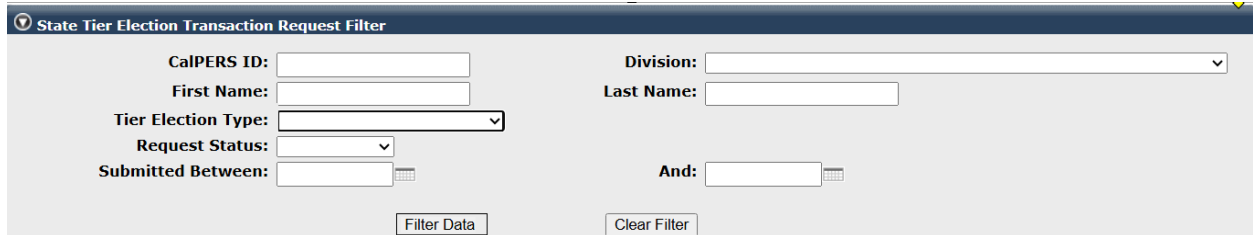
Request Statuses

- **Submitted:** CalPERS has submitted the request to an agency, but the agency has not reviewed or acted on it.
- **In-Progress:** Agency has reviewed the request but has not acted on it.
- **Unable to Process:** Agency has returned the request to CalPERS due to missing or insufficient information.
- **Completed:** Agency has processed the request.
- **Resubmitted:** CalPERS has responded to a request with an Unable to Process status by agency, requesting they process the original submission as is.
- **Withdrawn:** CalPERS has withdrawn the request, and no further action is required by the agency.
- **Rejected:** CalPERS has accepted a returned request with an Unable to Process status from an agency and will submit a new request with updated information.

Scenario 1: Review and Take Action on a State Tier Transaction Request

System Logic

You can use the State Tier Election Transaction Requests Filter section to sort and filter the list.



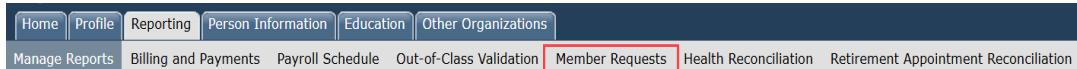
The filter form includes fields for CalPERS ID, First Name, Last Name, Division (dropdown), Tier Election Type (dropdown), Request Status (dropdown), Submitted Between (date range), and an And operator. It also has Filter Data and Clear Filter buttons.

Step Actions (12 steps)

Review a State Tier Transaction Request

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

Step 2 Select the **Member Requests** local navigation link.



Step 3 Select the **State Tier Election Transaction Requests List** left side navigation link.



Step 4 Within the State Tier Election Transaction Requests section, locate the member within the list.



Submit Date	Request Status	First Name	Middle Initial	Last Name	CalPERS ID	Tier Election Type	Effective Date	Division
04/29/2026	In-Progress	Paula	c.	Pers	0123456789	First Tier Future (FTF)	04/01/2026	State Agency
05/08/2026	Submitted	Joey	J.	Jones	9876543210	First Tier All (Past and Future)	05/01/2026	State Agency
05/08/2026	Submitted	Sam	S.	Smith	2345678901	First Tier Future (FTF)	05/01/2026	State Agency

Note: Within the State Tier Election Transaction Requests List section, the columns can be dragged and dropped to reorganize the order. The column order will return to its default order after you navigate away from the page.

Step 5 Select the **Status** link for the request you wish to review or complete.

State Tier Election Transaction Requests List									
Search:									
Submit Date	Request Status	First Name	Middle Initial	Last Name	CalPERS ID	Tier Election Type	Effective Date	Division	
04/29/2026	In-Progress	Paula	C.	Pers	0123456789	First Tier Future (FTF)	04/01/2026	State Agency	

Note: By default, only requests with a Submitted, In-Progress, or Resubmitted status display on this page. At the top, use the Status filter to display Completed, Withdrawn, Unable to Process, and Rejected requests.

Step 6 Do you need to take an action on this request?

Yes: Continue to step 7.

No: You have completed this scenario.

Complete or Return a State Tier Transaction Request

Step 7 What would you like to do with this request?

Complete: You are completing the request as provided. Continue to step 8.

Return: You are unable to process the request with the information provided. Skip to step 10.

Complete

Step 8 Within the Certification section, select the certification check box.

Certification

☐ By completing this request, I certify the following:

1. I am an authorized representative of State of California, and I am qualified to complete this request;

2. I acknowledge that the information provided in the Retirement System Transaction form will be processed in a timely manner or a receivable may be needed;

3. I understand this form provides the business partner with the information required to accurately update the retirement contributions for the participant's tier conversion;

4. I understand the business partner I am representing is accepting any employer liability associated with this tier conversion.

Completed By:

Phone:

Email:

Completion Date:

Complete Request

Step 9 At the bottom right, select the **Complete Request** button.

You have completed this scenario.

[Return](#)

Step 10

Select the caret to expand the Unable to Process section.

Unable to Process

▼ Certification

☐ By completing this request, I certify the following:

1. I am an authorized representative of State of California, and I am qualified to complete this request;
2. I acknowledge that the information provided in the Retirement System Transaction form will be processed in a timely manner or a receivable may be needed;
3. I understand this form provides the business partner with the information required to accurately update the retirement contributions for the participant's tier conversion;
4. I understand the business partner I am representing is accepting any employer liability associated with this tier conversion.

Completed By:
Phone:
Email:
Completion Date:

Complete Request

Step 11

Within the Unable to Process section, do *either* of the following:

- Select the **Unable to Process Reason** radio button, and then select the check boxes(es) for the field(s) that are incorrect.
- Complete the Unable to Process Note field with details as to what is insufficient or inaccurate.

Unable to Process

Please select a reason why this request cannot be completed. Only required if unable to process the request.

Unable to Process Reason: * ☐ Information provided does not match our records (incorrect data).

Select the field names that are incorrect:

☐ Name	☐ Employment Information	☐ Retirement System
☐ Membership Date	☐ Survivor's Coverage	☐ OASDI Coverage
	☐ Account Code	☐ Retirement Rate
	☐ Safety Member	☐ Optional Member
	☐ Birth Date	☐ Effective Date

Unable To Process Note: *

Marked as 'Unable To Process' By:
Phone:
Email:
Unable To Process Date:

Step 12

At the bottom right, select the **Unable to Process Request** button.

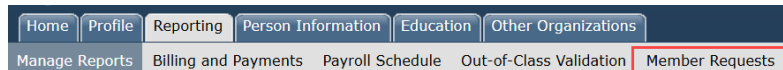
You have completed this scenario.

Scenario 2: Print a State Tier Transaction Request

Step Actions (6 steps)

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

Step 2 Select the **Member Requests** local navigation link.



Step 3 Select the **State Tier Election Transaction Requests List** left-side navigation link.



Step 4 Within the State Tier Election Transaction Requests section, locate the member within the list.

Step 5 Select the **Status** link for the request you wish to review or complete.

State Tier Election Transaction Requests List								
Search:								
Submit Date	Request Status	First Name	Middle Initial	Last Name	CalPERS ID	Tier Election Type	Effective Date	Division
04/29/2026	In-Progress	Paula	C.	Pers	0123456789	First Tier Future (FTF)	04/01/2026	State Agency

Note: By default, only requests with a Submitted, In-Progress, or Resubmitted status display on this page. At the top, use the Status filter to display Completed, Withdrawn, Unable to Process, and Rejected requests.

Step 6 Select the **Print** link.

*Required Fields [Print](#)

State Tier Election Transaction Request Type	
Program ☒ Service Credit Purchase (SCP)	Tier Election Type:* ☒ First Tier Future (FTF)
Area:* ☐ Member Election Team (MET)	☐ First Tier Past
	☐ First Tier All (Past and Future)
	☐ Second Tier Future
	☐ Second Tier Past

You have completed this scenario.

CalPERS Resources

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

- Take the [self-paced online classes](#) below (available 24 hours a day) by selecting the **Education** tab in myCalPERS:
 - myCalPERS Employment Certification: Certify a Leave of Absence Service Credit Purchase Request
 - myCalPERS Employment Certification: Service Credit Purchase & Arrears
- [Employment Certification](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Employment Certification
- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > Employer Education > myCalPERS Student Guides & Resources (*under Resources heading*)
- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > Employer Education > Business Rules & myCalPERS Classes (*under Resources heading*)
- [System Enhancements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Enhancements
- [Public Agency & Schools Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [State Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Reference Guide (PDF)
- [Circular Letters - CalPERS](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations> Public Employees' Retirement Law (PERL)
- [myCalPERS Reports Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Reports Catalog

CalPERS Contacts

Email

- To contact the [Service Credit Purchase Elections](#) team for assistance with reviewing and taking actions on (First Tier Future (FTF), First Tier All (Past and Future) and First Tier Past state tier election transaction (R01) requests, send an email to **MAMD-SCP_Elections@calpers.ca.gov**.
- To contact the [Employer Educators](#) for questions and training inquiries, send an email to **calpers_employer_communications@calpers.ca.gov**.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, send an email to **ert@calpers.ca.gov**.

Phone or Fax

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

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

Submit Inquiry

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