

# CALPERS PENSION ANALYTICS DASHBOARD USER MANUAL FOR CALPERS.CA.GOV

Version 2 – Release Date October 2025

## Purpose of the Funded Ratio Scatterplot

The purpose of the funded ratio scatterplot is to allow stakeholders to see how the CalPERS pension plans maintained by different public agencies compare to one another.

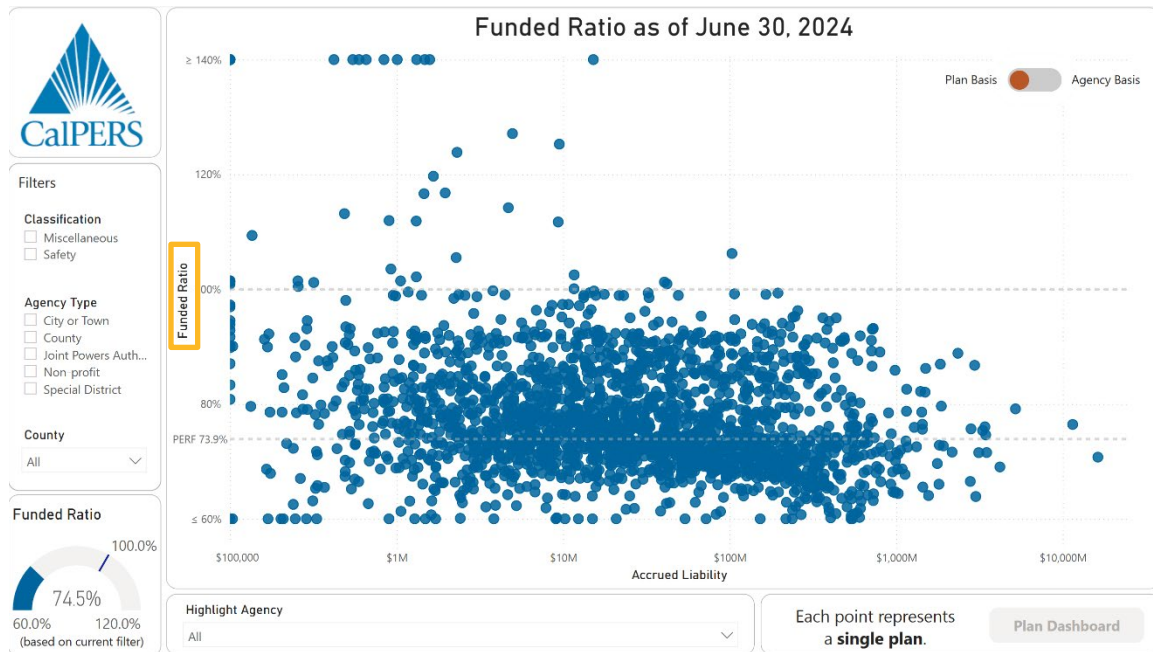
The tool allows you to:

- Filter the data by classification (Miscellaneous or Safety), agency type, and/or county
- Highlight one or more agencies
- Hover over any data point to see more detail, such as the Unfunded Accrued Liability (UAL).
- Toggle between viewing a scatterplot of funded ratios on a plan or an agency basis
- Select any data point and active a button to navigate to the plan dashboard.

For a better user experience, view the tool on a desktop/laptop rather than a mobile device.

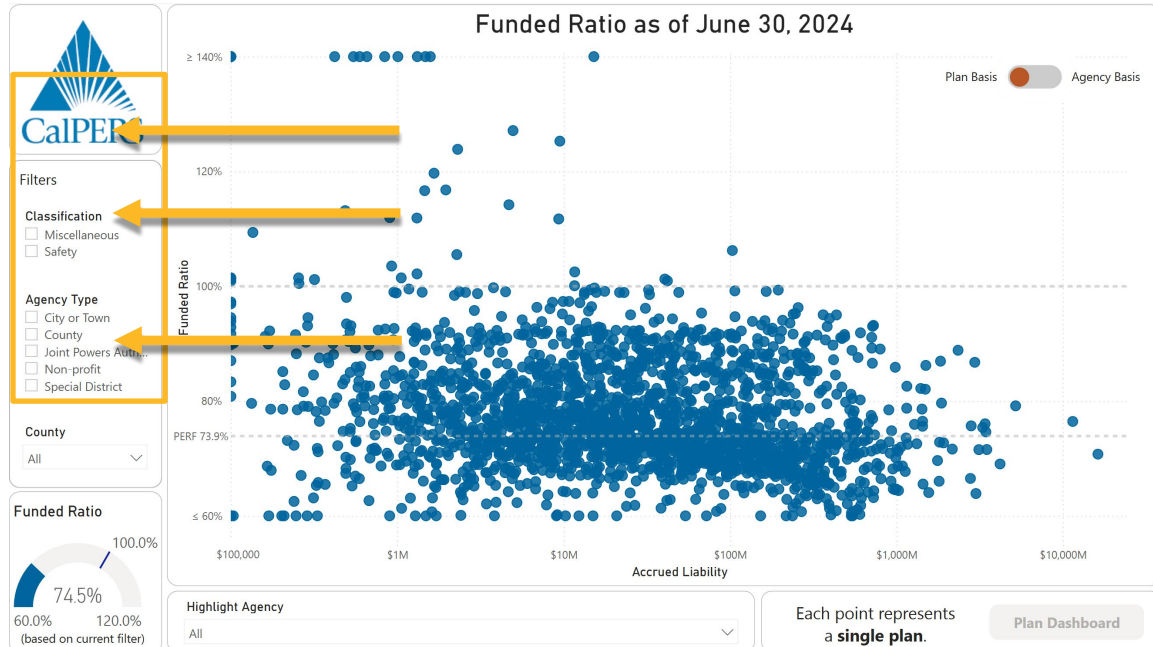
## Viewing Funded Ratios

When the page loads, one data point will be shown for every Miscellaneous plan as well as every Safety plan. If an agency receives separate valuation reports for different Safety categories, such as Police and Fire, there will be one data point for each. The default display will be on a “plan basis” where each data point represents **a single plan**.

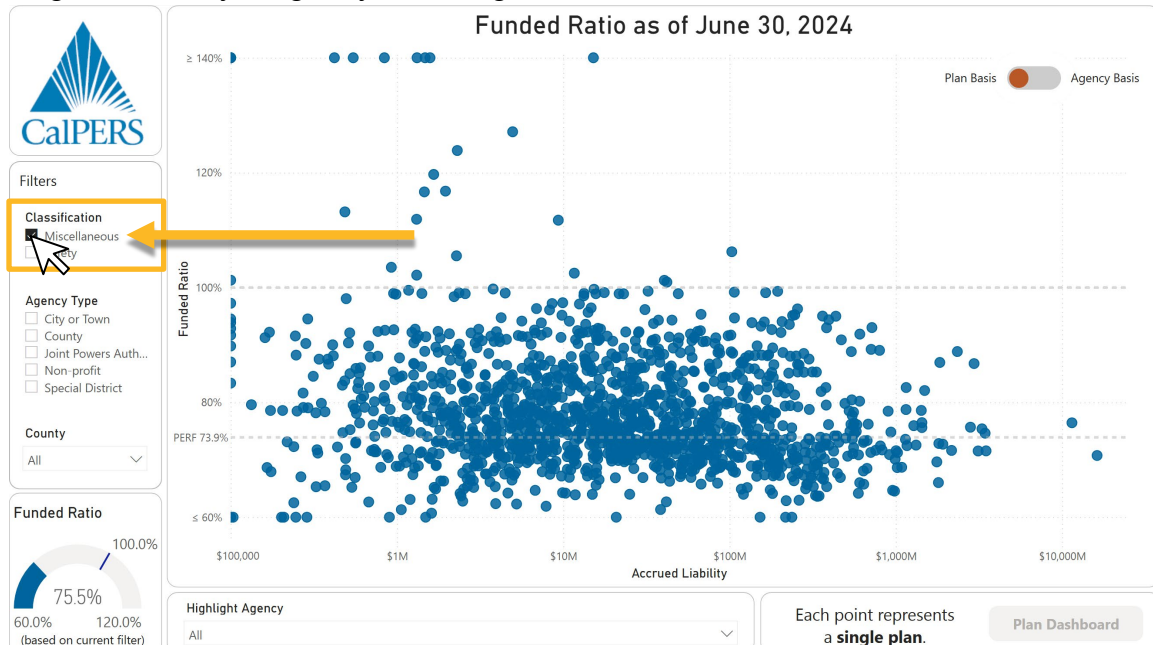


## Viewing Funded Ratios (continued)

Use the **Filters** on the left to focus on the peer group of interest based on **Classification**, **Agency Type** and **County**.

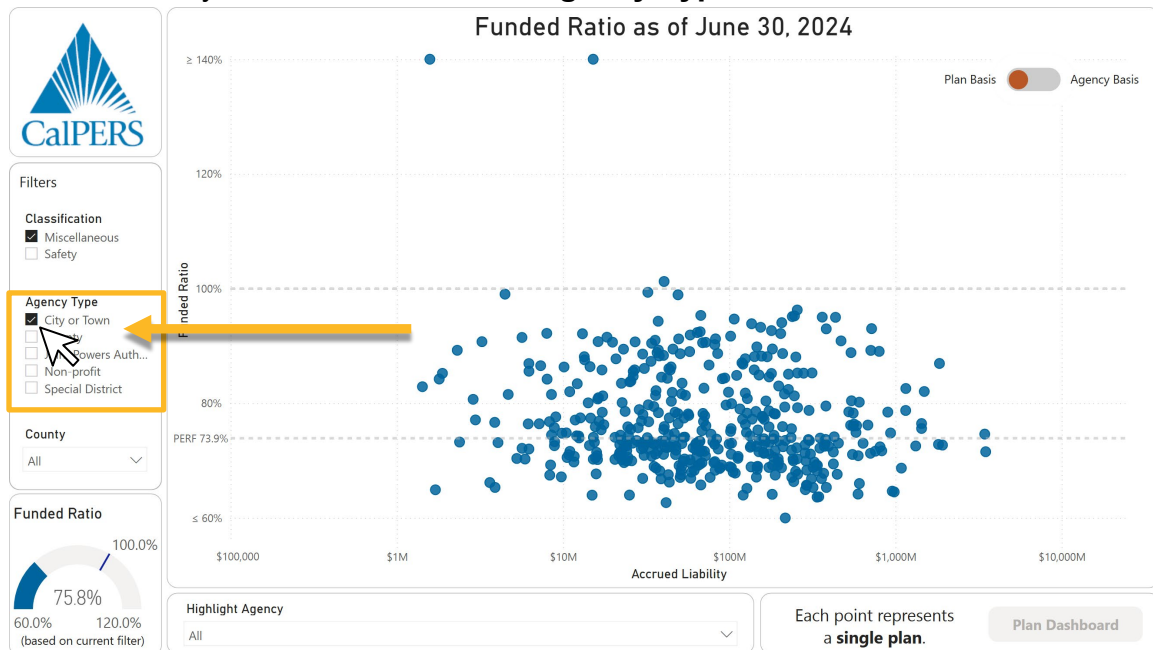


For example, to view only Miscellaneous plans for cities and towns in Los Angeles County, begin by checking the Miscellaneous filter under **Classification**.

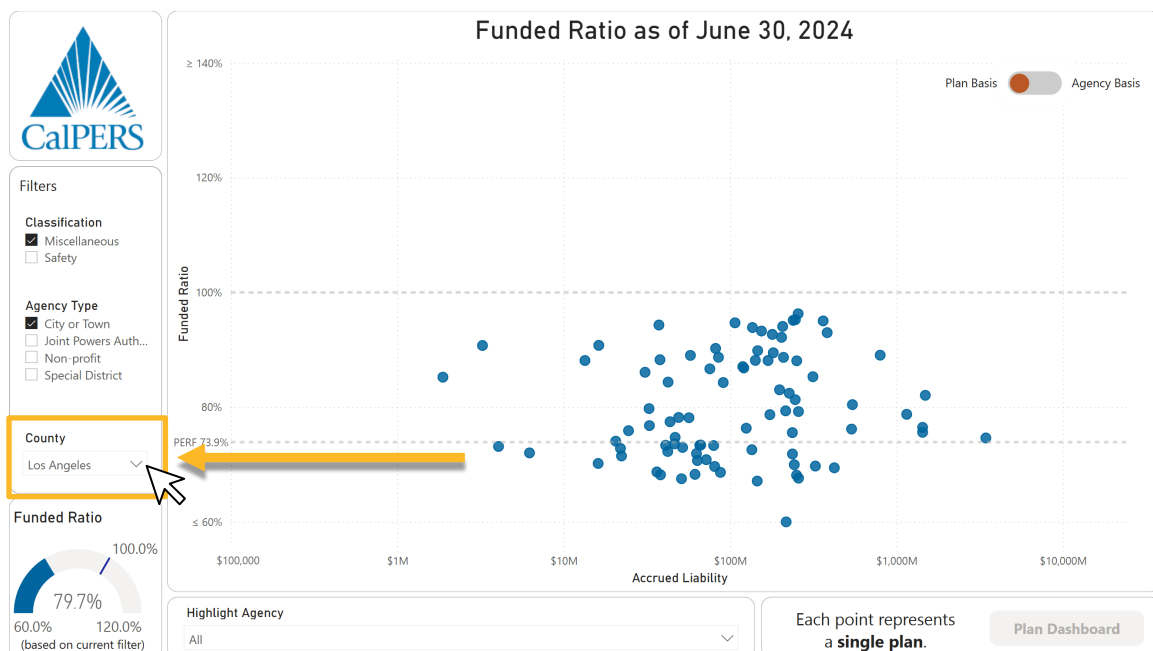


## Viewing Funded Ratios (continued)

Check the City and Town filter under **Agency Type**.



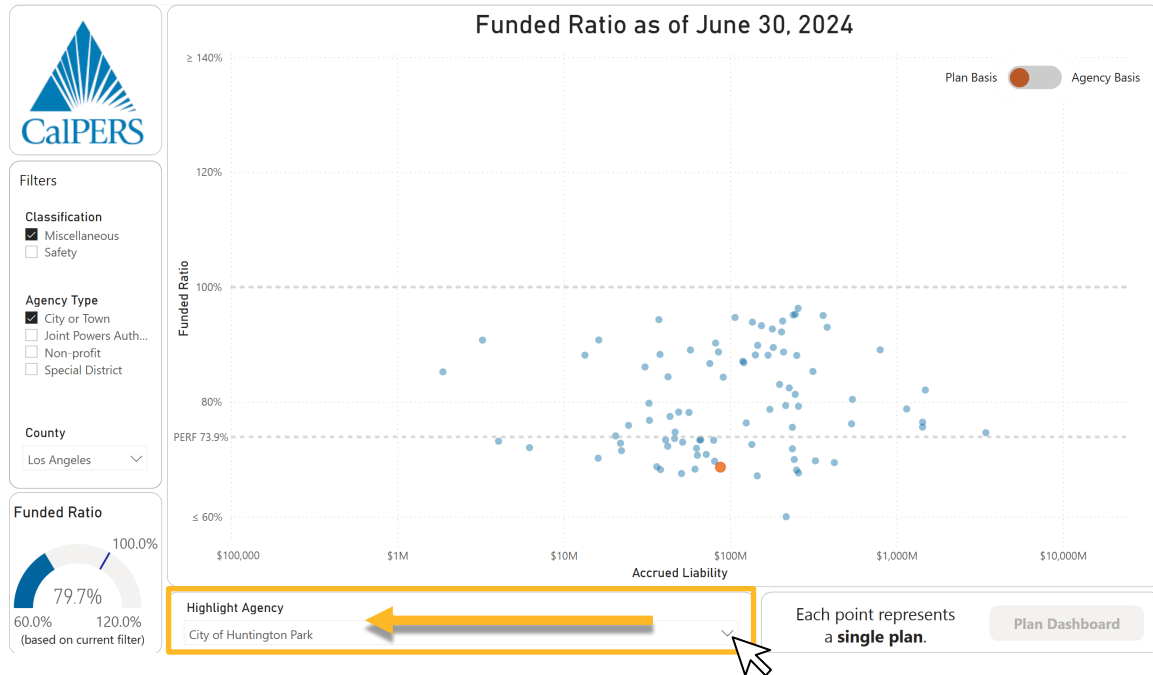
Open the **County** drop down list, check the Los Angeles filter and close the drop-down list.



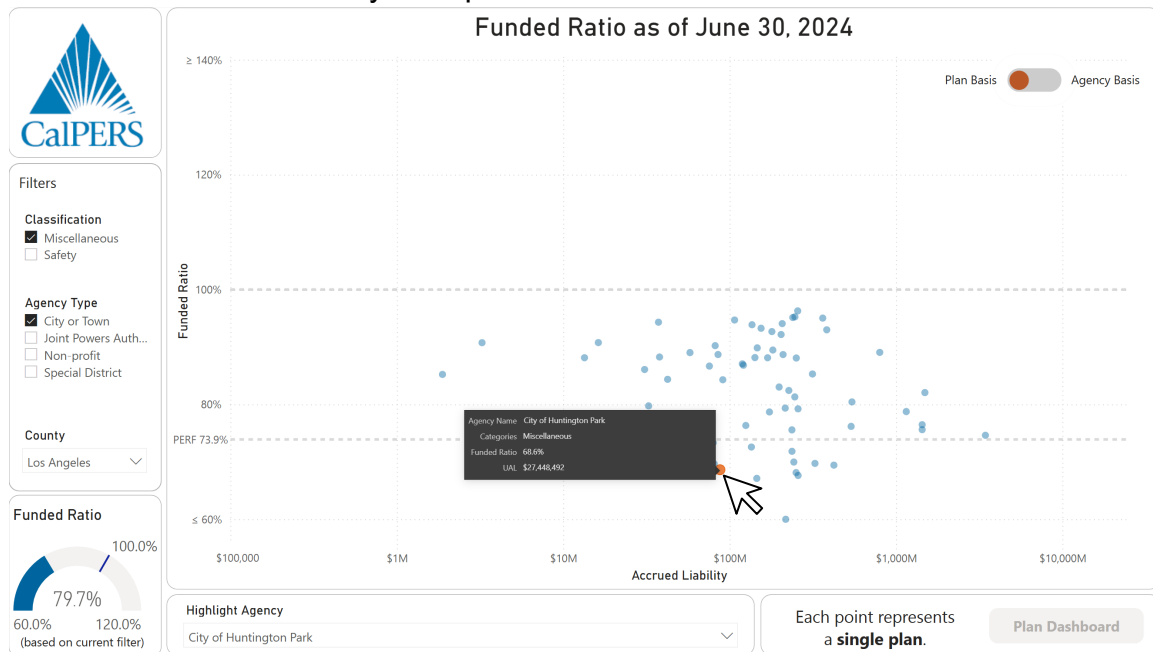
# CalPERS Pension Analytics Dashboard - User Manual

## Viewing Funded Ratios (continued)

To highlight specific agencies, open the **Highlight Agency** drop down list, check one or more agencies and close the drop-down list. The highlighted data points will appear in orange.

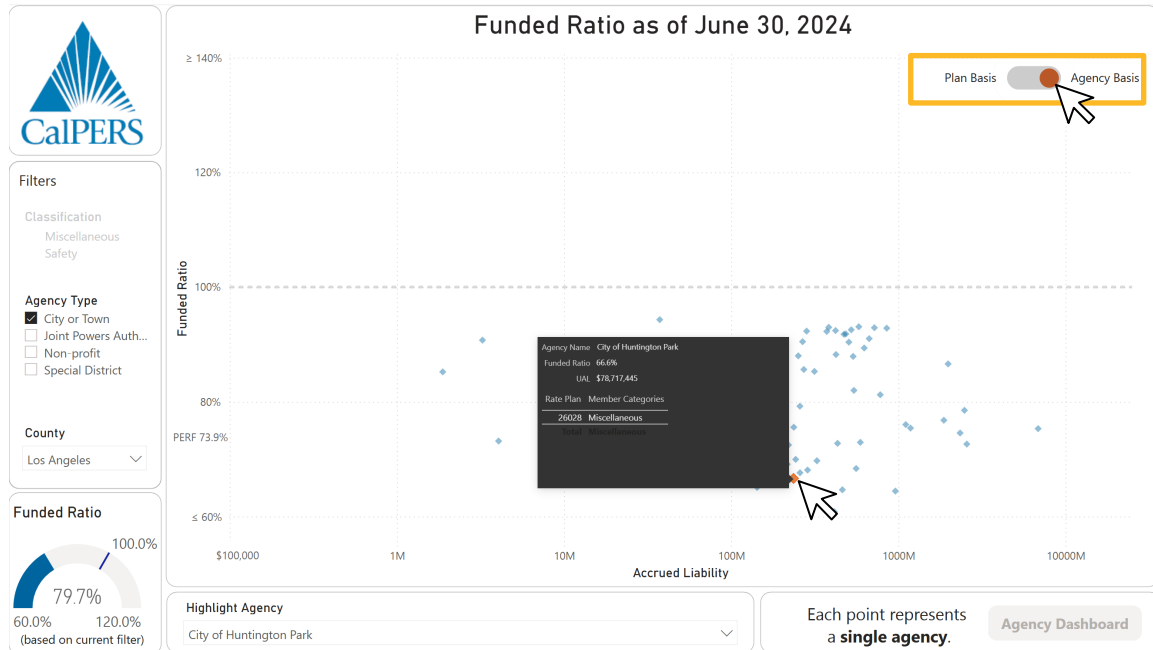


Hover the mouse over any data point for more information.

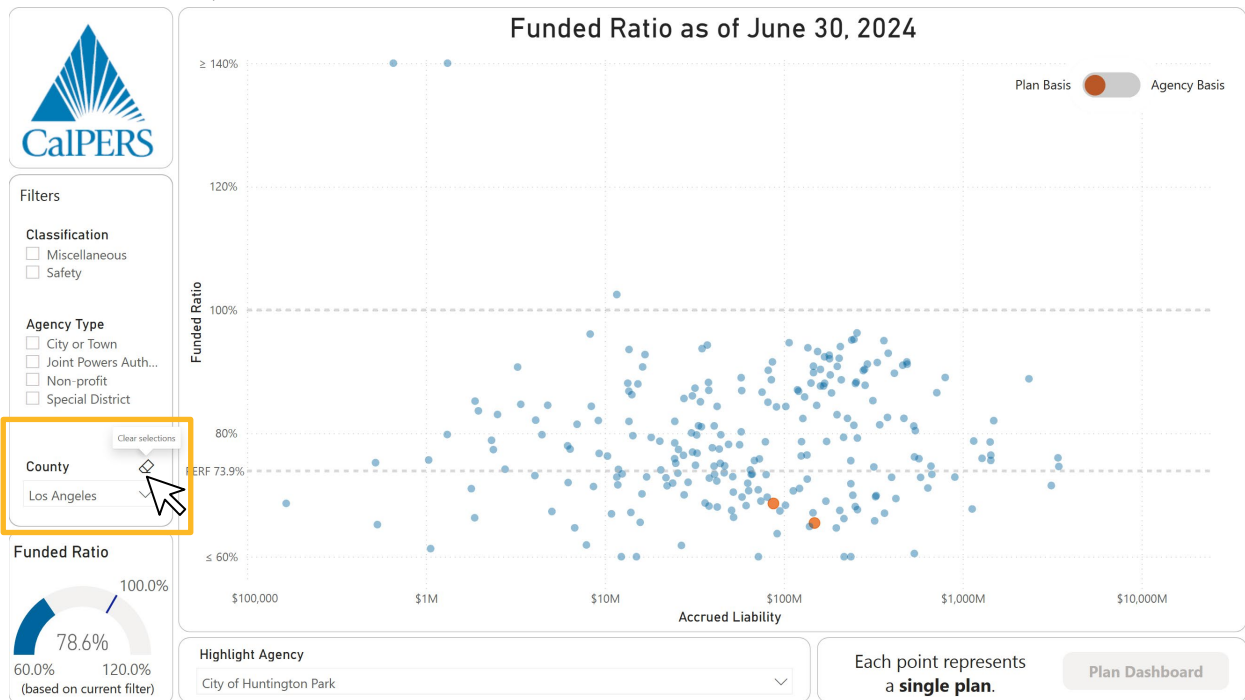


## Viewing Funded Ratios (continued)

To view results on an “agency basis” where each data point represents a **single agency’s** plans on an aggregated basis, check the **Agency Basis** toggle and hover the mouse over a data point.



To clear filters, click the eraser above each filter.



## Purpose of the Plan Dashboard

The purpose of the Plan Dashboard tool is to allow stakeholders to see information about a specific CalPERS pension plan.

The tool allows you to view the following information for a selected plan:

- Employer Normal cost rate
- Member contribution rate
- Funded status
- Member count
- Projected UAL payment

It also provides details via the following graphs:

- Funded ratio history – the plan's history is compared to the funded ratio history for all public agency plans.
- Funded status history – the plan's accrued liability is displayed alongside the plan's assets and surplus or UAL.
- UAL payments by Fiscal Year – the plan's UAL payments for each year, broken out into required payments and any Additional Discretionary Payments (ADP).

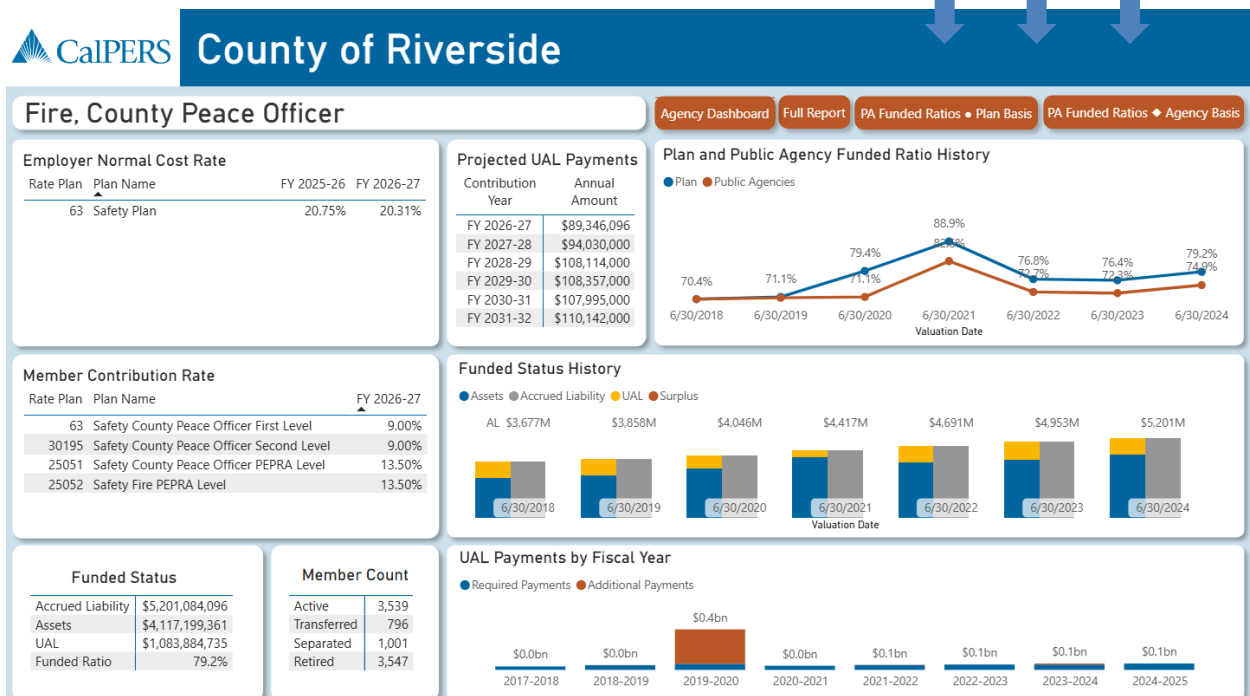
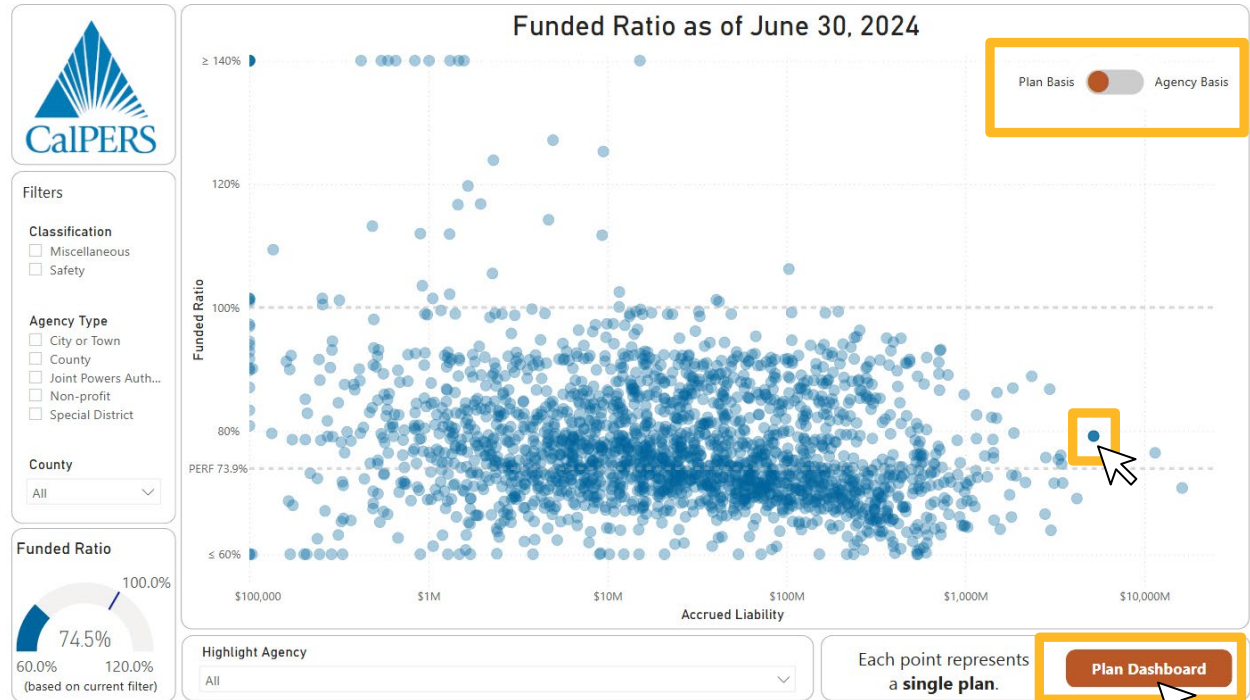
For a better user experience, view the tool on a desktop or laptop rather than a mobile device.



# CalPERS Pension Analytics Dashboard - User Manual

## Navigating to the Plan Dashboard

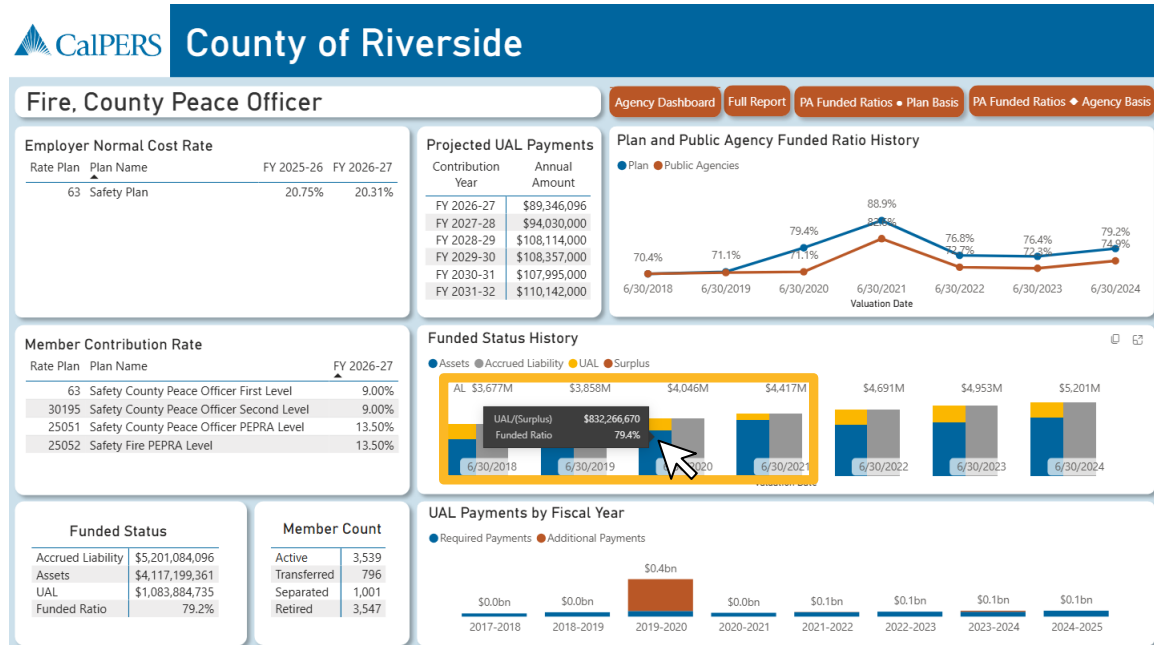
To navigate to the Plan Dashboard, open the **Funded Ratio Scatterplot**, ensure you are viewing it on the Plan Basis, select a plan to view, and click on **Plan Dashboard**.



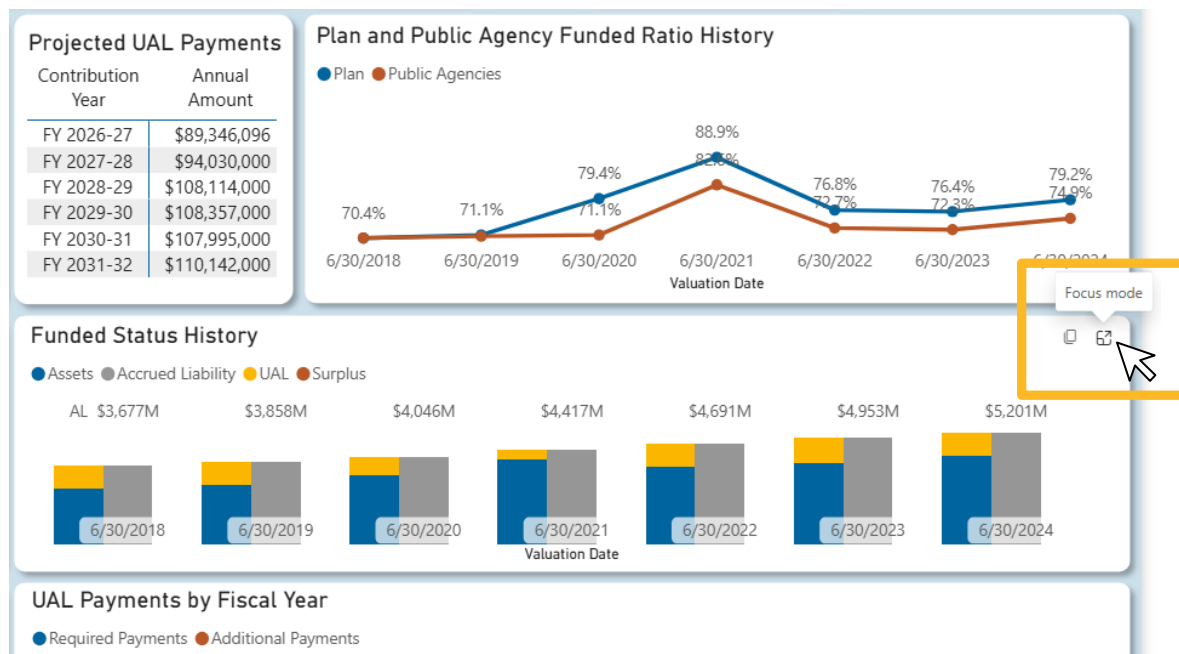
# CalPERS Pension Analytics Dashboard - User Manual

## Viewing the Plan Dashboard

To view more information in charts, hover your mouse over a specific year.

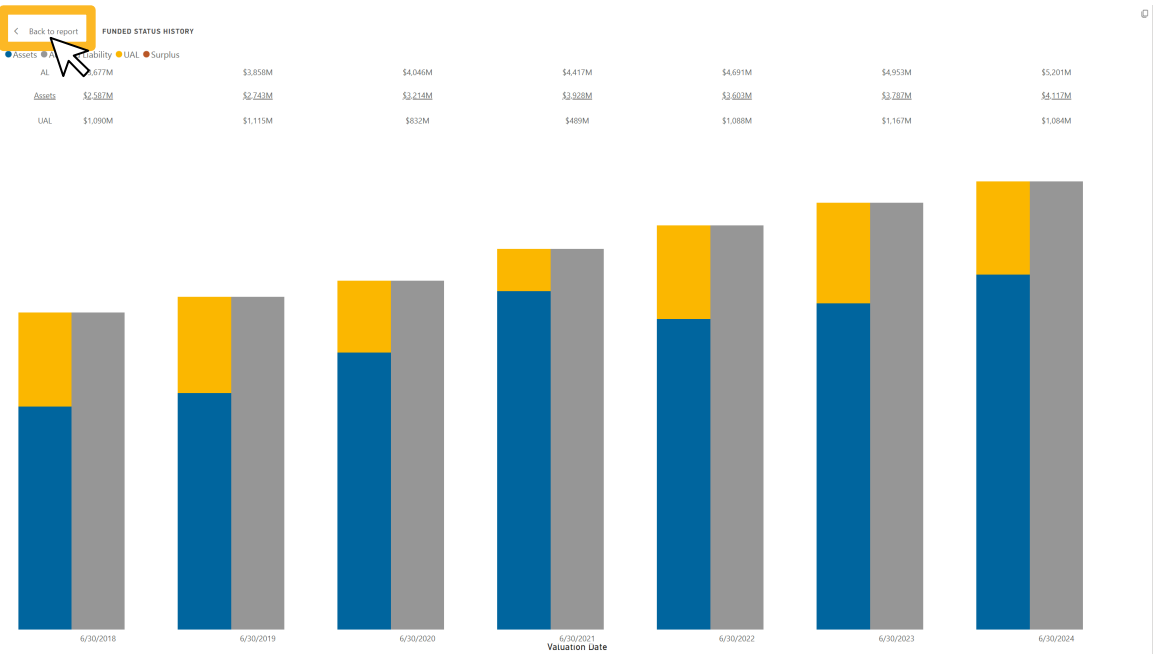


To view any of the tables or charts in **full size**, click on the **Focus Mode** button, located at the top right of each table or chart.



Viewing the Plan Dashboard (continued)

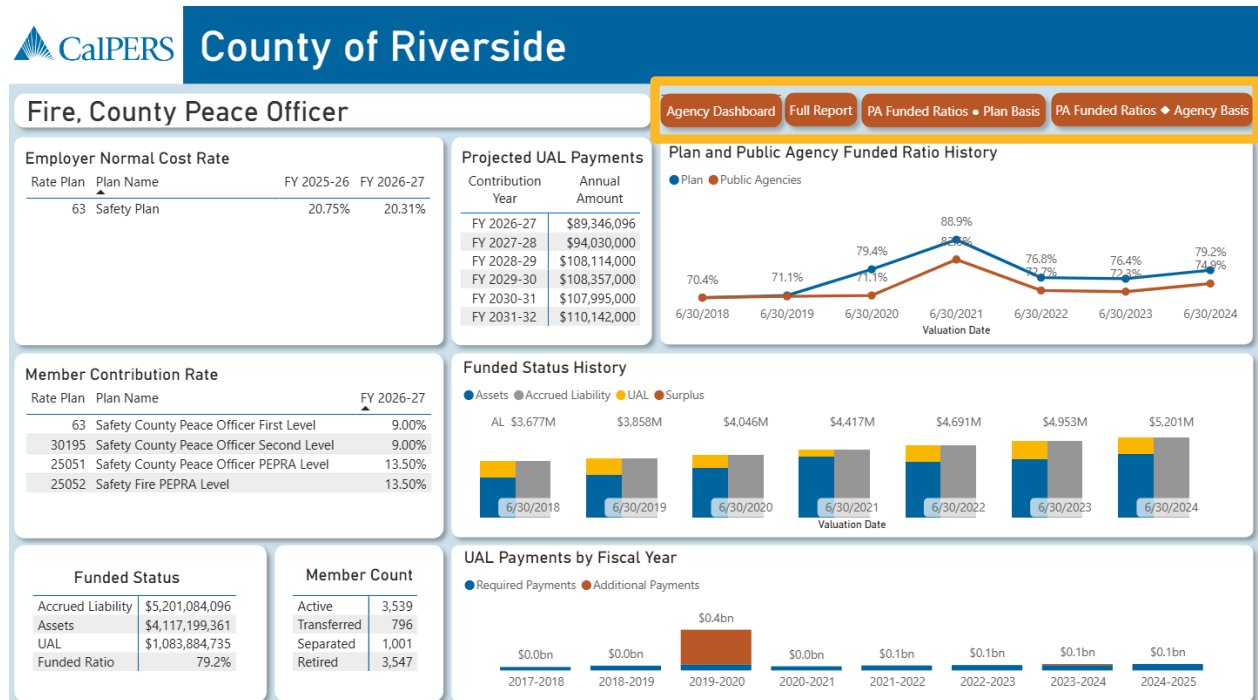
To return to the Dashboard, click on **Back to Report** on the top left.



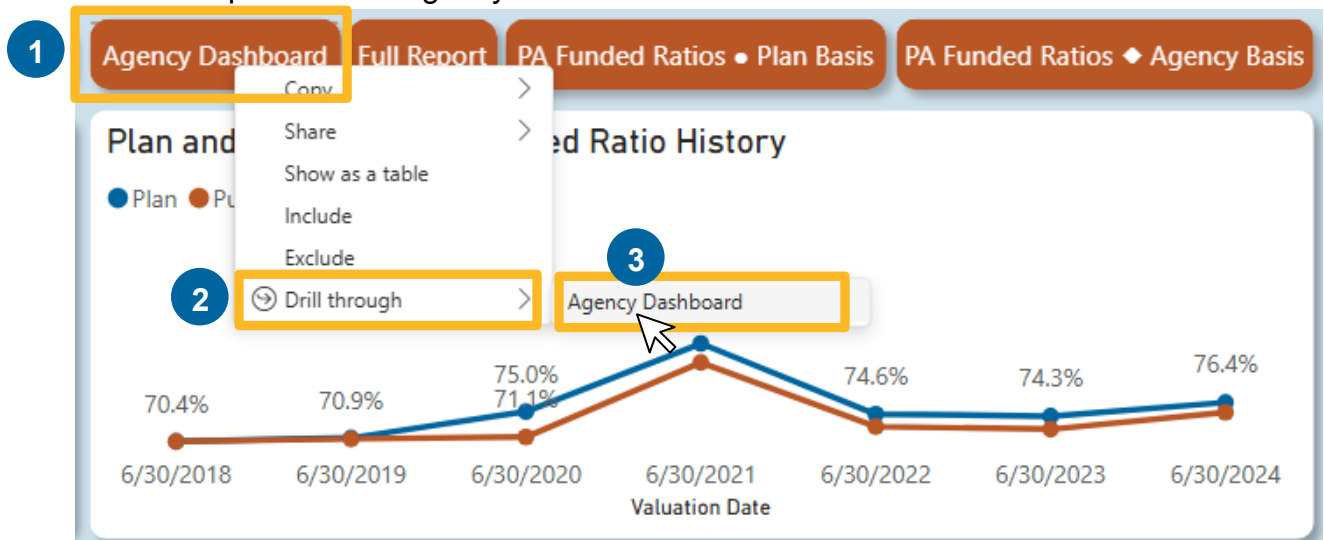
# CalPERS Pension Analytics Dashboard - User Manual

## Navigating from the Plan Dashboard

This dashboard's **navigation buttons** are located on the top right side.

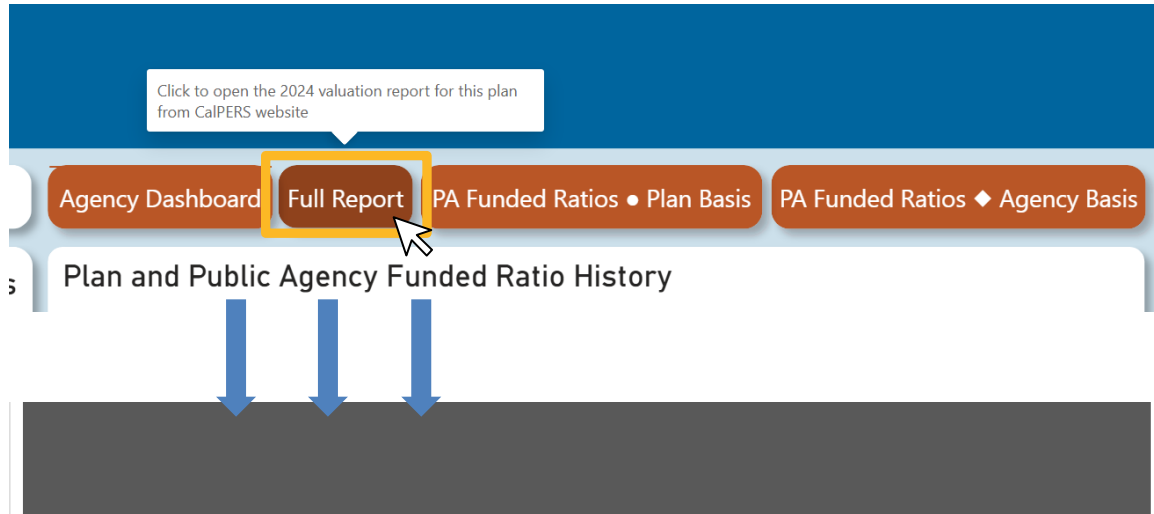


To go on to the **Agency Dashboard** for this plan, right click on the orange **Agency Dashboard** button, scroll to **Drill Through** and click on **Agency Dashboard**. This will take you to a page displaying similar information for all the retirement plans for an agency.



## Navigating from the Plan Dashboard (continued)

To view the **Actuarial Valuation Report**, click on the **Full Report** button. This will take you to the latest Actuarial Valuation Report posted on the CalPERS website for the plan.



### California Public Employees' Retirement System

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## Actuarial Valuation for the Safety Plan of the County of Riverside as of June 30, 2024

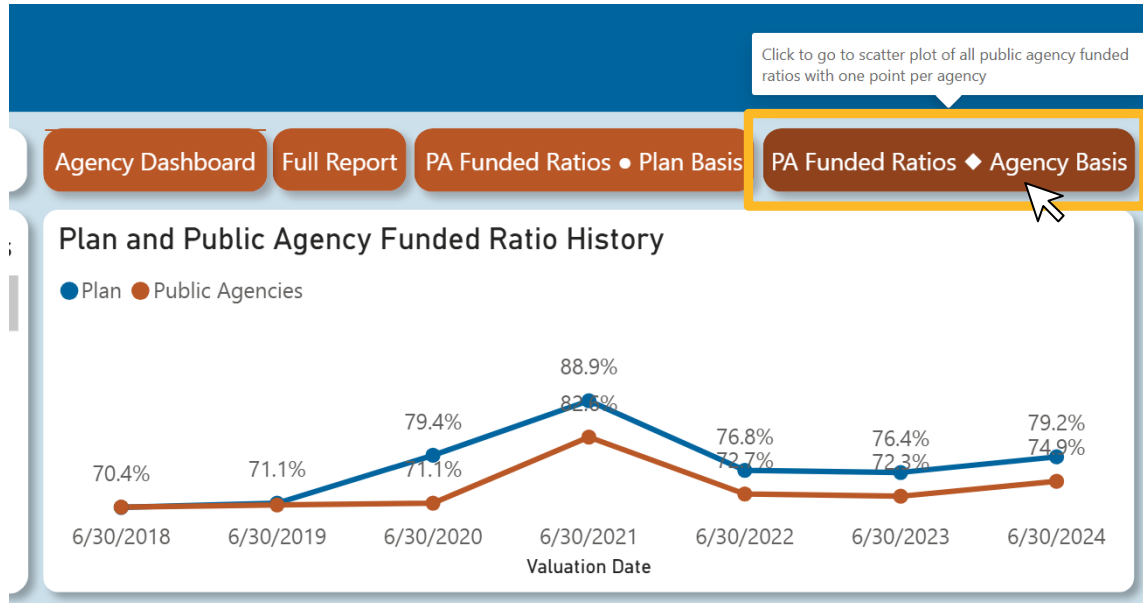
(CalPERS ID: 5982690295)  
(Rate Plan ID: 63)

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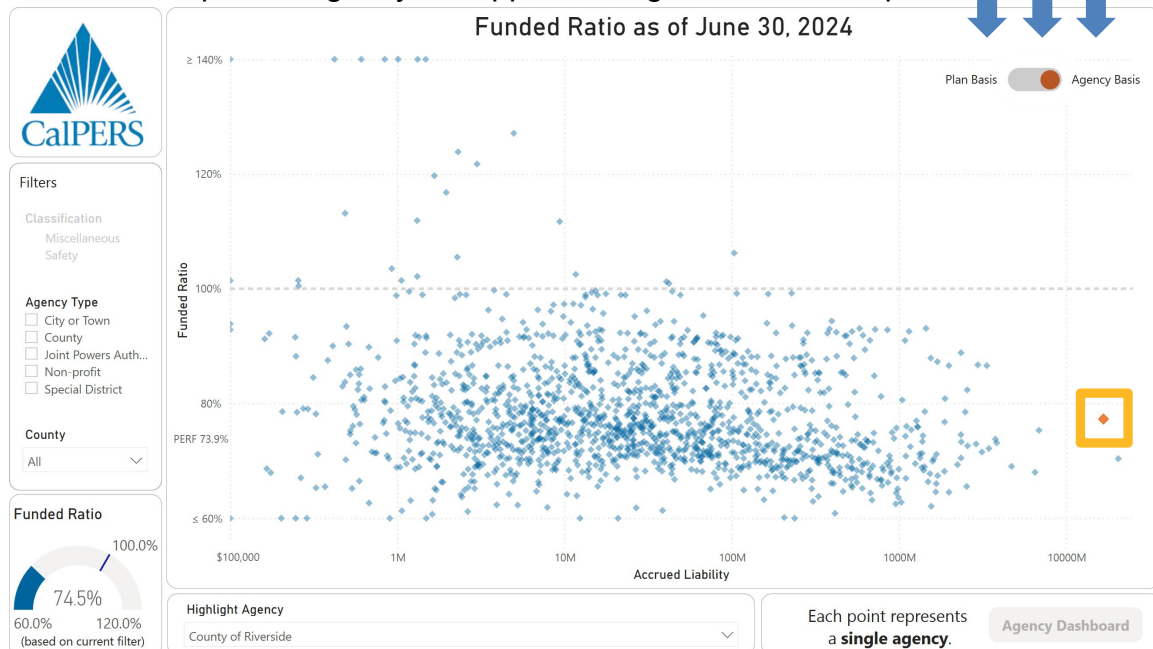
### Required Contributions for Fiscal Year

## Navigating from the Plan Dashboard (continued)

To view the **Funded Ratio Scatterplot** on a plan or agency basis, click on the **Funded Ratios – Plan Basis** or **Agency Basis** button.



Note that the plan or agency will appear orange on the scatterplot.



## Purpose of the Agency Dashboard Tool

The purpose of the Agency Dashboard tool is to allow stakeholders to see information about all the agency's CalPERS pension plan.

The tool allows you to view the following information for an agency:

- ◆ All CalPERS pension plans
- ◆ Employer Normal cost rate for all plans
- ◆ Member contribution rate for all plans

It also provides details via the following graphs:

- ◆ Funded ratio history – the agency's history is compared to the funded ratio history for all public agencies.
- ◆ Funded status history – the agency's accrued liability is displayed alongside the agency's assets and surplus or UAL.
- ◆ UAL payments by Fiscal Year – the agency's UAL payments for each year, broken out into required payments and any ADPs.

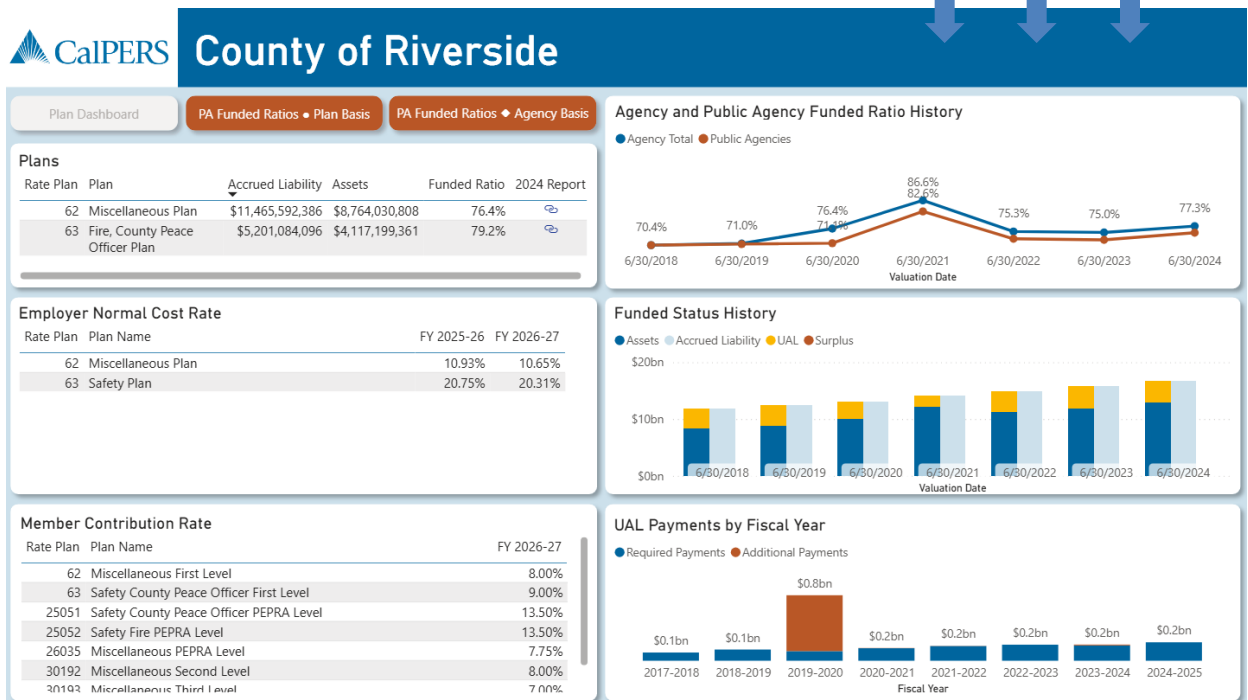
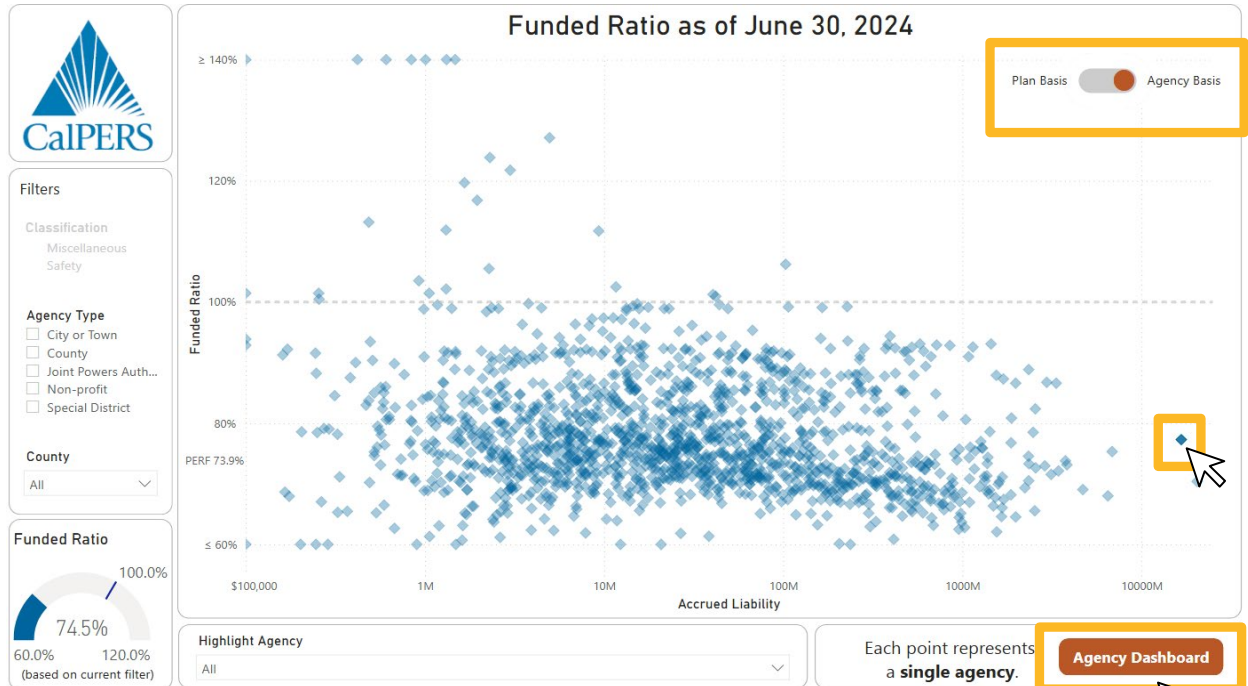
For a better user experience, view the tool on a desktop or laptop rather than a mobile device.



# CalPERS Pension Analytics Dashboard - User Manual

## Navigating to the Agency Dashboard

To navigate to the Agency Dashboard, open the **Funded Ratio Scatterplot**, ensure you are viewing it on the Agency Basis, select an agency to view, and click on **Agency Dashboard**.

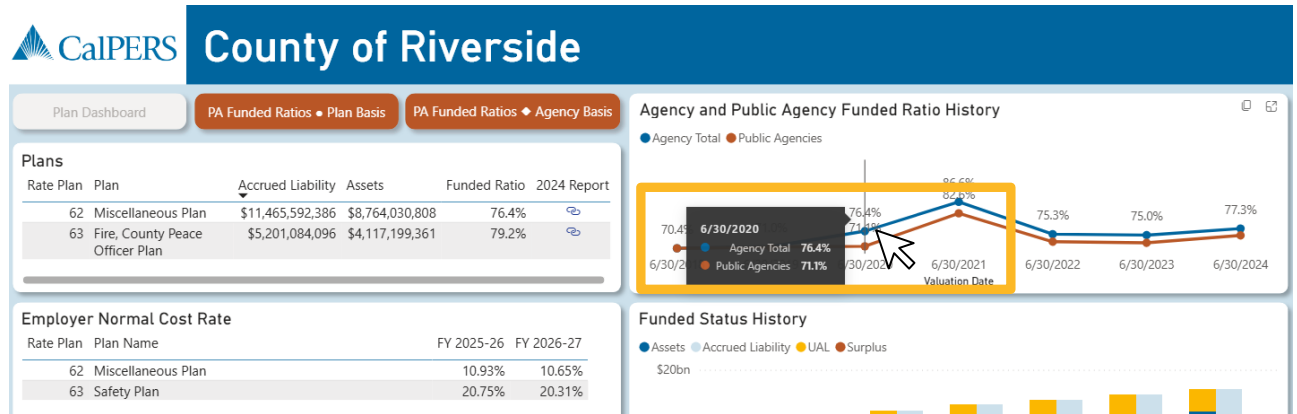




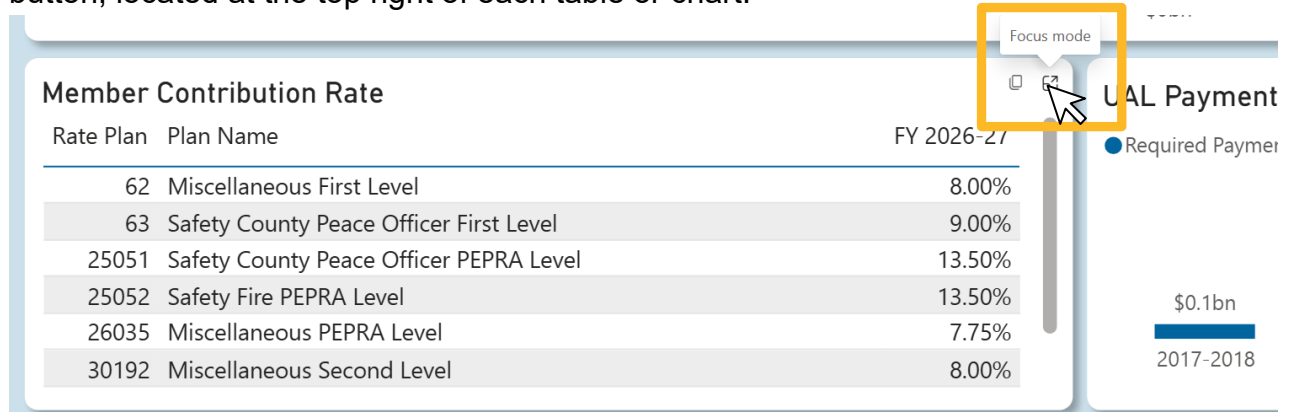
# CalPERS Pension Analytics Dashboard - User Manual

## Viewing the Agency Dashboard

To view more information in charts, hover your mouse over a specific year.



To view any of the tables or charts in full size, click on the Focus Mode button, located at the top right of each table or chart.



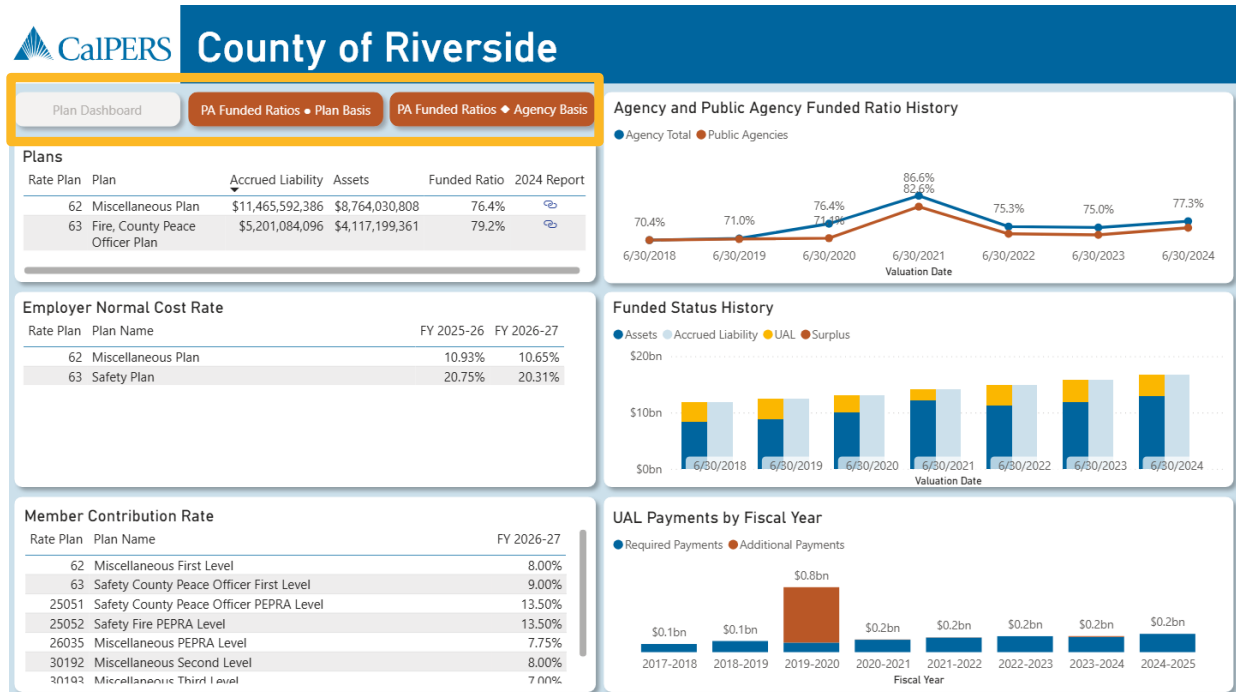
To return to the Dashboard, click on **Back to Report** on the top left.

**MEMBER CONTRIBUTION RATE**

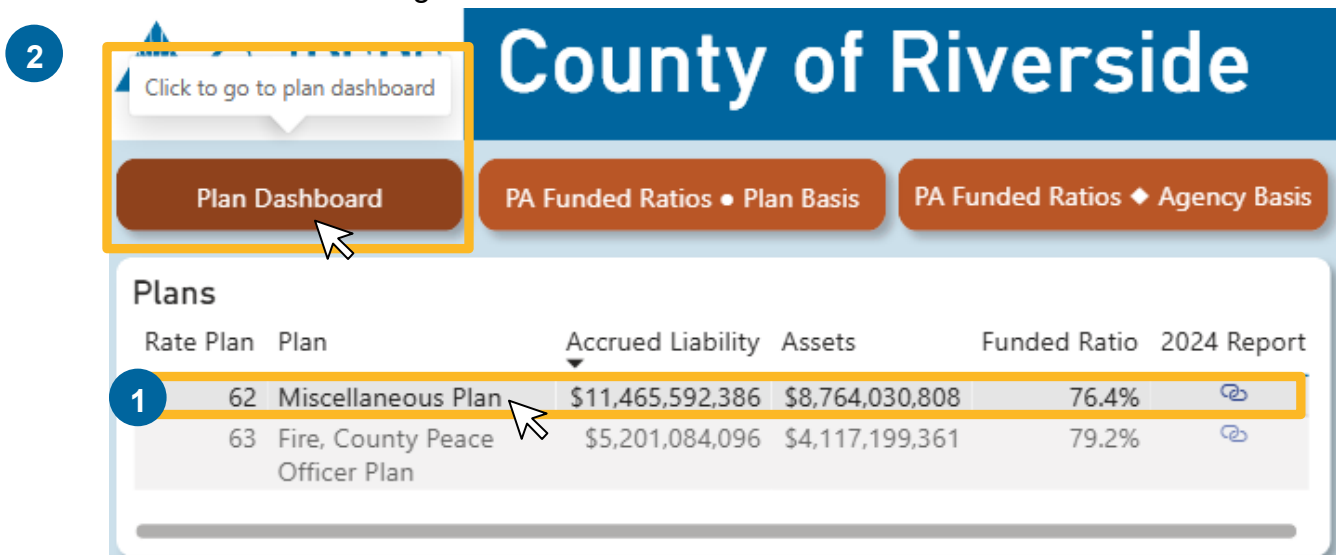
Rate Plan	Plan Name	FY 2026-27
62	Miscellaneous First Level	8.00%
63	Safety County Peace Officer First Level	9.00%
25051	Safety County Peace Officer PEPRA Level	13.50%
25052	Safety Fire PEPRA Level	13.50%
26035	Miscellaneous PEPRA Level	7.75%
30192	Miscellaneous Second Level	8.00%
30193	Miscellaneous Third Level	7.00%
30195	Safety County Peace Officer Second Level	9.00%

## Navigating from the Agency Dashboard

This dashboard's **navigation buttons** are located on the top left side. Note that the Plan Dashboard button will be greyed out unless a plan is selected in the Plans box.



To go on to the **Plan Dashboard**, select the desired plan from the **Plans** box, then click on the orange **Plan Dashboard** button.



# CalPERS Pension Analytics Dashboard - User Manual

## Navigating from the Agency Dashboard (continued)

Alternatively, **right click** on the desired rate plan in the Plans box, select Drill through from the dropdown menu, and click on **Plan Dashboard**.

The screenshot illustrates the navigation process from the Agency Dashboard to the Plan Dashboard. It shows the 'Plans' table with a right-click context menu open for the '62 Miscellaneous Plan'. The 'Drill through' option is selected, leading to the 'Plan Dashboard' button. The 'Plan Dashboard' button is highlighted with a blue circle and a mouse cursor. The 'Plan Dashboard' button is located in the 'Employer Normal Cost Rate' section, which is also highlighted with a blue circle and a mouse cursor. The 'Plan Dashboard' button is located in the 'Employer Normal Cost Rate' section, which is also highlighted with a blue circle and a mouse cursor.

**Plans Table:**

Rate Plan	Plan	Accrued Liability	Assets	Funded Ratio	2024 Report
62	Miscellaneous Plan	\$11,465,592,386	\$8,764,030,808	76.4%	<a href="#">Link</a>
63	Fire, County Peace Officer Plan	7,199,361	7,199,361	79.2%	<a href="#">Link</a>

**Employer Normal Cost Rate Table:**

Rate Plan	Plan Name	FY 2025-26	FY 2026-27
62	Miscellaneous Plan	10.93%	10.65%

**Plan Dashboard Button:**

Plan Dashboard

**CalPERS County of Riverside Dashboard Overview:**

The dashboard provides a comprehensive overview of the Miscellaneous Plan's financial status. It includes sections for:

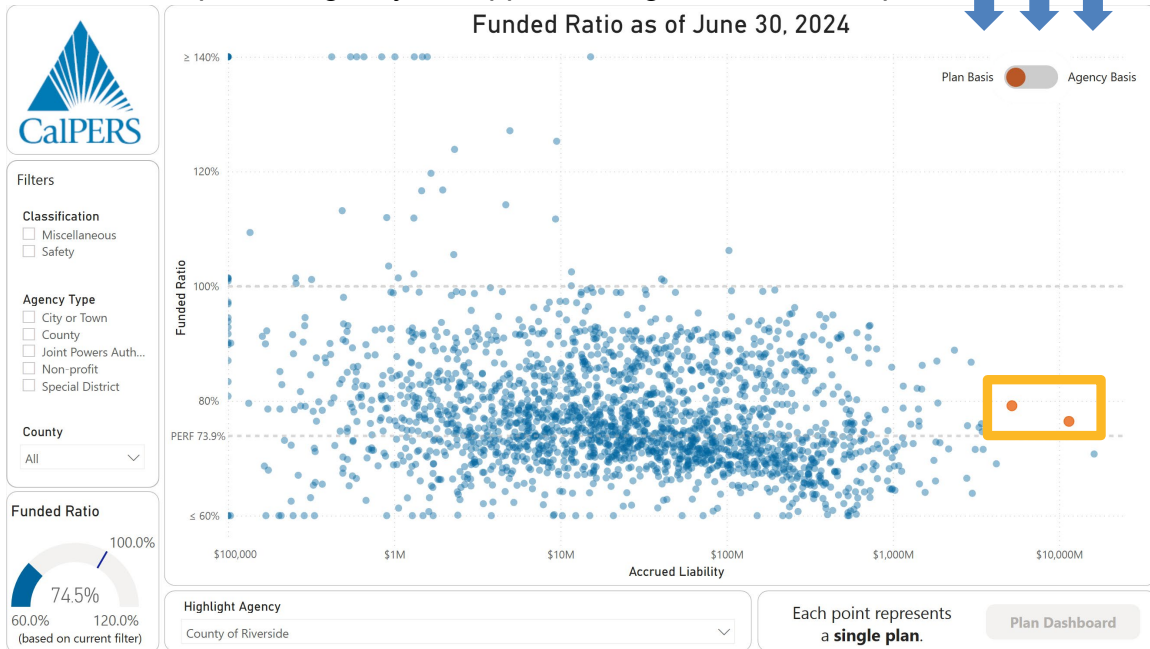
- Employer Normal Cost Rate:** Shows the rate for FY 2025-26 (10.93%) and FY 2026-27 (10.65%).
- Projected UAL Payments:** A table showing projected annual payments from FY 2026-27 to FY 2031-32.
- Plan and Public Agency Funded Ratio History:** A line chart showing the funded ratio from 6/30/2018 to 6/30/2024, with values ranging from 70.4% to 85.6%.
- Member Contribution Rate:** A table showing contribution rates for different member levels (30193, 26035, 62, 30192) for FY 2026-27.
- Funded Status History:** A bar chart showing the funded status (Assets, Accrued Liability, UAL, Surplus) from 6/30/2018 to 6/30/2024.
- Funded Status:** A table showing the current funded status (Accrued Liability, Assets, UAL, Funded Ratio) as of 6/30/2024.
- Member Count:** A table showing the number of active, transferred, separated, and retired members as of 6/30/2024.
- UAL Payments by Fiscal Year:** A bar chart showing required and additional payments from 2017-2018 to 2024-2025.

## Navigating from the Agency Dashboard (continued)

To view the **Funded Ratio Scatterplot** on a plan or agency basis, click on the **Funded Ratios – Plan Basis** or **Agency Basis** button.

The screenshot shows the CalPERS County of Riverside dashboard. At the top, there's a header with the CalPERS logo and the text "County of Riverside". Below the header, there are two buttons: "PA Funded Ratios • Plan Basis" and "PA Funded Ratios ♦ Agency Basis". The "PA Funded Ratios • Plan Basis" button is highlighted with a yellow box, and a mouse cursor is pointing at it. Below the buttons, there's a table titled "Plans" with columns: Rate Plan, Plan, Accrued Liability, Assets, Funded Ratio, and 2024 Report. The table shows one plan: 63 Fire, County Peace Officer Plan, with an accrued liability of \$5,201,084,096, assets of \$4,117,199,361, and a funded ratio of 79.2%.

Note that the plan or agency will appear orange on the scatterplot.



## Navigating from the Agency Dashboard (continued)

To view the **Actuarial Valuation Report**, click on the 2024 Report link for the desired plan, located on the right of the Plans chart. This will take you to the latest Actuarial Valuation Report posted on the CalPERS website for the plan.

The screenshot shows the 'Plans' section of the CalPERS Pension Analytics Dashboard. At the top, there are three tabs: 'Plan Dashboard', 'PA Funded Ratios • Plan Basis', and 'PA Funded Ratios ♦ Agency Basis'. Below the tabs is a table titled 'Plans' with the following columns: 'Rate Plan', 'Plan', 'Accrued Liability', 'Assets', 'Funded Ratio', and '2024 Report'. The table contains two rows of data. The first row is for '62 Miscellaneous Plan' with an accrued liability of \$11,465,592,386, assets of \$8,764,030,808, and a funded ratio of 76.4%. The second row is for '63 Fire, County Peace Officer Plan' with an accrued liability of \$5,201,084,096, assets of \$4,117,199,361, and a funded ratio of 79.2%. The '2024 Report' column for the first row contains a link icon, which is highlighted with a yellow box. A mouse cursor is pointing at the link icon. Below the table, there is a dark grey rectangular area. Three blue arrows point from the '2024 Report' link to this area.

Rate Plan	Plan	Accrued Liability	Assets	Funded Ratio	2024 Report
62	Miscellaneous Plan	\$11,465,592,386	\$8,764,030,808	76.4%	<a href="#">2024 Report</a>
63	Fire, County Peace Officer Plan	\$5,201,084,096	\$4,117,199,361	79.2%	<a href="#">2024 Report</a>

## California Public Employees' Retirement System

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### Actuarial Valuation for the Miscellaneous Plan of the County of Riverside as of June 30, 2024

(CalPERS ID: 5982690295)  
(Rate Plan ID: 62)

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#### Required Contributions for Fiscal Year