

myCalPERS Retirement Enrollment

Student Guide

March 7, 2026

Introduction

This student guide will assist you with adding, modifying, and reconciling retirement appointments. You must report an employee's retirement enrollment and ongoing appointment information to CalPERS in a timely manner. An appointment is a continuous term of employment with a single employer, from the point of membership eligibility until permanent separation. Changes to an appointment status such as a permanent separation, leave of absence, or member category are reportable events.

State agency (references specifically for this guide):

- State agency refers to a central-state agency that reports personnel, payroll, and retirement information in Personnel Information Management System (PIMS).
- This includes California State Universities (CSUs).

What's New

- Unit 2, scenario 2, has new questions when adding a retired annuitant appointment.
- Two scenarios for state agency appointments that don't update myCalPERS from PIMS.
 - Unit 3, scenario 9 (update a site change for an employee's appointment that has a transfer between two state agencies).
 - Unit 5 (correct the transactions that are in the preprocessing area).
- Health error codes have been added for preprocessing area assistance on pages 41-42

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

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

Training Opportunities

We offer instructor-led classes based on this guide. 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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Unit 1: Person Search Tool

In this unit, you will learn how to use the Person Search tool to verify membership status and confirm appointment information.

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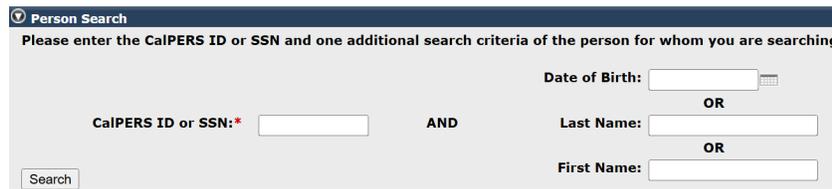
Scenario 1: Verify CalPERS Membership

You have a new employee whose appointment does not qualify for membership, so you will check their membership status. If they are already a member (have member contributions), you must add their new appointment to myCalPERS within 90 days; otherwise, your agency will pay all arrears contributions (member and employer) and an administrative fee of \$500.

Step Actions (7 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right. The birth date is preferred in case the employee had a name change.



Step 3 Select the **Search** button.

Step 4 Did the Search Results section display *No results found*?

Yes: They are not a member. Save a screenshot that includes the date in the upper right corner. This serves as proof that as of today, the employee was not a member. You have completed this scenario.

No: Continue to step 5.

Step 5 Enter the appropriate date in the Anticipated or Actual Hire Date field.



Step 6 Select the **Continue** button.

Step 7 Review the Summary section to verify CalPERS membership.



Member: Yes (has member contributions, may/may not be actively working)

Member: No (no member contributions on file, e.g., prior member who refunded, dependent on health benefits, beneficiary, etc. Provide the employee with a [Notice of Exclusion From CalPERS Membership \(PDF\)](#) form.

You have completed this scenario.

Scenario 2: Verify a School Employee's Eligibility for Retirement System Election

This scenario is only for school employers.

You have a new employee who is entering a certificated position or position performing creditable service. Using the steps in scenario 1, verify their CalPERS membership eligibility for the Retirement System Election (ES372) process.

Summary	
Profile	
Name: Paula Pers	CalPERS ID: 0123456789
Prior School Membership: No	Optional Member: No
Member: Yes	Prior School Membership Date:
Membership Date: 01/28/2019	Retired: No
ARP: No	Retirement Date:
5 Year Service Credit: Yes	ARP Effective Date:
Eligibility for Retirement System Election as of Today: Yes	

The Eligibility for Retirement System Election as of Today field:

Yes: The employee has:

- Five years of service credit in CalPERS or
- Previous CalPERS-covered employment within 120 days of the new position hire date with a school employer, Board of Governors of the Community Colleges, or State Department of Education.

No: The employee has:

- Less than five years of CalPERS service credit and
- Not previously worked in a CalPERS-covered position with a school employer, the Board of Governors of the Community Colleges, or the State Department of Education within 120 days.

The indicator:

- Does not provide direction on the CalSTRS criteria if the position mandatorily qualifies for CalPERS membership upon hire. Ensure the position meets the criteria.
- Only provides eligibility as of the current date. Verify the eligibility indicator on the date of hire to determine ES372 eligibility.
- Does not take into consideration whether a member refunded or retired from CalPERS. It may reflect 'Yes' even if they are ineligible due to being refunded or retired. Verify the employee's status before making a final determination.

You have completed this scenario.

Scenario 3: Review Retirement Appointment Details

You may access employee appointment information specifically to your agency. Verify your employee’s retirement appointment details, as this ensures the accuracy of their appointment (start date, enrollment level, etc.) and historical information (service credit, member funds on deposit, and membership date). Review the following:

- Name (must match their legal document (driver license, Social Security card, etc.))
- Appointment Event History and Appointment Details
- Membership Information
- Reciprocal Self-Certification Information
- Retired Annuitant Information
- Retired Annuitant Special Criteria

System Logic

For an appointment with a future effective date, not all the employee’s profile page will display until their enrollment date; however, you can review their appointment details.

Step Actions (5 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter the employee’s CalPERS ID or SSN plus complete one field on the right.

Step 3 Select the **Search** button.

Step 4 Within the Pre-Retirement Benefit Information section, verify the service credit and member contributions.

Note: The service credit total will reflect the current date and time even though the totals are when payroll was last posted.

Step 5 Within the Appointment History section, select the appropriate **Employer** link to review your employee’s current active appointment and event details.

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Appointment Event History

The employee's appointment events begin with a new appointment and end with a permanent separation. In between there may be appointment changes, site changes (state employee transfer between state agencies), or begin and/or end leaves of absence. If there is a long list of events, you may need to select the View All Site Events check box to display older events.

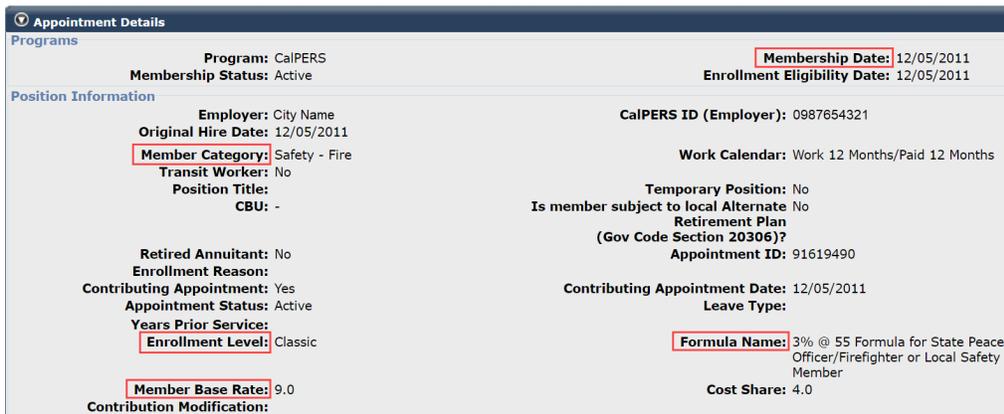
Select the **View Event Details** link to review the event history (when the event was created or updated and who made the change).



The screenshot shows a table titled "Appointment Event History" with columns for "Event Date", "Event", and "Event Details". The table contains four rows of data. Each row has a radio button in the "Event Date" column and a "View Event Details" link in the "Event Details" column. The table also includes "Correct Event", "Delete", and "View All Site Events" buttons, along with a "Display" button.

Event Date	Event	Event Details
<input type="radio"/> 05/12/2019	Appointment Change	View Event Details
<input type="radio"/> 07/10/2014	End Leave	View Event Details
<input type="radio"/> 02/16/2014	Begin Leave	Family Medical Leave
<input type="radio"/> 12/05/2011	New Appointment	View Event Details

Appointment Details



The screenshot shows the "Appointment Details" form with various fields. The "Program" is CalPERS and the "Membership Status" is Active. The "Membership Date" is 12/05/2011 and the "Enrollment Eligibility Date" is 12/05/2011. The "Position Information" section includes "Employer: City Name", "Original Hire Date: 12/05/2011", "Member Category: Safety - Fire", "Transit Worker: No", "Position Title: CBU: -", "Retired Annuitant: No", "Enrollment Reason:", "Contributing Appointment: Yes", "Appointment Status: Active", "Years Prior Service:", "Enrollment Level: Classic", "Member Base Rate: 9.0", and "Contribution Modification:". The "Work Calendar" is Work 12 Months/Paid 12 Months. The "Temporary Position" is No, "Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?" is No, "Appointment ID" is 91619490, "Contributing Appointment Date" is 12/05/2011, "Leave Type:", "Formula Name" is 3% @ 55 Formula for State Peace Officer/Firefighter or Local Safety Member, and "Cost Share" is 4.0.

The member category, enrollment level, and membership date determine the member's base rate and formula.

- **Membership Date:** The date the member became eligible for CalPERS membership.
- **Member Category:** Based on their position at your agency, this is entered when processing a new retirement enrollment or if it's changed.
- **Enrollment Level:** Classic or PEPR New is based on the membership date and if they have reciprocal membership in the Reciprocal Self-Certification Form Information section.
- **Member Base Rate:** Member's enrollment level, formula, and possible collective bargaining unit (CBU) determine their base rate (contribution rate/percentage of their reportable earnings that is paid to CalPERS).
- **Formula Name:** This includes the member's category, benefit level, and normal retirement age. This formula is used when CalPERS calculates the member's retirement.

Membership Information

This is based on your agency's contract and the member's appointment details. This includes CalPERS and CalSTRS election, Social Security, '59 survivor benefits, optional member election, and certificated employees (school employers).

Reciprocal Self-Certification Form Information

Completion of the Reciprocal Self-Certification Form (myCalPERS 1187) does not establish reciprocity; this form is used for enrollment purposes only to determine Classic or PEPR membership. To establish reciprocity, the employee must download the [When You Change Retirement Systems \(PUB 16\) \(PDF\)](#) publication to obtain the Confirmation of Intent to Establish Reciprocity When Changing Retirement Systems (CalPERS 1006) form and submit the form to CalPERS or make the request using their myCalPERS account.

Reciprocal Self-Certification Form Information	
You are required to provide and process the Reciprocal Self-Certification form for every new enrollment in CalPERS. The data provided in this section must be entered based on the self-certified data by the member. You must keep a copy of the form in your records for auditing purposes. For direction on how to process the form, visit our employer reference guide. The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant.	
Reciprocal Member Indicator:	Yes
Most Recent Reciprocal Agency:	San Bernardino County Employees' Retirement Association (SBCERA)
Earliest Qualifying Reciprocal Membership Date:	08/01/2016
Most Recent Reciprocal Permanent Separation Date:	12/03/2022
Retired Reciprocal Member Indicator:	No
Reciprocal Retirement Date :	N/A
Refunded Reciprocal Member Indicator:	No
Reciprocal Refunded Date:	N/A

Enter the required information from the completed Reciprocal Self-Certification Form in this section of the employees' appointment. The dates with other system and other factors determine the member's enrollment level under your agency.

- **Reciprocal Member Indicator:** This indicates if the member has or doesn't have reciprocity with an eligible retirement system.
- **Most Recent Reciprocal System:** Name of the system the member was with prior to entering our system.
- **Earliest Qualifying Reciprocal Membership Date:** Membership date with reciprocal system.
- **Most Recent Reciprocal Permanent Separation Date:** Separation date from the reciprocal system.
- **Retired Reciprocal Member Indicator:** If Yes, you will be prompted to enter the date the member retired with their reciprocal system.
- **Refunded Reciprocal Member Indicator:** If Yes, you will be prompted to enter the date the member refunded from their reciprocal system.

Note: If a member is placed into the Classic enrollment level based on the information provided on the form, they must establish reciprocity with the reciprocal system within one year. Failure to do so will trigger an audit, which may result in the member's appointment reverting from Classic to PEPR. Your agency will be responsible for any resulting payroll adjustments.

Retired Annuitant Information

This includes the retired annuitant (RA) type, 180-day exception, and 180-day exception reason.

Retired Annuitant Information
Retired Annuitant Type: Extra Help 180-Day Exception? Yes 180-Day Exception Reason: Appointed by governing body

Retired Annuitant Special Criteria

Displays if the RA was hired with an earnings limit or due to an executive order.

Retired Annuitant Special Criteria
Earnings Limit? No Executive Order? Yes Executive Order Number: B-53-18 Shasta Lake, Mendocino and Siskiyou Executive Begin Date: 12/30/2020 Executive End Date: 02/05/2021

You have completed this scenario.

Unit 2: New Appointments

In this unit, you will learn how to add a new appointment for eligible employees and retired annuitants.

- **Public Agencies and Schools:** Follow the steps in this unit to manually enter all new appointments in myCalPERS.
- **State Agencies:** After adding a new appointment in PIMS, it should update in myCalPERS in 1-2 days. If it does not update myCalPERS within two days, it will be in the Preprocessing Area section. Refer to Unit 5: Preprocessing Area (State Agencies) on how to review the information. If you need to manually enter a new appointment in myCalPERS, refer to the steps in this unit. You must have the Business Partner Retirement Enrollment access role.

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Scenario 1: Add a New Retirement Enrollment

Enroll qualifying employees in CalPERS membership within 90 days. If they are not enrolled timely, CalPERS will assess \$500 in administrative costs and arrears contributions (member and employer). Process a CalPERS retirement enrollment by completing the following:

- Verify if the employee has an existing myCalPERS account
- Confirm demographics and update if necessary (name must match their name on their Social Security card)
- Report appointment details
- Indicate reciprocal self-certification if it is applicable

Step Actions (23 Steps)

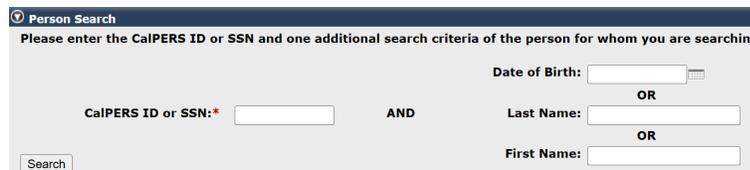
Step 1 Select the **Reporting** global navigation tab.

Step 2 Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.



Step 3 Select the **Continue** button.

Step 4 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

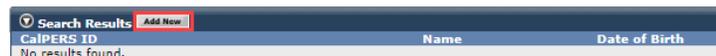


Step 5 Select the **Search** button.

Step 6 What is displayed next?

- **Search Results section shows “No results found”**: Continue to step 7.
- **Appointment Details page**: Skip to step 14.

Step 7 Within the Search Results section, select the **Add New** button.



Step 8 Complete the Person Details and Address Details sections.



Step 9

Complete the Address and Communication Details sections.

The screenshot shows two sections of a form. The first section, titled "Address Details", contains the following fields: "Address Type:" with a dropdown menu, "Country:" with a dropdown menu set to "United States", "Address:" with three stacked text input fields, "City:" with a text input field, "State:" with a dropdown menu set to "California", and "Zip Code:" with two text input fields separated by a hyphen. The second section, titled "Communication Details", contains a table with columns for "Primary", "Phone Type", "Phone Number", "Extension", and "International". There are six rows of radio buttons corresponding to "Work", "Fax", "TTY", "Cellular", "Home", and "Other". Below this table is an "Email" section with two radio buttons and two stacked text input fields.

Step 10 Select the **Primary** radio button for one phone number and an email address.

Step 11 Select the **Save & Continue** button.

Step 12 If multiple addresses display, select the radio button for the correct address.

Step 13 Select the **Confirm** button.

Step 14 Select the **Save & Continue** button.

Step 15 Complete the Appointment Details section.

The screenshot shows the "Appointment Details" section of a form. It includes a "Program" dropdown menu set to "CalPERS" and an "Enrollment Eligibility Date:" field. Below this is the "Position Information" section, which contains: "Employer:" with a dropdown menu, "Division:" with a dropdown menu, "Original Hire Date:" with a date picker, "Member Category:" with a dropdown menu, "Position Title:" with a dropdown menu and an "Update" link, "Work Calendar:" with a dropdown menu set to "Work 12 Months/Paid 12 Months", "Retired Annuitant?" with radio buttons for "Yes" and "No", "CBU:" with a dropdown menu, "Enrollment Reason:" with a dropdown menu, and "Refunded Appointment?" with radio buttons for "Yes" and "No".

Step 16 Complete the questions which are based on your agency type (state, school, or public agency) and the member category.

The screenshot shows the "Membership Information" section of a form. It contains two questions with radio button options: "Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)?*" with "Yes" and "No" options, and "Is the member subject to Social Security?" with "Yes" and "No" options. Below these is the "Optional Member Election" section with the question "Optional Member?*" and "Yes" and "No" options.

Step 17 Continue completing questions in the Membership Information section.
If the member is not subject to Social Security, upload the SSA-1945 form.

Membership Information
Member Information
Is the member subject to local Alternate Retirement Plan (Gov Code Section 20306)?*
 Yes
 No
Is the member subject to Social Security*
 Yes
 No
SSA Exclusion Reason:* Other
SSA Other Reason:*
SSA-1945 Form: [Provide Document](#)
Section 419(c) of Public Law 108-203, the Social Security Protection Act of 2004, requires State and local government employers to provide a statement to employees hired January 1, 2005 or later in a job not covered under Social Security. The statement explains how a pension from that job could affect future Social Security benefits to which they may become entitled. You can get the SSA-1945 form at www.ssa.gov/forms. If you have the signed form from the employee, you may provide it here.

Step 18 On the Reciprocal Self-Certification Form (myCalPERS 1187) section 1, did the member indicate that they have membership in a defined benefit plan?

Yes: In the Reciprocal Self-Certification Form Information section, select the **Yes** radio button.

No: Skip to step 21.

Step 19 Complete the Reciprocal Self-Certification Form Information section using the information the Reciprocal Self-Certification Form (myCalPERS 1187).

Reciprocity
Reciprocity
The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant. For auditing purposes, the employer must sign and retain the completed Reciprocal Self-Certification form for their records. Do not send a copy of the form to CalPERS.
Reciprocal Member Indicator:*
 Yes
 No
Most Recent Reciprocal Agency:*
Earliest Qualifying Reciprocal Membership Date:*
Most Recent Reciprocal Permanent Separation Date:
Retired Reciprocal Member Indicator:*
 Yes
 No
Refunded Reciprocal Member Indicator:*
 Yes
 No

Step 20 Skip to step 22.

Step 21 In the Reciprocal Self-Certification Form Information, select the **No** radio button.

Reciprocity
Reciprocity
The information entered is used to determine retirement enrollment level only, it will not establish reciprocity for the participant. For auditing purposes, the employer must sign and retain the completed Reciprocal Self-Certification form for their records. Do not send a copy of the form to CalPERS.
Reciprocal Member Indicator:*
 Yes
 No

Step 22 Select the **Save** button.

Step 23 Did the following message display?

The appointment you have entered is more than 90 days in the past of membership eligibility. Please review and confirm the date entered is correct and save your changes.

Yes: Select the **Save** button. **You have completed this scenario.**

No: **You have completed this scenario.**

Scenario 2: Add a Retired Annuitant Appointment

Retired annuitant (RA) is the general term for a CalPERS retiree employed by a CalPERS-contracted agency. An RA's appointment must be entered within 30 days of their hire date; otherwise, a \$200 fee will be assessed for each month the appointment is late. If the RA retired from your agency, myCalPERS will require the original hire date at your agency. When a new RA appointment is entered in myCalPERS, employers and RAs will receive information regarding the rules and regulations about post-retirement CalPERS employment. Add a retired annuitant appointment by doing the following:

- Verify the retiree worked for your agency or another CalPERS agency.
- Verify they retired more than 180 days from their RA appointment date.
- Confirm demographics. You can make changes after the RA appointment is updated (name must match their legal verification document).
- Report appointment details.
- Determine if they are exempt from the 180-day wait period.
- Identify the retired annuitant type.
- Determine the retiree's normal retirement age (bona fide separation requirement).

Note: If an RA is reinstating from retirement, process a new membership appointment.

Step Actions (19 Steps)

Step 1 Did the retired annuitant previously work for your agency?

Yes: Select the **Person Information** global navigation tab.

No: Skip to step 6.

Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND Date of Birth:

OR

Last Name:

OR

First Name:

Search

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **Add New** button.

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	11/28/2020

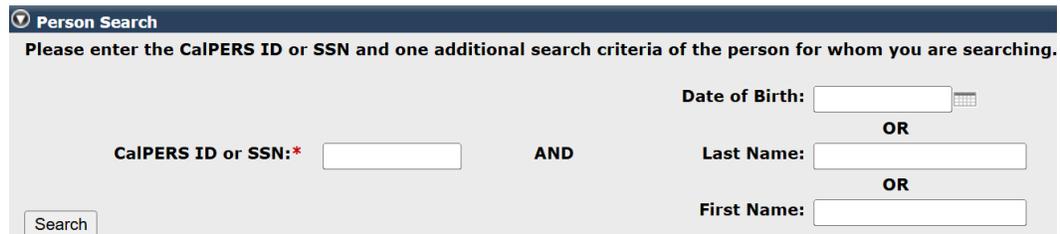
Step 5 Skip to step 11.

Step 6 Select the **Reporting** global navigation tab.

Step 7 Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.

Step 8 Select the **Continue** button.

Step 9 Enter the employee's CalPERS ID or SSN plus complete one field on the right.



Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND

Date of Birth:

OR

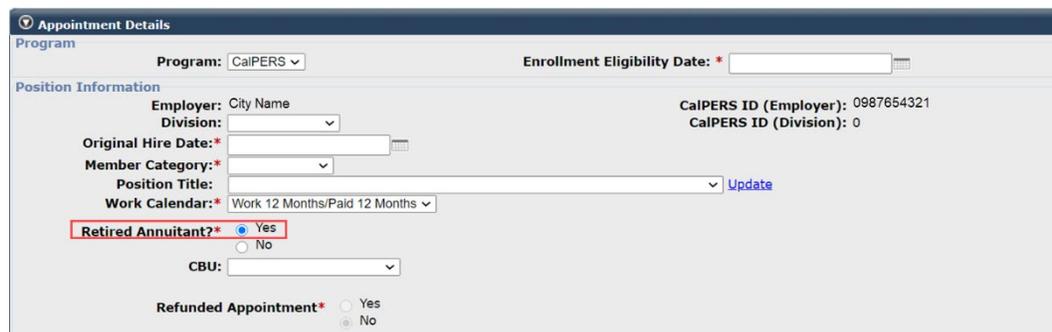
Last Name:

OR

First Name:

Step 10 Select the **Search** button.

Step 11 Complete the Appointment Details section.



Appointment Details

Program: Enrollment Eligibility Date: *

Position Information

Employer: City Name
Division:

Original Hire Date: *

Member Category: *

Position Title: [Update](#)

Work Calendar: *

Retired Annuitant? * Yes
 No

CBU:

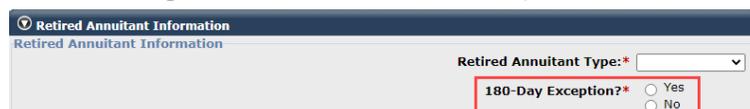
Refunded Appointment * Yes
 No

CalPERS ID (Employer): 0987654321
CalPERS ID (Division): 0

If they retired from your agency, enter their original hire date at your agency. Refer to unit 1, Review Retirement Appointment Details for more information.

Step 12 Within the Retired Annuitant Information section, does this appointment have a 180-day exception?

- **Has a 180-day exception:** Select the **Yes** radio button, then choose from the 180-Day Exception Reason drop-down list. If *Appointed by a governing body* is the reason, you must select the **Choose File** button to upload your 180-day exception resolution.
- **Does not have a 180-day exception:** Select the **No** radio button (this includes returning due to an Executive Order) and then continue to step 13.



Retired Annuitant Information

Retired Annuitant Information

Retired Annuitant Type: *

180-Day Exception? * Yes
 No

Note: RAs working under an executive order must be entered but will be exempt from work-hour limitations and the 180-day break in service requirements.

Step 13

Select from the Retired Annuitant Type drop-down list.

Retired Annuitant Information

Retired Annuitant Type:*

180-Day Exception?*

Yes

No

Note: For the Vacant Position type, you must select the **Choose File** button to upload the Resolution for Hiring a Retiree in an Interim Appointment.

Step 14

Within the Unemployment Certification sub-section, has the retiree received unemployment benefits as a retired annuitant with a CalPERS employer within the past 12 months of this enrollment?

Yes: Select the **Yes** radio button, then read the dialogue box that displays.

No: Select the **No** radio button, then select the **Download Template** link for the Unemployment Insurance Compensation Certification Form. After the employee completes this form, save a copy, then select the **Choose File** button to upload the form.

Unemployment Certification

California law prohibits appointment of a retired annuitant by a CalPERS employer if, during the 12-month period before an appointment, the retiree received unemployment insurance compensation for prior retired annuitant employment with any CalPERS employer. You can download or provide the retiree's certification here.

Has the retiree received unemployment benefits as a retired annuitant with a CalPERS employer within the past 12 months of this enrollment?*

Yes

No

Retired Annuitant Unemployment Certification No file chosen

Sample of the template page 1 (CalPERS Privacy Information on page 2):



State of California
California Public Employees' Retirement System
www.calpers.ca.gov

Unemployment Insurance Compensation Self-Certification Form

California law prohibits the appointment of a retired annuitant (RA) by a CalPERS employer if, during the 12-month period prior to an appointment, the retiree received any unemployment insurance compensation for prior retired annuitant employment with a CalPERS employer. A retiree who accepts an appointment after receiving unemployment insurance compensation as described shall terminate that employment on the last day of the current pay period and shall not be eligible for reappointment for a period of 12 months following the last day of employment.

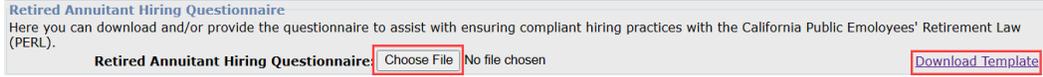
Sign and Certify

I, _____, certify that I have not received unemployment insurance benefits for prior retired annuitant work with any CalPERS employer in the 12 months prior to my start date as an RA.

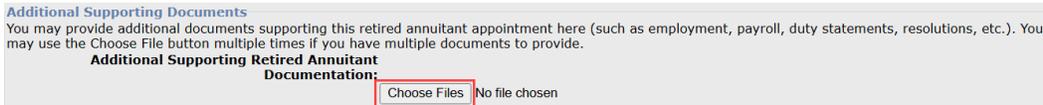
Name	CalPERS ID
Signature	Date

Step 15 Within the Retired Annuitant Hiring Questionnaire sub-section, select the **Download Template** link. Complete the questionnaire and then save it in the employee's file.

Optional: You may select the **Choose File** button to submit it to CalPERS.



Step 16 Within the Additional Supporting Documents sub-section, select the **Choose Files** button to upload one or more documents.

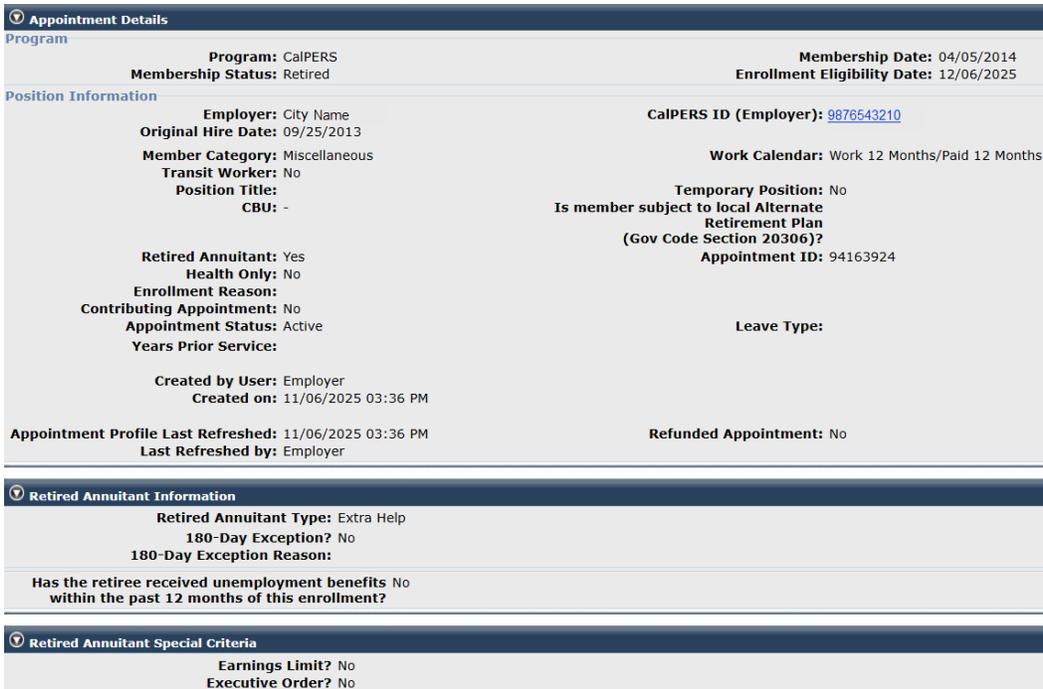


Step 17 The Retired Annuitant Special Criteria section displays.



Step 18 Select the **Save** button at bottom left.

Step 19 Verify the Appointment Details section is correct.



You have completed this scenario.

Unit 3: Maintain Enrollment

In this unit, you will learn how to update and maintain your employees' accounts, enrollments, and appointments.

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Scenario 1: Update Demographic Information

Public agencies, schools, and non-central state employers can update employee demographics in myCalPERS. State agencies update demographic information in PIMS.

Before correcting demographic information, your employee must provide a verification document. Refer to the [Public Agency & Schools Reference Guide \(PDF\)](#) or the [State Reference Guide \(PDF\)](#) for a list of acceptable documentation.

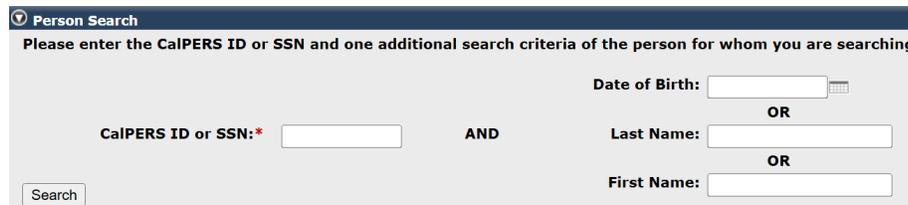
System Logic

- Name changes/corrections will impact payroll reporting.
- For CalPERS health enrollees, demographic changes are sent to their health carrier.
- A letter will be mailed to the member advising them of any demographic changes.

Step Actions (6 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.



The screenshot shows a 'Person Search' form with the following fields and options:

- CaPERS ID or SSN: * [Text Input]
- AND
- Date of Birth: [Date Picker]
- OR
- Last Name: [Text Input]
- OR
- First Name: [Text Input]
- Search [Button]

Step 3 Select the **Search** button.

Step 4 Within the Summary section, select the **Update Personal Information** link.

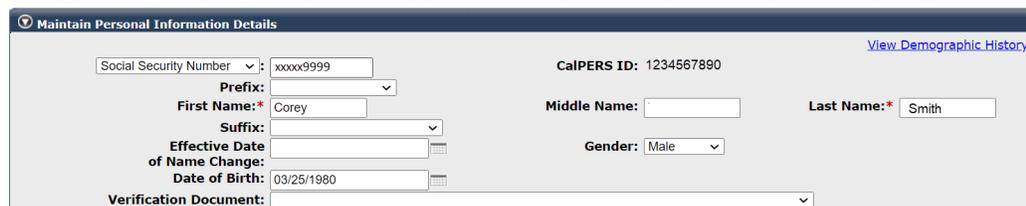


The screenshot shows a 'Summary Profile' section with the following information:

- SSN: xxx-xx-9999
- Name: Corey Smith
- Date of Birth: 03/25/1980
- Prior School Membership: No
- Membership Date: 06/29/2019
- Restrictions: No
- Last Reporting Date: 12/11/2020
- CalPERS ID: 1234567890
- Optional Member: No
- Date of Death:
- Prior School Membership Date:
- Retirement Date:

An 'Update Personal Information' link is highlighted in a red box in the top right corner.

Step 5 Complete the Maintain Personal Information Details section.



The screenshot shows a 'Maintain Personal Information Details' form with the following fields and options:

- Social Security Number: [Dropdown] xxxxx9999
- Prefix: [Dropdown]
- First Name: * Corey
- Suffix: [Dropdown]
- Effective Date of Name Change: [Date Picker]
- Date of Birth: 03/25/1980
- Verification Document: [Dropdown]
- CalPERS ID: 1234567890
- Middle Name: [Text Input]
- Last Name: * Smith
- Gender: [Dropdown] Male
- [View Demographic History](#)

Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 2: Update Employee Contact Information

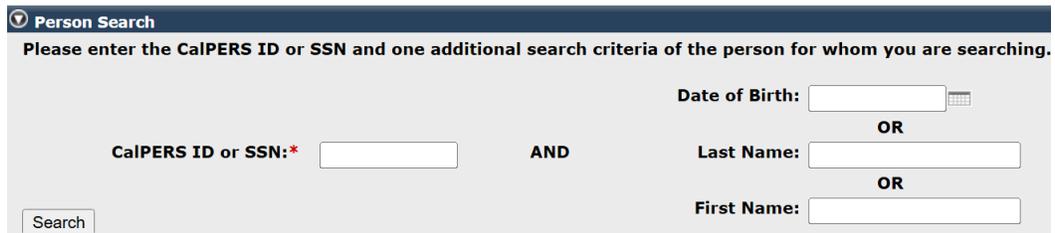
Public agencies, schools, and non-central state employers can update employee phone, email, or addresses in myCalPERS. State agencies update contact information in PIMS.

Step Actions (8 Steps)

Step 1 Select the **Person Information** global navigation tab.



Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

A search form titled 'Person Search'. It contains a text input field for 'CalPERS ID or SSN:*' and a search button. To the right, there are three search criteria: 'Date of Birth:' with a date picker, 'Last Name:' with a text input, and 'First Name:' with a text input. 'AND' is placed between the SSN field and the last name field. 'OR' is placed between the date of birth and last name fields, and between the last name and first name fields.

Step 3 Select the **Search** button.

Step 4 Within the Summary section, select the appropriate **Update** link.

A 'Summary' page for a profile. It is divided into 'Profile' and 'Communication' sections. The 'Profile' section includes fields for SSN, Name, Date of Birth, Prior School Membership, Membership Date, Restrictions, Last Reporting Date, CalPERS ID, Optional Member, Date of Death, Prior School Membership Date, and Retirement Date. There is an 'Update Personal Information' link. The 'Communication' section includes Preferred Communication, Primary Phone Number, Primary Email Address, Mailing Address, and Physical Address. There are four 'Update' links, one for each of the last four items. An 'Undeliverable Date' field is also present.

Step 5 Complete the Maintain Communication Details section.

Step 6 Select the **Save** button.

Step 7 Did you update the employee's address?

Yes: Confirm the address.

No: You have completed this scenario.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 3: Correct Retirement Appointment Events

You can correct retirement appointment events (new appointments, permanent separations, leave of absence, and appointment changes).

System Logic

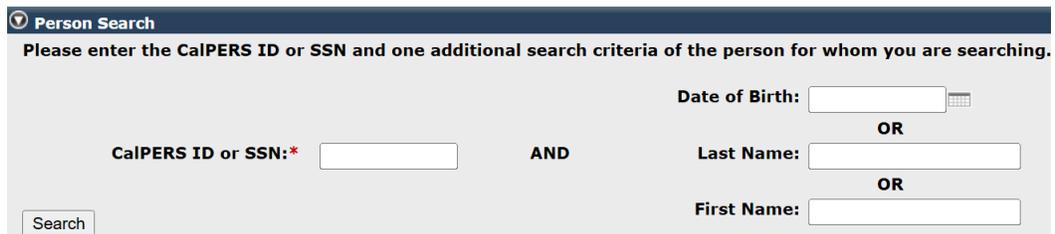
Corrections to appointment information may affect the member's health enrollment and/or payroll.

Step Actions (8 Steps)

Step 1 Select the **Person Information** global navigation tab.

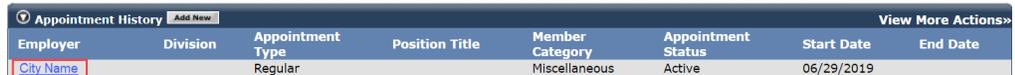


Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

A search form titled 'Person Search'. It contains a text input field for 'CalPERS ID or SSN:*' and three other input fields: 'Date of Birth:', 'Last Name:', and 'First Name:'. There are 'OR' labels between the fields and an 'AND' label between the SSN field and the 'Last Name' field. A 'Search' button is at the bottom left.

Step 3 Select the **Search** button.

Step 4 Select the appropriate active **Employer** link.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Note: For state agencies and CSUs, select the appropriate **Employer** link within the Site Change History section after you complete step 4.

Step 5 Within the Appointment Event History section, select the radio button of the appointment event to correct.

A section titled 'Appointment Event History'. It has buttons for 'Correct Event', 'Delete', and 'View All Site Events', and a 'Display' button. Below is a table with columns 'Event Date', 'Event', and 'Event Details'. The first row has a selected radio button, the date '12/03/2016', the event 'New Appointment', and a link 'View Event Details'. There are also 'Correct Event', 'Delete', 'View All Site Events', and 'Display' buttons below the table.

Step 6 Select the **Correct Event** button.

Step 7 Correct the information.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 4: Delete a Retirement Appointment

On a rare occasion, you may need to delete a retirement appointment. This can only be completed if the appointment does not have health and/or payroll history. If they have either, contact CalPERS for assistance.

System Logic

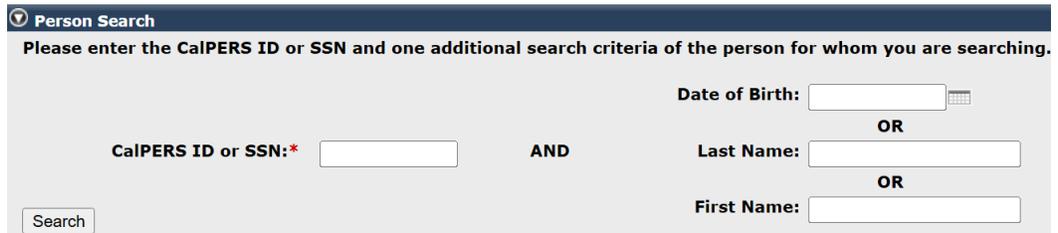
The demographic information and CalPERS ID will remain in myCalPERS; however, there will be no appointment information affiliated with your agency.

Step Actions (6 Steps)

Step 1 Select the **Person Information** global navigation tab.



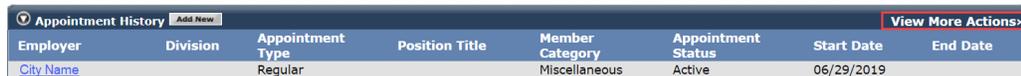
Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.



A search form titled 'Person Search' with the instruction: 'Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.' The form contains three input fields: 'CalPERS ID or SSN:*' (required), 'Date of Birth:' (with a calendar icon), and 'Last Name:'. There are 'OR' labels between the fields. A 'Search' button is at the bottom left.

Step 3 Select the **Search** button.

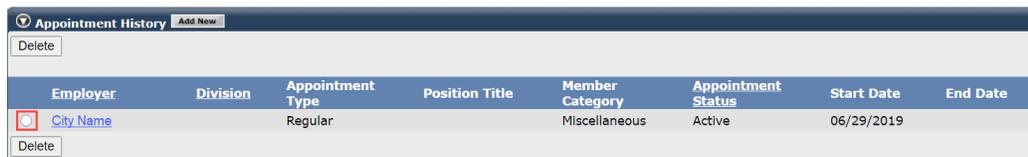
Step 4 Within the Appointment History section, select the **View More Actions** link or **Appointment History** left-side link.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

The table has a 'View More Actions' link in the top right corner.

Step 5 Within the Appointment History section, select the radio button for the appointment.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
<input checked="" type="radio"/> City Name		Regular		Miscellaneous	Active	06/29/2019	

The table has a 'Delete' button above and below the table.

Step 6 Select the **Delete** button.

You have completed this scenario.

Scenario 5: Process a Leave of Absence

If an employee goes on a leave of absence, e.g., unpaid leave or FMLA, a Begin Leave event should be entered. It is recommended that you add a future End Leave event when the Begin Leave event is entered. Refer to unit 3, scenario 3 if the End Date event needs to be changed.

System Logic

For public agencies and schools, health benefits will cancel for employees placed on a leave of absence unless it is due to Family Medical Leave Act or Maternity/Paternity leave.

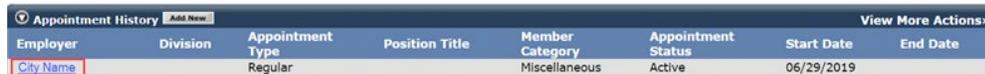
Step Actions (8 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Step 3 Select the **Search** button.

Step 4 At the bottom of the page, select the appropriate active **Employer** link.

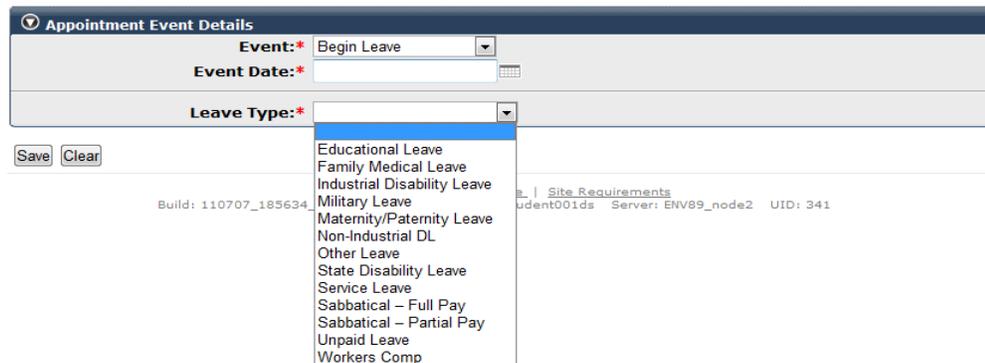


The screenshot shows a table titled 'Appointment History' with an 'Add New' button and a 'View More Actions' link. The table has columns for Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. The first row shows 'City Name' in the Employer column, 'Regular' in Appointment Type, 'Miscellaneous' in Member Category, and 'Active' in Appointment Status. The Start Date is '06/29/2019'.

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5 Within the Appointment Event History section, select the **Add New** button.

Step 6 Complete the Appointment Event Details section.



The screenshot shows the 'Appointment Event Details' form. The 'Event' dropdown is set to 'Begin Leave'. The 'Event Date' field is empty. The 'Leave Type' dropdown is open, showing a list of options: Educational Leave, Family Medical Leave, Industrial Disability Leave, Military Leave, Maternity/Paternity Leave, Non-Industrial DL, Other Leave, State Disability Leave, Service Leave, Sabbatical - Full Pay, Sabbatical - Partial Pay, Unpaid Leave, and Workers Comp. There are 'Save' and 'Clear' buttons at the bottom left. In the background, there is a footer with 'Build: 110707_185634' and 'Site Requirements'.

The **Begin Leave** event is the day after the last day on payroll, even if it is a weekend or holiday.

Step 7 Select the **Save** button.

Step 8 Do you want to add the End Leave event?

Yes: Return to step 5 and enter the **Event Date** field with the date the employee will return to work.

No: You have completed this scenario.

Scenario 6: Process an Appointment Change

Changes can occur throughout an employee's career with your agency. The following appointment changes can be made:

- Member category
- Collective bargaining unit (CBU)
- Position title
- Work calendar

Best Practices

If you make an appointment change that affects the employee's base rate, notify your agency's payroll department.

Step Actions (7 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Person Search

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND Date of Birth:

OR

Last Name:

OR

First Name:

Search

Step 3 Select the **Search** button.

Step 4 In the Appointment History section, select the appropriate active **Employer** link.

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5 Within the Appointment Event History section, select the **Add New** button.

Step 6 Complete the Appointment Event Details section.

Appointment Event Details

Event:*

Event Date:*

Save Clear

Site Change
Appointment Change
Begin Leave
End Leave
To Local ARP
From Local ARP
Permanent Separation

Build: 110707_185634 Use | Site Requirements student001ds Server: ENV89_node2 UID: 341

Step 7 Select the **Save** button.

You have completed this scenario.

Scenario 7: Process a Permanent Separation

The permanent separation date is the day after the employee's last day with your agency, which is often the day after the last day on payroll, even if it falls on a weekend or a holiday.

System Logic for a Permanent Separation

- A refunded appointment will not allow for a Permanent Separation event to be deleted.
- This will affect the employees' payroll reporting and health enrollment.
- This will deactivate the employees' myCalPERS employer system access. Refer to the [myCalPERS System Access Administration \(PDF\)](#) student guide for information.
- Employees with no posted payroll within the last six months or zero-posted records for twelve months will automatically be permanently separated through a monthly process.

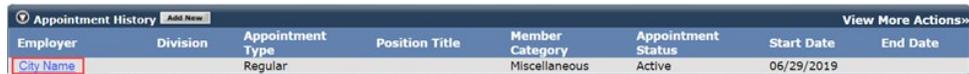
Step Actions (7 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate **Employer** link.



The screenshot shows a table titled "Appointment History" with an "Add New" button and a "View More Actions" link. The table has columns for Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. The "City Name" link under the Employer column is highlighted with a red box.

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

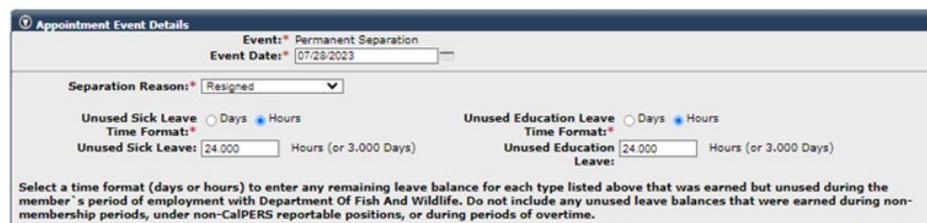
Step 5 Within the Appointment Event History section, select the **Add New** button.



The screenshot shows the "Appointment Event History" section with an "Add New" button highlighted in red. Below the button are "Correct Event" and "Delete" buttons, and a "View All Site Events" checkbox. A table lists events with columns for Event Date, Event, and Event Details. The first event is dated 01/01/2020 and is a "New Appointment".

Event Date	Event	Event Details
01/01/2020	New Appointment	View Event Details

Step 6 Complete the Appointment Event Details section.



The screenshot shows the "Appointment Event Details" form. The "Event" is "Permanent Separation" and the "Event Date" is "07/28/2023". The "Separation Reason" is "Resigned". There are fields for "Unused Sick Leave" and "Unused Education Leave", both set to "24,000" hours. The form includes radio buttons for "Days" and "Hours" and a note about selecting a time format.

Event: Permanent Separation
Event Date: 07/28/2023
Separation Reason: Resigned
Unused Sick Leave: 24,000 Hours (or 3,000 Days)
Unused Education Leave: 24,000 Hours (or 3,000 Days)

The unused sick leave and/or unused educational leave field:

- Will only display if your agency contracts for the optional benefit.
- Is only converted into service credit if the separation reason is Retirement.
- Can be entered in days or hours.

Step 7 Select the **Save** button. The member will be mailed an Options at Separation letter advising of their options as an inactive member.

You have completed this scenario.

Scenario 8: Delete an Appointment Event

Maintaining employee appointment details is essential for data integrity. You must remove an inaccurate appointment event from an employee's appointment history.

System Logic

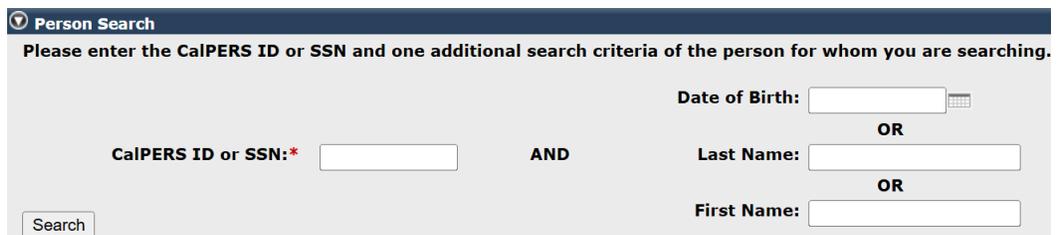
- You are unable to delete a retirement appointment using this scenario. Refer to unit 3, scenario 4 to delete an appointment.
- Deleting an appointment event may impact payroll reporting, so notify your payroll department of any changes.

Step Actions (6 Steps)

Step 1 Select the **Person Information** global navigation tab.

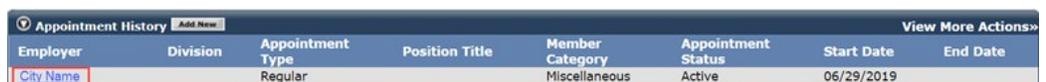


Step 2 Enter the employee's CalPERS ID or SSN plus complete one field on the right.

A search form titled 'Person Search' with the instruction 'Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.' It contains three input fields: 'CalPERS ID or SSN:*', 'Date of Birth:', and 'Last Name:'. There are 'OR' labels between the fields and an 'AND' label between the first and second fields. A 'First Name:' field is also present below the last name field. A 'Search' button is at the bottom left.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active **Employer** link.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City Name		Regular		Miscellaneous	Active	06/29/2019	

Step 5 Select the radio button of the event you wish to delete.



Event Date	Event	Event Details
<input checked="" type="radio"/> 12/31/2021	End Leave	
<input type="radio"/> 05/01/2021	Begin Leave	Unpaid Leave
<input type="radio"/> 12/05/2011	New Appointment	View Event Details

Step 6 Select the **Delete** button.

You have completed this scenario.

Scenario 9: Process a Site Change (State Agencies)

All state agencies are divisions under one employer (State of California). In myCalPERS, a permanent separation and new enrollment are not created if the employee is transferring between state agencies within one month. Their appointment history becomes updated to reflect the new agency on the same appointment which is a site change.

Why does someone need to process a site change?

Occasionally on a state transfer, a site change does not update myCalPERS from PIMS, which leaves the employee's position number (13-digit SCO number that defines the agency, unit, classification, and serial number) incorrect in myCalPERS. The new agency will not be able to review or process health transactions for the employee until this is corrected.

Scenario

Your former employee transferred to another state agency. Their appointment with their new agency is in PIMS; however, it's not in myCalPERS. The new agency contacted you to request a site change, so the employee's appointment is reflected correctly in myCalPERS.

Step Actions (12 Steps)

Step 1 Select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

Person Search

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND Date of Birth:

Last Name: OR First Name:

Search

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active **State of California** link.

Appt ID	Employer	Division	Appointment Type	Position Title	Member Category
12345678	State of California	State Controller Office	Regular	ASSOCIATE GOVERNMENTAL PROGRAM ANALYST	State Miscellaneous

Step 5 Within the Site Change History section, select your division link.

Site Change History

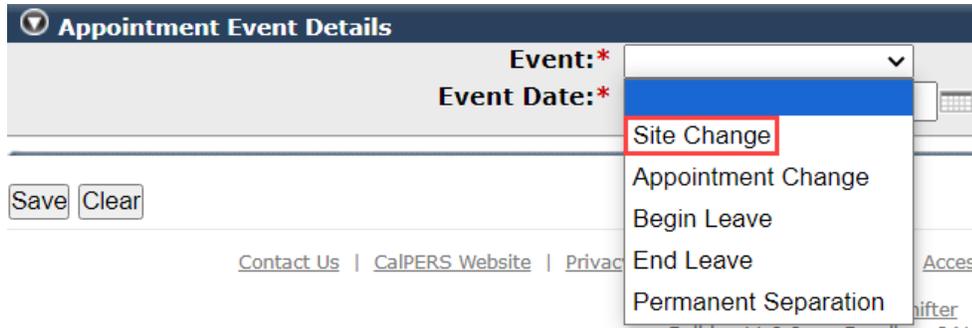
Employer: State of California

Division	Position Title
State Agency	ASSOCIATE GOVERNMENTAL PROGRAM ANALYST

Step 6 Within the Appointment Event History section, select the **Add New** button.



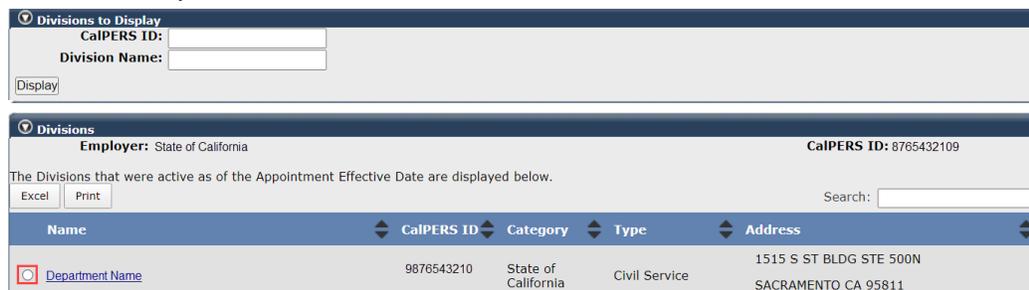
Step 7 Within the Appointment Event Details section, select Site Change from the Event drop-down list.



Step 8 Enter the event date and then choose the **Select** link.



Step 9 Within the Divisions section, select the radio button of the new division. You may also search by the division name or CalPERS ID.



Step 10 At the bottom left, choose the **Select** button.



Step 11

Select the **Update Appointment Details** link to ensure all other information is correct.

Appointment Event Details

Event:* Site Change

Event Date:*

Division: Department Name [Select](#)

[Update Appointment Details](#)

Step 12

After verifying and/or updating the appointment, select the **Save** button.

Appointment Details

Member Category: State Miscellaneous

Work Calendar: Work 12 Months/Paid 12 Months

CBU: R01 - Rank & File/ Admin, Financial & Staff Svc

Position Title: [Select](#)

Is the member subject to Social Security?*

Yes
 No

Tier: 1st Tier

Is the member participating in '59 Survivor benefits?*

Yes
 No

External Position Number:

Appointment Sequence Number: 01

Membership Information

Optional Member Election

Optional Member?*

Yes
 No

[Save](#)

You have completed this scenario.

Unit 4: Retirement Appointment Reconciliation

In this unit, you will learn how to use the Retirement Appointment Reconciliation (RAR) tool to identify appointments with unposted payroll records for your agency. Of those appointments with missing payroll, you may delete the appointment or maintain the following events:

- Permanent Separation
- Begin Leave
- End Leave

System Logic

- You may select multiple appointments to maintain.
- myCalPERS will update the RAR page on the last day of each month.
- Maintaining appointments within the RAR page automatically updates the list.
- Transactions completed outside the RAR page, e.g., updating the appointment within the employee’s profile page, will update the list the following business day.
- On Leave appointments with the following will be excluded from the list:
 - Appointments without an End Leave event will be excluded for six months.
 - Appointments with an End Leave event will be excluded for the entire leave.
- Active employees with no posted payroll within the last six months will automatically be permanently separated through a monthly process.

Refer to the [myCalPERS Retirement Appointment Reconciliation \(PDF\)](#) student guide for additional information.

Contents

Scenario 1: Add an Appointment Event.....	32
Scenario 2: Delete a Retirement Appointment	33

Scenario 1: Add an Appointment Event

You may add Permanent Separation, Begin Leave, or End Leave events.

Step Actions (7 Steps)

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

Step 2 Select the **Retirement Appointment Reconciliation** local navigation link.



Step 3 In the Participants With Unposted Payroll section, select the check box for each employee who has an appointment that needs to be maintained.

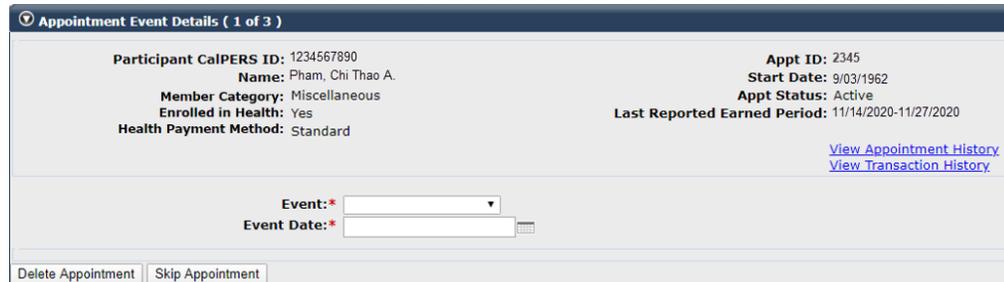


The screenshot shows a table titled 'Participants With Unposted Payroll'. The table has columns for Participant CalPERS ID, Name, Appt ID, Appt Status, Member Account Status, Retired Annuitant, Last Reported Earned Period, Payroll Past Due, and Unposted Payroll Periods. Three rows are visible, each with a checked checkbox in the first column. The first row is for Jones, Jason L. (Appt ID: 01234), the second for Pham, Chi Thao A. (Appt ID: 2345), and the third for Smith, Boyd B. (Appt ID: 9876). A 'Maintain Enrollment' button is visible at the top left of the table area.

Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Last Reported Earned Period	Payroll Past Due	Unposted Payroll Periods
<input checked="" type="checkbox"/>	0123456789 Jones, Jason L.	01234	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input checked="" type="checkbox"/>	1234567890 Pham, Chi Thao A.	2345	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input checked="" type="checkbox"/>	2345678901 Smith, Boyd B.	9876	Active	Active	No	11/14/2020 - 11/27/2020	Yes	Review

Step 4 Select the **Maintain Enrollment** button.

Step 5 Complete the Appointment Event Details section.



The screenshot shows the 'Appointment Event Details' form for a participant with CalPERS ID 1234567890 and name Pham, Chi Thao A. The form displays appointment details: Appt ID: 2345, Start Date: 9/03/1962, Appt Status: Active, and Last Reported Earned Period: 11/14/2020-11/27/2020. There are links for 'View Appointment History' and 'View Transaction History'. At the bottom, there are fields for 'Event:' (a dropdown menu) and 'Event Date:' (a date picker), along with 'Delete Appointment' and 'Skip Appointment' buttons.

- The Begin Leave event is the day after the last day at your agency, even if it is a weekend or holiday.
- The End Leave event is entered as the date the employee returns to work.
- The permanent separation date must be entered as at least one day after the last day at your agency, even if the date falls on a weekend or a holiday.

Step 6 Select the **Save & Go to Next** button if needed.

Note: If the Event type is Begin Leave, you may select the **Save & Add Event** button to add an End Leave event for this employee.

Step 7 Did you select more than one check box?

Yes: Return to step 5.

No: You have completed this scenario.

Scenario 2: Delete a Retirement Appointment

You can delete the entire appointment if necessary. This is rare but sometimes an appointment was updated in error or a new employee never worked.

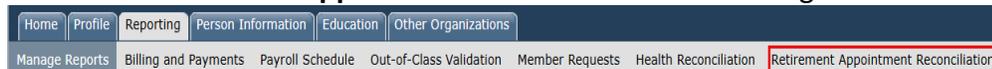
System Logic

You are unable to delete an appointment that has payroll and/or health benefits attached. Contact CalPERS for assistance.

Step Actions (7 Steps)

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

Step 2 Select the **Retirement Appointment Reconciliation** local navigation link.



Step 3 In the Participants With Unposted Payroll section, select the check box for each employee who has an appointment that needs to be deleted.



The screenshot shows a table titled 'Participants With Unposted Payroll'. The table has columns for Participant CalPERS ID, Name, Appt ID, Appt Status, Member Account Status, Retired Annuitant, Last Reported Earned Period, Payroll Past Due, and Unposted Payroll Periods. Three rows are visible, each with a checkbox in the first column selected. The 'Unposted Payroll Periods' column contains a 'Review' link for each row.

Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Last Reported Earned Period	Payroll Past Due	Unposted Payroll Periods
<input checked="" type="checkbox"/>	0123456789 Jones, Jason L.	01234	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input checked="" type="checkbox"/>	1234567890 Pham, Chi Thao A.	2345	Active	Active	No	10/31/2020 - 11/13/2020	Yes	Review
<input checked="" type="checkbox"/>	2345678901 Smith, Boyd B.	9876	Active	Active	No	11/14/2020 - 11/27/2020	Yes	Review

Step 4 Select the **Maintain Enrollment** button.

Step 5 Select the **Delete Appointment** button.



The screenshot shows the 'Appointment Event Details (1 of 3)' form. It displays participant information: Participant CalPERS ID: 2345678901, Name: Smith, Boyd B., Member Category: Miscellaneous, Enrolled in Health: Yes, Health Payment Method: Standard. It also displays appointment information: Appt ID: 9876, Start Date: 9/03/1962, Appt Status: Active, Last Reported Earned Period: 11/14/2020-11/27/2020. There are links for 'View Appointment History' and 'View Transaction History'. At the bottom, there are fields for 'Event:' and 'Event Date:', and two buttons: 'Delete Appointment' (highlighted with a red box) and 'Skip Appointment'.

Step 6 Select the **Save & Go to Next** button if needed.

Step 7 Did you select more than one check box?

Yes: Return to step 5.

No: You have completed this scenario.

Unit 5: Preprocessing Area (State Agencies)

In this unit, state agency employers will learn how to review and correct transactions that are in the retirement enrollment preprocessing area in myCalPERS.

Each night, PIMS generates an XML file to send new information to myCalPERS. If an error occurs during the transfer, the information will not post to an employee's myCalPERS account and will remain in the preprocessing area section of myCalPERS as an error.

You must review each error to confirm if the employee's myCalPERS data correctly matches PIMS.

- If an employee's myCalPERS account matches PIMS, you only need to delete the errors from the preprocessing area.
- If the employee's myCalPERS account does not match PIMS, you will need to resolve the errors using the transactions in Units 2 and 3 to correct myCalPERS before deleting the errors from the preprocessing area.

Preprocessing Retirement Enrollment Error Types

You must resolve the following preprocessing error types:

- Appointment Changes
- New Appointment
- Begin and End Leave
- Site Change
- Permanent Separation

Contents

Scenario: Correct a Preprocessing Error	35
myCalPERS/PIMS Field Equivalents	38
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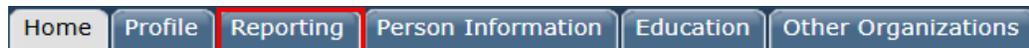
Scenario: Correct a Preprocessing Error

You will review and/or correct appointments that did not update in myCalPERS.

You must have the myCalPERS *Business Partner Retirement Enrollment* access role to correct preprocessing errors.

Step Actions (13 Steps)

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



Step 2 Select the **Preprocessing Area** left-side link.



Step 3 Are there Retirement Enrollment errors (Yes in the Error column)?

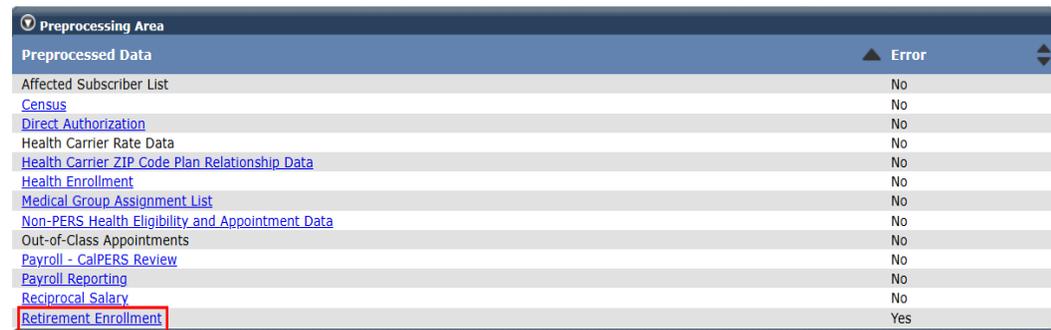


Preprocessed Data	Error
Affected Subscriber List	No
Census	No
Direct Authorization	No
Health Carrier Rate Data	No
Health Carrier ZIP Code Plan Relationship Data	No
Health Enrollment	No
Medical Group Assignment List	No
Non-PERS Health Eligibility and Appointment Data	Yes
Out-of-Class Appointments	No
Payroll - CalPERS Review	No
Payroll Reporting	Yes
Reciprocal Salary	No
Retirement Enrollment	Yes

Yes: Continue to step 4.

No: You have completed this scenario.

Step 4 Select the **Retirement Enrollment** link.



Preprocessed Data	Error
Affected Subscriber List	No
Census	No
Direct Authorization	No
Health Carrier Rate Data	No
Health Carrier ZIP Code Plan Relationship Data	No
Health Enrollment	No
Medical Group Assignment List	No
Non-PERS Health Eligibility and Appointment Data	No
Out-of-Class Appointments	No
Payroll - CalPERS Review	No
Payroll Reporting	No
Reciprocal Salary	No
Retirement Enrollment	Yes

Step 5 Review the Retirement Enrollment section. Does an employee have multiple errors (listed more than once)?

Yes: Continue to step 6.

No: Skip to step 8.

Step 6 At the top, within the Search Preprocessing Data section, enter the CalPERS ID number of an employee with multiple errors.

Search Preprocessing Data

CalPERS ID: 1234567890

SSN:

Event:

Event Date Range from:

Division:

Error:

To generate a report of erred transactions, select search criteria within this panel (or Clear all values if you want all records), click the Search button, then click the "Generate Error Report" button within the Retirement Enrollment panel below.

Retirement Enrollment

Process	Name	CalPERS ID	Event Date	Event	Division	Program	Preprocessed Status	Error
<input type="checkbox"/>	Solo, Hannah	1234567890	08/15/2025	Begin Leave Deletion	State agency	CalPERS	Error - Held	ENB00012 - Other erred transaction(s) for this person prevented this transaction from processing. Please review and correct the other erred transaction(s) for this person before continuing.
<input type="checkbox"/>	Solo, Hannah	1234567890	08/15/2025	Begin Leave	State agency	CalPERS	Error	ENI00061 - Two Begin Leave events cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
<input type="checkbox"/>	Solo, Hannah	1234567890	08/16/2025	Permanent Separation	State agency	CalPERS	Error - Held	ENB00012 - Other erred transaction(s) for this person prevented this transaction from processing. Please review and correct the other erred transaction(s) for this person before continuing.

Note: Filtering by individual employees helps to better understand how to address their errors and the order to resolve them.

You may select the **Generate Error Report** button to run the Retirement Enrollment Preprocessing Errors report to export the data for review.

Step 7 Select the **Search** button.

Step 8 Review the employee's error(s) and then compare the data in myCalPERS to PIMS.

Step 9 After comparing myCalPERS data and PIMS, does the myCalPERS data match PIMS?

If Yes: Continue to step 10

If No: Correct the transaction within myCalPERS to match PIMS, then continue to step 10. This might require modifying, deleting, and/or entering a new transaction in myCalPERS. Refer to Units 2 and 3 if needed.

Step 10 Select the **Process** check box for any errors you have just resolved.

Retirement Enrollment Add New								
Select All Add to Process List								
Process	Name	CalPERS ID	Event Date	Event	Division	Program	Preprocessed Status	Error
<input checked="" type="checkbox"/>	Solo, Hannah	1234567890	03/17/2021	Appointment Change	State Controller Office	CalPERS	Error	ENI00064 - Two Appointment Change Events for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
<input type="checkbox"/>	Solo, Hannah	1234567890	05/01/2023	Appointment Change	State Controller Office	CalPERS	Error	ENI00064 - Two Appointment Change Events for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
Select All Add to Process List								

Step 11 Select the **Add to Process List** button.

Step 12 Select the **Delete** radio button for all displayed errors.

To Process						
Order	Action	Name	CalPERS ID	Event Date	Event	Preprocessed Status
	<input type="radio"/> Process <input checked="" type="radio"/> Delete <input type="radio"/> None	Solo, Hannah	1234567890	08/15/2025	Begin Leave Deletion : Other Leave	
	<input type="radio"/> Process <input checked="" type="radio"/> Delete <input type="radio"/> None	Solo, Hannah	1234567890	08/15/2025	Begin Leave : Other Leave	ENI00061 - Two Begin Leave events cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
	<input type="radio"/> Process <input checked="" type="radio"/> Delete <input type="radio"/> None	Solo, Hannah	1234567890	08/16/2025	Permanent Separation :Other	ENI00085 - The appointment has contributions reported after the event date of the permanent separation event. Extend the Event Date past the contribution reporting date or back out the contributions to continue.

Step 13 Select the **Continue** button. **You have completed this scenario.**

myCalPERS/PIMS Field Equivalents

Below is a list of myCalPERS data terms and their equivalent terms in PIMS.

Refer to the CalPERS [State Reference Guide \(PDF\)](#) and the [SCO Personnel Action Manual: Section 2 – PAR Items, Lines 1-7 \(PDF\)](#) for more information.

myCalPERS Data	Employment History (USPS Legacy) Fields
Appointment End Date	Appointment Effective Date (Separation Transactions)
Appointment ID	Position Number
Appointment Sequence Number	Position Sequence Number
Appointment Start Date	Appointment Effective Date (Appointment Transactions)
Appointment Status (Active)	Pay Status (Active)
Enrollment Level (PEPRA New, Classic, Super Classic)	E-level Indicator (PEPRA, Classic, Super Classic)
CalPERS ID or Person ID	Social Security Number
CBU	CBID
Division	State Department
Division CalPERS ID	State Department Agency Number
Error Record Create Date	Entry Date
Event Date	Effective Date
First Name, Last Name, Middle Initial	First Name, Last Name, Middle Initial
Member Base Rate	Retirement Rate (Employee)
Member Category	Retirement Category
Position Title	Class Title
Retirement Plan	Retirement System
Social Security Contribution Modification	Exclusion Amount
State External Position Number	Position Number

myCalPERS Event Types and Employment History Transaction Codes

- **New Appointment (NAP)** = A01, A02, A03, A04, A09, A10, A11, A12, A13, A14, A20, A21, A22, A30, A31, A32, A33, A34, A35, A50, A52, A56, A57, A58, A59, A60, A61, A63, A64, A65, A68, A98, A99, 405, 505, or R01
- **Appointment Change (ACH)** = A01, A02, A03, A04, A09, A10, A11, A12, A13, A14, A20, A21, A22, A30, A31, A32, A33, A34, A35, A50, A52, A54, A56, A57, A58, A59, A60, A61, A63, A64, A65, A68, A98, A99, 120, 122, 126, 130, 440, or 505 (*including corrections*)
- **Site Change (STC)** = A01, A02, A03, A04, A09, A10, A11, A12, A13, A14, A20, A21, A22, A30, A31, A32, A33, A34, A35, A50, A52, A54, A56, A57, A58, A59, A60, A61, A63, A64, A65, A68, A98, A99, 120, 122, 126, 130, or 505 (*including corrections*)
- **Begin Leave (BEL)** =
 - CSU Record:
 - **CSU Transaction Code** = S42, S43, S44, S45, S46, S58, S59, S60, S61, S62, S63, S64, S65, S85, or 645 or
 - **Transaction Code** = 565 and Job Injury Code = 1, 2, 5, or 7 or
 - **Transaction Code** = S49 and Job Injury Code = 8 or 9
 - Civil Service Record:
 - **Civil Service Transaction Code** = S49, S50, S51, S52, S53, S54, S55, S56, S57, or S85 or
 - **Transaction Code = 565 and Job Injury Code = 2 or 5**
- **End Leave (ENL)** =
 - CSU Record:
 - **CSU Transaction Code** = A58, A57, A58, A59, or A68 or
 - **Transaction Code** = 565 and Job Injury Code = 3, 4, or 6
 - Civil Service Record:
 - **Transaction Code** = A03, A30, A31, A32, A33, A34 or A35 or
 - **Transaction Code** = 565 and Job Injury Code = 4 or 6
- **Permanent Separation (PSP)** = S01, S02, S03, S04, S05, S10, S20, S21, S30, S31, S32, S33, S34, S35, S40, S41, S70, S71, S80, S90, S95, or S99
- **Address Change (ADC)** = E01, E04
- **Profile Change (PRC)** = E01, E05, E07, or 440
- **Address Change (ADC) & Profile Change (PRC)** = E01
- **New Judge Appointment (NJA)** = A01, A02, A03, A04, A09, A10, A11, A12, A13, A14, A20, A21, A22, A30, A31, A32, A33, A34, A35, A50, A52, A56, A57, A58, A59, A60, A61, A63, A64, A6, A68, A98, A99, or 505 (*for JRS Retirement System*)
- **Left Bench (LFB)** = S01, S02, S03, S04, S05, S10, S20, S21, S30, S31, S32, S33, S34, S35, S40, S41, S70, S71, S80, S90, S95, or S99 (*for JRS Retirement System*)

myCalPERS Error Codes

Appointment Change

- **BE22803** - Other erred transaction(s) for this person prevented this transaction from processing. Please review and correct the other erred transaction(s) for this person before continuing.
- **COI00035** - The Member must be enrolled in Tier 2 within the last 90 days to select Tier 2.
- **CRB00099** - The reported appointment ID-XXXXXXX does not match the Participants record.
- **ENB00012** - Other erred transaction(s) for this person prevented this transaction from processing. Please review and correct the other erred transaction(s) for this person before continuing.
- **ENI00028** - A CalPERS ID is required on all transactions except new enrollments. Please search for the person by their SSN and birthdate to obtain their CalPERS ID and update this information in your system. You can then either enter the transaction manually on the person's account or submit another enrollment file with the correct CalPERS ID.
- **ENI00029** - The event correction or deletion was not applied because the corresponding event to be corrected or deleted does not exist.
- **ENI00045** - The event occurs on or after the appointment has been separated. Verify and update the event date.
- **ENI00046** - The Event Date may not be moved to a date on or before the New Appointment Event. Verify and update the event date.
- **ENI00055** - A Site Change Event and an Appointment Change Event for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
- **ENI00064** - Two Appointment Change Events for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
- **ENI00067** - An Appointment Change or Site Change Event cannot occur on the same date as a New Appointment Event. Verify and update the Event Date or review the Enrollment Eligibility Date of the New Appointment Event for accuracy.
- **ENI00086** - No appointment was found for this employee at this employer. Please submit a New Appointment Event first.
- **ENI00092** - This member's provisions have been overridden. Contact CalPERS to resolve the appointment transaction for this member's account.

Begin Leave

- **CRB00099** - The reported appointment ID - XXXXXXXX does not match the Participants record.
- **COI00179** - The appointment is marked as refunded. Please contact CalPERS if changes are required.
- **ENI00029** - The event correction or deletion was not applied because the corresponding event to be corrected or deleted does not exist.

- **ENI00045** - The event occurs on or after the appointment has been separated. Verify and update the event date.
- **ENI00060** - A Begin Leave Event cannot be deleted when a corresponding End Leave Event exists. Please review the Member's appointment history and remove the corresponding End Leave event first, or if you are trying to correct the Begin Leave date, submit a Begin Leave Correction Event.
- **ENI00061** - Two Begin Leave events cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.

End Leave

- **ENI00048** - Two End Leave Events for the same appointment may not occur on the same day. Verify and update the event date.
- **ENI00052** - A Begin Leave Event must occur before the End Leave Event. Verify and update the Event Date or submit a corresponding Begin Leave Event before submitting this End Leave Event.
- **ENI00053** - Only another End Leave event was found within the Member's appointment history prior to the Event Date entered below. A Begin Leave Event must occur between two End Leave Events. Verify and update the Event Date or submit a corresponding Begin Leave Event before submitting this End Leave Event.
- **INI00025** - The current transaction request conflicts with a future dated or more recent transaction (New Enrollment). Rescind the conflicting Future Dated transaction.

General

- **COI00001** - Enter a valid Address Line 1 that does not include the following characters: [!*~`!@\$%^_+={}" <>?()|].
- **COR00001** - Enter the following required field(s): {Address, City, State, County, or Gender}
- **CRB00011** - The Participant does not exist in the system for the reported CalPERS ID – {0}.
- **ENW00041** - You have selected to report {0} in the time format of {1}. Please review your entry for accuracy and click the Save button again to continue.

Health

- **COB00010** - A P.O. Box cannot be used for a health eligibility address. Please enter the member's physical address.
- **GEI00056** - Enter a valid ZIP Code for the state of CA.
- **HEI00015** - The subscribers Benefit Medical Group must be changed if the health event reason is Change Medical Group.
- **HEI00023** - A P.O. Box cannot be used for a health eligibility address. Please enter the member's physical address.
- **HEI00046** - This health event cannot be created because a conflicting Open Enrollment health event already exists with an effective date of XX/XX/XXXX. To proceed you must either rescind the conflicting health event or change the current health event effective date.

- **HEI00060** - The records selected may not be deleted as at least one appointment is associated with health.
- **HEI00129** - This event caused a mismatch between the health account coverage type and the enrolled health plan coverage type effective on XX/XX/XXXX. This event can be processed only by suspending financials.
- **INI00069** - The participant's mailing address is currently used for health eligibility. A P.O. Box cannot be used for a health eligibility address. Possible remedies include: 1) provide a Physical Address (non- P.O. Box) for the participant to be used for health eligibility, or 2) specify that the participants Employer ZIP Code be used for health eligibility in absence of a Physical Address. Once this is complete, you may submit the P.O. Box address as the participants Mailing Address.

New Appointment

- **COI00057** - The Social Security Number (SSN) submitted is invalid per Social Security Administration specifications. Please review and re-submit the enrollment with an SSN that does not begin with 9, 666 or contain all zeroes in any one section.
- **COI00064** - Appointment Identifier provided does not match a {1} in the system.
- **COI00081** - The Appointment Identifier is invalid. Verify and update your entry.
- **COR00015** - The address provided is missing the County and could not be verified by the address validation process and may be undeliverable. Please review the address if changes are required or verify that the address can be submitted as-is on the next screen, Confirm Address.
- **COR00043** - The Employee is retired and receiving benefits. If the employee is returning to CalPERS-covered service as a Retired Annuitant, be sure to select Yes for the Retired Annuitant question. Otherwise, contact CalPERS because this may be an illegal hire.
- **CRB00099** - The reported appointment ID - XXXXXXXX does not match the Participants record.
- **CRB00104** - The SSN does not match the participant's data in the system.
- **CTR00033** - The CalPERS ID XXXXXXXXXX is incorrect. Verify and update your entry.
- **ENI00003** - The records selected may not be deleted as at least one appointment is associated with a payroll.
- **ENI00005** - The Social Security Number provided is associated with an existing member with conflicting information. Verify and update your entry.
- **ENI00022** - The enrollee must be either subject to Social Security or participating in '59 Survivor benefits. Please select one.
- **ENI000026** - An enrollee must be retired to select the Retired Annuitant option. Verify and update your entry.
- **ENI00033** - The appointment cannot be deleted because there are additional events associated with it. Verify and update your entry.
- **ENI00035** - The position provided is an invalid position for the employer. Verify the position.
- **ENI00046** - The Event Date may not be moved to a date on or before the New Appointment Event. Verify and update the event date.

- **ENI00087** - Additional Events cannot be submitted on Local System and Non-Qualified Appointments.
- **ENI00091** - The Appointment cannot be deleted because there is a New Enrollment Event associated to it. Verify and update your entry.
- **ENI00098** - The appointment has contributions reported before the event begin date. Extend the Event Date before the contribution reporting date or back out the contributions to continue.
- **GEI00056** - Enter a valid ZIP Code for the state of CA.
- **INI00021** - The SSN must not be used for subsequent enrollment requests. CalPERS ID must be used.

Permanent Separation

- **COI00017** - Enter a valid program.
- **ENB00014** - Other erred transaction(s) for this person prevented this transaction from processing. Please review and correct the other erred transaction (s) for this person before continuing.
- **ENI00046** - The Event Date may not be moved to a date on or before the New Appointment Event. Verify and update the event date.
- **ENI00047** - Two Permanent Separation Events for the same appointment may not occur. Verify and update the event date.
- **ENI00085** - The appointment has contributions reported after the event date of the permanent separation event. Extend the Event Date past the contribution reporting date or back out the contributions to continue.
- **ENI00094** - Please enter a valid Separation Date. The date must be after Enrollment Eligibility Date.
- **ENI00095** - The Permanent Separation date cannot be greater than the Date of Death plus one day. Verify and update your entry.
- **ENI00100**- Unused Sick Leave cannot be reported because the Employer does not contract for Sick Leave.
- **ENI00123** – The Enrollment Eligibility Date cannot be on or after the date of the appointment’s Permanent Separation. Please enter a valid Enrollment Eligibility Date or review the appointment to ensure the date of Permanent Separation is correct.

Site Change

- **ENI00045** - The event occurs on or after the appointment has been separated. Verify and update the event date.
- **ENI00054** - Two Site Change Events for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.
- **ENI00055** - A Site Change Event and an Appointment Change Event for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.

- **ENI00067** - An Appointment Change or Site Change Event cannot occur on the same date as a New Appointment Event. Verify and update the Event Date or review the Enrollment Eligibility Date of the New Appointment Event for accuracy.

Miscellaneous

Contact CalPERS for assistance with the following errors:

- **BE22802** - An error for which there is no standard message has occurred. Please report Exception event id: XXXXXXXXXXXX to CalPERS for assistance.
- **COI00179** - The appointment is marked as refunded. Please contact CalPERS if changes are required.
- **ENI00092** - This member's provisions have been overridden. Contact CalPERS to resolve the appointment transaction for this member's account.

Contact SCO for assistance with the following error:

- **ENI00085** - The appointment has contributions reported after the event date of the permanent separation event. Extend the Event Date past the contribution reporting date or back out the contributions to continue. – *If backing out contributions, must contact SCO for assistance.*

SCO Resources

Obtain more information by visiting the [SCO Website](#) at www.sco.ca.gov.

[Retirement Enrollment Preprocessing Toolkit](#)

Pathway: SCO website > State and Local > State Departments > Human Resources > Statewide Civil Service Retirement Program > *Retirement Enrollment Preprocessing Toolkit heading*

[SCO Personnel Action Manual: Section 2 – PAR Items, Lines 1-7 \(PDF\)](#)

Pathway: State Controller’s Office website > State and Local > State Departments > Human Resources > Personnel Administration > Personnel Action Manual (PAM) > Section 2 – PAR Items, Lines 1 - 7

CalPERS Resources

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

- [Business Rules & myCalPERS Classes](#)

Pathway: CalPERS website > Employers > Employer Education > myCalPERS Student Guides & Resources (*under Resources heading*)

- [myCalPERS Student Guides & Resources](#)

Pathway: CalPERS website > Employers > I Want To...: Access myCalPERS Student Guide

- [Self-Paced Online Classes](#) (log in to myCalPERS, select the **Education** global navigation tab, then the **Classes** local navigation link)

- Business Rules

- Qualifications for California State Universities (CSU)
- Qualifications for Public Agencies, State Agencies & Schools
- Requirements for Public Agencies & Schools
- Working After Retirement

- myCalPERS

- Add a New Appointment
- Edit Reciprocal Information
- Enrolling a Retired Annuitant
- Add Appointment Events
- Out-of-Class Reporting
- Reconcile by Appointments

- [myCalPERS Technical Requirements](#)

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements

- [Public Agency & Schools Reference Guide \(PDF\)](#)

Pathway: CalPERS website > Employers > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)

- [State Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Reference & Health Guides > State Reference Guide (PDF)
- [myCalPERS System Enhancements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS System Enhancements
- [Email Subscriptions](#)
Pathway: CalPERS website > (scroll to the bottom) Subscribe
- [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
 - Automatic Permanent Separation-Potential Appointments Report (PDF)
 - Benefit Recipients by Employer Report (PDF)
 - Business Partner On Leave Report (PDF)
 - CalPERS ID and Appointment ID Report (PDF)
 - Confirmation of No Payroll Contributions Reportable Report (PDF)
 - Overtime Appointment Identifier Report (PDF)
 - Participant Appointment Details Report (PDF)
 - Participant Enrollment History Report (PDF)
 - Participant Pension Enrollment Data Report (PDF)
 - Participant Undeliverable Address Report (PDF)
 - Retired Annuitant Hours Worked Report (PDF)
 - Retired Annuitant Late Fee Status Report (PDF)
 - Retirement Appointment Reconciliation Report (PDF)
 - Separated Retirement Reconciliation Appointments Report (PDF)

CalPERS Contacts

Email

- To contact the [Employer Education Team](#) for questions and requests, email calpers_employer_communications@calpers.ca.gov.
- To contact the [Employer Account Management Division](#) for questions related to Retirement Appointment Reconciliation, email employertechnicalsupport@calpers.ca.gov.
- To contact the [Employer Account Management Division](#) for questions about membership, email membership_reporting@calpers.ca.gov.
- To contact the [Membership and Post Retirement Employment Determinations Team](#) for post-employment questions, email working_after_retirement@calpers.ca.gov.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email 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, then select the **Submit Inquiry** link to submit a question or request.