myCalPERS Retirement Enrollment

Student Guide

November 6, 2024

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.

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

System Access

If myCalPERS does not allow you to do these scenarios, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

Prior to taking a myCalPERS training, new users should review the Introduction to myCalPERS for Business Partners (PDF) student guide and take a Business Rules class. Business rules summarizes the laws defined by the California Public Employees' Retirement Law (PERL).

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Unit 1: Person Search Tool

The Person Search tool allows you to verify membership status and confirm appointment information.

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- Scenario 3: Review Retirement Appointment Details – Page 7

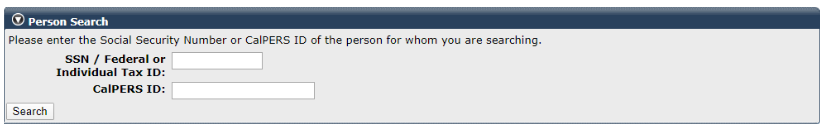
Scenario 1: Verify CalPERS Membership

You have a new employee whose appointment does not qualify for membership. However, you will still need to verify membership status in case the new employee is already a CalPERS member. If they are already a member, the new employee will have to be enrolled into retirement even if the position they are filling in does not qualify for membership because they are already a member. If an eligible employee is not enrolled into CalPERS membership within 90 days, your agency will pay all arrears contributions (both member and employer) and an administrative fee ($500 per employee, per late appointment).

Step Actions (7 Steps)

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

Step 2 — Enter either the SSN, Individual Tax ID, or CalPERS ID.



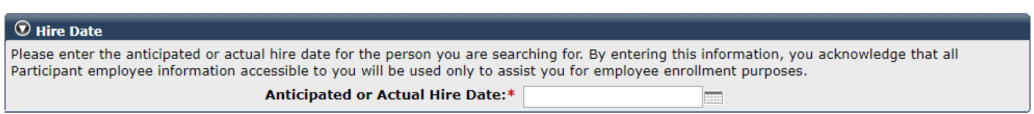
Step 3 — Select the **Search** button.

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 — In the Hire Date section, enter the appropriate date into 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 means they have member contributions but may or may not be actively working**.** No means they are a non-member (no member contributions on file), e.g., a prior member who refunded, a dependent on health benefits, a beneficiary, etc.

You have completed this scenario.

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

Note: This scenario is intended 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
		Optional Member:	No
Prior School Membership:	No	**Prior School Membership Date:**	
Member:	Yes	**Retired:**	No
Membership Date:	01/28/2019	**Retirement Date:**	
ARP:	No		
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 you are viewing it. Verify the eligibility indicator on the date of hire to determine ES372 eligibility.
- Does not take into consideration if 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 specific 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:

- Appointment Event History
- Appointment Details
- Membership Information
- Reciprocal Self-Certification Information
- Retired Annuitant Information
- Retired Annuitant Special Criteria

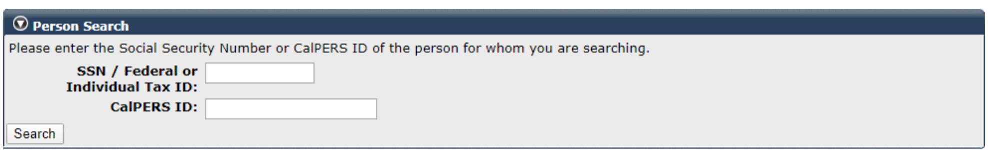
System Logic

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)

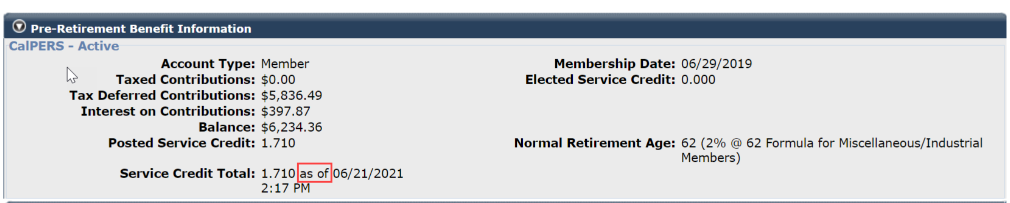
Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter either the SSN, Individual Tax ID, or CalPERS ID.


Person Search
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.
SSN / Federal or Individual Tax ID:
CalPERS ID:
Search

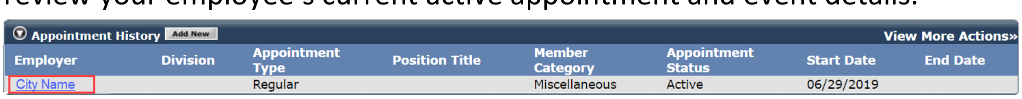
Step 3 Select the **Search** button.

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


Pre-Retirement Benefit Information
CalPERS - Active
Account Type: Member
Taxed Contributions: $0.00
Tax Deferred Contributions: $5,836.49
Interest on Contributions: $397.87
Balance: $6,234.36
Posted Service Credit: 1.710
Service Credit Total: 1.710 as of 06/21/2021 2:17 PM
Membership Date: 06/29/2019
Elected Service Credit: 0.000
Normal Retirement Age: 62 (2% @ 62 Formula for Miscellaneous/Industrial Members)

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

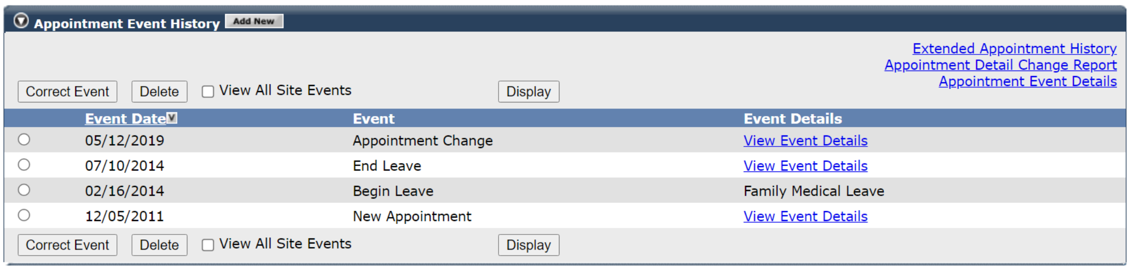
Step 5 Within the Appointment History section, select the appropriate **Employer** link to review your employee's current active appointment and event details.


Appointment History Add New View More Actions»

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

This provides a list of the employee's appointment events and event details. Their history begins with a new appointment and ends with a permanent separation. In between, they may have an appointment change, site change (a State employee transfer between State agencies), and/or a leave of absence (begin and/or end leave). Select a **View Event Details** link to review the event history (when the event was created or updated and who made the change).


Appointment Event History Add New

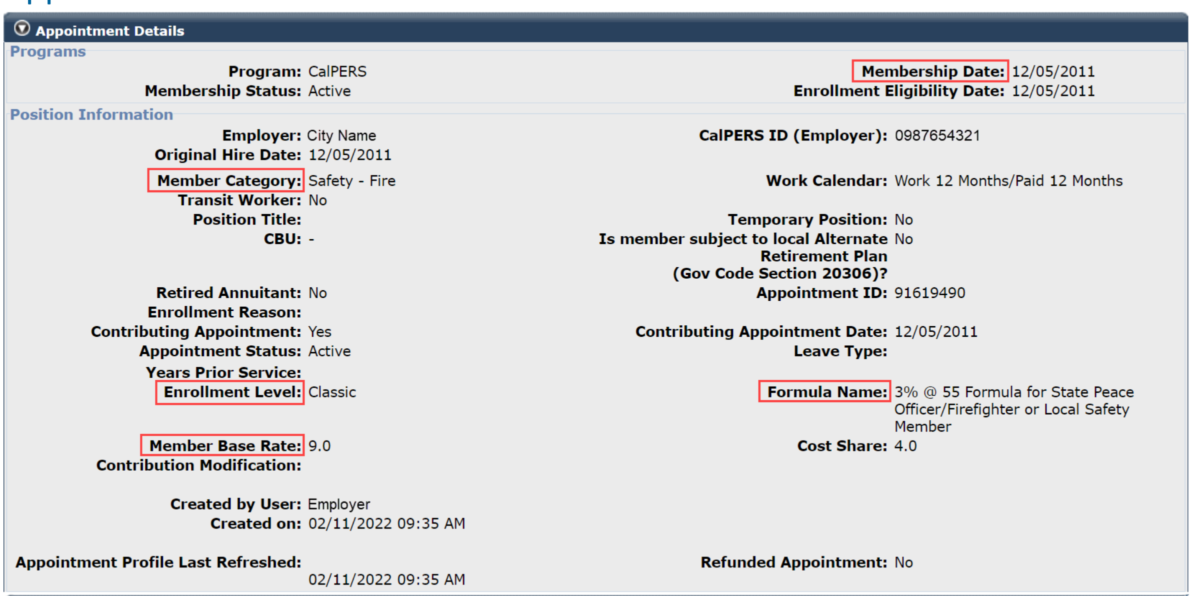
Extended Appointment History
Appointment Detail Change Report
Appointment Event Details

Correct Event Delete View All Site Events Display

	Event Date	Event	Event Details
○	05/12/2019	Appointment Change	View Event Details
○	07/10/2014	End Leave	View Event Details
○	02/16/2014	Begin Leave	Family Medical Leave
○	12/05/2011	New Appointment	View Event Details

Correct Event Delete View All Site Events Display

Appointment Details


Appointment Details

Programs

Program: CalPERS
Membership Status: Active
Membership Date: 12/05/2011
Enrollment Eligibility Date: 12/05/2011

Position Information

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
Contribution Modification:
Created by User: Employer
Created on: 02/11/2022 09:35 AM
Appointment Profile Last Refreshed: 02/11/2022 09:35 AM

CalPERS ID (Employer): 0987654321
Work Calendar: Work 12 Months/Paid 12 Months
Temporary Position: No
Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)? No
Appointment ID: 91619490
Contributing Appointment Date: 12/05/2011
Leave Type:
Formula Name: 3% @ 55 Formula for State Peace Officer/Firefighter or Local Safety Member
Cost Share: 4.0
Refunded Appointment: No

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 and PEPRA New. This is based on the membership date and if they have applicable reciprocal membership entered into the Reciprocal Self-Certification Form Information panel in their appointment.

- **Member Base Rate**: The member's enrollment level and formula determine their base rate (contribution rate). This is the percentage of their reportable earnings that is paid to CalPERS to fund their retirement.
- **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 employee (school employers). This is an example for a public agency employee:

Membership Information

Is the member subject to Social Security? Yes

Optional Member

Optional Member? No

Reciprocal Self-Certification Form Information

Completion of the Reciprocal Self-Certification Form does not establish reciprocity; this form is used for enrollment purposes only. To request 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 in their myCalPERS account using the member self-services.

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

Using the Reciprocal Self-Certification Form (myCalPERS 1187) the member completed, enter the information exactly as provided into the Reciprocal Self-Certification Form Information panel in their appointment. The dates with other system and other factors determine the member's enrollment level (Classic or PEPRA) under your agency.

- **Reciprocal Member Indicator**: This indicates if the employee has or doesn't have reciprocity with an eligible retirement system.
- **Most Recent Reciprocal System:** This will be the name of the system the member was with prior to entering our system.

- **Earliest Qualifying Reciprocal Membership Date:** This will be the membership date with the reciprocal system.
- **Most Recent Reciprocal Permanent Separation Date**: This will be the separation date from the reciprocal system.
- **Retired Reciprocal Member Indicator:** This will be a yes or no question. If yes, you will be prompted to enter the date the member retired with their reciprocal system.
- **Refunded Reciprocal Member Indicator:** This will be a yes or no question. If yes, you will be prompted to enter the date the member refunded from their reciprocal system.

  Your agency is responsible for ensuring all information is entered accurately based on the information provided on the Reciprocal Self-Certification Form. We encourage you to request the member provide substantiating documentation with the form if they are placed into the classic enrollment level due to the information provided. If this information is later found to be inaccurate, we will request your agency to make changes to the enrollment. Any resulting adjustments will be your agency's responsibility.

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

This unit provides the steps on how to add a new appointment for eligible employees and retired annuitants.

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- Scenario 1: Add a New Retirement Enrollment – Page 12
- Scenario 2: Add a Retired Annuitant Appointment – Page 16

Scenario 1: Add a New Retirement Enrollment

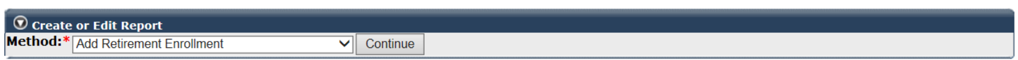
It is your responsibility to enroll qualifying CalPERS members within 90 days. If the member is not enrolled timely, CalPERS will assess administrative costs and arrears contributions (member and employer). Enroll your employee into CalPERS membership by completing the following:

- Verify if the employee has an existing myCalPERS account
- Confirm demographics
- Report appointment details
- Indicate reciprocal self-certification if it is applicable

Step Actions (23 Steps)

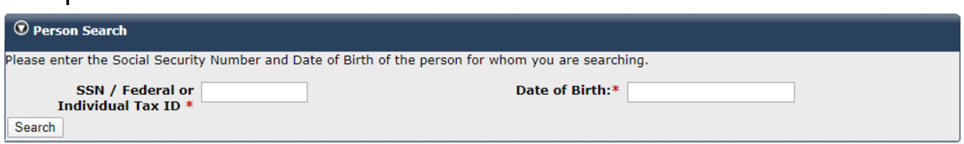
Step 1 Select the **Reporting** global navigation tab.

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 Complete the Person Search section.

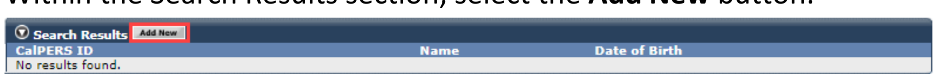


Step 5 Select the **Search** button.

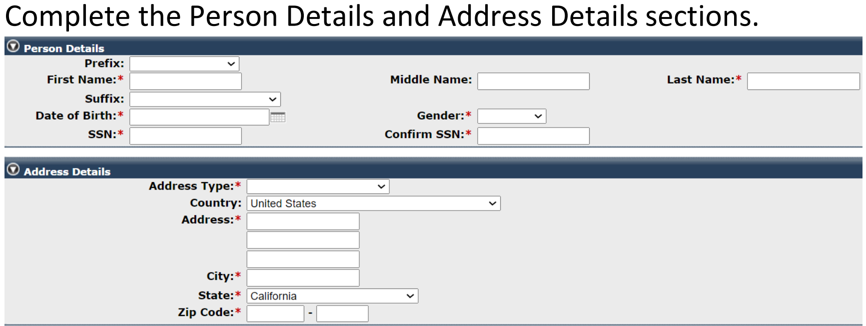
Step 6 What displayed next?

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

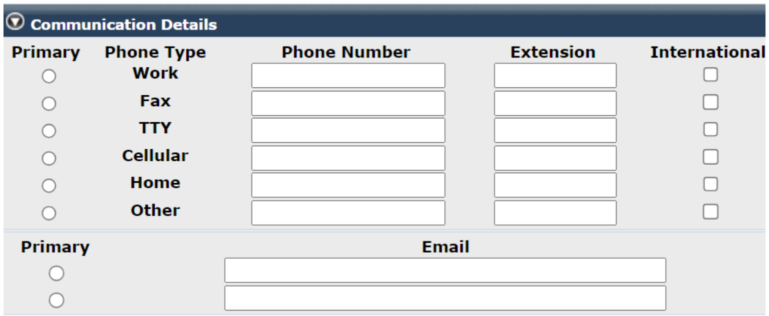
Step 7 Within the Search Results section, select the **Add New** button.



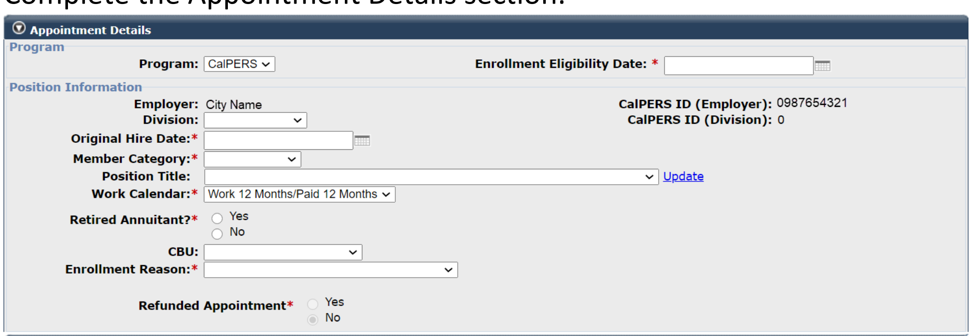
Step 8 Complete the Person Details and Address Details sections.



Step 9	Complete the Address and Communication Details sections.



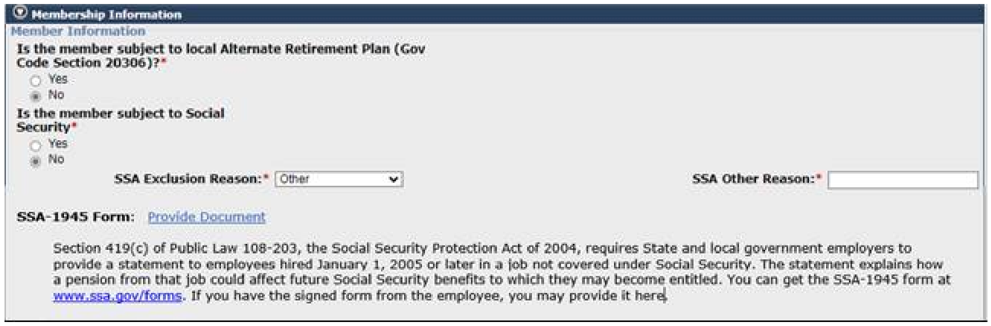
Step 10	Select the **Primary** radio button for one phone number and an email address.
Step 11	Select the **Save & Continue** button.
Step 12	If multiple addresses display, select the radio button for the correct address.
Step 13	Select the **Confirm** button.
Step 14	Select the **Save & Continue** button.
Step 15	Complete the Appointment Details section.



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

Step 17 Continue completing questions in the Membership Informtion section.

If the member is not subject to Social Security, upload the SSA-1945 form.

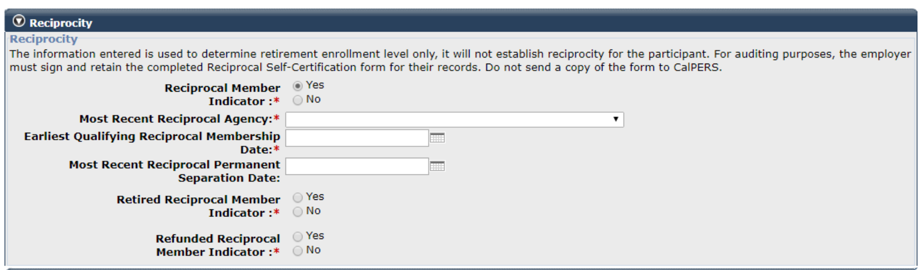


Step 18 On the Reciprocal Self-Certification Form (myCalPERS 1187) section 1, did the member indicate that they have membership in a defined benefit plan?

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

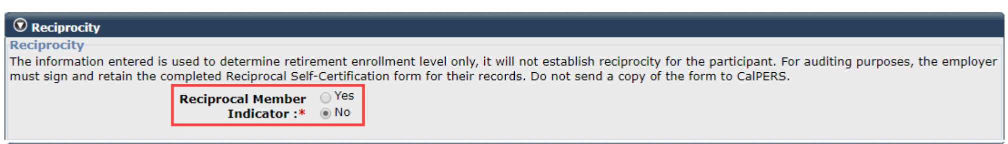
No: Skip to step 21.

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



Step 20 Skip to step 22

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



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
- Confirm demographics
- Report appointment details
- Identify the retired annuitant type
- Determine if exempt from the 180-day wait period
- Determine the retiree's normal retirement age (bona fide separation requirement)

Note: If a retired annuitant is reinstating from retirement, then you will need to process a new membership appointment**.**

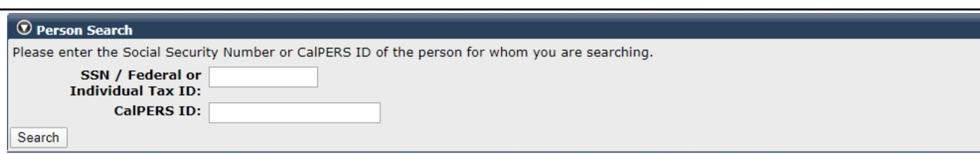
Step Actions (23 Steps)

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

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

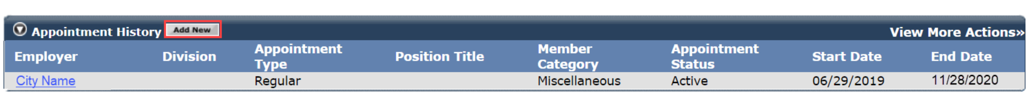
No: Skip to step 6.

Step 2 Enter either the SSN, Individual Tax ID, or CalPERS ID.



Step 3 Select the **Search** button.

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



Step 5 Skip to step 11.

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

Step 7

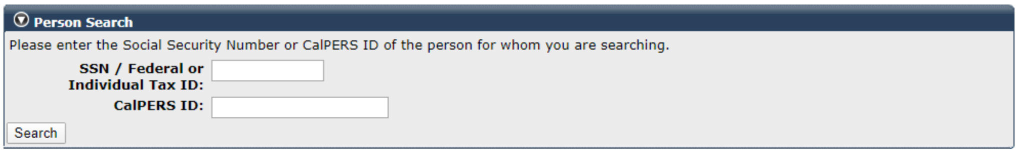
Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.

Step 8

Select the **Continue** button.

Step 9

Complete the Person Search section.

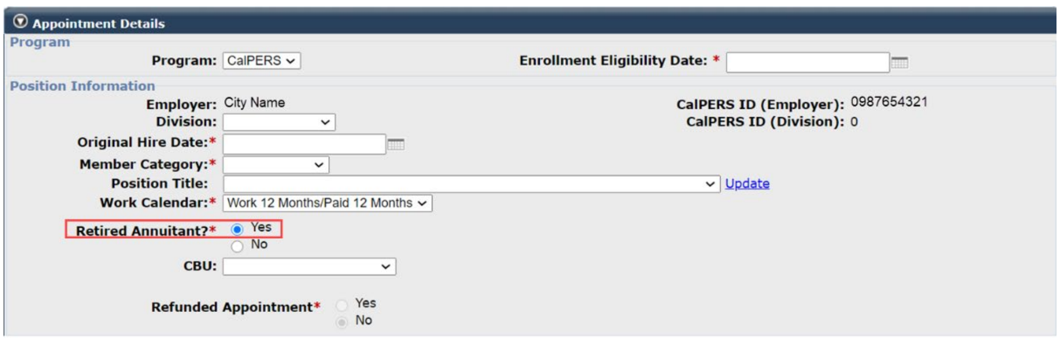


Step 10

Select the **Search** button.

Step 11

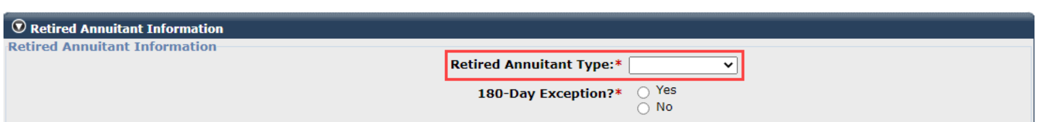
Complete the Appointment Details section.



If the RA retired from your agency, myCalPERS will require the original hire date at your agency. Refer to unit 1, Review Retirement Appointment Details for where to locate this information. Skip to step 13.

Step 12

Within the Retired Annuitant Information section, select from the Retired Annuitant Type drop-down list.



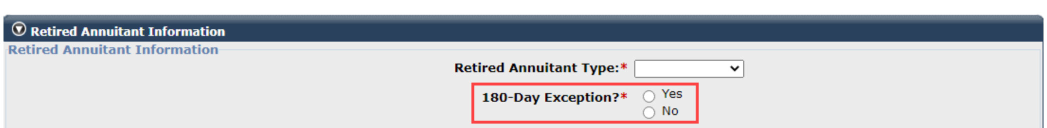
Step 13

Does this appointment have a 180-day exception?

Yes: Select the **Yes** radio button and continue to step 16.

No: Select the **No** radio button, and then skip to step 21.

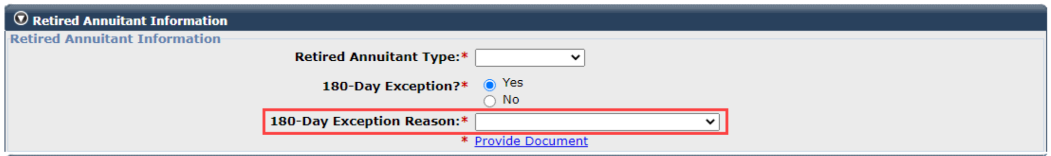
Note: If they are returning due an Executive Order, select **No.**



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.

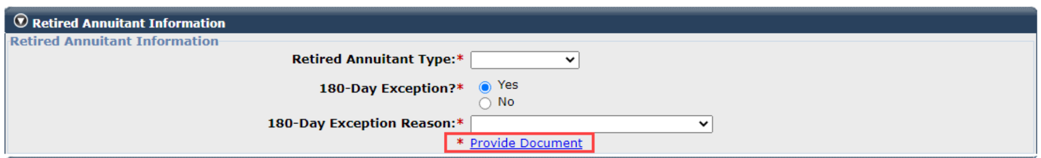
Step 14

Within the Retired Annuitant Information section, select from the 180-Day Exception Reason drop-down list.



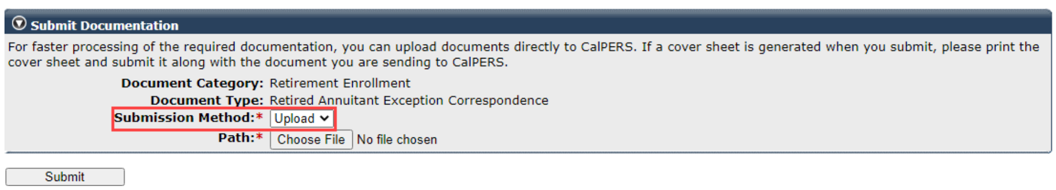
Step 15

Within the Retired Annuitant Information section, select the **Provide Document** link unless it is for the Returning Safety Position reason.



Step 16

Within the Submit Documentation section, select from the Submission Method drop-down list.



Step 17

What submission method did you select?

Mail: Mail the documentation to CalPERS, and then skip to step 21.

FAX: Fax the documentation to CalPERS, and then skip to step 21.

Upload (preferred): Select the **Choose file** button, and then continue to step 20.

Step 18

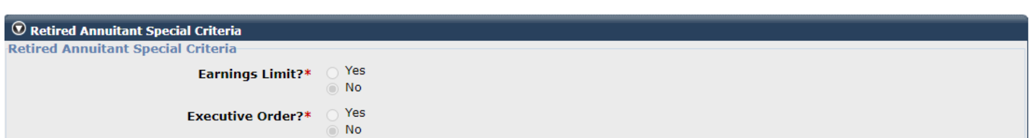
Upload the file.

Step 19

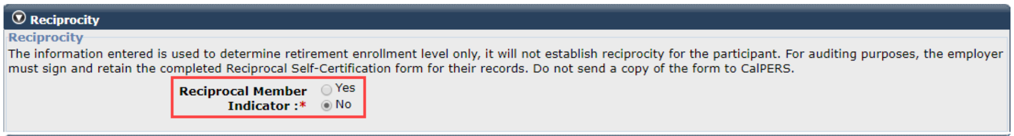
Select the **Submit** button.

Step 20

Skip the Retired Annuitant Special Criteria section.



Step 21 Within the Reciprocity section, select the **No** radio button.



Step 22 Select the **Save** button.

Step 23 Verify the Appointment Details section is correct.

You have completed this scenario.

Unit 3: Maintain Enrollment

You may update and maintain your employees' accounts, enrollments, and appointments.

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Scenario 1: Update Demographic Information

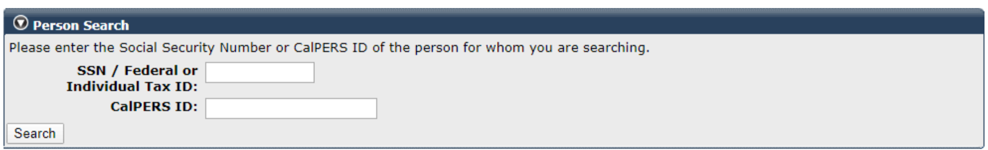
System Logic

- Before correcting demographic information, your employee must provide a verification document. Refer to the [Public Agency & Schools Reference Guide (PDF)] for a list of acceptable documentation.
- Name changes/corrections will impact payroll reporting.
- If the member is also enrolled in health benefits with CalPERS, the demographic changes will be reported to their health carrier.
- When demographic information is updated in myCalPERS, a letter is mailed to the member advising them of the change(s).

Step Actions (6 Steps)

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

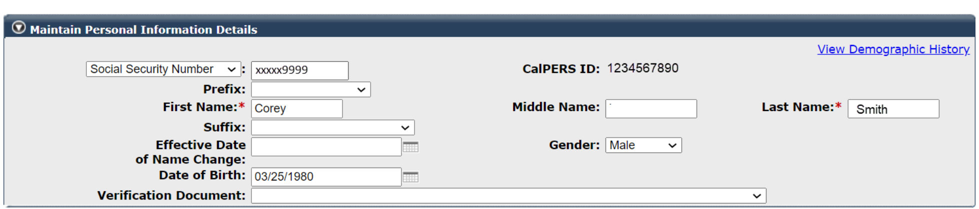
Step 2 Enter either the SSN, Individual Tax ID, or CalPERS ID.



Step 3 Select the **Search** button.

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

Step 5 Complete the Maintain Personal Information Details section.



Step 6 Select the **Save** button.

You have completed this scenario.

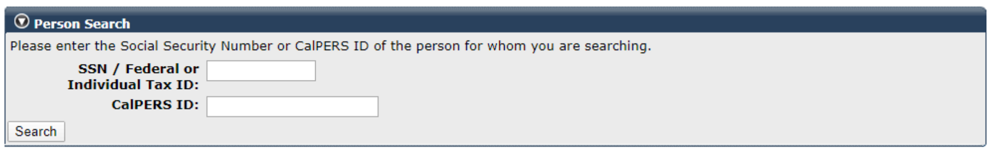
Scenario 2: Update Employee Contact Information

It's important to update an employee's contact information when needed.

Step Actions (8 Steps)

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

Step 2 Enter either the SSN, Individual Tax ID, or CalPERS ID.



Step 3 Select the **Search** button.

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

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).

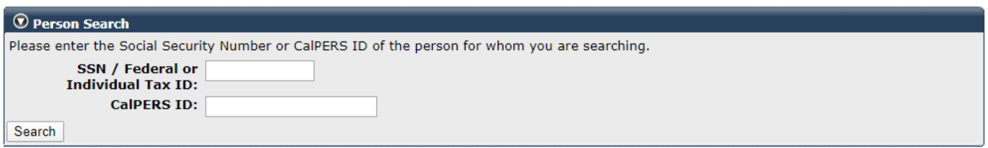
System Logic

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

Step Actions (8 Steps)

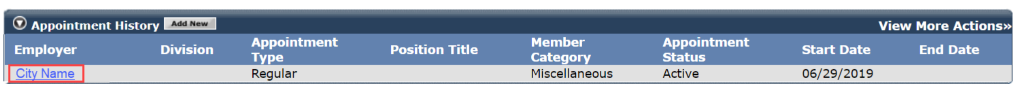
Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter either the SSN, Individual Tax ID, or CalPERS ID.

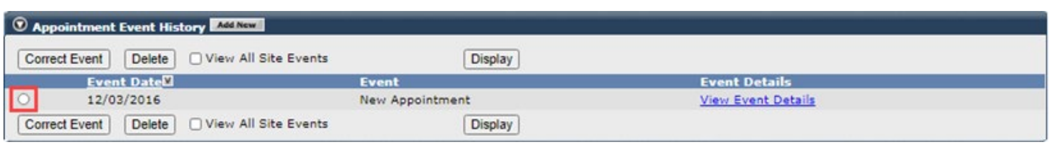


Step 3 Select the **Search** button.

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



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



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.

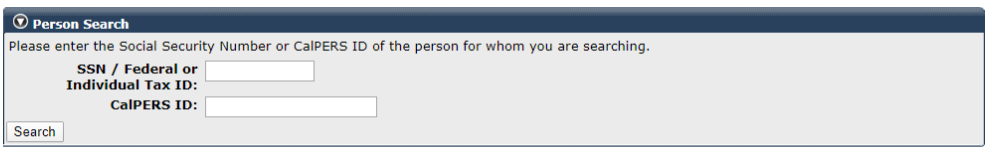
System Logic

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

Step Actions (6 Steps)

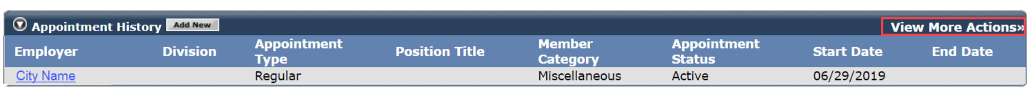
Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter either the SSN, Individual Tax ID, or CalPERS ID.



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.



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

Step 6 Select the **Delete** button.

You have completed this scenario.

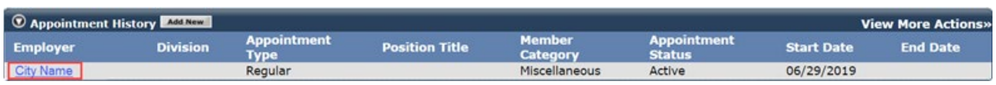
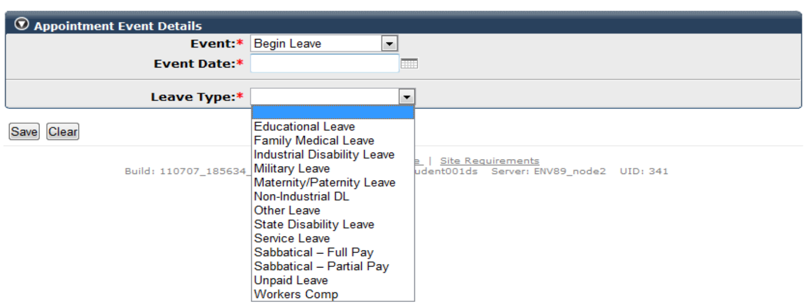
Scenario 5: Process a Leave of Absence

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

myCalPERS will cancel the health enrollment 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 either the SSN, Individual Tax ID, or CalPERS ID.
Step 3	Select the **Search** button.
Step 4	Within the Appointment History section, select the appropriate active **Employer** link. 
Step 5	Within the Appointment Event History section, select the **Add New** button.
Step 6	Complete the Appointment Event Details section.  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. The **End Leave** event is entered as 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

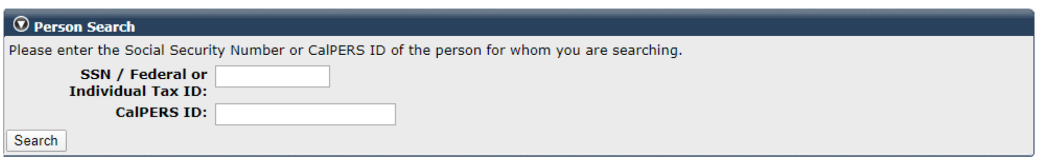
Best Practices

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

Step Actions (7 Steps)

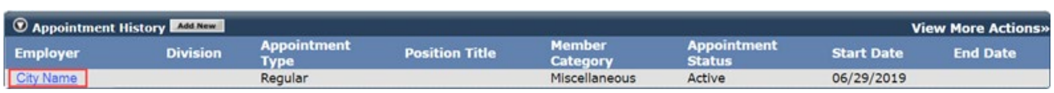
Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter either the SSN, Individual Tax ID, or CalPERS ID.



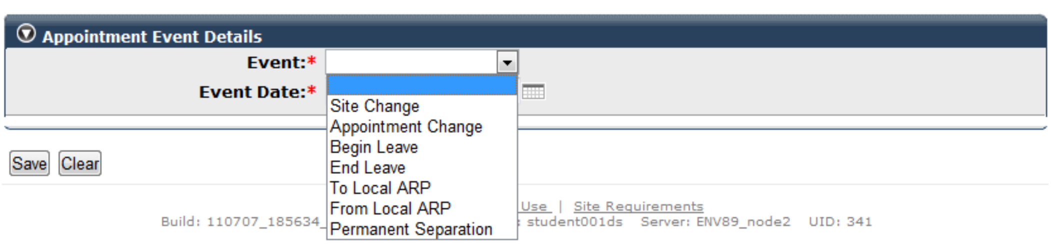
Step 3 Select the **Search** button.

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



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

Step 6 Complete the Appointment Event Details section.



Step 7 Select the **Save** button.

You have completed this scenario.

Scenario 7: Process a Permanent Separation

System Logic

- 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.
- A refunded appointment will not allow for a Permanent Separation event to be deleted.
- A permanent separation will affect the employee's payroll reporting and health enrollment.
- A permanent separation will deactivate the employee's myCalPERS employer system access. Refer to the myCalPERS System Access Administration (PDF) student guide for information.
- Active employees with no posted payroll within the last six months will automatically be permanently separated through a monthly process.

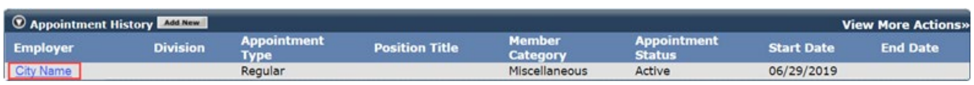
Step Actions (7 Steps)

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

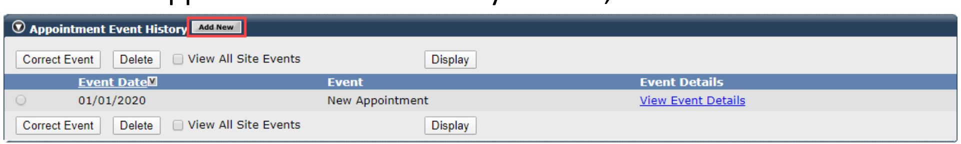
Step 2 Enter either the SSN, Individual Tax ID, or CalPERS ID.

Step 3 Select the **Search** button.

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



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



Step 6 Complete the Appointment Event Details section.

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.

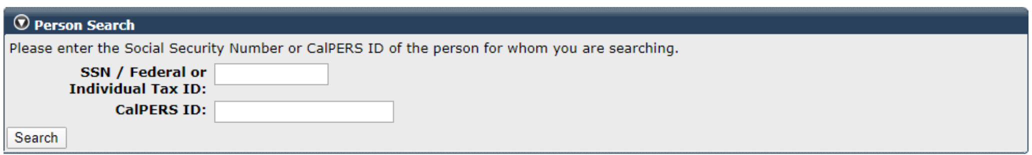
System Logic

- 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 payroll department of any changes.

Step Actions (6 Steps)

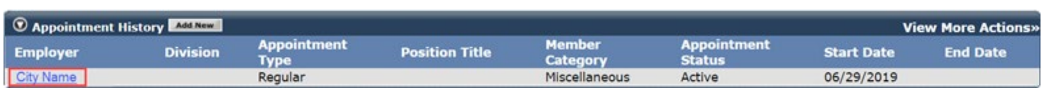
Step 1 Select the **Person Information** global navigation tab.

Step 2 Enter either the SSN, Individual Tax ID, or CalPERS ID.

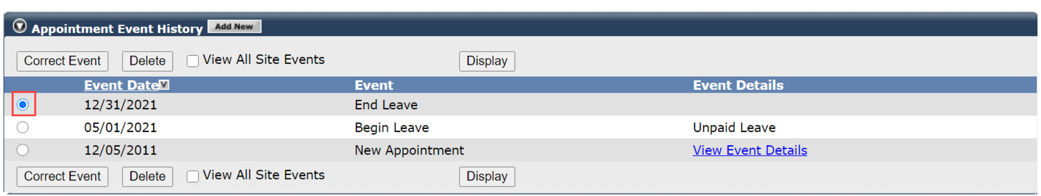


Step 3 Select the **Search** button.

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



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



Step 6 Select the **Delete** button.

You have completed this scenario.

Unit 4: Retirement Appointment Reconciliation

The Retirement Appointment Reconciliation (RAR) tool is used 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 – Page 30
- Scenario 2: Delete a Retirement Appointment – Page 31

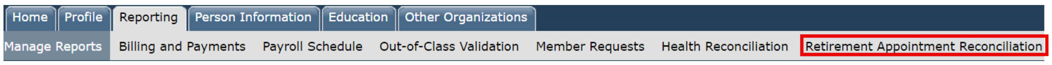
Scenario 1: Add an Appointment Event

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

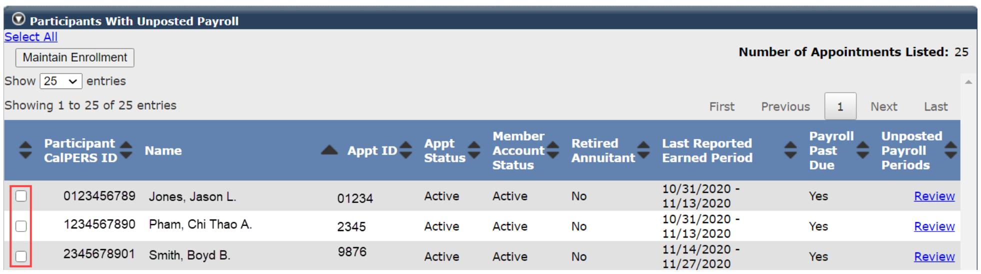
Step Actions (7 Steps)

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

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

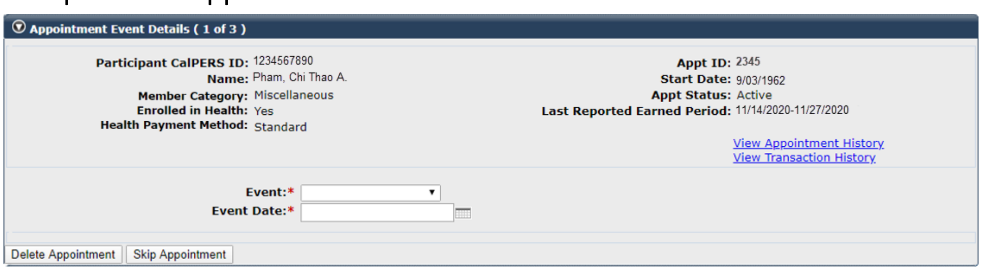


Step 3 In the Participants With Unposted Payroll section, select the check box for each employee who has an appointment that needs to be maintained.



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

Step 5 Complete the Appointment Event Details section.



- 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.

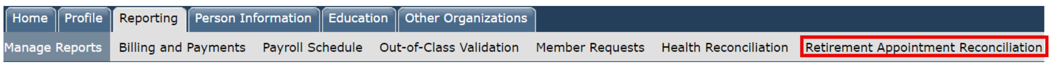
Scenario 2: Delete a Retirement Appointment

System Logic

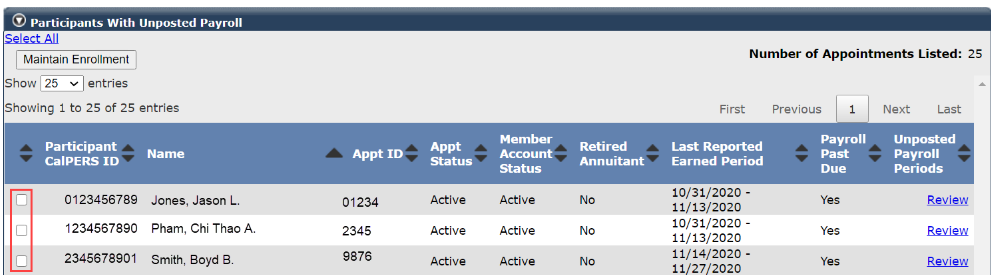
You are unable to delete an appointment that has payroll and/or health benefits attached. Contact CalPERS for assistance.

Step Actions (7 Steps)

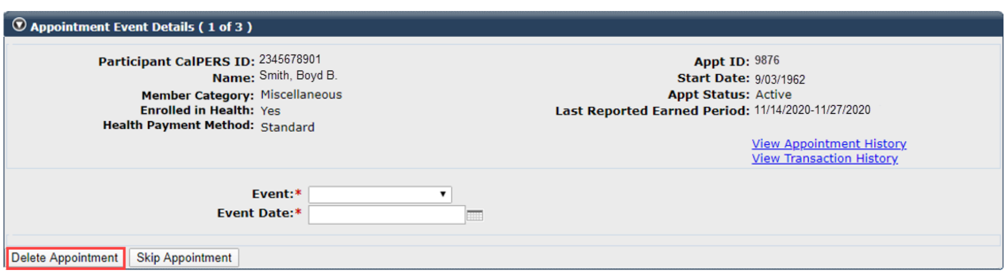
Step 1	Select the **Reporting** global navigation tab.
Step 2	Select the **Retirement Appointment Reconciliation** local navigation link.



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



Step 4	Select the **Maintain Enrollment** button.
Step 5	Select the **Delete Appointment** button.



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.**

CalPERS Resources

Obtain more information by visiting the CalPERS website at www.calpers.ca.gov.

- Business Rules & myCalPERS Classes
  Pathway: CalPERS website > Employers > I Want To…: Attend Training & Events > Business Rules & myCalPERS Classes
- myCalPERS Student Guides & Resources
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guide
- myCalPERS Technical Requirements
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- Public Agency & Schools Reference Guide (PDF)
  Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- Circular Letters - CalPERS
  Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- Public Employees' Retirement Law (PERL)
  Pathway: CalPERS website > About > Laws, Legislation & Regulations> Public Employees' Retirement Law (PERL)
- myCalPERS Employer Reports (Cognos) Catalog
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) 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.