myCalPERS Employment Certification Functionality

Student Guide

October 10, 2024

CalPERS

myCalPERS Employment Certification Functionality

This guide will help you electronically submit employment information for service credit purchases and membership review. For additional information, visit the [Employment Certification](#) page on the CalPERS website.

Service Credit Purchases

Employment certification and payroll details for service credit purchase requests must be submitted through myCalPERS. Employees who request to purchase service credit for prior employment periods will need to complete a service credit purchase request online via myCalPERS or by completing the applicable request form from the CalPERS website. They will submit the form to the employer associated to the employment period. You will complete and submit the certification in myCalPERS.

Membership Reviews

You may be required to submit employment information and service period (payroll) details for an employee whose membership status needs to be reviewed. This can be for any type of arrears driven by late enrollment or pre-review for service credit purchase. To ensure an accurate reflection of service credit to your employee's account, your agency must submit the requested information through myCalPERS for review.

System Access

To access the pages detailed in these scenarios, your assigned user roles must include:

- Business Partner Arrears

Along with one or more of the following roles:

- Business Partner Payroll
- Business Partner Payroll Limited
- Business Partner Retirement Enrollment
- Business Partner Retirement Enrollment Limited

If you are unable to view or process these scenarios, contact your agency's system access administrator to update your myCalPERS access. To locate a list of your agency's system access administrator(s) within myCalPERS, select **Profile** global navigation tab > **Contacts** left-side link > System Admin column displays Y.

If your agency does not have a system access administrator on file or they have left your agency, call the customer contact center at **888 CalPERS**.

Disclaimer

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

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).
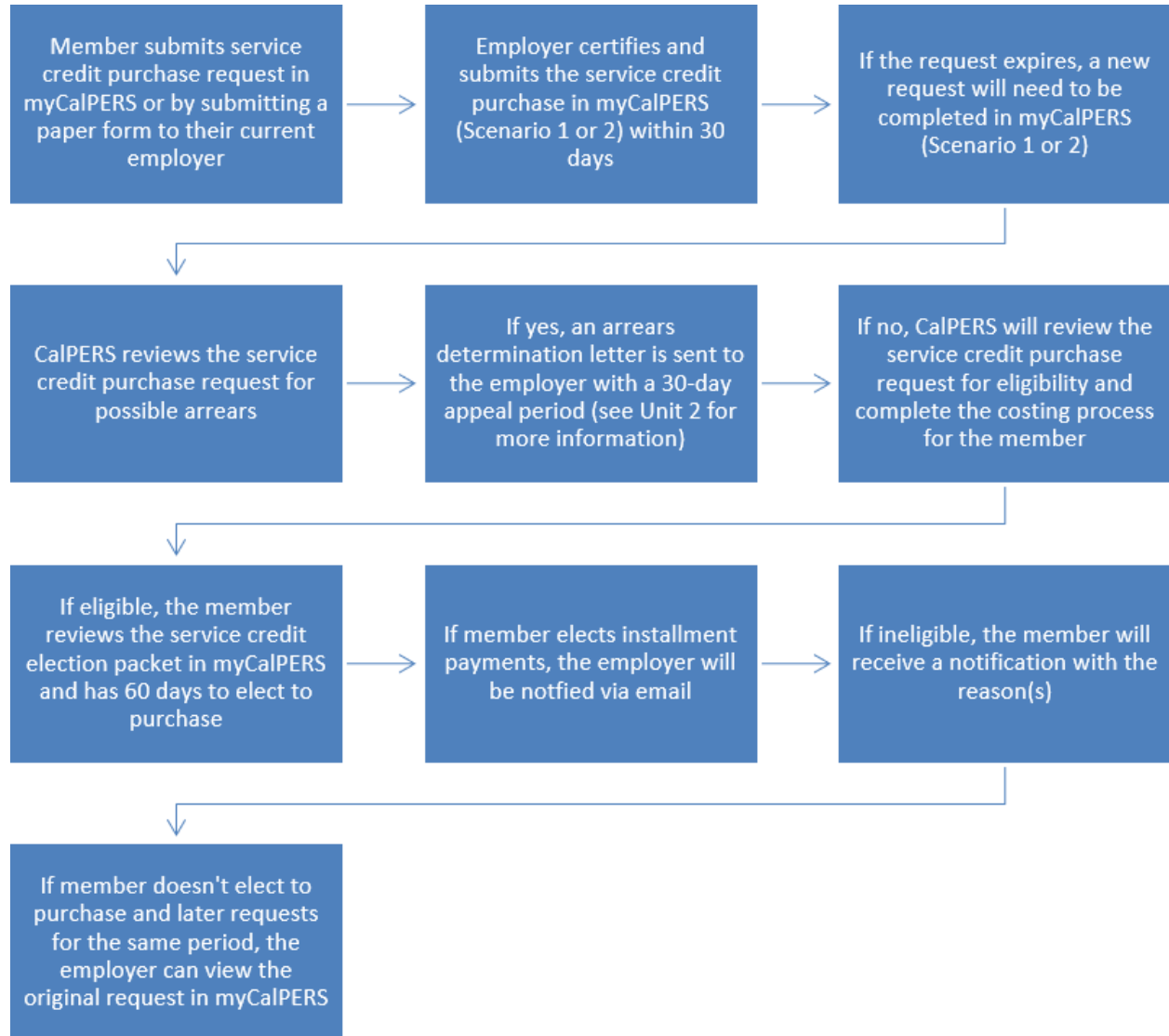
Contents

Unit 1: Service Credit Purchase Certification

CalPERS offers a variety of service credit purchase options for eligible members. To learn more about the options and requirements, visit the Service Credit page on the CalPERS website.

Service Credit Purchase Process

The chart below details the service credit purchase process and the associated scenario to complete your employer responsibilities:

```
┌─────────────────────────┐      ┌─────────────────────────┐      ┌─────────────────────────┐
│ Member submits service  │      │ Employer certifies and  │      │ If the request expires, │
│ credit purchase request │ ───> │ submits the service     │ ───> │ a new request will need │
│ in myCalPERS or by      │      │ credit purchase in      │      │ to be completed in      │
│ submitting a paper form │      │ myCalPERS (Scenario 1   │      │ myCalPERS               │
│ to their current        │      │ or 2) within 30 days    │      │ (Scenario 1 or 2)       │
│ employer                │      │                         │      │                         │
└─────────────────────────┘      └─────────────────────────┘      └─────────────────────────┘
        │
        v
┌─────────────────────────┐      ┌─────────────────────────┐      ┌─────────────────────────┐
│ CalPERS reviews the     │      │ If yes, an arrears      │      │ If no, CalPERS will     │
│ service credit purchase │ ───> │ determination letter is │ ───> │ review the service      │
│ request for possible    │      │ sent to the employer    │      │ credit purchase request │
│ arrears                 │      │ with a 30-day appeal    │      │ for eligibility and     │
│                         │      │ period (see Unit 2 for  │      │ complete the costing    │
│                         │      │ more information)       │      │ process for the member  │
└─────────────────────────┘      └─────────────────────────┘      └─────────────────────────┘
        │
        v
┌─────────────────────────┐      ┌─────────────────────────┐      ┌─────────────────────────┐
│ If eligible, the member │      │ If member elects        │      │ If ineligible, the      │
│ reviews the service     │ ───> │ installment payments,   │ ───> │ member will receive a   │
│ credit election packet  │      │ the employer will be    │      │ notification with the   │
│ in myCalPERS and has 60 │      │ notfied via email       │      │ reason(s)               │
│ days to elect to        │      │                         │      │                         │
│ purchase                │      │                         │      │                         │
└─────────────────────────┘      └─────────────────────────┘      └─────────────────────────┘
        │
        v
┌─────────────────────────┐
│ If member doesn't elect │
│ to purchase and later   │
│ requests for the same   │
│ period, the employer    │
│ can view the original   │
│ request in myCalPERS    │
└─────────────────────────┘
```

Employment and Service Period Certification Statuses

The following is a list of the service credit purchase request statuses:

- **Requested**: Employee has submitted the request to the employer, but the employer has not started or submitted the certification.
- **In-Progress**: Employer has started but has not submitted the certification.
- **Certification Expired**: Request has expired due to employer failing to complete and submit the request within 30 days. The member must resubmit their request. There may also be increased cost.
- **Submitted**: Employer has certified and submitted the request to CalPERS for review.
- **Complete**: CalPERS has completed the service credit purchase request process.
- **Rejected**: Employer has rejected the request.
- **Employer Withdrawn:** Employer has withdrawn the request due to member requesting or employer opened in error.

Correcting a Service Credit Purchase Certification

- **In-Process**: Corrections can be made by opening the request.
- **Submitted**: Corrections can be made by calling the contact center at **888 CalPERS.**
- **Completed**: Corrections cannot be made.

Notifications

For your agency to receive timely notifications of a member's service credit purchase deduction election, your system access administrator must designate a *primary* Payroll and Human Resources contact type. Your agency's system access administrator should follow the steps in the myCalPERS System Access Administration (PDF) student guide for establishing and maintaining agency contacts.

Documentation

To view documentation that has been sent regarding a service credit purchase request, review your agency's document history within myCalPERS > Common Tasks left-side folder > **Document History** left-side link.

Contents

Scenario 1: Certify a Service Credit Purchase Request

Members have two options for submitting a service credit purchase request:

myCalPERS

Members can request to purchase service credit by completing and submitting the service credit purchase request from their myCalPERS account. Once submitted, you will locate the request in myCalPERS, complete the employment certification portion, and submit the request by using this scenario starting with step 1.

Request Form

Members can submit their request using the applicable service credit purchase request form. It is critical that they submit the form to their employer at the time of the requested period, which may not always be their current employer. You will then follow the steps in this scenario to complete the employment certification portion and submit the request starting with step 8.

System Logic

- Create a separate request for each of the following if, during the requested period, the member:

  – Held more than one position/appointment
  – Had multiple time bases
  – Changed employers (including campus and department changes)

- For definitions of the fields, refer to the Appendix at the end of this guide.

Step Actions (65 steps)

myCalPERS

Step 1	Select the **Reporting** global navigation tab.
Step 2	Select the **Member Requests** local navigation link.
Step 3	Within the Employment and Service Period Certification List section, locate the member within the list.

Step 4   Select the **Status** link for the request you wish to complete. Only the requests in the status 'Requested' and 'In-Progress' will show on this page, if you need to go into another request that has been 'Submitted', 'Certification Expired', 'Rejected', or 'Employer Withdrawn' it will need to be selected in the Status filter.

Step 5   Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Step 6   Review and complete the Employment Information section. The **CBU** and **Class Code** fields only display for State and CSU employers.

Note: You may need to correct the service period start and end dates to accurately reflect all reportable employment prior to the membership date. The myCalPERS 2788 is an optional (yet recommended) field for submitting your agency's hiring documents.

Step 7   Skip to step 17.

Paper Request Form

Step 8   Select the **Reporting** global navigation tab.

Step 9   Select the **Member Requests** local navigation link.

Step 10   Within the Employment and Service Period Certification List section, select the **Add New** button.

Step 11   Complete the Employment Information section. The **CBU** and **Class Code** fields are only for State and CSU employers.

Note: The myCalPERS 2788 is an optional (yet recommended) field for submitting your agency's hiring documents.

Step 12   Select the **Yes** radio button.

Step 13   Select the type of service credit the member is requesting to purchase.

Note: Each service credit purchase type must be requested separately.

Step 14   Upload the service credit purchase request document by selecting the **Add Document** button.

Step 15   Locate the document, and then select the **Open** button.

Step 16   Complete the remaining questions.

Is the participant above a member of a reciprocal system? *	○ Yes ○ No
Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982?*	○ Yes ○ No
Was the service rendered under a fellowship program? *	○ Yes ○ No
Was this position filled by an election or appointment to a fixed term of office? *	○ Yes ○ No
Was the service rendered through an independent contractor or paid through a third party or temporary employment agency ? *	○ Yes ○ No
For teacher's assistants in a credential program only:	
Did the employee require a temporary certificate from a California teacher training institution to serve as a teacher's assistant during the requested employment period ? *	○ Yes ○ No
Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? *	○ Yes ○ No

Step 17   Select the **Save** button.

Step 18   Did the member hold multiple positions during the service credit purchase
               request period?

               Yes: How did the member submit their request?

               - **myCalPERS Request**: Within the Employment Periods section, select the
                 Add New button and return to step 6.
               - **Request Form**: Return to step 10.

               No: Continue to the next page to submit payroll for the service credit purchase

               request period.

Submit Service Period Payroll Details

In addition to submitting employment details, payroll details for the service credit purchase request period must also be submitted. There are two options for submitting payroll:
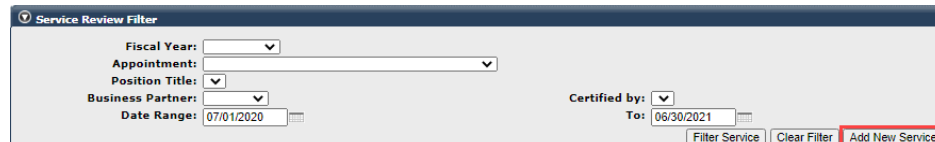
- **Manual entry**: Payroll is entered into myCalPERS manually for each earned period using the steps outlined in this scenario starting with step 19.
  File upload: Payroll for each earned period is uploaded into myCalPERS using a CSV or XML file using the steps outlined in this scenario starting with step 36. Refer to the Technical Resources page of the CalPERS website to download and use the CalPERS Review Report Template (CSV) as well as the Data Element Definition document, which you can refer to when filling out the CalPERS Review Report Template.

System Logic

- You must report payroll for the entire service credit purchase period.

  – If an earned period does not have reportable earnings, report a zero-period (0.00) record. Refer to the myCalPERS Payroll Reporting (PDF) student guide (Unit 3, Scenario 4) for the proper reporting steps.

- Do not report payroll for dates outside of the requested service credit purchase period. You may need to adjust the begin/end dates of record(s) to correspond with the service credit purchase period dates.
- Earned periods cannot be lumped together. Report each earned period separately.
- All earnings should be reported in one record, including adjustments, unless:

  – The earned period crosses fiscal years.
  – There are multiple pay rates, positions, or time bases for the same earned period.

- Ensure the information is reported accurately as it will be used in the calculation of the service credit purchase and may impact membership date, member cost, and employer liability.
- If a payroll schedule causes an error to occur, contact CalPERS.

Manual Entry

Step 19   Within the Service Review Filter section, select the **Add New Service** button.

Step 20   Within the Maintain Record Details section, enter the begin and end dates of the earned period.

Note: The **Payroll Record Memo** field is optional.

Step 21	Select from the **Member Category** drop-down list and complete the **Position Title** and **CBU** fields. These fields are required for State and CSU.

Step 22	Associating to an appointment:

- If you are reporting payroll for an existing appointment in myCalPERS, select the **appointment** radio button.

- If you are reporting payroll for an appointment that isn't in myCalPERS (e.g., service prior to membership), leave the **No Appointment** radio button selected.

Step 23	Select the correct **Payroll Schedule** from the drop-down list.

Step 24	Complete the **Payroll Schedule, Pay Rate Type**, and **Pay Rate** fields. In the **Reportable Earnings** field, enter only earnings based on reportable hours. Do not include overtime earnings.

Step 25	Complete the **Scheduled Full Time Hours Per Week field. If their Pay Rate Type is Daily, complete the Scheduled Full Time Days Per Week** field as well.

Note: Report what is considered full time for the position whether the member works full time or not.

Step 26	Complete the **Total Hours Worked** field with only the regular (non-overtime) hours worked in the period. If they worked overtime in this period, enter the hours in the **Overtime Hours Worked** field.
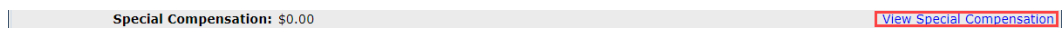
Total Hours Worked:* `0.0`   Overtime Hours Worked: `0.0`

Step 27	Is there special compensation to be reported? **Yes**: Continue to step 28. **No**: Skip to step 34.

Step 28	Select the **View Special Compensation** link.

Special Compensation: $0.00   View Special Compensation

Step 29	Within the View Special Compensation section, select the **Add New** button.

View Special Compensation
Select All | Delete | Add New
| | Category | Type | Amount |
No results found.
Select All | Delete | Add New

Step 30	Within the Maintain Special Compensation Details section, complete the **Special Compensation Category**, **Special Compensation Type**, and **Amount** fields.

Maintain Special Compensation Details
Special Compensation Category:* [▼]
Special Compensation Type:* [▼]
Amount:* $0.00
Save | Save and Add Another

Step 31	Is there additional special compensation to add to this record? **Yes**: Select the **Save and Add Another** button and return to step 30. **No**: Continue to step 32.
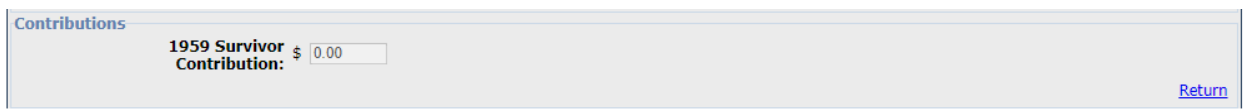
Step 32	Select the **Save** button.

Step 33	Select the **Return** link.

Step 34	If applicable, enter the contributions in the **1959 Survivor Contribution** field.

Contributions
1959 Survivor Contribution: $ `0.00`
Return

Step 35	Do you have additional periods or report adjustments to report? **Yes**: Select the **Save & Continue** button and return to step 20. **No**: Select the **Save & Return** button and skip to step 59.
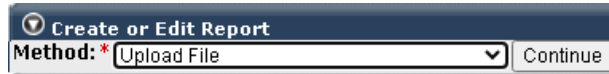
File Upload

Step 36 Select the **Reporting** global navigation tab.
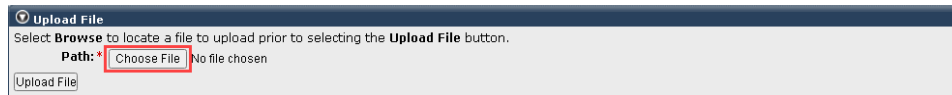
Step 37 Within the Create or Edit Report section, select **Upload File** from the Method drop-down list.

Step 38 Select the **Continue** button.

Step 39 Within the Upload File section, select the **Choose File** button.

Step 40 Locate the file, and then select the **Open** button.

Step 41 Select the **Upload File** button.
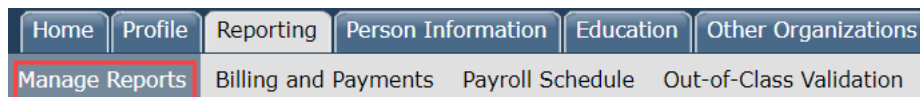
Step 42 Within the File Upload History section, locate your report.

Step 43 Refresh the page until the File Status column of your report shows *Accepted*.
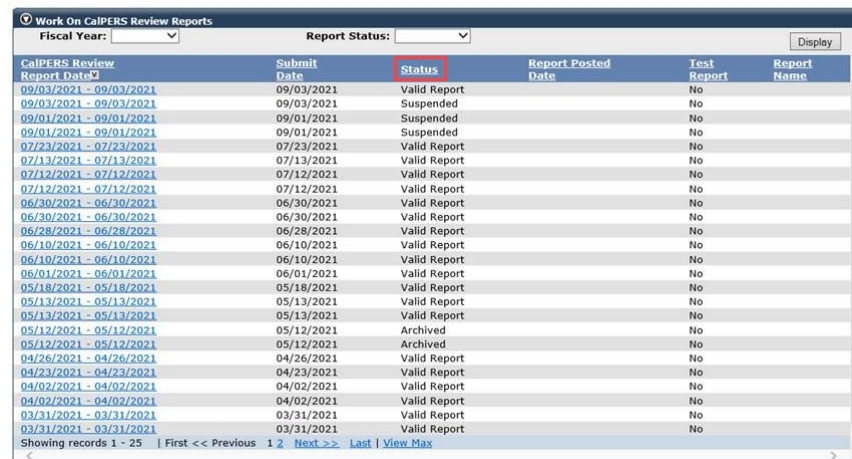
Step 44 Select the **Manage Reports** local navigation link.

Step 45 Scroll down to the Work on Existing CalPERS Review Reports section.

Step 46 Review the Status column.

Step 47   What is the status of the report?

Valid Report: Your report is valid. Skip to step 53.

Suspended: Your report has error(s) that must be corrected. Continue to step 48.

Step 48   Select the **CalPERS Review Report Date** link for the suspended report.

Step 49   Within the Record Present in the Report section, review the Status column for records with errors.

Step 50	Select the **SSN** link for the record that has an error.

Step 51	Review the messages section to determine what requires correction.
Step 52	Select the **Save & Return** button.
Step 53	Are there additional records with errors?

Yes: Return to step 50.

No: Continue to step 54. |
Step 54	Select the **Reporting** global navigation tab.
Step 55	Select the **Member Requests** local navigation link.
Step 56	Within the Employment and Service Period Certification List section, locate the member within the list. Only the requests in the status' 'Requested' and 'In-Progress' will show on this page, if you need to go into another request that has been 'Submitted', 'Certification Expired', 'Rejected', or 'Employer Withdrawn' it will need to be selected in the Status filter.
Step 57	Select the **Status** link for the request you wish to complete.

Step 58	Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Submit, Reject, or Withdraw a Service Credit Purchase Request

Step 59	What would you like to do with this request?

Submit: You've completed the certification and are ready to submit to CalPERS, continue to step 60.

Reject: The member submitted a request via myCalPERS and you wish to reject their request, skip to step 62.

Withdraw: The member submitted the request to you via paper form, you initiated it in myCalPERS, but now wish to withdraw the request, skip to step 65.

Submit

Step 60	Within the Certification section, select the **certification** check box.

Step 61	Select the **Submit** button.

You have completed this scenario.

Reject

Step 62	Expand the SCP Request Reject Reason section.

Step 63   Select the reason for rejecting the service credit purchase request.

Step 64   Within the Certification section, select the **Reject Member SCP Request** button.

You have completed this scenario.

Withdraw

Step 65   Within the Certification section, select the **Withdraw Certification Request** button.

You have completed this scenario.

Scenario 2: Certify a Leave of Absence Service Credit Purchase Request

Members have two options for submitting a service credit purchase request for a leave of absence:

myCalPERS

Once logged into their myCalPERS account, members can request to purchase service credit by completing the service credit purchase request online. Once submitted, you will locate the request in myCalPERS, complete the employment certification portion, and submit the request by using this scenario.

Request Form

Members can submit their request using the applicable service credit purchase request form. Once completed, the member will submit the form to the employer where the leave of absence occurred. Refer the employee to the [Request Service Credit (PDF)](#) hand out. The employer will then complete the employer certification portions and submit directly to CalPERS via fax or mail.

System Logic

- Each leave of absence period must be requested separately.
- For definitions of the fields, refer to the Appendix at the end of this guide.

Note:

These instructions for certifying a leave of absence service credit purchase do not apply to Temporary Disability Absence.

Step Actions (14 steps)

Step 1	Select the **Reporting** global navigation tab.
Step 2	Select the **Member Requests** local navigation link.
Step 3	Within the Employment and Service Period Certification List section, locate the member within the list.
Step 4	Select the **Status** link for the request you wish to complete. Only requests in the status' 'Requested' and 'In-Progress' shows on this page, if you need to go into another request that has been 'Submitted', 'Certification Expired', 'Rejected', or

'Employer Withdrawn' it will need to be selected in the Status filter.

Step 5   Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Step 6   Review the **Dates of Employment** fields and update to reflect the dates of the leave of absence.

Note: If the approved leave dates are different from the dates requested, please correct the dates.

Step 7   Select the **Save** button.

Submit, Reject, or Withdraw a Service Credit Purchase Request

Step 8   What would you like to do with this request?

Submit: You've completed the certification and are ready to submit to CalPERS, continue to step 9.
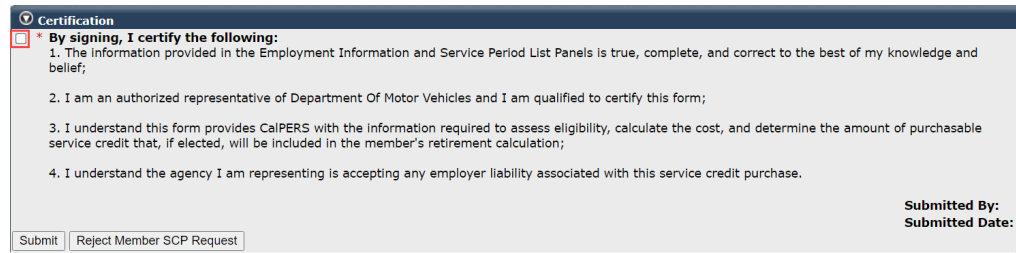
Reject: The member submitted the request via myCalPERS and you wish to reject their request, skip to step 11.

Withdraw: The member submitted the request to you via paper form, you initiated it in myCalPERS but now wish to withdraw the request, skip to step 14.

Step 9   Within the Certification section, select the **certification** check box.

Step 10   Select the **Submit** button.
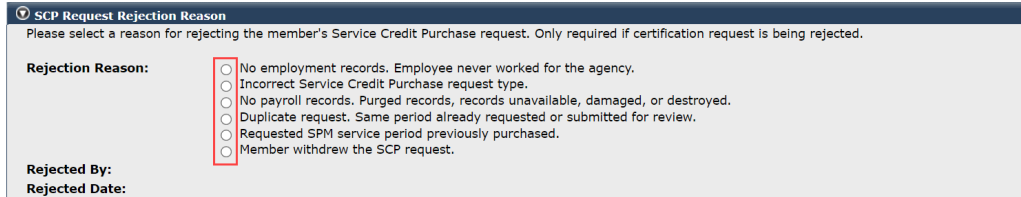
You have completed this scenario.

Reject
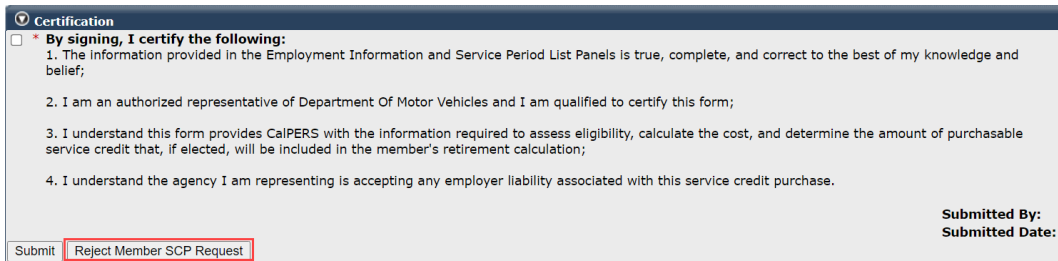
Step 11   Expand the SCP Request Reject Reason section.

Step 12   Select the reason for rejecting the service credit purchase request.

Step 13   Within the Certification section, select the **Reject Member SCP Request** button.

You have completed this scenario.

Withdraw

Step 14   Within the Certification section, select the **Withdraw Certification Request** button.

You have completed this scenario.

Scenario 3: Review a Service Credit Purchase Request

You will review or check the status of a submitted service credit purchase request.

System Logic

The following is a list of the service credit purchase request statuses:

- **Requested**: Employee has submitted the request, but the employer has not started or submitted the certification.
- **In-Progress**: Employer has started but has not submitted the certification.
- **Certification Expired**: Request has expired due to employer failing to complete and submit the request within 30 days. The member must resubmit their request. There may also be increased cost.
- **Submitted**: Employer has certified and submitted the request to CalPERS for review.
- **Complete**: CalPERS has completed the service credit purchase request process.
- **Rejected**: Employer has rejected the request.
- **Employer Withdrawn:** Employer has withdrawn the request due to member requesting or employer opened in error.

Correcting a Service Credit Purchase Certification

- **In-Process**: Corrections can be made by opening the request.
- **Submitted**: Corrections can be made by calling the contact center at **888 CalPERS.**
- **Completed**: Corrections cannot be made.

Step Actions (12 steps)

Check the Status

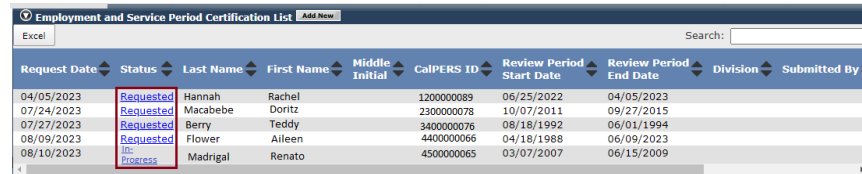|	
Step 1	Select the **Reporting** global navigation tab.
Step 2	Select the **Member Requests** local navigation link.
Step 3	Within the Employment and Service Period Certification List section, locate the member within the list.
Step 4	Within the Employment and Service Period Certification List section, review the status column to check the status of the request.

Step 5   Select the **Status** link for the request you wish to complete. Only the requests in the status' 'Requested' and 'In-Progress' will show on this page, if you need to go into another request that has been 'Submitted', 'Certification Expired', 'Rejected', or 'Employer Withdrawn' it will need to be selected in the Status filter.

Step 6   Within the Employment Periods section, select the **Start Date – End Date** link.

Note: There may be more than one period of employment displayed.

Step 7   Review the Employment Information section.

Step 8   Select the **Return** link at bottom right.

Step 9   Select the **Status** link for the request you wish to review.

Step 10   Within the Service Review Filter section, change the Date Range and To fields to match the period of the service credit purchase request.

Step 11   Select the **Filter Service** button.

Step 12   Within the Service Period List section, view the reported payroll for the service credit purchase period.

Service Period List

Excel Show 25 ⌄ entries   Search: [   ]

Start Date	End Date	Appointment ID	Position Title	Full Time Pay Rate	Reportable Earnings	FT Hours per Week	Reportable Hours Worked	Overtime Hours Worked
07/05/2014	07/18/2014		Fire Fighter Trainee	$13.21	$0.00	0.0	80.0	0.0
07/01/2014	07/04/2014		Fire Fighter Trainee	$13.21	$0.00	0.0	32.0	0.0
06/21/2014	06/30/2014		Fire Fighter Trainee	$13.21	$0.00	0.0	48.0	0.0
06/07/2014	06/20/2014		Fire Fighter Trainee	$13.21	$0.00	0.0	80.0	0.0
05/24/2014	06/06/2014		Fire Fighter Trainee	$13.21	$0.00	0.0	80.0	0.0
05/10/2014	05/23/2014		Fire Fighter Trainee	$13.21	$0.00	0.0	80.0	0.0
04/26/2014	05/09/2014		Fire Fighter Trainee	$13.21	$0.00	0.0	80.0	0.0
04/12/2014	04/25/2014		Fire Fighter Trainee	$13.21	$0.00	0.0	80.0	0.0
03/29/2014	04/11/2014		Fire Figher Trainee	$13.21	$0.00	0.0	80.0	0.0
03/24/2014	03/28/2014		Fire Fighter Trainee	$13.21	$0.00	0.0	40.0	0.0

Showing 1 to 10 of 10 entries   First   Previous | 1 | Next   Last

You have completed this scenario.

Unit 2: Arrears

Arrears are the cost of retirement contributions from a member's earnings that were not previously reported and paid to CalPERS. An agency may be responsible for paying both the member and employer contributions along with an administrative cost associated with each arrears determination.

You are responsible for determining membership eligibility upon hire, including checking an employee's CalPERS membership status in myCalPERS. If the employee is not eligible at date of hire, the employer must continue to monitor their eligibility throughout their employment.

Upon meeting the eligibility requirements, you must enroll the member into membership within 90 days of their eligibility date. Failure to enroll a member timely will result in an arrears determination.

Arrears Administrator

For your agency to receive timely notifications of arrears determinations, your system access administrator must designate a *primary* Arrears Administrator contact type. We recommend selecting email as the preferred method of communication. Your agency's system access administrator should follow the steps in the [myCalPERS System Access Administration (PDF)](#) student guide for establishing and maintaining agency contacts.

What Initiates an Arrears Review?

Below is a list of reasons that may cause an arrears determination:

- Member not enrolled into membership in myCalPERS timely (90-day violation)
- Membership date input error
- Missing payroll
- Employer updates/corrects an appointment
- Service Prior to Membership (SPM) request
- Retirement, death, and/or disability review
- Business partner/member calls the CalPERS Contact Center
- Member refunds or re-deposits

Arrears Determination Processes

Late Appointments (90-day violation)

The chart below details the process and the associated scenarios related to 90-day violations:

Employer enters appointment with an eligibility date more than 90 days in the past	myCalPERS creates an arrears determination (Scenario 1)	Employer is sent the Notification of Reported Late Appointment letter (myCalPERS 0847)
Employer has 30 days to either waive the appeal (Scenario 2) or submit documentation for reconsideration (Scenario 3)	Once the appeal is waived or the 30-day period has passed, the employer must submit the payroll for the arrears period (Scenario 4)	If payroll is not reported within 60 days, the employer is sent the Notification of Employer Paid Arrears Processing letter (myCalPERS 2723) requesting payroll
The Notification of Arrears Determination letter (myCalPERS 2785) is sent to the employer advising them of CalPERS' determination	Once payroll is submitted applicable invoice(s) are sent to the employer for the contributions and late fee	Member is sent the Employer Paid Arrears letter (myCalPERS 1360 or 2786) advising them their account has been credited for the arrears period at no cost to them

All Other Reasons

The chart below details the process and the associated scenarios for all other arrears reasons (refer to the list on the previous page):

```
┌─────────────────────────┐     ┌─────────────────────────┐     ┌─────────────────────────┐
│ CalPERS has determined  │     │ Employer is sent the    │     │ Employer must submit    │
│ there may be arrears for │ ──> │ Request for Employment  │ ──> │ the payroll for the     │
│ a member (see reasons   │     │ Information 1st letter  │     │ arrears period          │
│ on previous page)       │     │ (myCalPERS 2783)        │     │ (Scenario 4)            │
└─────────────────────────┘     └─────────────────────────┘     └─────────────────────────┘
                                                                              │
     ┌────────────────────────────────────────────────────────────────────────┘
     v
┌─────────────────────────┐     ┌─────────────────────────┐     ┌─────────────────────────┐
│ If the certification is  │     │ Once the certification  │     │ If arrears are found,   │
│ not received within 30   │     │ is received, CalPERS    │     │ the Notification of     │
│ days, the Request for   │ ──> │ will review for possible │ ──> │ Arrears Determination   │
│ Employment Information   │     │ arrears                 │     │ letter (myCalPERS 2785) │
│ 2nd letter (myCalPERS    │     │                         │     │ is sent to the employer │
│ 2784) is sent to the     │     │                         │     │ advising them of        │
│ employer                 │     │                         │     │ CalPERS' determination  │
└─────────────────────────┘     └─────────────────────────┘     └─────────────────────────┘
                                                                              │
     ┌────────────────────────────────────────────────────────────────────────┘
     v
┌─────────────────────────┐     ┌─────────────────────────┐
│ Applicable invoice(s)   │     │ The Employer Paid       │
│ are sent to the employer │ ──> │ Arrears (myCalPERS 1360 │
│ for the contributions    │     │ or 2786) is sent to the │
│ and late fee             │     │ member advising them    │
│                          │     │ their account has been  │
│                          │     │ credited for the        │
│                          │     │ arrears period at no    │
│                          │     │ cost to them            │
└─────────────────────────┘     └─────────────────────────┘
```

Documentation

To view documentation that has been sent regarding an arrears determination, review your agency's document history within myCalPERS > Common Tasks left-side folder > **Document History** left-side link.
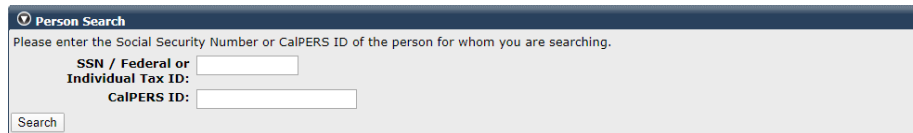
Contents

Scenario 1: View Arrears Determination

You want to view an arrears determination.

Step Actions (6 steps)

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

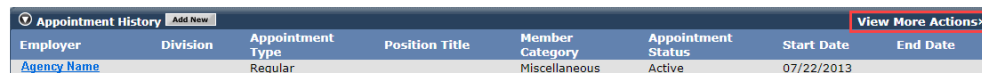**Step 2**   Complete the Person Search section.

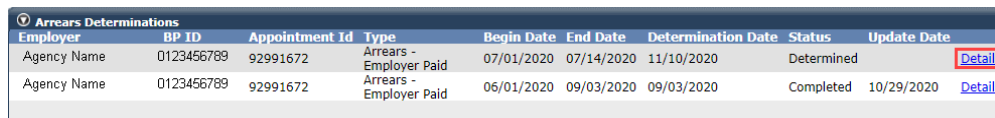**Step 3**   Select the **Search** button.

Step 4   Within the Appointment History section, select the **View More Actions** link.

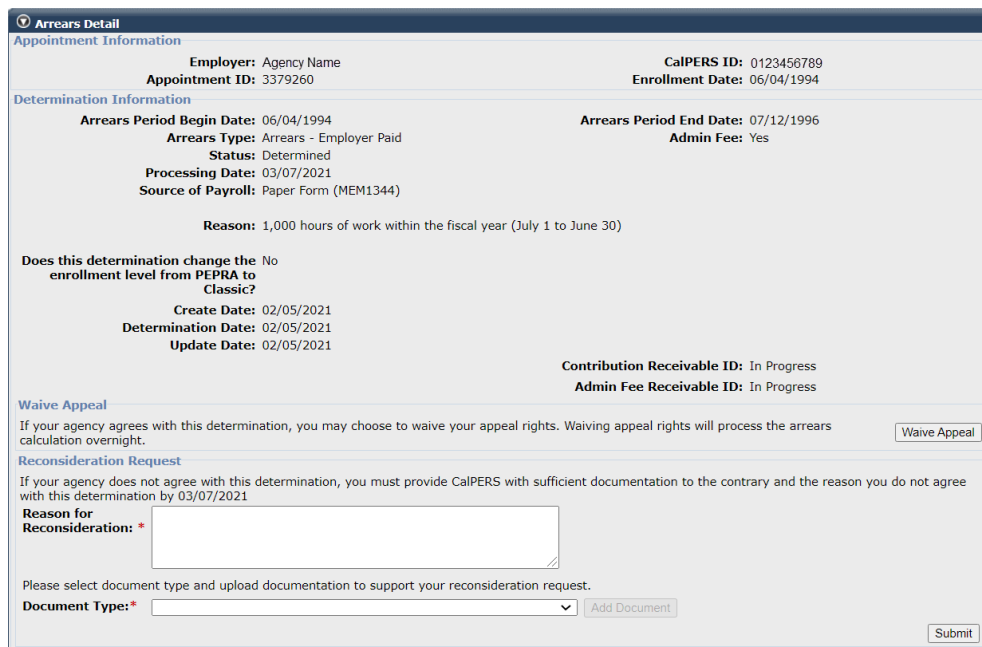**Step 5**   Within the Arrears Determinations section, select the **Details** link.

Step 6   Review the Arrears Detail section.

You have completed this scenario.

Scenario 2: Waive Appeal

You agree with the arrears determination and elect to waive the appeal.
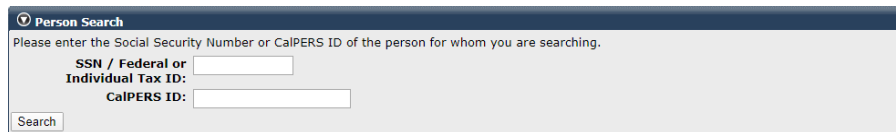
System Logic

- An appeal can only be waived within 30 days of when the arrears determination was created.
- Once an appeal is waived, payroll for the arrears period can be reported. Refer to Unit 2, Scenario 4 of this student guide for reporting payroll. If payroll has already been associated to the arrears determination from a submitted employment certification, the payroll will be automatically posted.

Step Actions (7 steps)

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

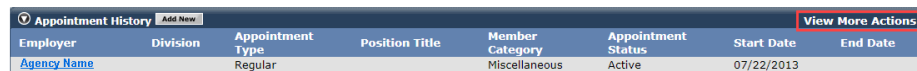| Step 2	Complete the Person Search section.

Step 3	Select the **Search** button.

Step 4	Within the Appointment History section, select the **View More Actions** link.

Step 5	Within the Arrears Determinations section, select the **Details** link.

Step 6	Within the Arrears Detail section, select the **Waive Appeal** button.

Arrears Detail

Appointment Information

Employer:	Agency Name	**CalPERS ID:**	0123456789
Appointment ID:	92991672	**Enrollment Date:**	07/01/2020

Determination Information

Arrears Period Begin Date:	07/01/2020	**Arrears Period End Date:**	07/14/2020
Arrears Type:	Arrears - Employer Paid	**Admin Fee:**	Yes
Status:	Determined		
Processing Date:	12/25/2020		
Source of Payroll:	N/A - Late Enrollment		

Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPRA to Classic? No

Create Date:	11/10/2020		
Determination Date:	11/10/2020		
		Admin Fee Receivable ID:	In Progress

Waive Appeal

If your agency agrees with this determination, you may choose to waive your appeal rights. Waiving appeal rights will process the arrears calculation overnight.

[Waive Appeal]

Reconsideration Request

If your agency does not agree with this determination, you may provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 12/25/2020

Reason for Reconsideration: *

Please select document type and upload documentation to support your consideration request

Document Type:* [   ] [Add Document]

[Submit]

Step 7   Within the Waive Appeal section, select the **Yes** button.

Waive Appeal

Are you sure you want to waive your agency's appeal rights?

[Yes] [Cancel]

You have completed this scenario.

Scenario 3: Submit Reconsideration

You want to submit additional information and documentation for reconsideration of an arrears determination.
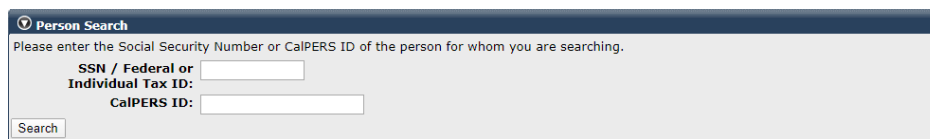
System Logic

- You have 30 days from when the arrears determination was created to submit documentation for reconsideration.
- Once the appeal period closes, if CalPERS determines the arrears stands, your agency will need to report payroll for the arrears period. Refer to Unit 2, Scenario 4 for reporting payroll of this student guide. If payroll has already been associated to the arrears determination from a submitted employment certification, the payroll will be automatically posted.

Step Actions (10 steps)

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

Step 2   Complete the Person Search section.

Step 3   Select the **Search** button.

Step 4   Within the Appointment History section, select the **View More Actions** link.

Step 5   Within the Arrears Determinations section, select the **Details** link.

Step 6   Within the Arrears Detail section, complete the **Reason for Reconsideration** field.

Step 7   Within the Arrears Detail section, select from the **Document Type** drop-down list.

Step 8   Within the Arrears Detail section, select the **Add Document** button.

Step 9   Locate the document, and then select the **Open** button.

Step 10   Within the Arrears Detail section, select the **Submit** button.

You have completed this scenario.

Scenario 4: Report Payroll

CalPERS has requested that you report payroll for an arrears determination.

System Logic

- For late appointment reporting, only report payroll as prior period adjustments for the arrears period once the appeal has been waived (Unit 2, Scenario 1 of this student guide) or the 30-day appeal period has closed. Refer to the myCalPERS Payroll Reporting (PDF) student guide (Unit 3, Scenario 4) for the proper reporting steps.
- If an arrears determination is completed through an employment certification containing payroll that has been submitted by your agency, there are no further actions needed to post the arrears payroll to a member's account: The arrears payroll will post when arrears determination status changes to "completed."
- For reporting employer paid arrears through the regular payroll reporting process, and to learn more about the arrears process, refer to the myCalPERS Payroll Reporting (PDF) and myCalPERS Payroll Adjustments (PDF) student guides.
- Continue reporting the member's current payroll in your earned period reports. Refer to the myCalPERS Payroll Reporting (PDF) student guide.

You have completed this scenario.

Appendix

For additional information, refer to the following resources:

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

Employment Certification

Appointment Tenure

Enter the tenure as of the begin date of the requested period.

Contract Exclusions

Confirm if the position is excluded by reviewing your agency's contract exclusions in myCalPERS.

- Schools: Position exclusions do not apply
- Public Agency: Review your agency's contract exclusions within myCalPERS > **Profile** global navigation tab > **Retirement Contract** local navigation link > Exclusions section.
- State & CSU: The [State Reference Guide (PDF)](#) provides a complete list of positions excluded by law

Employment Category

This is entered based on what the category of the position would have been if the employee was brought into membership as of when they started in this position.

Hiring Document (myCalPERS 2788)

This field is optional (yet recommended). If you would like to provide additional information related to the time base and tenure of the appointment, upload it here.

Position Titles

This is the position that they were in at the time of their request. These must match in the Employment Information and Pay Period Detail sections.

Time Base

Enter the time base as of the begin date of the requested service credit purchase period.

Payroll

Begin/End Dates

Earned periods must be entered by pay period and separated by fiscal year. Multiple pay periods cannot be combined.

- For Public Agency and Schools: Enter your agency's earned period begin and end dates.
- For State and CSU: Enter the pay period dates based on the State Controller's Office decentralized payroll calendars.

Division

Only displays for public agencies and county office of education employers.

Overtime Hours

Enter the number of overtime hours for the period.

Pay Rate

Enter the full-time pay rate for the earned period even if the employee is part-time.

Pay Rate Type

Enter the pay rate type (Hourly, Monthly, or Daily) per your pay schedule.

Position Titles

This is the position that they were in at the time of the request. This must match in the Employment Information and Pay Period Detail sections.

Reportable Earnings

Enter the reportable gross earnings for the earned period when earned, not paid. Do not enter overtime earnings.

Scheduled Full Time Hours Per Week

Complete for all Pay Rate Types (Hourly, Monthly, and Daily). Enter the number of hours that are considered full time for the position.

Scheduled Full Time Days Per Week

Complete if the Pay Rate Type field is entered as Daily in addition to completing the Scheduled Full Time Hours Per Week field. Enter the numbers of days that are considered full time for the position.

Special Compensation

Report only the reportable special compensation for the earned period per your agency's Memorandum of Understanding (MOU).

Total Hours Worked

Report only the regular hours worked in the earned period.

CalPERS Resources

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

- Take the online classes below available 24 hours a day. Sign up for classes via the **Education** tab in myCalPERS.
  - myCalPERS Employment Certification: Certify a Leave of Absence Service Credit Purchase Request
  - myCalPERS Employment Certification: Service Credit Purchase & Arrears
- [Employment Certification](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Employment Certification
- [myCalPERS Student Guides & Resources](#)
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides
- [Business Rules & myCalPERS Classes](#)
  Pathway: CalPERS website > Employers > I Want To… : Attend Training & Events > Business Rules & myCalPERS Classes
- [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)
- [State Reference Guide (PDF)](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Reference Guide (PDF)
- [Circular Letters - CalPERS](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law (PERL)](#)
  Pathway: CalPERS website > About > Laws, Legislation & Regulations> Public Employees' Retirement Law (PERL)
- [myCalPERS Employer Reports (Cognos) Catalog](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > Employer Reports (Cognos) Catalog

CalPERS Contacts

Email

- To contact [employer educators](#) for questions and requests, email **calpers_employer_communications@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**.
- To contact the [membership team](#) for assistance with the service credit purchase and employment certification processes, email **membership_reporting@calpers.ca.gov**.

Phone or Fax

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

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

Submit Inquiry

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