

# myCalPERS Employment Certification Functionality

Student Guide

**October 10, 2024**



# 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

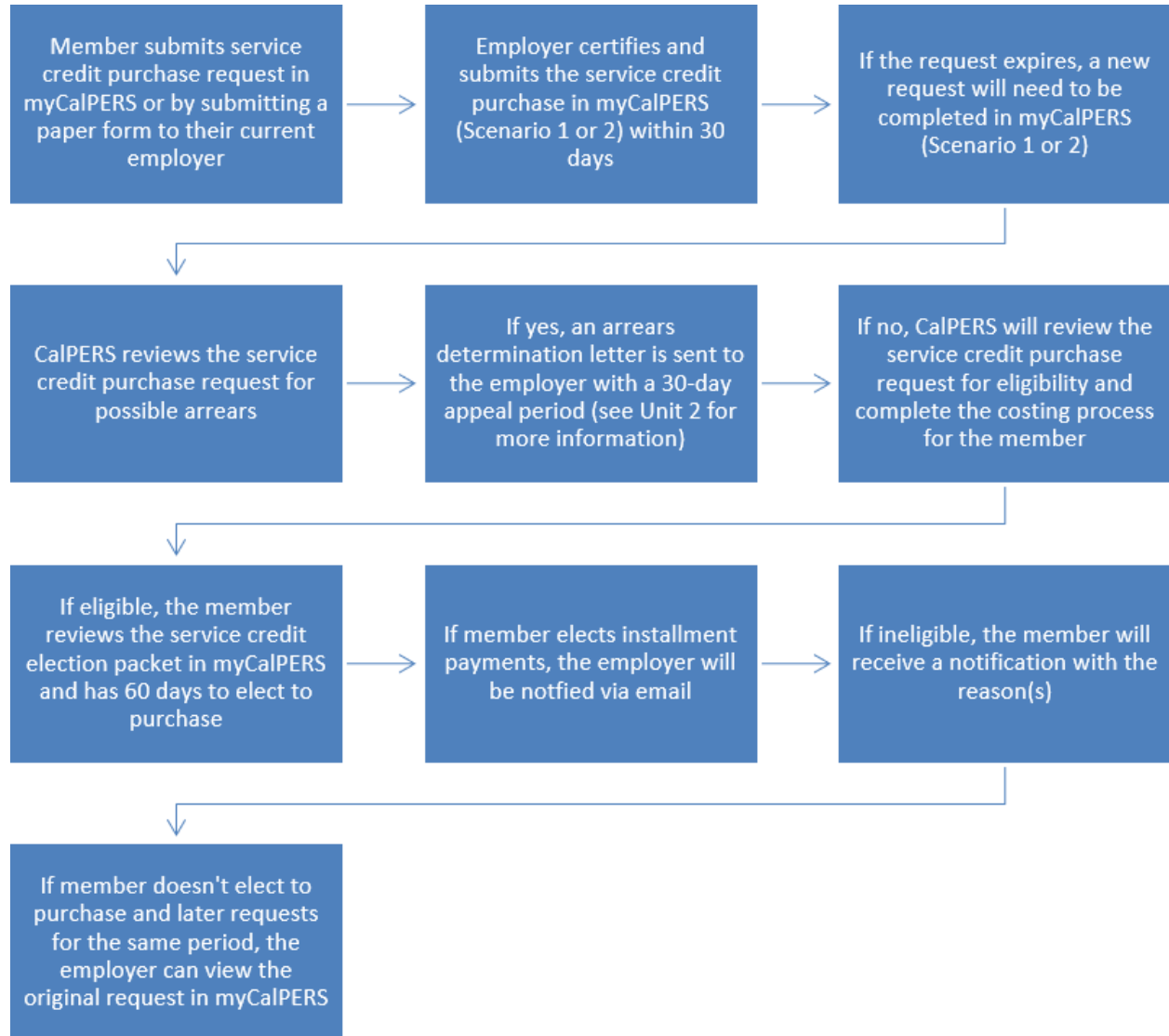
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# Unit 1: Service Credit Purchase Certification

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:



## 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.

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- Scenario 3: Review a Service Credit Purchase Request – Page 23

## 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.

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

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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.

The screenshot shows a table titled "Employment and Service Period Certification List" with an "Add New" button. The table has columns for Request Date, Status, Last Name, First Name, Middle Initial, CaPERS ID, Review Period Start Date, Review Period End Date, Division, and Submitted By. The Status column contains links for "Requested" and "In-Progress".

Request Date	Status	Last Name	First Name	Middle Initial	CaPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	<a href="#">Requested</a>	Hannah	Rachel		1200000089	06/25/2022	04/05/2023		
07/24/2023	<a href="#">Requested</a>	Macabebe	Doritz		2300000078	10/07/2011	09/27/2015		
07/27/2023	<a href="#">Requested</a>	Berry	Teddy		3400000076	08/18/1992	06/01/1994		
08/09/2023	<a href="#">Requested</a>	Flower	Aileen		4400000066	04/18/1988	06/09/2023		
08/10/2023	<a href="#">In-Progress</a>	Madrigal	Renato		4500000065	03/07/2007	06/15/2009		

The screenshot shows a filter form titled "Employment and Service Period Certification Filter". It includes fields for CalPERS Id, Status (a dropdown menu), Last Name, Submitted By, SSN, Division (a dropdown menu), First Name, and an "and" field. There are "Filter Data" and "Clear Filter" buttons at the bottom right.

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.

The screenshot shows a table titled "Employment Periods" with an "Add New" button. The table has columns for Participant, CalPERS Id, Division, Start Date - End Date, Employment Category, Position Title, and SCP Type. The Start Date - End Date column contains a link for "03/01/2014 - 07/19/2014".

Participant	CalPERS Id	Division	Start Date - End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		<a href="#">03/01/2014 - 07/19/2014</a>			Service Prior to Membership

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.

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
02/22/2021	Requested	Sanchez	Eric		0123456789	03/01/2014	07/15/2014		
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	09/11/2006		
02/04/2021	Requested	Wolfgang	Steven		2345678901	03/06/1998	11/12/1998		
02/08/2021	Requested	French	Douglas		3456789012	03/31/2013	03/22/2019		
01/04/2021	Submitted	Matson	Oleg		4567890123	11/03/2018	06/28/2019		WALKER, L
01/12/2021	In-Progress	Chen	Roberta		5678901234	01/07/2012	07/26/2019		
01/14/2021	Submitted	Kinsler	Kirsti		6789012345	09/22/2014	01/10/2017		WALKER, L



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

**Employment Information**  
Participant: \* [Select](#)  
Business Partner: Agency Name  
BP Contact Name: Kasey Schuman  
Division: Department Of Agency  
Phone Number:  Ext:   
Dates of Employment: \*  
From:  To:   
Employment Category: \*   
Primary Position Title as displayed on your publicly available pay schedule: \*   
Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS? \*  Yes  No [View Exclusions](#)  
Time Base: \*  
 Full Time  Intermittent  On Call  Part Time  Indeterminate  Work(ed) As Needed  
CBU: \*   
Class Code: \*   
Appointment Tenure: \*  
 Permanent  Indeterminate  Seasonal  Temporary  
Months per Year: \*  
 8 Months  9 Months  10 Months  
 11 Months  12 Months  
Please upload the participant's hiring document (myCalPERS 2788):   
Is the participant requesting to purchase Service Credit? \*  Yes  No  
 [Return](#)

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

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

Is the participant requesting to purchase Service Credit? \*  Yes  No

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

Service Credit Purchase Type Requested: \*  
 Service Prior to Membership  
 Comprehensive Employment and Training Act (CETA)  
 Fellowship  
 Prior Service as Public Service  
 Local System Redeposit  
 Optional Arrears

**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.

Please upload the participant's Service Prior to Membership related signed service credit purchase request form (myCalPERS 1168): \*

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? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under the Comprehensive Employment & Training Act from 1973 to 1982?*	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered under a fellowship program? *	<input type="radio"/> Yes <input type="radio"/> No
Was this position filled by an election or appointment to a fixed term of office? *	<input type="radio"/> Yes <input type="radio"/> No
Was the service rendered through an independent contractor or paid through a third party or temporary employment agency ? *	<input type="radio"/> Yes <input type="radio"/> 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 ? *	<input type="radio"/> Yes <input type="radio"/> No
Did the Participant contribute to a retirement plan, other than CalPERS, during the specified time period? *	<input type="radio"/> Yes <input type="radio"/> 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.

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## 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:

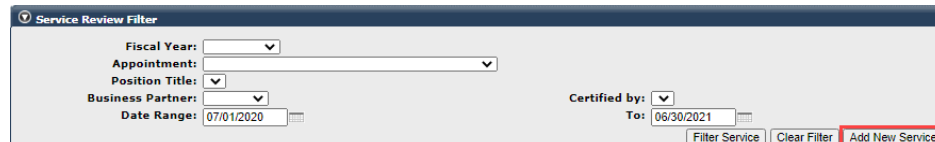
- **Manual entry:** Payroll is entered into myCalPERS manually for each earned period using the steps outlined in this scenario starting with step 19.  
**File upload:** Payroll for each earned period is uploaded into myCalPERS using a CSV or XML file using the steps outlined in this scenario starting 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.

Payroll Record Memo:  Payroll Schedule: \*   
 Division:

**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.

Earnings  
 Member Category:   
 Position Title:   
 Class Code:

**Step 22** Associating to an appointment:

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

Earnings  
 Appointment:  No Appointment  92139121 : Agency Name - Safety - County Peace Officer - 03/21/2015  
 92111572 : Agency Name - Safety - County Peace Officer - 01/10/2015 - 02/25/2015

- 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.

Earnings  
 Appointment:  No Appointment  92139121 : Agency Name - Safety - County Peace Officer - 03/21/2015  
 92111572 : Agency Name - Safety - County Peace Officer - 01/10/2015 - 02/25/2015

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

Payroll Schedule: \*

**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.

Pay Rate Type:  Pay Rate: \$   
 Reportable 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.

Scheduled Full Time Hours Per Week:  Scheduled Full Time Days Per Week:

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.



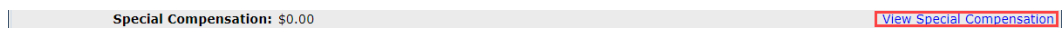
Total Hours Worked: 0.0 Overtime Hours Worked: 0.0

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?

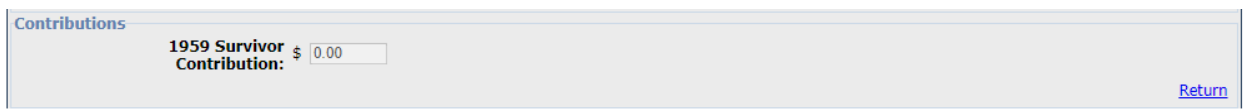
**Yes:** Select the **Save and Add Another** button and return to step 30.

**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?

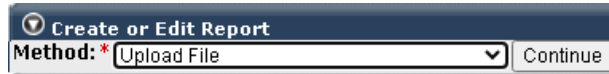
**Yes:** Select the **Save & Continue** button and return to step 20.

**No:** Select the **Save & Return** button and skip to step 59.

## File Upload

Step 36 Select the **Reporting** global navigation tab.

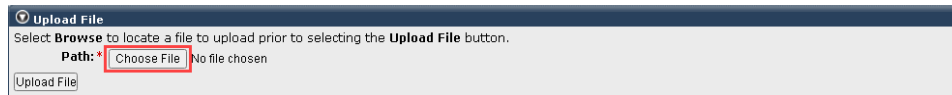
Step 37 Within the Create or Edit Report section, select **Upload File** from the Method drop-down list.



Create or Edit Report  
Method: \* **Upload File** Continue

Step 38 Select the **Continue** button.

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



Upload File  
Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.  
Path: \* **Choose File** No file chosen  
Upload File

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

Step 41 Select the **Upload File** button.

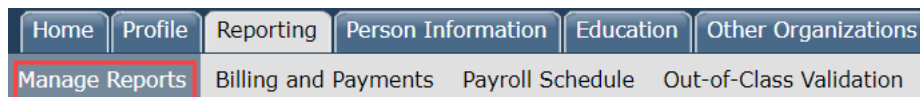


Upload File  
Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.  
Path: \* **Choose File** 202108101...1\_10056.csv  
Upload File

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*.

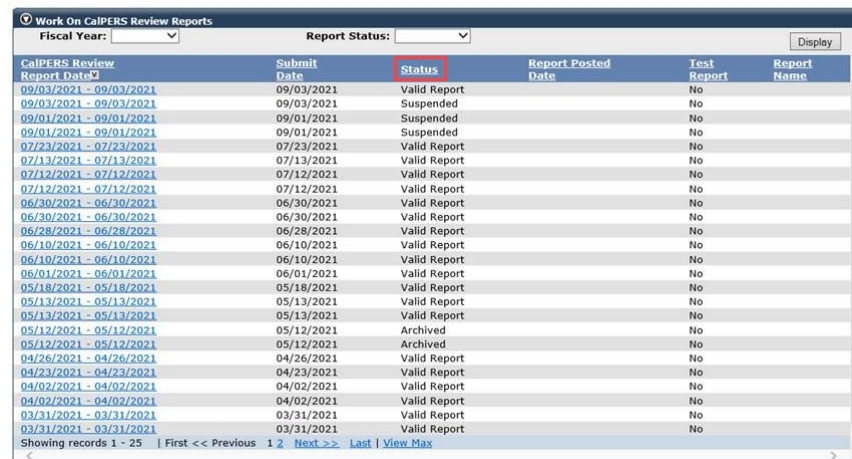
Step 44 Select the **Manage Reports** local navigation link.



Home Profile Reporting Person Information Education Other Organizations  
**Manage Reports** Billing and Payments Payroll Schedule Out-of-Class Validation

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

Step 46 Review the Status column.



CalPERS Review Report Date	Submit Date	Status	Report Posted Date	Test Report	Report Name
09/03/2021 - 09/03/2021	09/03/2021	Valid Report		No	
09/03/2021 - 09/03/2021	09/03/2021	Suspended		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
09/01/2021 - 09/01/2021	09/01/2021	Suspended		No	
07/23/2021 - 07/23/2021	07/23/2021	Valid Report		No	
07/13/2021 - 07/13/2021	07/13/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
07/12/2021 - 07/12/2021	07/12/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/30/2021 - 06/30/2021	06/30/2021	Valid Report		No	
06/28/2021 - 06/28/2021	06/28/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/10/2021 - 06/10/2021	06/10/2021	Valid Report		No	
06/01/2021 - 06/01/2021	06/01/2021	Valid Report		No	
05/18/2021 - 05/18/2021	05/18/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/13/2021 - 05/13/2021	05/13/2021	Valid Report		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
05/12/2021 - 05/12/2021	05/12/2021	Archived		No	
04/26/2021 - 04/26/2021	04/26/2021	Valid Report		No	
04/23/2021 - 04/23/2021	04/23/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
04/02/2021 - 04/02/2021	04/02/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	
03/31/2021 - 03/31/2021	03/31/2021	Valid Report		No	

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.

CalPERS Review Report Date	Submit Date	Status	Report Posted Date	Test Report	Report Name
<a href="#">09/03/2021 - 09/03/2021</a>	09/03/2021	Valid Report		No	
<a href="#">09/03/2021 - 09/03/2021</a>	09/03/2021	Suspended		No	
<a href="#">09/01/2021 - 09/01/2021</a>	09/01/2021	Suspended		No	
<a href="#">09/01/2021 - 09/01/2021</a>	09/01/2021	Suspended		No	
<a href="#">07/23/2021 - 07/23/2021</a>	07/23/2021	Valid Report		No	
<a href="#">07/13/2021 - 07/13/2021</a>	07/13/2021	Valid Report		No	
<a href="#">07/12/2021 - 07/12/2021</a>	07/12/2021	Valid Report		No	
<a href="#">07/12/2021 - 07/12/2021</a>	07/12/2021	Valid Report		No	
<a href="#">06/30/2021 - 06/30/2021</a>	06/30/2021	Valid Report		No	
<a href="#">06/30/2021 - 06/30/2021</a>	06/30/2021	Valid Report		No	
<a href="#">06/28/2021 - 06/28/2021</a>	06/28/2021	Valid Report		No	
<a href="#">06/10/2021 - 06/10/2021</a>	06/10/2021	Valid Report		No	
<a href="#">06/10/2021 - 06/10/2021</a>	06/10/2021	Valid Report		No	
<a href="#">06/01/2021 - 06/01/2021</a>	06/01/2021	Valid Report		No	
<a href="#">05/18/2021 - 05/18/2021</a>	05/18/2021	Valid Report		No	
<a href="#">05/13/2021 - 05/13/2021</a>	05/13/2021	Valid Report		No	
<a href="#">05/13/2021 - 05/13/2021</a>	05/13/2021	Valid Report		No	
<a href="#">05/12/2021 - 05/12/2021</a>	05/12/2021	Archived		No	
<a href="#">05/12/2021 - 05/12/2021</a>	05/12/2021	Archived		No	
<a href="#">04/26/2021 - 04/26/2021</a>	04/26/2021	Valid Report		No	
<a href="#">04/23/2021 - 04/23/2021</a>	04/23/2021	Valid Report		No	
<a href="#">04/02/2021 - 04/02/2021</a>	04/02/2021	Valid Report		No	
<a href="#">04/02/2021 - 04/02/2021</a>	04/02/2021	Valid Report		No	
<a href="#">03/31/2021 - 03/31/2021</a>	03/31/2021	Valid Report		No	
<a href="#">03/31/2021 - 03/31/2021</a>	03/31/2021	Valid Report		No	

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

SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
xx-1111	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
xx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/07/2020-03/20/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/21/2020-04/03/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/04/2020-04/17/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/18/2020-05/01/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/02/2020-05/15/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/16/2020-05/29/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0

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

SSN	CaPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
<a href="#">XX-1111</a>	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
<a href="#">XX-1111</a>	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/07/2020-03/20/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
<a href="#">XX-1111</a>	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/21/2020-04/03/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
<a href="#">XX-1111</a>	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/04/2020-04/17/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
<a href="#">XX-1111</a>	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/18/2020-05/01/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
<a href="#">XX-1111</a>	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/02/2020-05/15/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
<a href="#">XX-1111</a>	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/16/2020-05/29/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0

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.

Request Date	Status	Last Name	First Name	Middle Initial	CaPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		120000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macebebe	Doriz		210000079	10/07/2011	06/27/2015		
07/22/2023	Requested	Berry	Teddy		340000076	08/18/1992	06/01/1994		
06/09/2023	Requested	Flores	Aileen		440000056	04/18/1988	06/09/2023		
06/10/2023	In Progress	Madrigal	Banato		450000065	03/07/2007	06/10/2009		



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.

Participant	CalPERS Id	Division	Start Date - End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/01/2014 - 07/19/2014			Service Prior to Membership

### 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.

\* By signing, I certify the following:

1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of Department Of Motor Vehicles and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

Submitted By:  
Submitted Date:

Submit Reject Member SCP Request

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.

**SCP Request Rejection Reason**  
Please select a reason for rejecting the member's Service Credit Purchase request. Only required if certification request is being rejected.

**Rejection Reason:**

- No employment records. Employee never worked for the agency.
- Incorrect Service Credit Purchase request type.
- No payroll records. Purged records, records unavailable, damaged, or destroyed.
- Duplicate request. Same period already requested or submitted for review.
- Requested SPM service period previously purchased.
- Member withdrew the SCP request.

**Rejected By:**  
**Rejected Date:**

Step 64

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

**Certification**

\* **By signing, I certify the following:**

1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of Department Of Motor Vehicles and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

**Submitted By:**  
**Submitted Date:**

Submit **Reject Member SCP Request**

You have completed this scenario.

Withdraw

Step 65

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

**Certification**

\* **By signing, I certify the following:**

1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of City of Oakland and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

**Submitted By:**  
**Submitted Date:**

Submit **Withdraw Certification Request**

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 <b>Reporting</b> global navigation tab.
Step 2	Select the <b>Member Requests</b> local navigation link.
Step 3	Within the Employment and Service Period Certification List section, locate the member within the list.
Step 4	Select the <b>Status</b> 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.

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		120000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		230000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		340000076	08/18/1992	06/01/1994		
08/09/2023	Requested	Flower	Aileen		440000066	04/18/1988	06/09/2023		
08/10/2023	In-Progress	Madrigal	Renato		450000065	03/07/2007	06/15/2009		

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.

Participant	CalPERS Id	Division	Start Date - End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		11/09/2006 - 12/22/2008			Maternity/Paternity Leave of Absence

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.

Participant: \* 0123456789 - Eric Sanchez  
Business Partner: Agency Name  
Division:  
Dates of Employment: \*  
From: 11/06/2006  
To: 12/22/2006  
Service Credit Purchase Type Requested: Maternity/Paternity Leave of Absence

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.

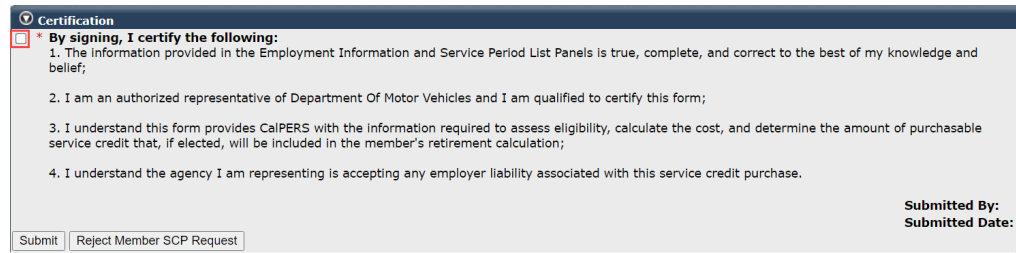
**Reject:** The member submitted the request via myCalPERS and you wish to reject their request, skip to step 11.

**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.

## Submit

### Step 9

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



**Certification**

\* **By signing, I certify the following:**

1. The information provided in the Employment Information and Service Period List Panels is true, complete, and correct to the best of my knowledge and belief;
2. I am an authorized representative of Department Of Motor Vehicles and I am qualified to certify this form;
3. I understand this form provides CalPERS with the information required to assess eligibility, calculate the cost, and determine the amount of purchasable service credit that, if elected, will be included in the member's retirement calculation;
4. I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

**Submitted By:**  
**Submitted Date:**

---

### Step 10

Select the **Submit** button.

**You have completed this scenario.**

---

## Reject

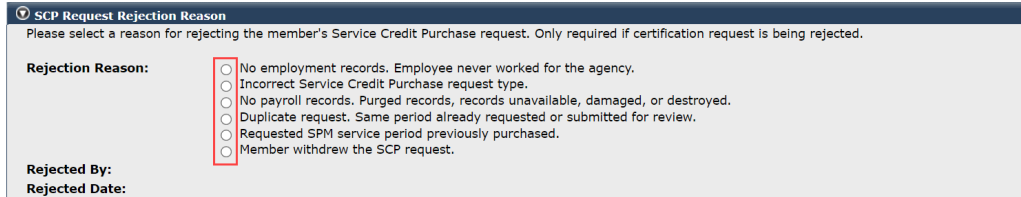
### Step 11

Expand the SCP Request Reject Reason section.



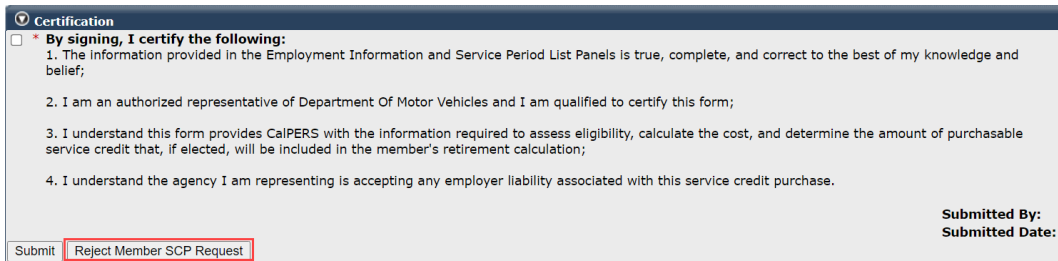
### Step 12

Select the reason for rejecting the service credit purchase request.

A screenshot of a form titled "SCP Request Rejection Reason". The form has a dark blue header with the title. Below the header, there is a paragraph of text: "Please select a reason for rejecting the member's Service Credit Purchase request. Only required if certification request is being rejected." Below this is a section labeled "Rejection Reason:" followed by a list of five radio button options. The first option, "No employment records. Employee never worked for the agency.", is selected and highlighted with a red box. Below the list are fields for "Rejected By:" and "Rejected Date:". The form has a light gray background.

### Step 13

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

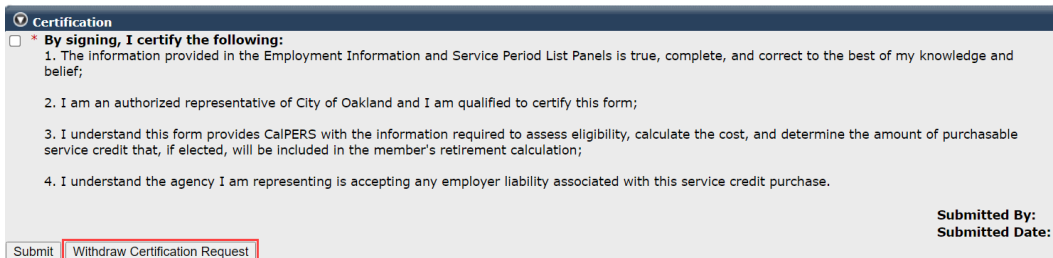
A screenshot of a form titled "Certification". The form has a dark blue header with the title. Below the header, there is a checkbox labeled "By signing, I certify the following:" followed by four numbered statements. At the bottom left, there are two buttons: "Submit" and "Reject Member SCP Request", with the latter highlighted by a red box. At the bottom right, there are labels for "Submitted By:" and "Submitted Date:". The form has a light gray background.

You have completed this scenario.

## Withdraw

### Step 14

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

A screenshot of a form titled "Certification". The form has a dark blue header with the title. Below the header, there is a checkbox labeled "By signing, I certify the following:" followed by four numbered statements. At the bottom left, there are two buttons: "Submit" and "Withdraw Certification Request", with the latter highlighted by a red box. At the bottom right, there are labels for "Submitted By:" and "Submitted Date:". The form has a light gray background.

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.

---

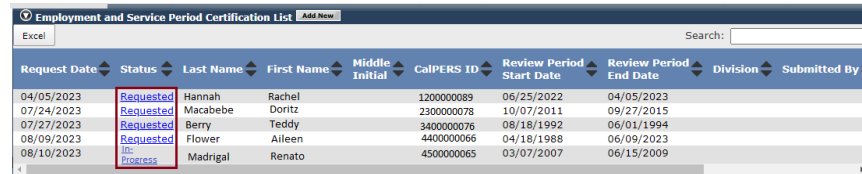
Step 4      Within the Employment and Service Period Certification List section, review the status column to check the status of the request.

---

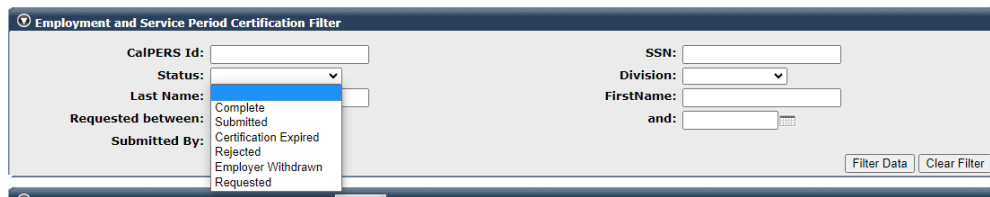
## Review

### 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.



Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	Requested	Hannah	Rachel		120000089	06/25/2022	04/05/2023		
07/24/2023	Requested	Macabebe	Doritz		230000078	10/07/2011	09/27/2015		
07/27/2023	Requested	Berry	Teddy		340000076	08/18/1992	06/01/1994		
08/09/2023	Requested	Flower	Aileen		440000066	04/18/1988	06/09/2023		
08/10/2023	In-Progress	Madrigal	Renato		450000065	03/07/2007	06/15/2009		



Employment and Service Period Certification Filter

CalPERS Id:

Status:

Last Name:

Requested between: 

- Complete
- Submitted
- Certification Expired
- Rejected
- Employer Withdrawn
- Requested

Submitted By:

SSN:

Division:

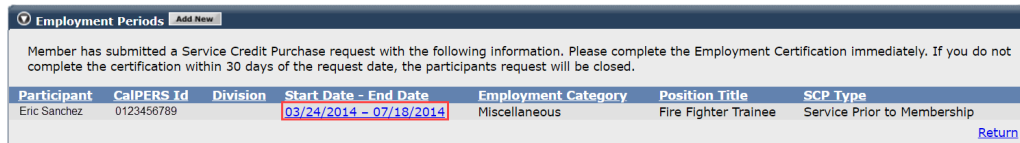
FirstName:

and:

### 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.



Employment Periods [Add New](#)

Member has submitted a Service Credit Purchase request with the following information. Please complete the Employment Certification immediately. If you do not complete the certification within 30 days of the request date, the participants request will be closed.

Participant	CalPERS Id	Division	Start Date – End Date	Employment Category	Position Title	SCP Type
Eric Sanchez	0123456789		03/24/2014 – 07/19/2014	Miscellaneous	Fire Fighter Trainee	Service Prior to Membership

[Return](#)

### Step 7

Review the Employment Information section.



**Employment Information**

Participant: \* Eric Sanchez  
 Participant's Email Address: ericSanchez@agencyname.com  
 Business Partner: Agency Name  
 Participant's Phone Number: (999) 888-7777  
 Division: [Dropdown]

Dates of Employment: \*  
 From: 02/06/2006  
 To: 08/11/2006

Employment Category: \* Miscellaneous

Primary Position Title as displayed on your publicly available pay schedule: \* Police Officer Trainee

Was the participant's employment excluded from CalPERS membership due to your agency's contract agreement with CalPERS? \*  Yes  No [View Exclusions](#)

Time Base: \*  
 Full Time  Part Time  Fractional Time Base: [ ]/[ ]  
 Intermittent  Indeterminate  Scheduled hours per week: 40.0  
 On Call  Work(ed) As Needed

Appointment Tenure: \*  
 Permanent  
 Indeterminate  
 Seasonal  
 Temporary  
 Term End Date: 08/11/2006

Months per Year: \*  
 8 Months  9 Months  12 Months  10 Months

Please upload the participant's hiring document (myCalPERS 2788):

Service Credit Purchase Type Requested:  
 Is the participant above a member of a reciprocal system? \*  Yes  No  
 Service Prior to Membership  
 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  
 Did the Participant withdraw these funds? \*  Yes  No

Plan Type: \*  Defined Benefit  Defined Contribution  
 Plan Name: \* ICMA-RC Deferred Comp P

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

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

**Employment and Service Period Certification List** [Add New](#)

Excel Search: [ ]

Request Date	Status	Last Name	First Name	Middle Initial	CalPERS ID	Review Period Start Date	Review Period End Date	Division	Submitted By
04/05/2023	<a href="#">Requested</a>	Hannah	Rachel		120000089	06/25/2022	04/05/2023		
07/24/2023	<a href="#">Requested</a>	Macabebe	Doritz		230000078	10/07/2011	09/27/2015		
07/27/2023	<a href="#">Requested</a>	Berry	Teddy		340000076	08/18/1992	06/01/1994		
08/09/2023	<a href="#">Requested</a>	Flower	Alleen		440000066	04/18/1988	06/09/2023		
08/10/2023	<a href="#">In Progress</a>	Madrigal	Renato		450000065	03/07/2007	06/15/2009		

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.

**Service Review Filter**

Fiscal Year: [Dropdown]  
 Appointment: [Dropdown]  
 Division: [Dropdown]  
 CBU: [Dropdown]  
 Business Partner: [Dropdown]  
 Date Range: 07/01/2013  
 Position Title: [Dropdown]  
 Class Code: [Dropdown]  
 Certified by: [Dropdown]  
 To: 06/30/2015

[Filter Service](#) [Clear Filter](#) [Add New Service](#)

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 Fighter 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?

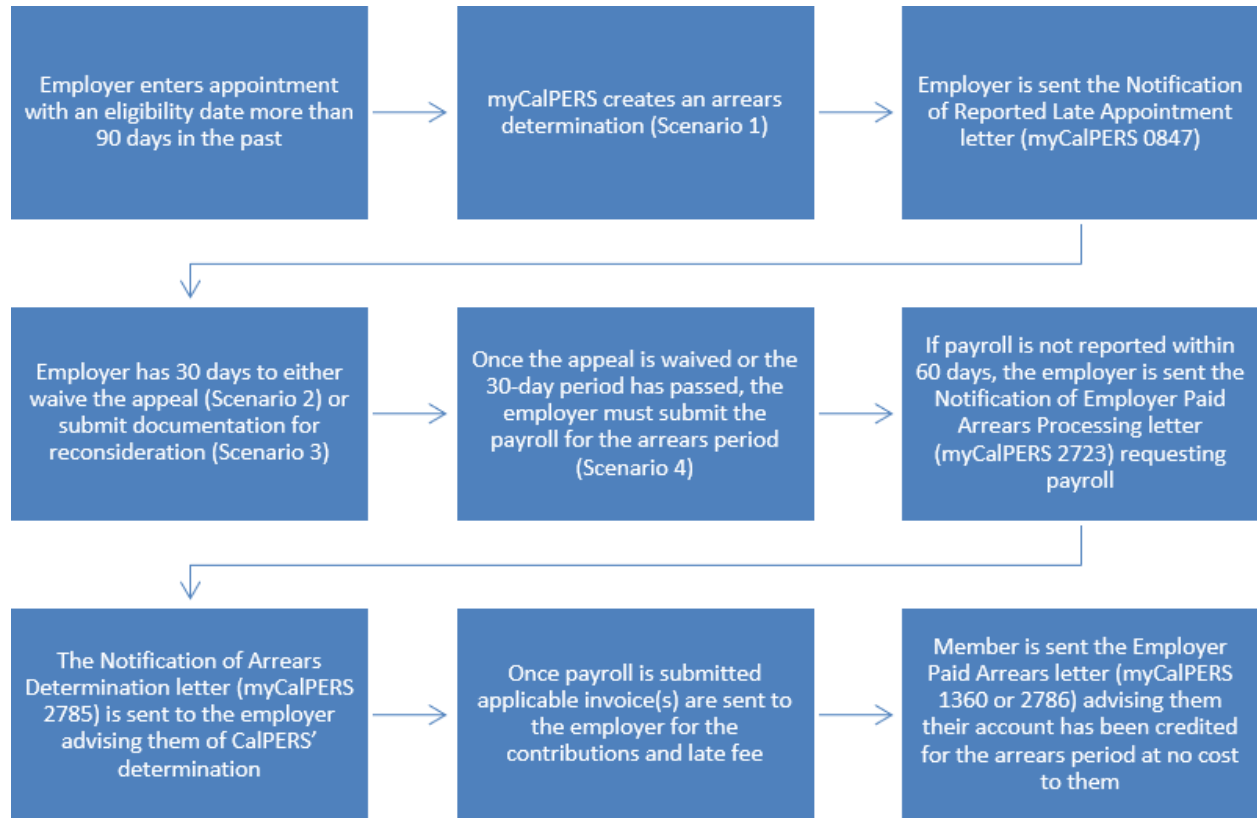
Below is a list of reasons that may cause an arrears determination:

- 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

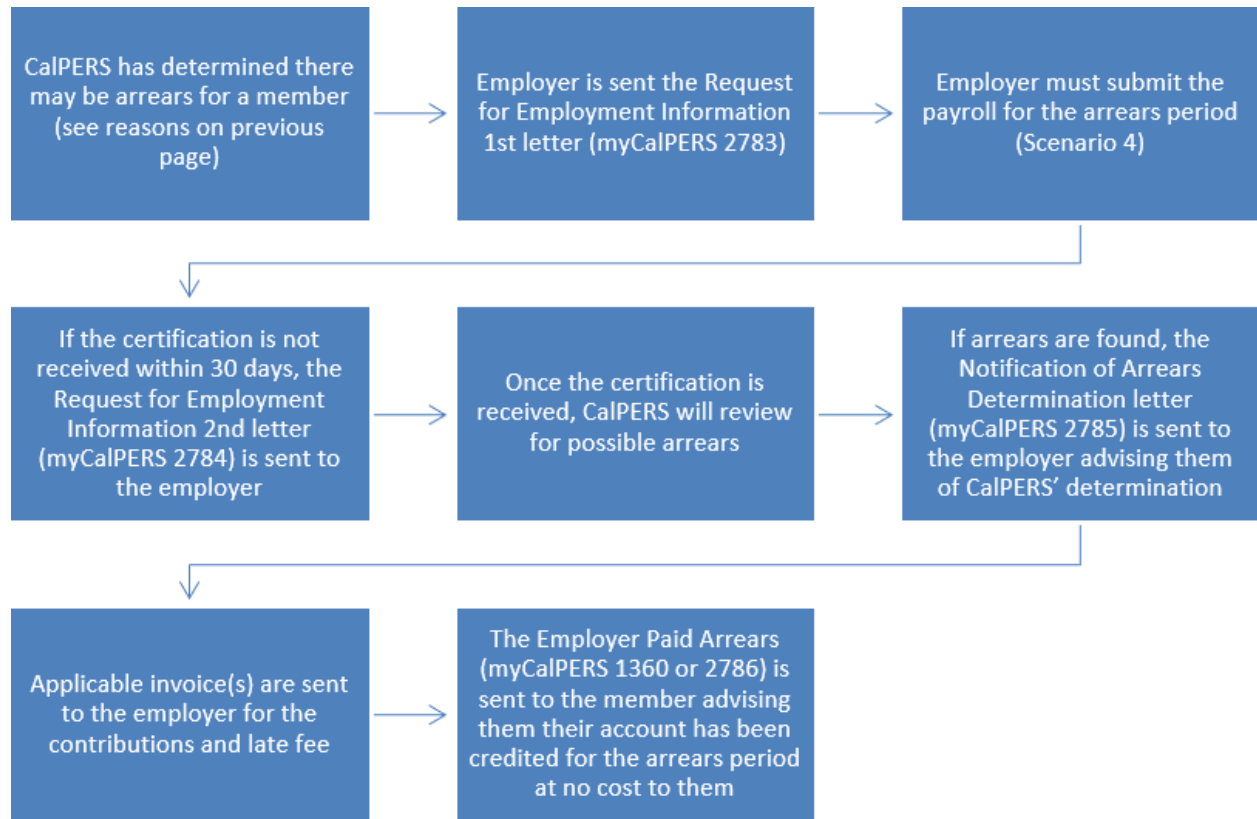
### Late Appointments (90-day violation)

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



## 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):



## 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 – Page 30
- Scenario 2: Waive Appeal – Page 31
- Scenario 3: Submit Reconsideration – Page 33
- Scenario 4: Report Payroll – Page 36

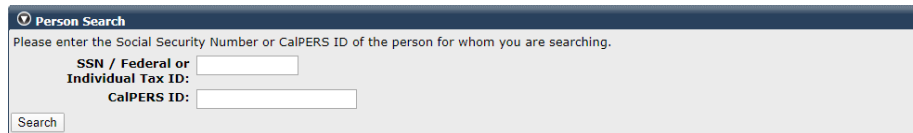
## Scenario 1: View Arrears Determination

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.



**Person Search**

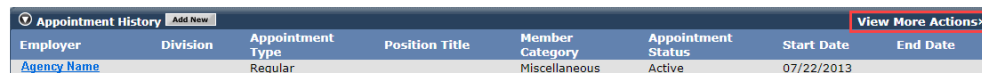
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

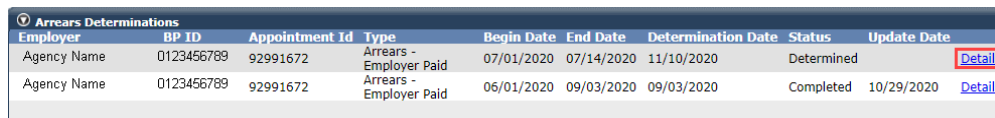
Step 3 Select the **Search** button.

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



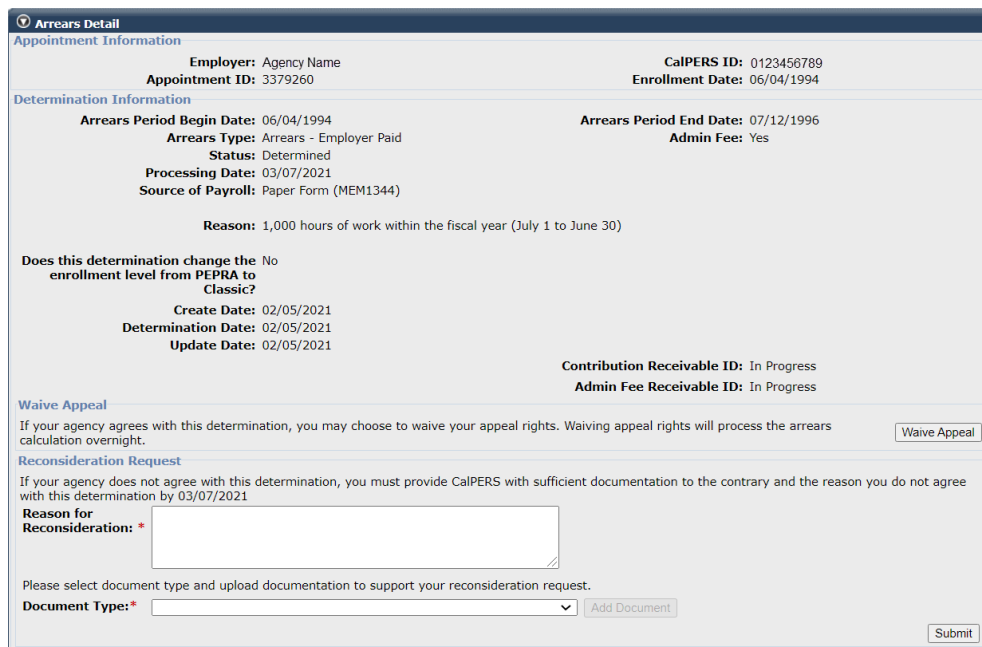
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date	View More Actions*
<a href="#">Agency Name</a>		Regular		Miscellaneous	Active	07/22/2013		

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



Employer	BP ID	Appointment Id	Type	Begin Date	End Date	Determination Date	Status	Update Date	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined		<a href="#">Details</a>
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020	<a href="#">Details</a>

Step 6 Review the Arrears Detail section.



**Arrears Detail**

**Appointment Information**

Employer: Agency Name  
Appointment ID: 3379260  
CalPERS ID: 0123456789  
Enrollment Date: 06/04/1994

**Determination Information**

Arrears Period Begin Date: 06/04/1994  
Arrears Period End Date: 07/12/1996  
Arrears Type: Arrears - Employer Paid  
Admin Fee: Yes  
Status: Determined  
Processing Date: 03/07/2021  
Source of Payroll: Paper Form (MEM1344)

Reason: 1,000 hours of work within the fiscal year (July 1 to June 30)

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

Create Date: 02/05/2021  
Determination Date: 02/05/2021  
Update Date: 02/05/2021

Contribution Receivable ID: In Progress  
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.

**Reconsideration Request**

If your agency does not agree with this determination, you must provide CalPERS with sufficient documentation to the contrary and the reason you do not agree with this determination by 03/07/2021

Reason for Reconsideration: \*

Please select document type and upload documentation to support your reconsideration request.

Document Type: \*

You have completed this scenario.

## Scenario 2: Waive Appeal

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

### System Logic

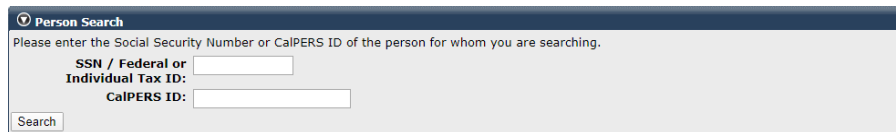
- An appeal can only be waived within 30 days of when the arrears determination was created.
- Once an appeal is waived, payroll for the arrears period can be reported. Refer to Unit 2, Scenario 4 of this student guide for reporting payroll. If payroll has already been associated to the arrears determination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



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:

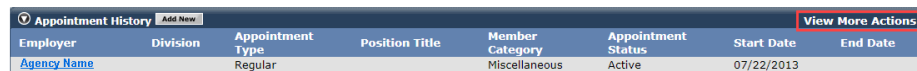
CalPERS ID:

---

Step 3 Select the **Search** button.

---

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



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date	View More Actions
Agency Name		Regular		Miscellaneous	Active	07/22/2013		

---

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



Employer	BP ID	Appointment Id	Type	Begin Date	End Date	Determination Date	Status	Update Date	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined		<a href="#">Details</a>
Agency Name	0123456789	92991672	Arrears - Employer Paid	05/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020	<a href="#">Details</a>

---

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

**Arrears Detail**

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

**Determination Information**  
 Arrears Period Begin Date: 07/01/2020  
 Arrears Type: Arrears - Employer Paid  
 Status: Determined  
 Processing Date: 12/25/2020  
 Source of Payroll: N/A - Late Enrollment  
 Arrears Period End Date: 07/14/2020  
 Admin Fee: Yes  
 Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPR to Class? 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: \*

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?

**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

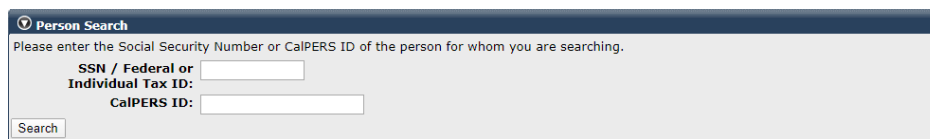
- You have 30 days from when the arrears determination was created to submit documentation for reconsideration.
- Once the appeal period closes, if CalPERS determines the arrears stands, your agency will need to report payroll for the arrears period. Refer to Unit 2, Scenario 4 for reporting payroll 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.

---

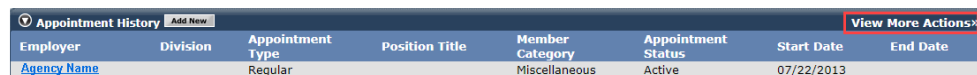
Step 2 Complete the Person Search section.



Step 3 Select the **Search** button.

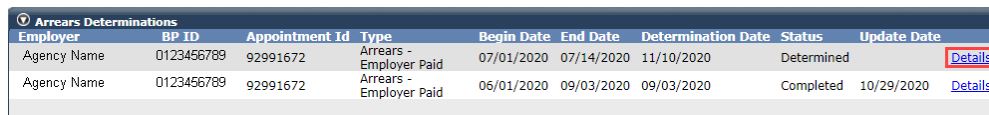
---

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



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
Agency Name		Regular		Miscellaneous	Active	07/22/2013	

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



Employer	BP ID	Appointment Id	Type	Begin Date	End Date	Determination Date	Status	Update Date
Agency Name	0123456789	92991672	Arrears - Employer Paid	07/01/2020	07/14/2020	11/10/2020	Determined	Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020 Details

Step 6

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

**Arrears Detail**

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

**Determination Information**  
Arrears Period Begin Date: 07/01/2020  
Arrears Type: Arrears - Employer Paid  
Status: Determined  
Processing Date: 12/25/2020  
Source of Payroll: N/A - Late Enrollment  
Arrears Period End Date: 07/14/2020  
Admin Fee: Yes  
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPR 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.

**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: \*

Step 7

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

**Arrears Detail**

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

**Determination Information**  
Arrears Period Begin Date: 07/01/2020  
Arrears Type: Arrears - Employer Paid  
Status: Determined  
Processing Date: 12/25/2020  
Source of Payroll: N/A - Late Enrollment  
Arrears Period End Date: 07/14/2020  
Admin Fee: Yes  
Reason: Appointment enrollment was reported late 90 days or more

Does this determination change the enrollment level from PEPR 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.

**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: \*

Step 8

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

**Arrears Detail**

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

**Determination Information**  
Arrears Period Begin Date: 07/01/2020  
Arrears Type: Arrears - Employer Paid  
Status: Determined  
Processing Date: 12/25/2020  
Source of Payroll: N/A - Late Enrollment  
Arrears Period End Date: 07/14/2020  
Admin Fee: Yes  
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: Election of Optional Membership - Part-Time Employee: myCalPERS 0843 [Add Document](#)

[Submit](#)

Step 9

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

Step 10

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

**Arrears Detail**

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

**Determination Information**  
Arrears Period Begin Date: 07/01/2020  
Arrears Type: Arrears - Employer Paid  
Status: Determined  
Processing Date: 12/25/2020  
Source of Payroll: N/A - Late Enrollment  
Arrears Period End Date: 07/14/2020  
Admin Fee: Yes  
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: Election of Optional Membership - Part-Time Employee: myCalPERS 0843 [View Document](#) [Replace](#)  
Election of Optional Membership.docx is added.

[Submit](#)

**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](http://www.calpers.ca.gov) 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](mailto: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](mailto: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](mailto: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.