

myCalPERS Employment Certification Functionality

Student Guide

March 02, 2024



myCalPERS Employment Certification Functionality

This guide provides detailed steps to 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 RO
- Business Partner Retirement Enrollment
- Business Partner Retirement Enrollment RO

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 > Contacts section > 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).

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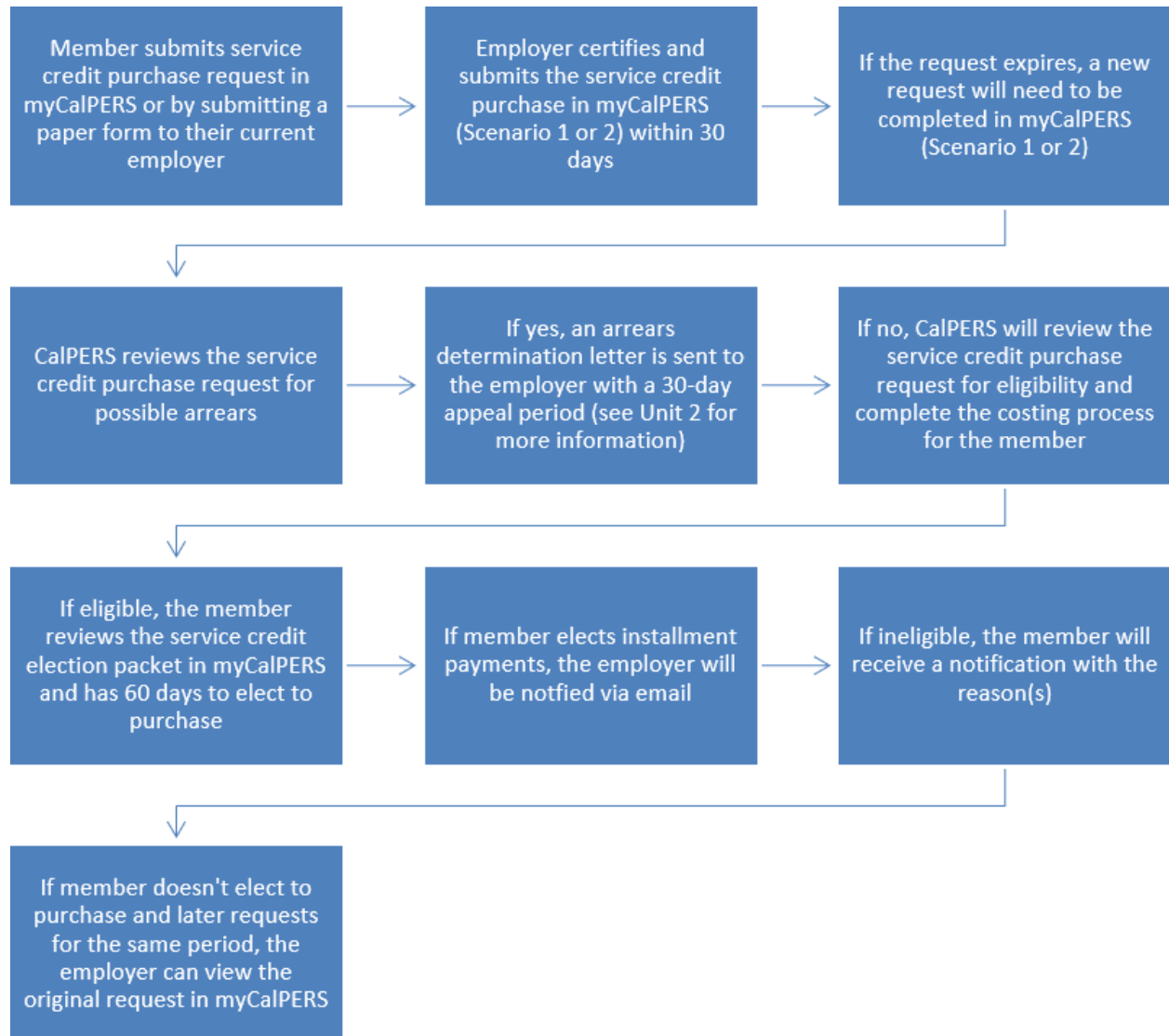
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Unit 1: Service Credit Purchase Certification

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 > Document History.

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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, see the Appendix at the end of this guide.

Step Actions

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.

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	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		

The screenshot shows a filter form titled "Employment and Service Period Certification Filter". It includes fields for CalPERS Id, Status (a dropdown menu with options: Complete, Submitted, Certification Expired, Rejected, Employer Withdrawn, Requested), Last Name, Submitted By, SSN, Division, First Name, and an "and" field. There are "Filter Data" and "Clear Filter" buttons.

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 the "Employment Periods" section with a message: "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." Below the message is a table with columns: Participant, CalPERS Id, Division, Start Date - End Date, Employment Category, Position Title, and SCP Type. The "Start Date - End Date" column contains a link "03/01/2014 - 07/19/2014".

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

Step 6

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

Employment Information

Participant: * Eric Sanchez
Participant's Email Address: eric.sanchez@agencyname.com
Business Partner: Agency Name
Participant's Phone Number: (999) 888-7777
Division: Department Name

Dates of Employment: *
From: 10/20/2014 To: 06/30/2015

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): [Add Document](#)

Service Credit Purchase Type Requested: Service Prior to Membership
Is the participant above a member of a reciprocal system? * 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

Save [Return](#)

Note: You may need to correct the service period start and end dates to reflect all reportable employment prior to the membership date..

Step 7

Skip to step 17

[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.

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

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	07/19/2014		
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	05/11/2006		
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	ID-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

Showing 1 to 7 of 7 entries [Previous](#) 1 [Next](#)

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 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.

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:

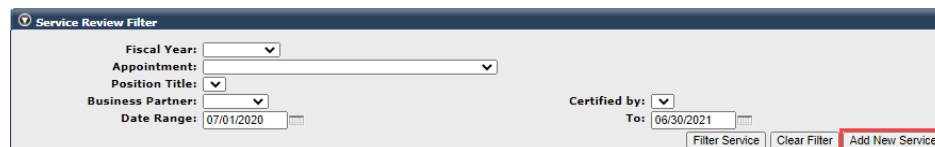
- **Manual entry:** Payroll is entered into myCalPERS manually for each earned period using the steps outlined in this scenario starting with step 19.
- **File upload:** Payroll for each earned period is uploaded into myCalPERS using a CSV or XML file using the steps outlined in this scenario starting with step 36.

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 record. See 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.

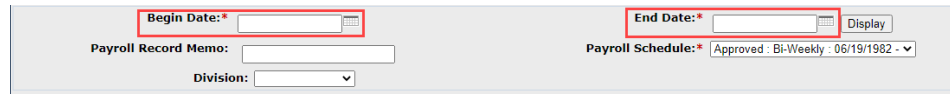
Manual Entry

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



The screenshot shows a web form titled "Service Review Filter". It contains several input fields and buttons. The fields include "Fiscal Year" (a dropdown menu), "Appointment" (a text input field), "Position Title" (a dropdown menu), "Business Partner" (a dropdown menu), "Date Range" (a date input field with the value "07/01/2020"), and "Certified by:" (a dropdown menu). Below these fields are three buttons: "Filter Service", "Clear Filter", and "Add New Service". The "Add New Service" button is highlighted with a red border.

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



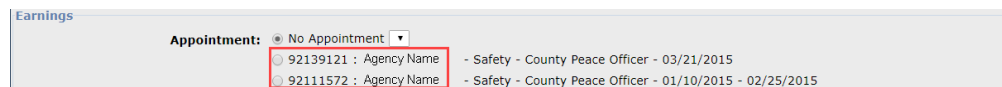
Note: The **Payroll Record Memo** field is optional.

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

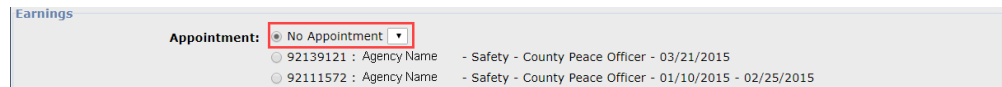


Step 22 Select an appointment:

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



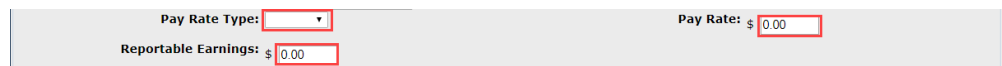
-If you are reporting payroll for an appointment that isn't in myCalPERS, leave the **No Appointment** radio button selected.



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

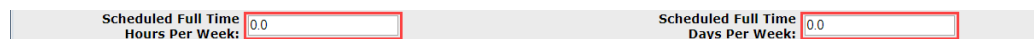


Step 24 Complete the **Payroll Schedule**, **Pay Rate Type**, and **Pay Rate** fields. In the **Reportable Earnings** field, enter only earnings based on reportable hours. Do not include overtime earnings.

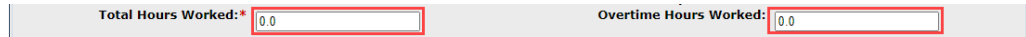


Step 25 Complete either the **Scheduled Full Time Hours Per Week** or **Scheduled Full Time Days Per Week** field.

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.



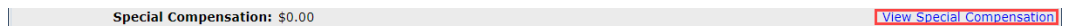
A horizontal bar containing two input fields. The first field is labeled "Total Hours Worked:*" and contains the value "0.0". The second field is labeled "Overtime Hours Worked:" and also contains the value "0.0". Both fields are outlined in red.

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.



A horizontal bar showing "Special Compensation: \$0.00" on the left and a red-outlined link "View Special Compensation" on the right.

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



A screenshot of the "View Special Compensation" section. It features a table with columns "Category", "Type", and "Amount". Above the table are buttons for "Select All", "Delete", and "Add New". Below the table, it says "No results found." and repeats the "Select All", "Delete", and "Add New" buttons. The "Add New" buttons are highlighted with red boxes.

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



A screenshot of the "Maintain Special Compensation Details" section. It shows three input fields: "Special Compensation Category:" (a dropdown menu), "Special Compensation Type:" (a dropdown menu), and "Amount:*\$" (a text box containing "\$0.00"). Below these fields are "Save" and "Save and Add Another" buttons.

Step 31 Is there additional special compensation to add to this record?

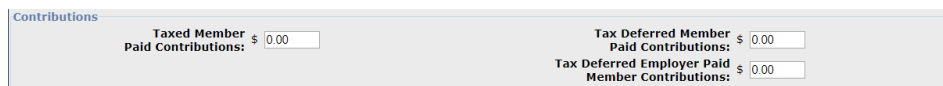
Yes: Select the **Save and Add Another** button and return to step 30

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 appropriate field.



A screenshot of the "Contributions" section. It contains four input fields for contributions: "Taxed Member Paid Contributions: \$ 0.00", "Tax Deferred Member Paid Contributions: \$ 0.00", "Tax Deferred Employer Paid Member Contributions: \$ 0.00", and another "Tax Deferred Member Paid Contributions: \$ 0.00".

Step 35 Do you have additional periods or report adjustments to report?

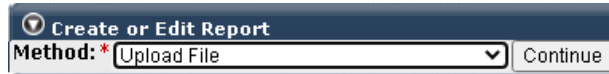
Yes: Select the **Save & Continue** button and return to step 20

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

File Upload

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

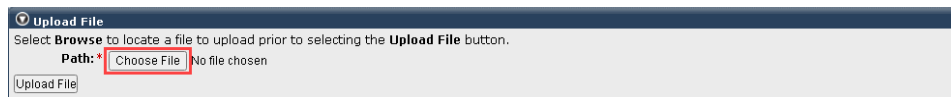
Step 37 Within the Create or Edit Report section, select **Upload File** from the Method drop-down list.



Create or Edit Report
Method: * Upload File Continue

Step 38 Select the **Continue** button.

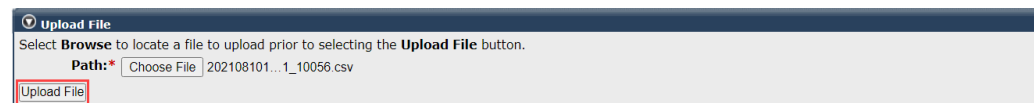
Step 39 Within the Upload File section, select the **Choose File** button.



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.

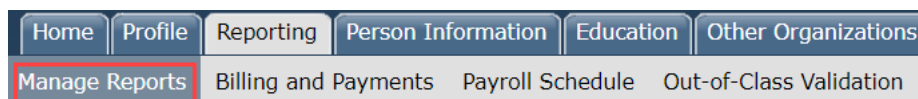


Upload File
Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.
Path: * Choose File 202108101...1_10056.csv
Upload File

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*.

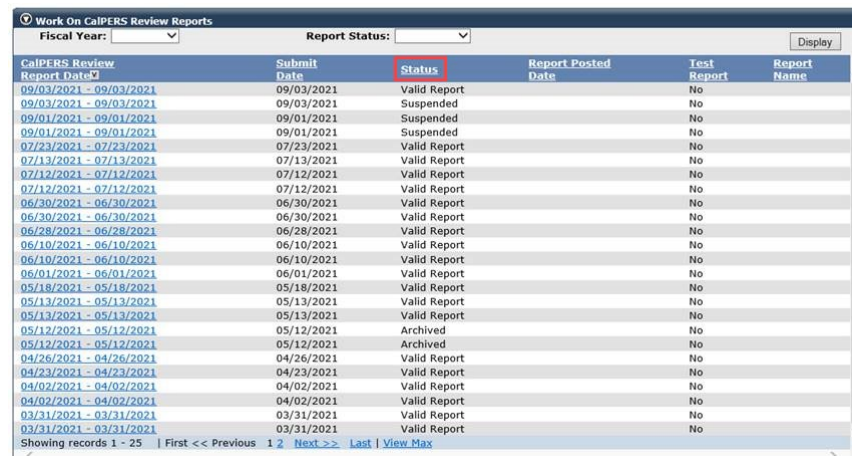
Step 44 Select the **Manage Reports** local navigation link.



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
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 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.

Records Present in the Report

Select All Delete

SSN	CaPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	Hours Worked	OT Hours
XXX-1111	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
XXX-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

Select All Delete

Generate Report Summary [View Payroll Report Summary](#)

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.

Employment and Service Period Certification List Add New

Excel Search:

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	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 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 and submitted 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 their current employer. You 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, see 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

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.

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		11/06/2006 – 12/22/2006			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		Division:	
Business Partner: Agency Name			
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:

Submit Reject Member SCP Request

Step 10

Select the **Submit** button.

You have completed this scenario.

Reject

Step 11

Expand the SCP Request Reject Reason section.

SCP Request Rejection Reason

Step 12

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 13

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 14

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 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

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 with 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	Alleen		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:

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

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:

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: Service Prior to Membership

Is the participant above a member of a reciprocal system? * 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

Did the Participant withdraw these funds? * Yes No

Plan Type: * Defined Benefit Defined Contribution

Plan Name: * ICMA-RC Deferred Comp PS

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

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

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 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 [calendar icon]
Position Title: [dropdown]
Class Code: [dropdown]
Certified by: [dropdown]
To: 06/30/2015 [calendar icon]

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.

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 their 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?

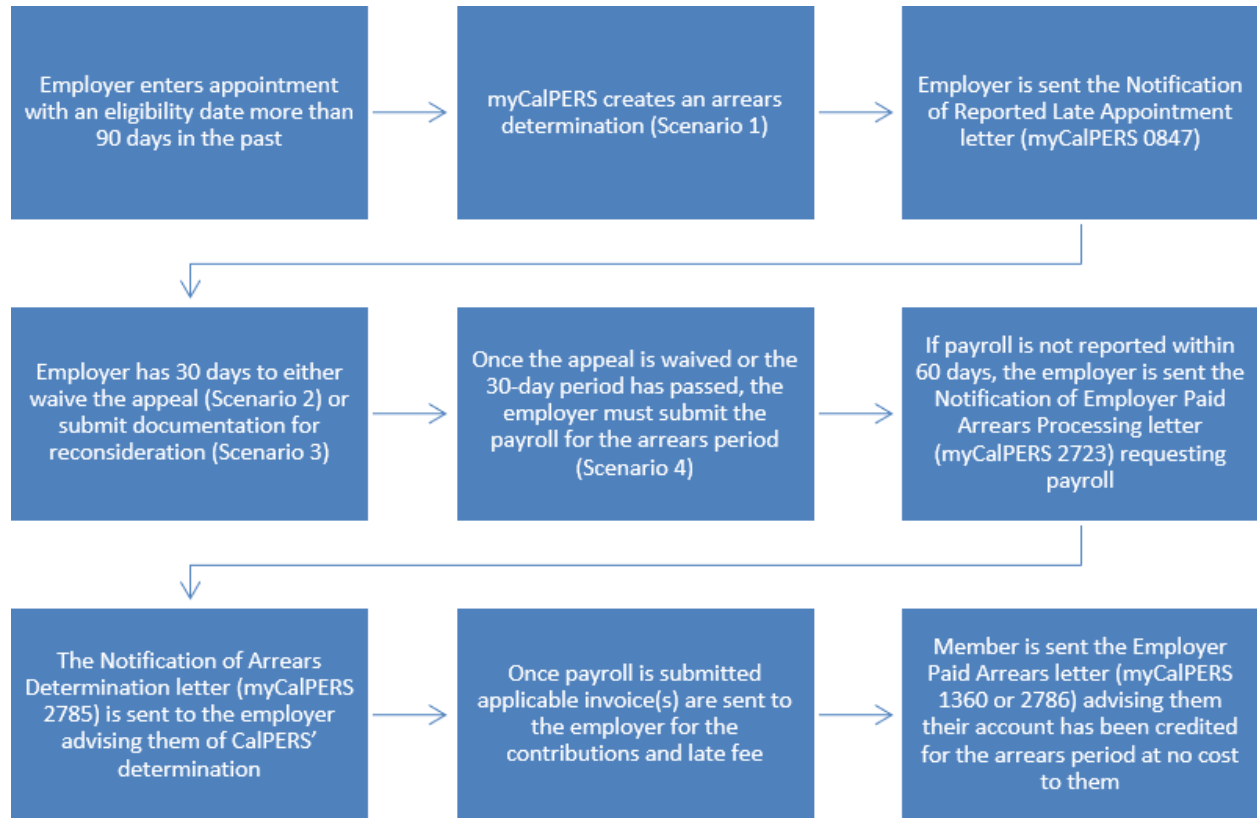
Below is a list of reasons that may cause an arrears determination:

- 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

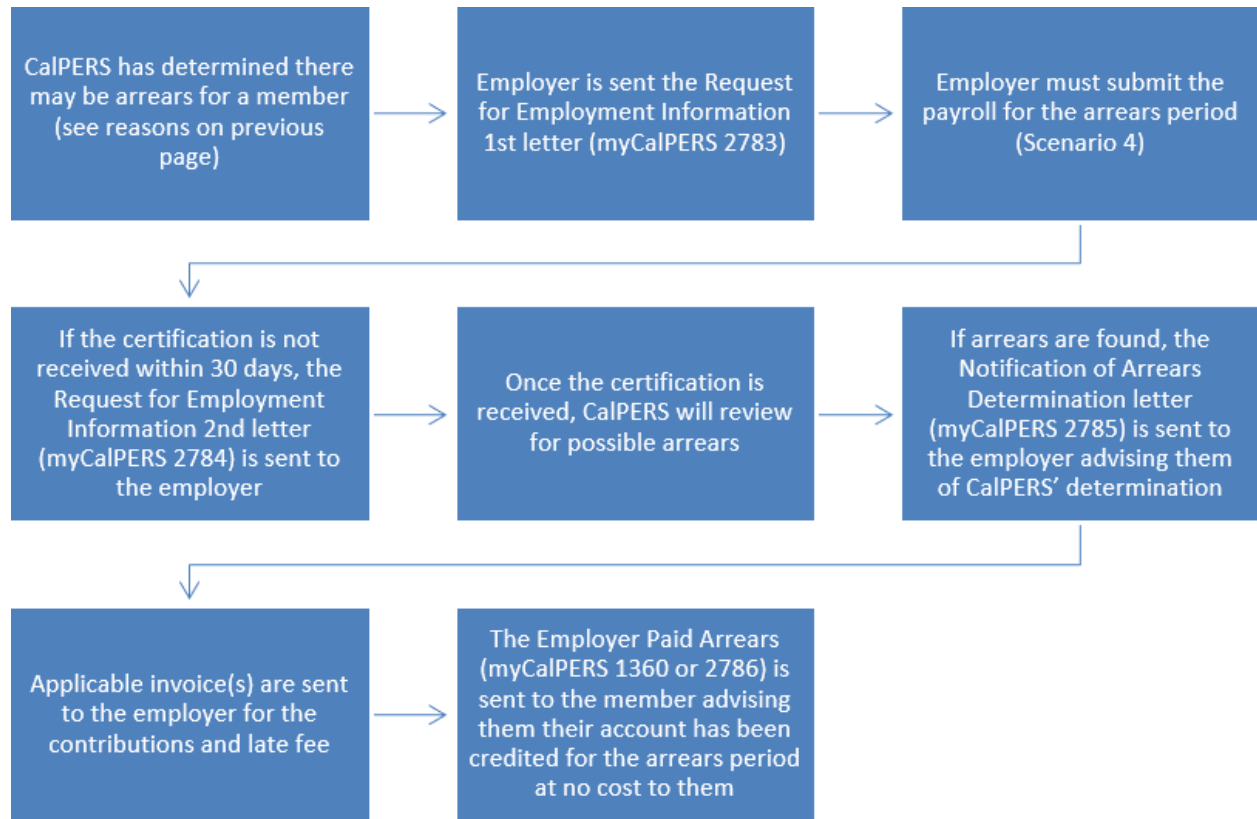
Late Appointments (90-day violation)

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 (see 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 > Document History.

Contents

Scenario 1: View Arrears Determination	28
Scenario 2: Waive Appeal	29
Scenario 3: Submit Reconsideration.....	31
Scenario 4: Report Payroll.....	34

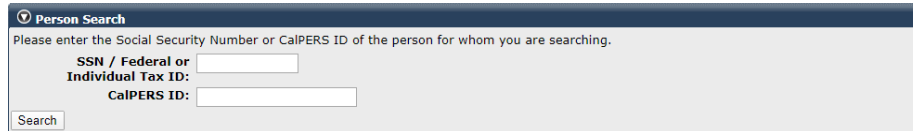
Scenario 1: View Arrears Determination

You want to view an arrears determination.

Step Actions

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

Step 2 Complete the Person Search section.



Person Search

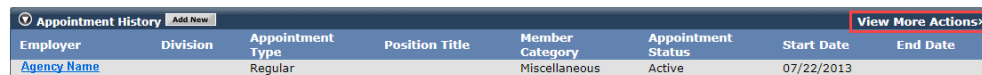
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

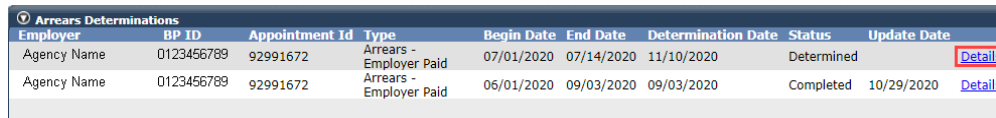
Step 3 Select the **Search** button.

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



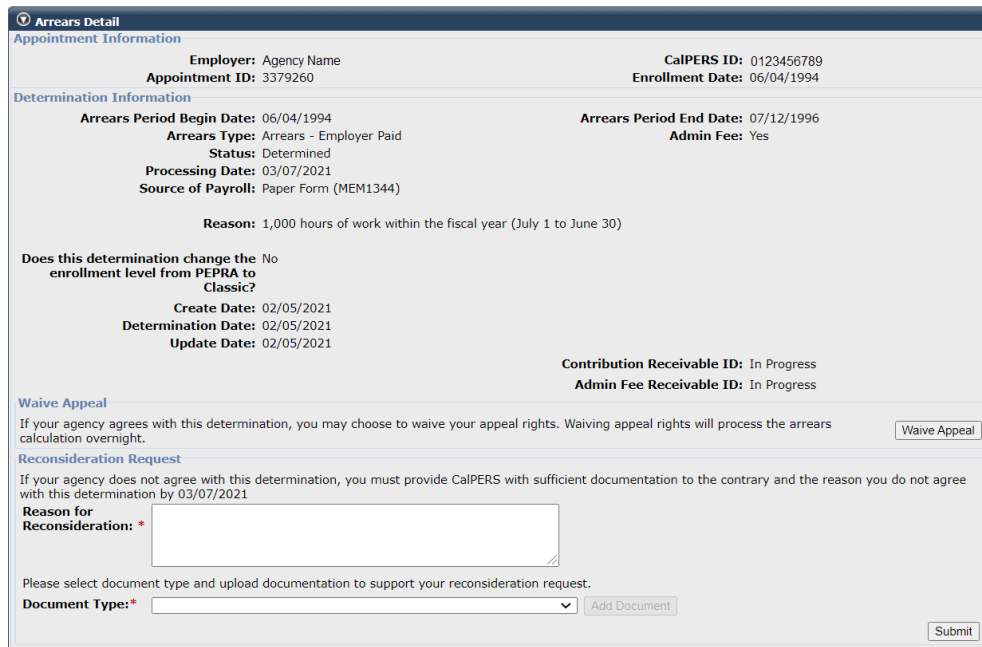
Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date	View More Actions
Agency Name		Regular		Miscellaneous	Active	07/22/2013		View More Actions

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		Details
Agency Name	0123456789	92991672	Arrears - Employer Paid	06/01/2020	09/03/2020	09/03/2020	Completed	10/29/2020	Details

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 PEPR 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.

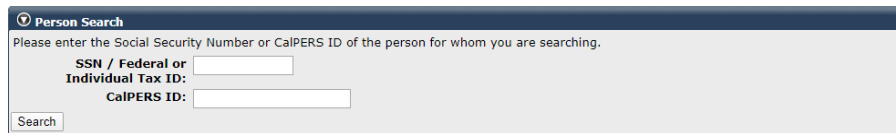
System Logic

- 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. See unit 2, scenario 4 of this student guide for reporting payroll.

Step Actions

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

Step 2 Complete the Person Search section.



Person Search

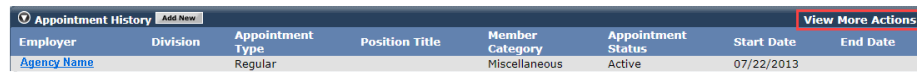
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

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	
Agency Name		Regular		Miscellaneous	Active	07/22/2013		View More Actions

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, 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 Period End Date: 07/14/2020
Arrears Type: Arrears - Employer Paid
Status: Determined
Admin Fee: Yes
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 PEPA 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 Waive Appeal section, select the **Yes** button.



You have completed this scenario.

Scenario 3: Submit Reconsideration

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

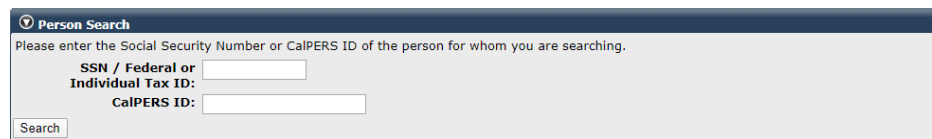
System Logic

- 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. See unit 2, scenario 4 for reporting payroll of this student guide.

Step Actions

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

Step 2 Complete the Person Search section.

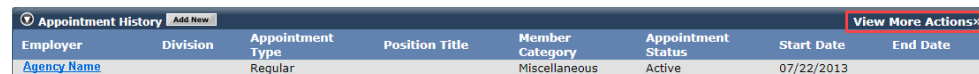


The screenshot shows a 'Person Search' form with the following fields and a search button:

- SSN / Federal or Individual Tax ID:
- CalPERS ID:
- Search button

Step 3 Select the **Search** button.

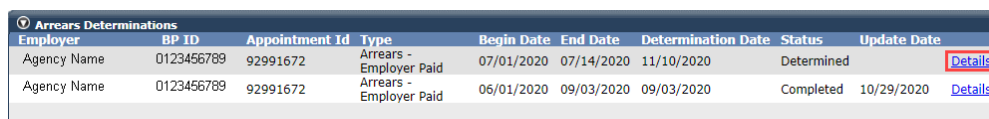
Step 4 Within the Appointment History section, select the **View More Actions** link.



The screenshot shows a table with the following columns and data:

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.



The screenshot shows a table with the following columns and data:

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: [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: [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

- Only report payroll 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.
- Continue reporting the member's current payroll in your earned period reports.
- You must report payroll for the entire arrears period.
- Earned periods cannot be lumped together. Report each earned period separately.
- If an earned period does not have reportable earnings, report a zero-period record. See the [myCalPERS Payroll Reporting \(PDF\)](#) student guide (Unit 3, Scenario 4) for the proper reporting steps.
- Separate the payroll into two records if:
 - An earned period crosses fiscal years.
 - There are multiple pay rates or positions for the same earned period.
- Do not report payroll for dates outside of the requested service credit purchase period.
- Begin and end dates must be within the same fiscal year. If an earned period crosses fiscal years, separate the payroll into two records.
- Do not report payroll for dates outside of the requested arrears period using this scenario.

Step Actions

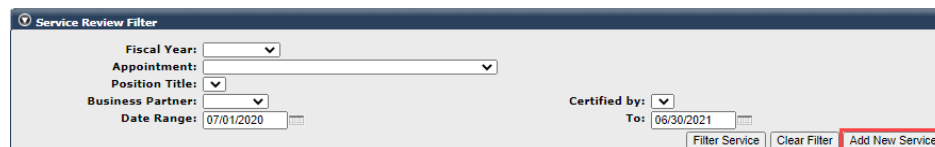
Step 1 How would you like to submit your payroll?

Manual entry: Continue to step 2

File upload: Skip to step 19

Manual Entry

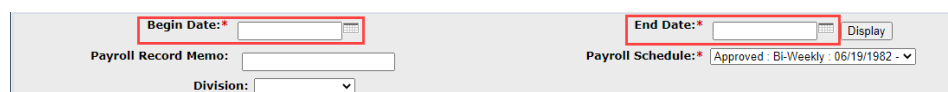
Step 2 Within the Service Review Filter section, select the **Add New Service** button.



The screenshot shows a 'Service Review Filter' form with the following fields and controls:

- Fiscal Year: [Dropdown]
- Appointment: [Dropdown]
- Position Title: [Dropdown]
- Business Partner: [Dropdown]
- Date Range: 07/01/2020 [Text]
- Certified by: [Dropdown]
- To: 06/30/2021 [Text]
- Buttons: Filter Service, Clear Filter, Add New Service (highlighted with a red box)

Step 3 Within the Maintain Record Details section, enter the begin and end dates of the earned period.



The screenshot shows a 'Maintain Record Details' form with the following fields and controls:

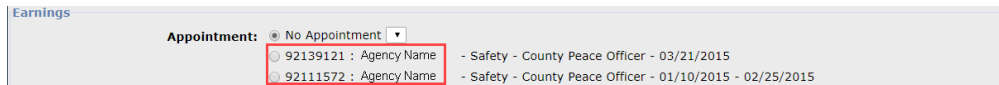
- Begin Date: * [Text] (highlighted with a red box)
- End Date: * [Text] (highlighted with a red box)
- Display: [Button]
- Payroll Record Memo: [Text]
- Division: [Dropdown]
- Payroll Schedule: * Approved - Bi-Weekly - 06/19/1982 - [Dropdown]

Step 4 Select from the **Member Category** drop-down lists and complete the **Position Title** and **CBU** fields. These fields are required for state and CSU.




The screenshot shows a form titled "Earnings" with three input fields: "Member Category" (a dropdown menu), "Position Title" (a text box), and "Class Code" (a text box). Each field is highlighted with a red rectangular box.

Step 5 Select an appointment:
-If you are reporting payroll for an existing appointment in myCalPERS, select the **appointment** radio button.



The screenshot shows the "Appointment" section of the "Earnings" form. It features a radio button for "No Appointment" and two radio buttons for existing appointments: "92139121 : Agency Name - Safety - County Peace Officer - 03/21/2015" and "92111572 : Agency Name - Safety - County Peace Officer - 01/10/2015 - 02/25/2015". The "No Appointment" radio button is selected and highlighted with a red box.

-If you are reporting payroll for an appointment that isn't in myCalPERS, leave the **No Appointment** radio button selected.



This screenshot is identical to the previous one, showing the "Appointment" section with the "No Appointment" radio button selected and highlighted with a red box.

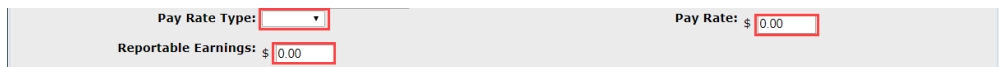
Step 6 Select the correct **Payroll Schedule** from the drop-down list.



The screenshot shows a single input field labeled "Payroll Schedule:*" with a dropdown arrow on the right side.

Step 7 Within the Maintain Record Details section, complete the **Pay Rate Type**, **Pay Rate**, and **Reportable Earnings** fields. These fields are required.

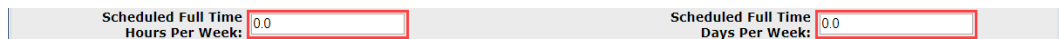
Note: Do not include overtime earnings in the **Reportable earnings** field.



The screenshot shows three input fields: "Pay Rate Type" (a dropdown menu), "Pay Rate: \$" (a text box with "0.00" entered), and "Reportable Earnings: \$" (a text box with "0.00" entered). Each field is highlighted with a red rectangular box.

Step 8 Complete either the **Scheduled Full Time Hours Per Week** or **Scheduled Full Time Days Per Week** field.

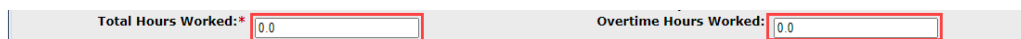
Note: Report what is considered full time for the position whether the member works full time or not.



The screenshot shows two input fields: "Scheduled Full Time Hours Per Week: 0.0" and "Scheduled Full Time Days Per Week: 0.0". Both fields are highlighted with red rectangular boxes.

Step 9 Complete the **Total Hours Worked** field with the regular hours and the **Overtime Hours Worked** field with the overtime hours.

Note: Report only the hours worked for the period in this record.



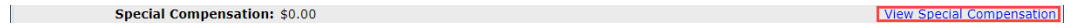
The screenshot shows two input fields: "Total Hours Worked:* 0.0" and "Overtime Hours Worked: 0.0". Both fields are highlighted with red rectangular boxes.

Step 10 Is there special compensation to be reported?

Yes: Continue to step 11

No: Skip to step 17

Step 11 Select the **View Special Compensation** link.



Special Compensation: \$0.00 [View Special Compensation](#)

Step 12 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 13 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 14 Is there additional special compensation to add to this record?

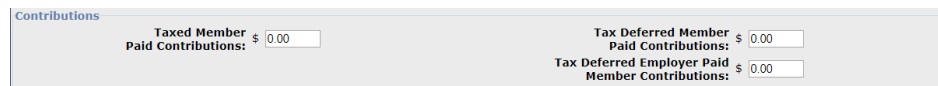
Yes: Select the **Save and Add Another** button, and then return to step 13

No: Continue to step 15

Step 15 Select the **Save** button.

Step 16 Select the **Return** link at bottom right.

Step 17 If applicable, enter the contributions in the appropriate field.



Contributions

Taxed Member Paid Contributions: \$ 0.00	Tax Deferred Member Paid Contributions: \$ 0.00
	Tax Deferred Employer Paid Member Contributions: \$ 0.00

Step 18 Do you have additional periods or adjustments to report?

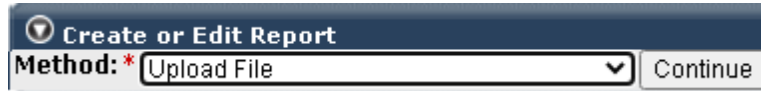
Yes: Select the **Save & Continue** button, and then return to step 3

No: Select the **Save & Return** button, and then skip to step 35

File Upload

Step 19 Select the **Reporting** global navigation tab.

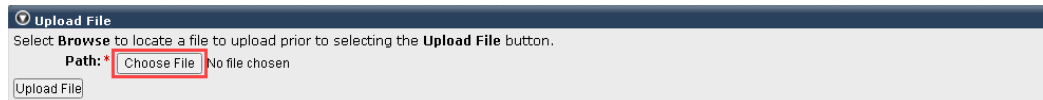
Step 20 Within the Create or Edit Report section, select **Upload File** from the Method drop-down list.



▼ Create or Edit Report
Method: * Upload File Continue

Step 21 Select the **Continue** button.

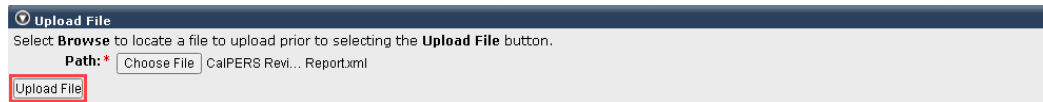
Step 22 Within the Upload File section, select the **Choose File** button.



▼ 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 23 Locate the file, and then select the **Open** button.

Step 24 Select the **Upload File** button.

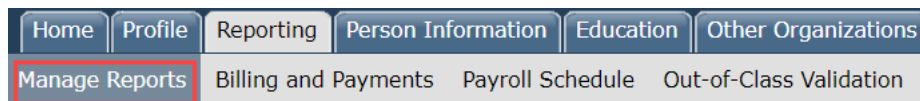


▼ Upload File
Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.
Path: * Choose File CalPERS Rev... Report.xml
Upload File

Step 25 Within the File Upload History section, locate your report.

Step 26 Refresh the page until the File Status column of your report shows *Accepted*.

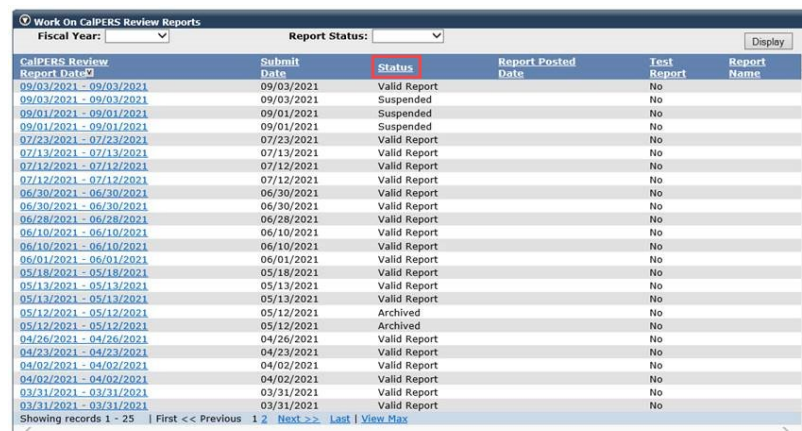
Step 27 Select the **Manage Reports** local navigation link.



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

Step 28 Scroll down to the Work on Existing CalPERS Review Reports section.

Step 29 Review the Status column.



Work on CalPERS Review Reports
Fiscal Year: Report Status: Display

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	

Showing records 1 - 25 | First << Previous 1 2 Next >> Last | View Max

Step 30 What is the status of the report?

Valid Report: Your report is valid. Skip to step 42.

Suspended: Your report has error(s) that must be corrected. Continue to step 31.

Step 31 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
09/03/2021 - 09/03/2021	09/03/2021	Valid Report		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	
05/12/2021 - 05/12/2021	05/12/2021	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 32 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
xxx-1111	0123456789	Agency Name	SARINAS, YELTSIN BELLARMINE	03/01/2020-03/06/2020	Miscellaneous	Reported	\$100.00	\$0.00	10.0	0.0
xxx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/07/2020-03/20/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xxx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	03/21/2020-04/03/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xxx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/04/2020-04/17/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xxx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	04/18/2020-05/01/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xxx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/02/2020-05/15/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0
xxx-1111	0123456789	Agency Name	Sarinas, Yeltsin Bellarmine	05/16/2020-05/29/2020	Miscellaneous	Error	\$100.00	\$0.00	10.0	0.0

Step 33 Select the **SSN** link for the record that has an error.

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

Step 34 Review the messages section to determine what requires correction.

Step 35 Select the **Save & Return** button.

Step 36 Are there additional records with errors?

Yes: Return to step 33

No: Continue to step 37

Step 37 Select the **Reporting** global navigation tab.

Step 38 Select the **Member Requests** local navigation link.

Step 39 Within the Employment and Service Period Certification List section, locate the member within the list.

Step 40 Select the **Status** link for the request you wish to complete.

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	07/19/2014		
02/25/2021	Requested	Nguyen	Lisa		1234567890	02/06/2006	08/11/2006		
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

Showing 1 to 7 of 7 entries

Step 41 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

[Return](#)

Step 42 Within the Certification section, select the **certification** check box.

Certification

* By signing, I certify the following:

- 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;
- I am an authorized representative of Agency Name and I am qualified to certify this form;
- 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;
- I understand the agency I am representing is accepting any employer liability associated with this service credit purchase.

Submitted By:
Submitted Date:

Step 43 Select the **Submit** button.

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 > Retirement Contract > Exclusions
- 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. 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 agency 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

Scheduled Full Time Hours Per Week

Complete only if the Pay Rate Type field is entered as Hourly. Enter the number of hours that are considered full time for the position.

Scheduled Full Time Days Per Week

Complete only if the Pay Rate Type field is entered as Daily. 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 myCalPERS Education tab.
 - 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.