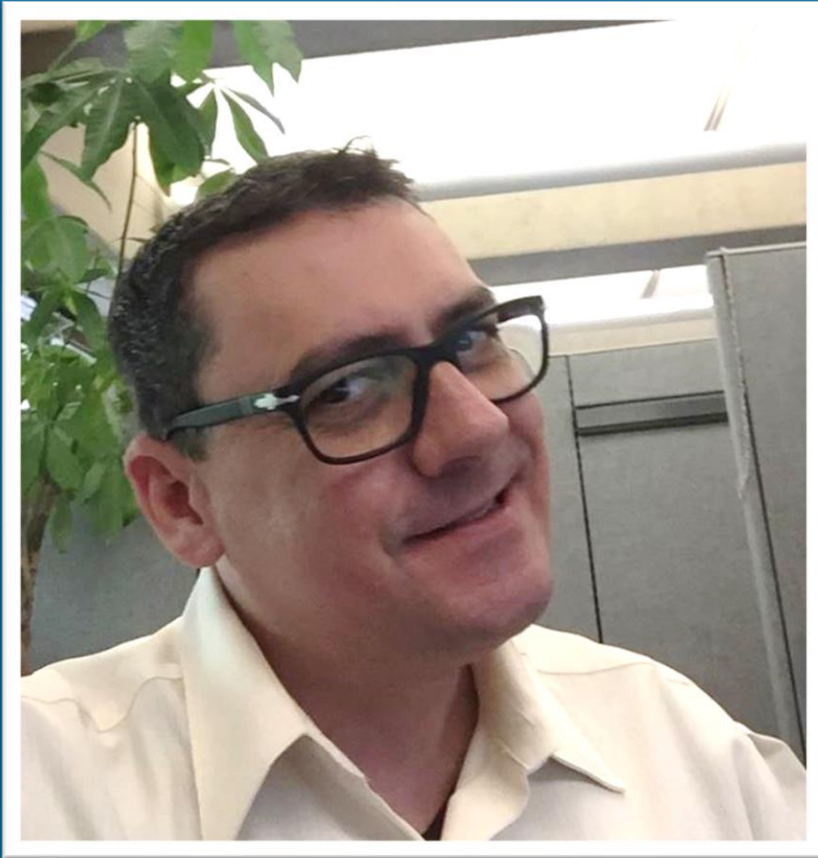


School Employer Advisory Committee

August 4, 2021



William Greenhalgh and Susan Forrer

Employer Response Team

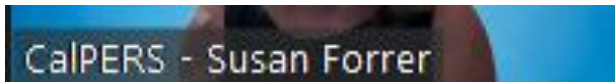
Employer Account Management Division

Housekeeping (1 of 2)

Webinar is being recorded

Attendee mics are muted

Change name to read: Agency name - Full name



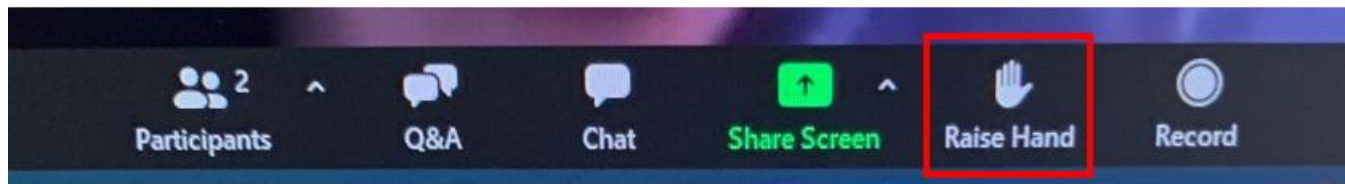
Meeting materials available on www.calpers.ca.gov

Email: CalPERS_SEAC@calpers.ca.gov

Housekeeping (2 of 2)

Options to submit a question for panelist(s):

- Q&A feature
- Raise hand feature
 - When the host calls on you to talk, you will be prompted to unmute your microphone
 - While unmuted, your profile picture and name will display to the host and panelists
 - Your name will only display to the other attendees
 - Select **Lower Hand** to lower, if needed. **Note:** This will not mute your microphone if you're unmuted



Agenda (1 of 2)

Legislation Update – Andrea Peters

Post-retirement Employment COVID-19 Update – Catalina Estrada

Assembly Bill 1309 – Jonathan Hensley

MOU Review Website – Brad Hanson

State Social Security Administration Update – Veronica Silva-Gil

Break

Agenda (2 of 2)

myCalPERS System Enhancements – Meghan Korte and Ryan Bieker

EDJOIN – Jennifer Rains and Jennifer Helfend-Gomez

CalPERS Educational Forum – Stakeholder Relations

Questions and Answers – Renee Ostrander, Brad Hanson, and Christina Rollins

Legislative Update

Andrea Peters
Legislative Affairs Division

COVID Executive Order N-08-21

Catalina Estrada and Brad Hanson
Employer Account Management Division

Governor's Executive Order N-08-21 (1 of 2)

Updates to Governor's Executive Order N-25-20 dated
March 4, 2020

- N-08-21 lifts the suspension of certain statutes and regulations for retired annuitants effective July 1, 2021

Governor's Executive Order N-08-21 (2 of 2)

Post-retirement employment requirements reinstated

- 180-day waiting period

Post-retirement employment requirements still suspended

- 960 work hour limit per fiscal year
- Retirees employed in a vacant position under Government (Gov.) Code section 21221(h) can only be appointed to the position once
- 60-day bona fide separation in service

COVID-19: Supplemental Paid Sick Leave

Circular Letter 200-023-21

All hours of supplemental paid sick leave to be reported

- Report regular full-time base pay rate with the appropriate corresponding earnings, not to exceed earnings for full-time service
- Hours are included when determining membership eligibility (1,000 hours)

Retired annuitants cannot accrue paid sick leave, but can receive this supplemental paid sick leave

- Hours are to be reported and will be subjected to the 960-hour per fiscal year limitation

COVID-19: Stipends and Pays

COVID stipends are not reportable:

- Additional compensation for working additional duties
- “In-person” or “in-service” pay
- Considered as an ad-hoc payment or stipend

Trend

- Converting COVID stipend as Off-Salary-Schedule pay
- Exclusively in the final compensation period

Questions?

Assembly Bill 1309: Retired Annuitant Late Fees

Jonathan Hensley

Financial Reporting & Accounting Services Division

What is Assembly Bill (AB) 1309?

Effective January 1, 2018, AB 1309 amended Gov. Code section 21220 of the Public Employees' Retirement Law (PERL)

Authorized the board to assess a \$200 fee if employer failed to enroll or report payroll for a retired annuitant member

Fees began to be assessed as of July 1, 2018

Why AB 1309?

Retired annuitant late fees are assessed solely for the purpose of maintaining accurate administrative records in myCalPERS

Employers will incur these fees as a result of late enrollment and/or late or missing payroll reporting

Assessed fees can not be passed from the employer to the employees

Employer Responsibility for AB 1309 (1 of 2)

Enrollment

- Employers must enroll a retired annuitant employed in any capacity, without reinstatement, within 30 days of their hire date, otherwise a fee of \$200 will be assessed per month until the retired annuitant is enrolled in myCalPERS

Payroll reporting

- Employers must report and post payroll for a retired annuitant employed in any capacity, without reinstatement, within 30 days following the last day of the earned period, otherwise a \$200 fee will be assessed per month until the payroll is posted in myCalPERS

Employer Responsibility for AB 1309 (2 of 2)

Fee waiver requests

- Employers can request a waiver for the late fees assessed
- CalPERS will grant each employer only one fee waiver
 - With the understanding they will be able to maintain compliance in the future
- After the one-time waiver is granted, future fee waiver requests will not be accepted unless fees are assessed as a result of an extraordinary event such as a system defect

Response to Pandemic

Due to the pandemic, CalPERS waived the fees during California shut down orders

Fees assessed from March 2020 through June 2021 were automatically waived

Beginning July 2021, fees will be assessed as usual

Fee Waiver for Business Partners

How do I request a fee waiver?

- In myCalPERS, go to Reporting Tab > Payroll Schedules > Fee List
- Select the fee hyperlink, enter reason for appeal, submit
- Status of appeal can be viewed under the Appeal Status column

AB 1309 Questions?

Compliance in Compensation Reporting Webpage

Brad Hanson

Employer Account Management Division

Compensation Reporting Webpage

Circular Letter 200-041-21

Common reporting scenarios

Common labor policy and agreement issues

Labor policy and agreement sample

Special compensation reportability table

Special Compensation Reportability Table

Provides reportability details for each member category within the identified Special Compensation category and type

Incentive							
Educational							
Premium							
Special Assignment							
Statutory							
Show 10 entries							Search: <input type="text"/>
Special Compensation Type	Misc.	Safety-Fire	Safety-Police	Classic	PEPRA	Notes	
Bonus	Yes	Yes	Yes	Yes		Must have a system in place for evaluating a member for superior performance	
Dictation/Shorthand/Typing Premium	Yes	Yes	Yes	Yes	Yes	Only for clerical employees	
Longevity Pay	Yes	Yes	Yes	Yes	Yes	Minimum of five years as qualifying condition for reporting	
Management Incentive Pay	Yes	Yes	Yes	Yes		Generally provided for management exempt employees	
Marksmanship Pay			Yes	Yes	Yes		
Master Police Officer		Yes		Yes	Yes	Meets years of employment, performance standards, education, Peace Officer Standard Training, and perform specialty assignment	
Off-Salary-Schedule-Pay	Yes	Yes	Yes	Yes		This can be reportable in lieu of a negotiated increase up to 6% per fiscal year; it cannot be a combination with salary increase	
Physical Fitness Program		Yes	Yes	Yes	Yes		
Value of Employer-Paid Member Contributions	Yes	Yes	Yes	Yes		Resolution must be established with CalPERS and must be adopted via the Employer's Governing Body	

Showing 1 to 9 of 9 entries

Previous **1** Next

State Social Security Administrator Update

Veronica Silva-Gil
Employer Account Management Division



Official State Social Security Administrator

Topics

Annual Information Request

Invoices

myCalPERS clean up



Annual Information Request

For 2020-2021

- Issued 1522 Annual Information Request (AIR)
- Received 1136 responses (round of applause please!) or 75% completion rate. THANK YOU!!!

For 2021-2022

- Will continue to send out the AIR for all school districts



Invoices

For 2021-2022 Fiscal Year, no invoices will be issued

Circular Letter 200-027-21



myCalPERS Clean Up

SSSA is reviewing all school districts associated to each County Office of Education (COE)

- Will work with COE and school districts to obtain dissolution documents
- Will work with the Social Security Administration to update records
- Will update myCalPERS records



COE Modifications

After the records are confirm SSSA will:

- Enter modifications for each school district and related documents
- Provide a list of modifications and coverage for every school district under each COE



SSSA Contact Information

Email: sssa@calpers.ca.gov

Call: (916) 795-0810

Mail: CalPERS

State Social Security Administrator

P.O. Box 720720

Sacramento, CA 94229



SSSA Questions



Official State Social Security Administrator

An aerial photograph of a modern university building complex. The central feature is a tall, glass-enclosed tower with a complex, lattice-like internal structure. To its right is a large, multi-story building with a flat roof and numerous windows. The foreground shows a paved courtyard with several people walking, and a road with a yellow crosswalk. The scene is set against a clear blue sky with some light clouds.

Break

myCalPERS System Support

Ryan Bieker

Meghan Korte

Employer Account Management Division

System Support Agenda

Recent enhancements

Upcoming system enhancements

Employer reports (Cognos) reminder

Ongoing retirement appointment maintenance

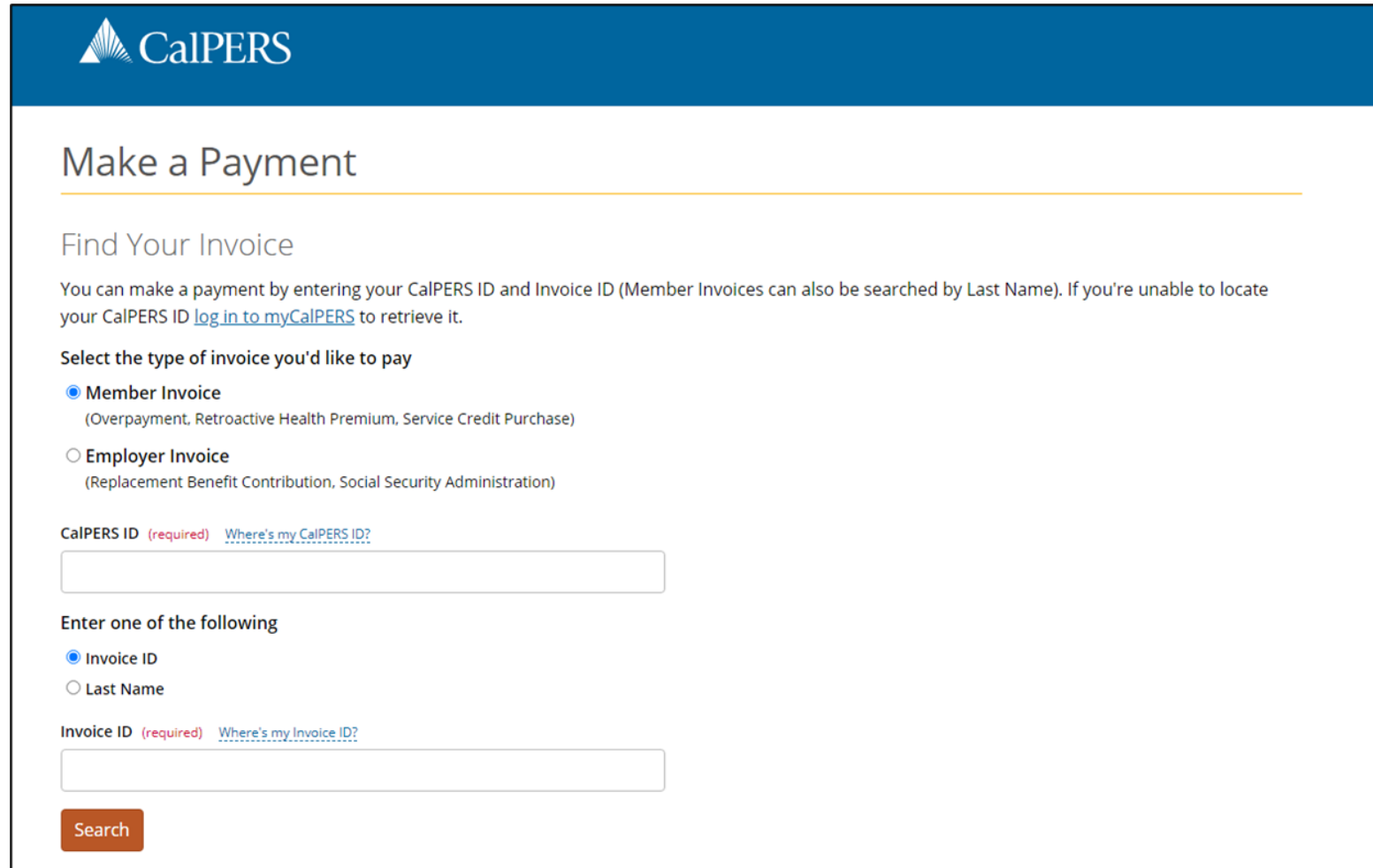
Recent Updates

Updates to retirement enrollment & XML requirements

- Mandatory field
- DED and schemas are available online

Electronic Gateway Payment

Electronic Gateway Payment



The screenshot shows the CalPERS 'Make a Payment' page. At the top is the CalPERS logo. Below it is the heading 'Make a Payment'. The main section is titled 'Find Your Invoice'. A paragraph explains that users can make a payment by entering their CalPERS ID and Invoice ID, and provides a link to retrieve their CalPERS ID. Below this is a section to 'Select the type of invoice you'd like to pay', with two radio button options: 'Member Invoice' (selected) and 'Employer Invoice'. Each option has a sub-description. Below the options is a text input field for the 'CalPERS ID (required)' with a link to 'Where's my CalPERS ID?'. Underneath is the instruction 'Enter one of the following' with two radio button options: 'Invoice ID' (selected) and 'Last Name'. Below this is another text input field for the 'Invoice ID (required)' with a link to 'Where's my Invoice ID?'. At the bottom left is a brown 'Search' button.

Upcoming System Enhancements

Certificated Members Cognos report (mid-August)

FAQs link in MSS for electronic gateway payment

Employers will be cc'd on personal and demographic changes

Notification regarding non-contributory and contributory appointments

Retirement enrollment welcome letter and publications

System Enhancements Page



[Home](#) | [Active Members](#) | [Retirees](#) | [Employers](#) | [myCalPERS Log In](#)

[Actuarial Resources](#) | [Benefit Programs](#) | [Contracts](#) | [myCalPERS Technical Requirements](#) | [Policies & Procedures](#)

Home > Employers > myCalPERS Technical Requirements > System Enhancements

System Enhancements

Access the link below to view the myCalPERS system enhancements implemented to improve functionality and efficiency when conducting business with CalPERS.

2021	2020	2019
<ul style="list-style-type: none">• June 19 Release• April 24 Release• March 6 Release• January 16 Release		

[myCalPERS Technical Requirements](#)

- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
- [Special Compensation Reportability Table](#)
- [System Access Administrators](#)
- [System Enhancements](#)
- [Technical Resources](#)

Cognos Employer Reports (1 of 3)

Business Partner myCalPERS User Access

CalPERS ID and Appointment ID

Benefit Recipient by Employer

Missing Participant Payroll Records

Retirement Appointment Reconciliation

Cognos Employer Reports (2 of 3)

Posted Contribution Detail

Payroll Report Summary

Error List Report

Participant Undeliverable Address

Retired Annuitant Late Fee Status

Retired Annuitant Hours Worked

Cognos Employer Reports (3 of 3)

Additional resources

- Circular Letters
- Cognos report catalog on public website
 - Cognos reports browser requirements
- Student guides
- Online classes for employer reports

Retirement Appointment Reconciliation

Friendly reminder to complete monthly reconciliation

Automated permanent separations

- Confirm unposted payroll will NOT stop this
 - Report zero payroll instead
- Report a leave of absence or report payroll

Questions

EDJOIN Recruitment and Retention Partnership

Jennifer Helfend-Gomez, CalSTRS
Jennifer Rains, CalPERS

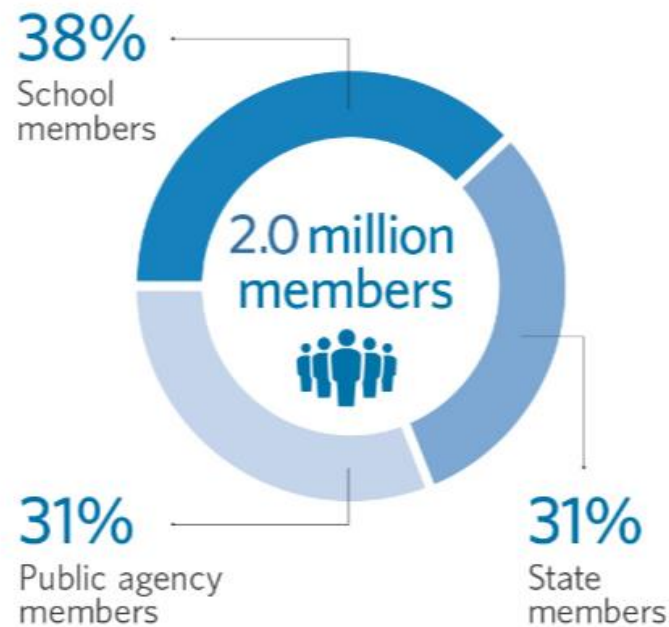
EDJOIN, CalSTRS and CalPERS Recruitment and Retention Partnership

The Education Job Opportunity Information Network (EDJOIN) - operating out of the San Joaquin County Office of Education

Why is This Partnership Important?

CalPERS Members

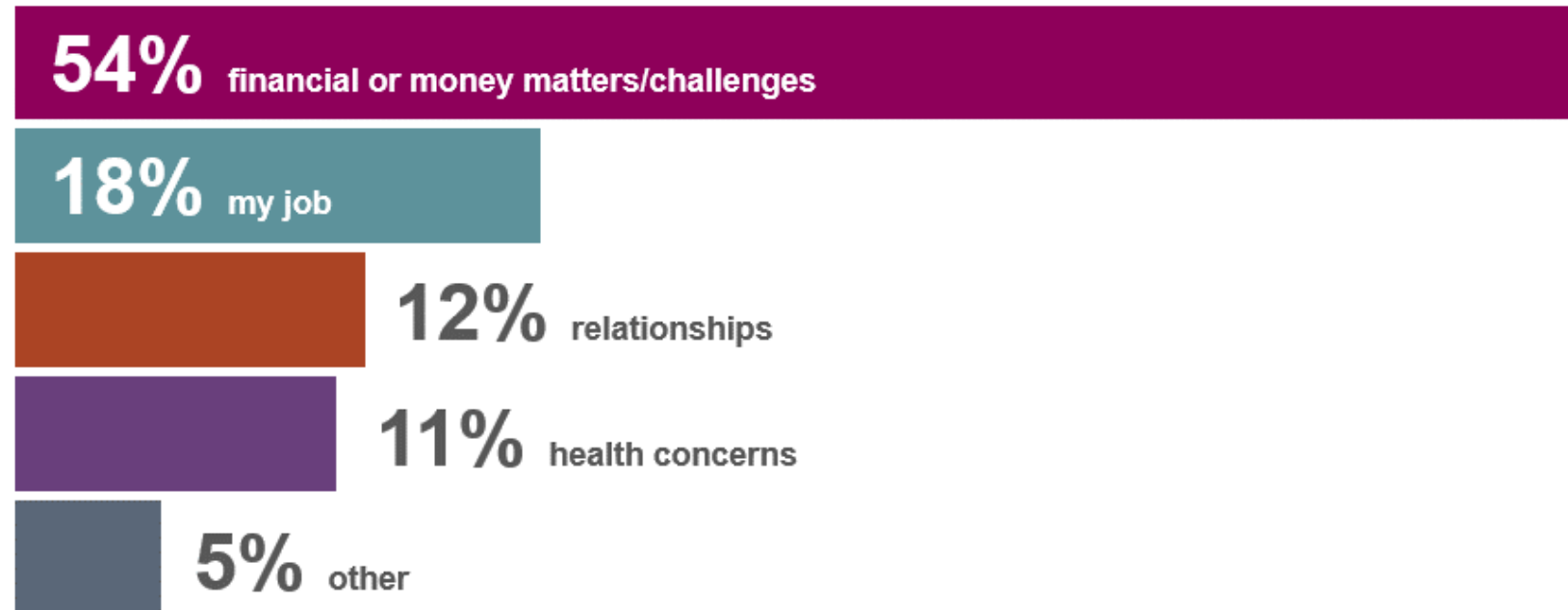
As of June 30, 2019



CalPERS serves approx.
760,000 school members

Finances are Top Stressor Across Generations

Which of the following causes you the most stress?



Source: PwC's 9th annual Employee Financial Wellness Survey COVID-19 Update, PwC US, 2020

Most Haven't Saved at All



\$0

**Median retirement
account balance of
individuals under age 65**

Source: NIRS, 2018

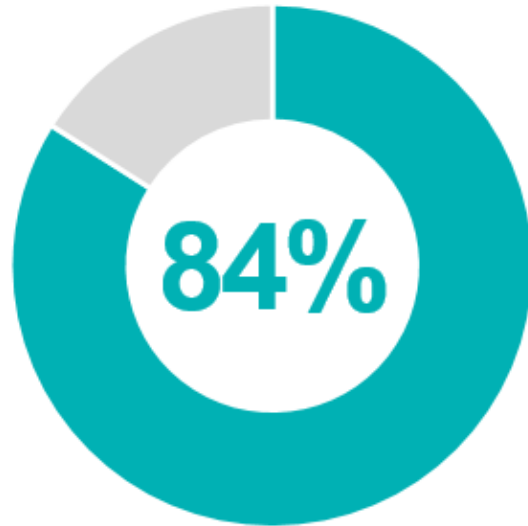
► The Retirement Landscape

41

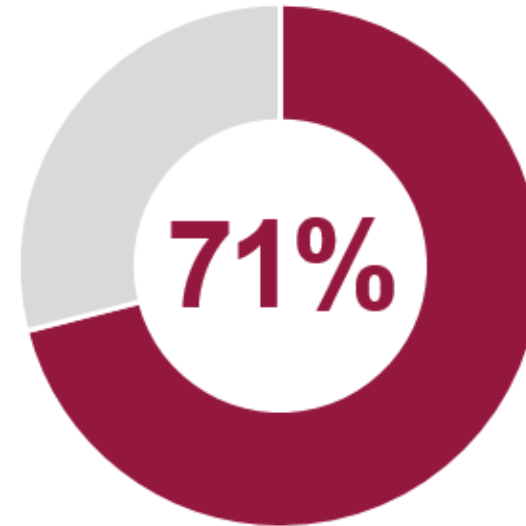
The infographic features a large orange '\$0' on the left side. To the right, there is a grid of several white piggy banks, each with a vertical slot on its back. The background is a dark gray. The text 'Median retirement account balance of individuals under age 65' is centered below the '\$0'. At the bottom left, it says 'Source: NIRS, 2018'. At the bottom right, there is a teal bar containing the text '► The Retirement Landscape' and the number '41'.

DB Plans

Valuable Recruitment and Retention Tool



of Millennials working for state and local government say that a pension benefit is the reason they stay at the job.



of Millennials say that cutting their pension benefits would make them more likely to leave their state or local government job.

Source: NIRS, February 2020

Digital Badge in All Certificated Job Postings

Early career

CalSTRS is your retirement plan. We're here for you. Take a few minutes to learn more about your benefits and steps you can take now for your secure future.



Near retirement

You've been a member with us for some time now. You may be aware of all the resources that CalSTRS offers – if not, this page is just for you.

CalSTRS offers many ways to learn about your benefits, including tools, resources and services to assist you throughout the planning process.



Midcareer

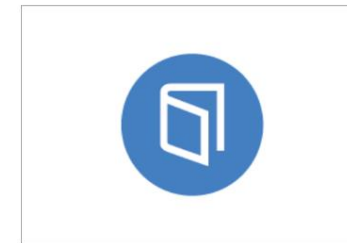
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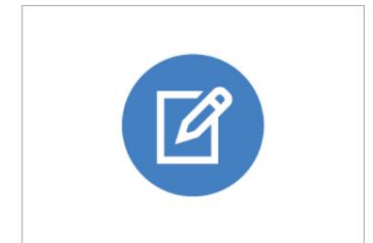
Sign up for myCalSTRS

[READ MORE >](#)



Know your benefits

[READ MORE >](#)



Near-retirement considerations

[READ MORE >](#)

CalSTRS Onboarding and Retention Toolkit

Six video modules with corresponding lesson plans:

- Welcome to CalSTRS
- Understanding the Formula
- The Gap
- Survivor Benefits
- myCalSTRS
- Purchase Service Credit
- Refund: Consider the Consequences

www.calstrs.com/onboardingretentiontoolkit



EDJOIN Classified Job Posting

Program Manager (Do Not Apply) PERS



About the Employer

This is a test account only. Do not apply to the postings.

Job Summary

Under the direction of the Director, performs a variety of complex and difficult budget and accounting duties and oversight for GVCC's natural resource and recycling division along with all grants. Write and prepare monthly, quarterly, or annual reports as required by the grant, attend meetings and trainings required by the granting agency provides assistance in the preparation and maintenance of budgets, position control, financial reports, and accounting records, works closely with Local, State and Federal agencies. Independent judgment and problem-solving skills to be fully exercised in relation to assigned areas of responsibility.

Requirements / Qualifications

Obtain a Bachelor's Degree. Experience of a related nature may be substituted for degree.

[Tweet](#) [Share](#) [Print](#)



Application Deadline

7/31/2021 11:55 PM Pacific

Date Posted

7/28/2021

Contact

Kee Camitchel

Number of Openings

2

Salary

Management Salary Schedule, Range 9, \$372.49-\$438.34/Daily, Plus Fringe Benefits/Educational Degree Stipends

Length of Work Year

1

[ADD TO WISH LIST](#)

[VIEW JOB WISHLIST](#)

[APPLY](#)

Links Related To This Job

[SJCOE - All Open Positions](#)
[City of Stockton](#)
[Chamber of Commerce](#)

CalPERS Links

Not all postings qualify for CalPERS. Informational Only.

[CalPERS Retirement Benefits](#)

CalPERS Webpage for Classified Job Seekers



[INVESTMENTS](#) | [NEWSROOM](#) | [CONTACT](#) | [ABOUT](#)

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[myCalPERS Log In](#)

[Retirement Benefits](#)

[Health Benefits](#)

[Death Benefits](#)

[Home](#) > [Active Members](#) > [Retirement Benefits](#) > [Service Credit](#) > [School Members: Welcome to CalPERS](#)

School Members: Welcome to CalPERS

We're here to make sure you enjoy financial security when you retire from your public service career. CalPERS is the nation's largest public pension system, with more than 2 million members. We provide retirement benefits to State of California employees, classified school employees, and employees from other agencies throughout the state. Visit our [Facts at a Glance](#) to learn more about us.

Who Is a CalPERS School Member?

School members are employees in classified, non-certificated positions within the jurisdiction of a K-12 school or community college employer. School members include administrative staff, technical and support staff, bus drivers, and custodial staff. Currently, we serve more than 700,000 school

Resources

[CalPERS Quick Tip Video Series](#)

[Retirement Benefits](#)

[Service Credit](#)

Forms & Publications

[School Member Benefits \(PUB 2\) \(PDF\)](#)

CalPERS Webpage for New Members

Home Active Members Retirees Employers myCalPERS Log In

Home > Life Events > New CalPERS Member

New CalPERS Member

Joining CalPERS Membership

Welcome! You're now a member of the California Public Employees Retirement System (CalPERS). Your employment with a CalPERS-covered employer means you've taken an important step in achieving retirement security. It's never too early to start thinking about retirement. Keep in mind your CalPERS benefits are only one part of your overall retirement savings so check with your employer or financial advisor to learn more about additional retirement options.

What Are Your First Steps?

To get you started, here are a few resources and actions for you to consider:

- Register for your [myCalPERS](#) account. See below for more detailed information.
- Designate your beneficiaries
- Submit [CalPERS Special Power of Attorney \(PDF\)](#)
- Explore a [Supplemental Savings Plan](#) that may be available, depending on your employer. See [Other Savings Plans](#) section for more information.

[+ myCalPERS & Your CalPERS ID](#)

[+ Membership](#)

Resources

- [CalPERS Long-Term Care](#)
- [Health Benefits](#)
- [Member Education](#)
- [myCalPERS](#)
- [PEPRA](#)
- [Retirement Benefits](#)
- [Special Power of Attorney](#)

Forms & Publications

- [Health Program Guide \(HBD-120\) \(PDF\)](#)
- [Local Miscellaneous Member Benefits \(PUB 8\) \(PDF\)](#)
- [Pre-Retirement Lump Sum Beneficiary Designation \(PDF\)](#)
- [Special Power of Attorney \(PDF\)](#)
- [State Miscellaneous & Industrial Member Benefits \(PUB 6\) \(PDF\)](#)

The Future of the Partnership

Pilot phase

- Feedback from stakeholders

Possibility of more phases/content

Any questions?

CalPERS Educational Forum

Joshua Robinson
Stakeholder Relations

CalPERS Educational Forum Online

October 19-20

Join employers just like you for in-depth education on how to best administer CalPERS benefits. You'll be able to:

- Choose from a many engaging educational sessions
- Connect with experts at exhibits and consultations
- Enhance your understanding of human resources and financial reporting responsibilities
- Hear from CalPERS leaders

Register soon for this free two-day event (August 24th)

Get more information at: www.calpers.ca.gov/educationalforum



Questions & Answers

Renee Ostrander, Brad Hanson, and Christina Rollins

Thank you for joining us!

CalPERS School Employer Advisory Committee