

# myCalPERS Payroll Reporting

Student Guide

**March 14, 2025**



# Introduction

This guide is a resource to assist you with earned period payroll reporting. As a business partner with a retirement contract with CalPERS, you must provide and manage payroll information regularly. Payroll reports contain your employees' records that are uploaded or added manually to preprocessing areas before they can be submitted in myCalPERS. After a report is submitted for processing, all records are validated, and errors are identified to allow for corrections.

## Disclaimer

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

## What's New

When reporting payroll by the copy-forward method, the following records now copy forward:

- Earned Period No Contribution and No Service records (employees who are retired annuitants, in an alternate retirement plan [Gov. Code 20306], or in overtime positions).
- Zero-payroll records

## System Access

If you are unable to process these scenarios, contact your agency's system access administrator to update your myCalPERS access.

## Training Opportunities

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

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# Unit 1: Person Search Tool

In this unit, you will learn to use the Person Search tool to verify an active employee's appointment details and position information. A new or returning employee must have an appointment with your agency in myCalPERS before submitting payroll for them.

## System Logic

- You can use the last four digits of an SSN to search for one of your employees.
- The Person Search tool needs to be refreshed in between searches. Clear the last employee's profile information by selecting the **Person Search** left-side link.

## Step Actions (5 steps)

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

Step 2 Complete the Person Search section.

The screenshot shows the 'Person Search' section of the system. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information (selected), Education, and Other Organizations. Below the tabs is a 'Person Search' header with a dropdown arrow. The main area contains the text: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button is located at the bottom left of the search area.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **Employer** link that has an Active appointment status.

The screenshot shows the 'Appointment History' section. At the top, there are tabs: Appointment History (selected), Add New, and View More Actions. Below the tabs is a table with the following columns: Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. The first row of data is highlighted with a red box around the 'Agency Name' in the Employer column. The data in this row is: Agency Name, Regular, Miscellaneous, Active, 01/06/2020.

Step 5 Within the Appointment Details section, review your employee's appointment details, which includes their eligibility date and member base rate.

The screenshot shows the 'Appointment Details' section. It is divided into several sections: Programs, Position Information, and Appointment Details. The 'Programs' section shows: Program: CalPERS, Membership Status: Active, Membership Date: 11/23/2020, and Enrollment Eligibility Date: 11/23/2020. The 'Position Information' section shows: Employer: Agency Name, Original Hire Date: 11/23/2020, Member Category: Miscellaneous, Transit Worker: No, Position Title: CBU: -, Work Calendar: Work 12 Months/Paid 12 Months, Temporary Position: No, Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)? No, Appointment ID: 93026247, Contributing Appointment Date: 11/23/2020, Leave Type: -. The 'Appointment Details' section shows: Retired Annuitant: No, Enrollment Reason: Full Time for 6 months or more, Contributing Appointment: Yes, Appointment Status: Active, Years Prior Service: Enrollment Level: PEPR New, Member Base Rate: 7.25, Contribution Modification: Formula Name: 2% @ 62 Formula for Miscellaneous/Industrial Members, Cost Share: 0.0.

You have completed this scenario.

## Unit 2: Initiate Payroll Reporting

In this unit, you will learn how to create an earned period payroll report. A payroll report is not complete until the report has been submitted and posted.

### Transmitting Payroll Information

There are two methods for transmitting payroll information through myCalPERS:

- **File Upload** – This method uses a payroll report file with data from your internal payroll system and uploads it to myCalPERS.
- **Online Data Entry** – This method uses myCalPERS to enter your payroll data. There are two online data entry options.
  - **Manual Entry** – Create a new earned period or adjustment payroll report by entering each payroll record. This is used primarily by new agencies that are reporting for the first time.
  - **Copy Forward** – Copy a posted earned period payroll report to create a new earned period report. Copied records can be modified or deleted, and new records can be added. This is commonly used when earnings are the same (or similar) across earned periods.

### Reporting Payroll Adjustments Records

For online-data-entry users, if you are only reporting adjustment records, create an adjustment report. Refer to the [myCalPERS Payroll Adjustments \(PDF\)](#) student guide for step actions.

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## Scenario 1: File Upload

You will create a payroll report by uploading an XML file to myCalPERS.

### Resources

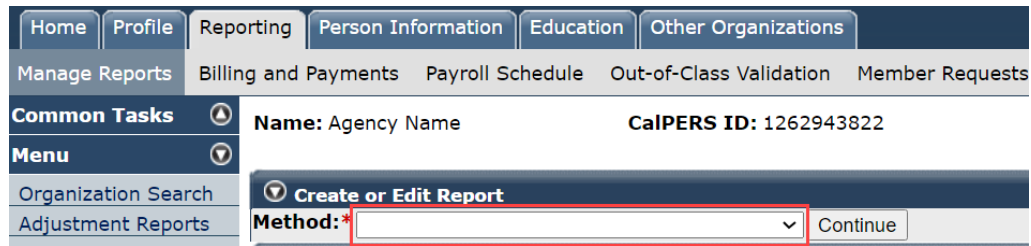
To start using the file upload method, refer to the [myCalPERS Technical Resources webpage](#). The Toolkit folder contains files to assist you in ensuring your agency can connect to myCalPERS and submit correctly formatted files. If you have questions or issues, contact [myCalPERS System Support](mailto:employertechnicalsupport@calpers.ca.gov) at [employertechnicalsupport@calpers.ca.gov](mailto:employertechnicalsupport@calpers.ca.gov).

### Step Actions (11 steps)

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

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Step 2 Within the Create or Edit Report section, select Upload File from the Method drop-down list.

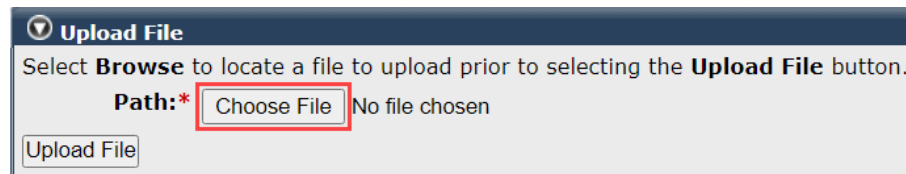


The screenshot shows the myCalPERS user interface. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Member Requests. The main content area shows 'Name: Agency Name' and 'CalPERS ID: 1262943822'. Below this is a 'Create or Edit Report' section with a 'Method:' dropdown menu. The dropdown menu is open, showing 'Upload File' as the selected option. A 'Continue' button is visible to the right of the dropdown.

Step 3 Select the **Continue** button.

---

Step 4 Within the Upload File section, select the **Choose File** button.



The screenshot shows the 'Upload File' section. It contains the text: 'Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.' Below this is a 'Path:\*' field with a 'Choose File' button and the text 'No file chosen'. An 'Upload File' button is visible at the bottom left.

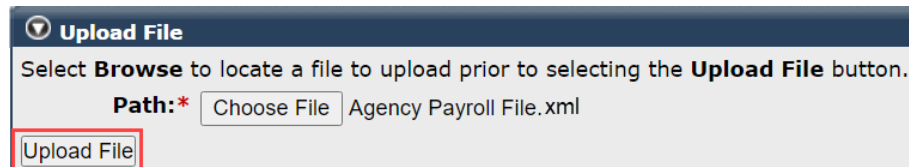
Step 5 Select the payroll file from your computer.

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Step 6 Select the **Open** button.

---

Step 7 Select the **Upload File** button.



The screenshot shows the 'Upload File' section. It contains the text: 'Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.' Below this is a 'Path:\*' field with a 'Choose File' button and the text 'Agency Payroll File.xml'. An 'Upload File' button is visible at the bottom left.

Step 8

Select the **View Preprocessing Areas** link at the bottom right under the File Upload History section.

**Note:** The File Status column will display one of the following:

- **Ready:** Prepared to go through processing in myCalPERS
- **Accepted:** Passed first level validations (formatting, required fields, etc.)
- **Rejected:** Failed the first level validations (contribution totals, payroll dates with regards to permanent separations, etc.)

File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
Payroll Reporting	11/02/2020	Ready		20200402153458_010_10006_CPRVALID.xml			
Payroll Reporting	10/29/2020	Accepted	Completed	20201029130618_459_10006.xml	97	6	103
7	10/29/2020	Accepted	Completed	20201029122628_668_00007.xml	183	0	183
7	10/29/2020	Accepted	Completed	20201029094907_619_00007.xml	17	0	17
Payroll Reporting	10/28/2020	Accepted	Completed	20201028143230_233_10006.xml	96	6	102
7	10/28/2020	Accepted	Completed	20201028094843_071_00007.xml	157	0	157
Payroll Reporting	10/27/2020	Accepted	Completed	20201027135057_851_10006.xml	97	4	101
7	10/27/2020	Accepted	Completed	20201027120547_908_10006.xml	93	4	97
Payroll Reporting	10/27/2020	Accepted	Completed	20201027084858_151_00007.xml	18	3	21
Payroll Reporting	10/27/2020	Accepted	Completed	20201027102247_211_10006.xml	68	3	71
Payroll Reporting	10/27/2020	Accepted	Completed	20201027090222_960_10006.xml	49	2	51
7	10/23/2020	Accepted	Completed	20201023150829_908_00007.xml	99	0	99
Payroll Reporting	10/23/2020	Accepted	Completed	20201023124658_169_10006.xml	22	4	26
7	10/23/2020	Accepted	Completed	20201023082902_962_00007.xml	8	1	9
Payroll Reporting	10/22/2020	Accepted	Completed	20201022170819_345_10006.xml	21	4	25
Payroll Reporting	10/22/2020	Accepted	Completed	20201022152202_836_10006.xml	20	3	23
Payroll Reporting	10/22/2020	Accepted	Completed	20201022101016_044_10006.xml	19	3	22
Payroll Reporting	10/21/2020	Accepted	Completed	20201021160045_118_10006.xml	18	2	20
7	10/21/2020	Accepted	Completed	20201021152650_409_00007.xml	70	0	70
Payroll Reporting	10/21/2020	Accepted	Completed	20201021145041_045_10006.xml	10	0	10
7	10/21/2020	Accepted	Completed	20201021083533_645_00007.xml	41	0	41
Payroll Reporting	10/21/2020	Accepted	Completed	20201021013201_774_10006.xml	19472	0	19472
Payroll Reporting	10/21/2020	Accepted	Completed	20201020235422_426_10006.xml	19450	23	19473
Payroll Reporting	10/20/2020	Accepted	Completed	20201020224917_631_10006.xml	19450	23	19473
Payroll Reporting	10/20/2020	Accepted	Completed	20201020220424_048_10006.xml	19450	23	19473

[View Preprocessing Areas](#)

Step 9

Within the Preprocessing Area section, select the **Payroll Reporting** link.

Preprocessed Data			
	Valid	Error	Total
Affected Subscriber List	90	2	92
<a href="#">Census</a>	-	-	-
<a href="#">Direct Authorization</a>	90	2	92
Health Carrier Rate Data	-	-	-
<a href="#">Health Carrier ZIP Code Plan Relationship Data</a>	-	-	-
<a href="#">Health Enrollment</a>	-	-	-
<a href="#">Medical Group Assignment List</a>	-	-	-
<a href="#">Payroll Reporting</a>	-	-	-
<a href="#">Retirement Enrollment</a>	-	-	-

[Upload Data File](#) [View Upload History](#)

Step 10

Within the Work on Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link to access the report's Payroll Report Detail page.

Work On Existing Payroll Reports						
Program: <input type="text" value="CalPERS"/>		Fiscal Year: <input type="text"/>		Report Status: <input type="text"/>		
Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	
	<a href="#">06/13/2024 - 06/13/2024</a>	Posted	Payroll - Adjustments		06/13/2024	
	<a href="#">06/12/2024 - 06/12/2024</a>	Posted	Payroll - Adjustments		06/12/2024	
	<a href="#">06/10/2024 - 06/10/2024</a>	Posted	Payroll - Adjustments		06/10/2024	
	<a href="#">06/10/2024 - 06/10/2024</a>	Posted	Payroll - Adjustments		06/10/2024	
	<a href="#">06/07/2024 - 06/07/2024</a>	Posted	Payroll - Adjustments		06/07/2024	

**Note:** Select the **View Max** link at the bottom of the Work on Existing Payroll Reports section to display all payroll reports.

Step 11

At the bottom right of the Payroll Report Detail page, select the **View Records** link to access the records within the report.

[Process Report](#) [Cancel Report](#) [Generate Report Summary](#)

[View Records](#)

**You have completed this scenario.**

## Scenario 2: Online Data Entry – Manual Entry

You will create a payroll report by manually entering information for each payroll record within the report. This method is primarily used by new agencies.

### New Contracting Agencies

The following must be in myCalPERS before reporting earned period records:

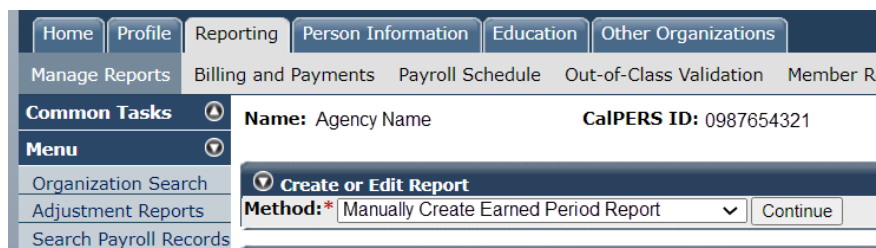
- Your retirement contract: otherwise, you cannot enroll employees in CalPERS and report their payroll.
- Your agency's payroll schedule (Monthly, Semi-monthly, Bi-weekly, or Quadri-weekly)
- Your employees' PERS appointments with your agency

### Step Actions (18 steps)

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

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Step 2 Within the Create or Edit Report section, select Manually Create Earned Period Report from the Method drop-down list.

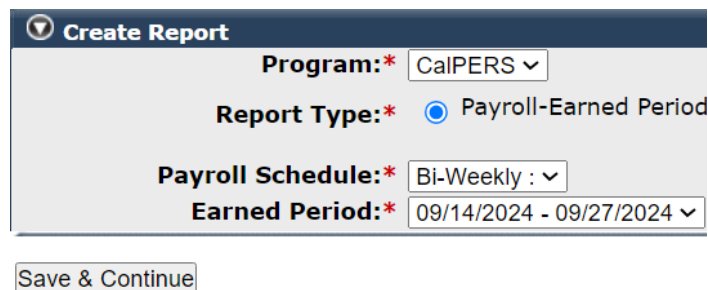


The screenshot shows the 'Reporting' tab selected in the top navigation bar. Below it, the 'Common Tasks' menu is open, and the 'Create or Edit Report' option is highlighted. The 'Method' dropdown menu is set to 'Manually Create Earned Period Report', and a 'Continue' button is visible next to it.

Step 3 Select the **Continue** button.

---

Step 4 Complete the Create Report section.



The screenshot shows the 'Create Report' form with the following fields filled out: 'Program' is set to 'CalPERS', 'Report Type' is 'Payroll-Earned Period', 'Payroll Schedule' is 'Bi-Weekly', and 'Earned Period' is '09/14/2024 - 09/27/2024'. A 'Save & Continue' button is located at the bottom of the form.

Step 5 Select the **Save & Continue** button.

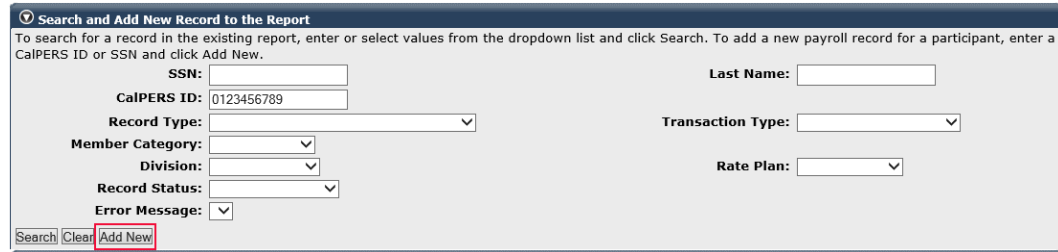
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Step 6 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

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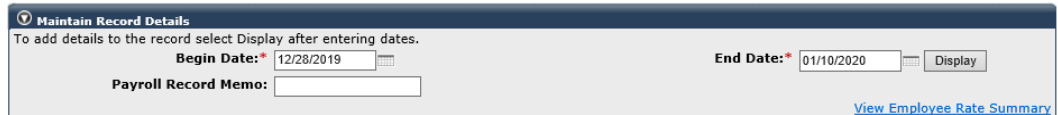
Step 7

Select the **Add New** button.



Step 8

If needed, within the Maintain Record Details section, modify the Begin Date and End Date fields.

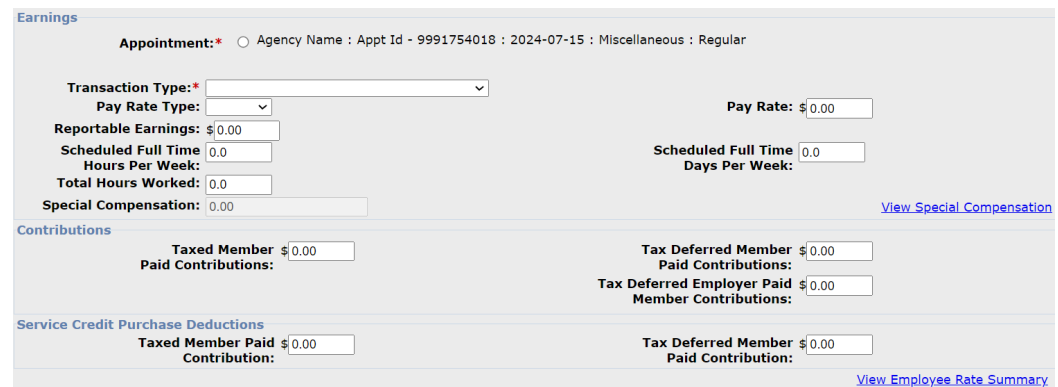


Step 9

Select the **Display** button.

Step 10

Complete the Earnings subsection.



- **Transaction Type:** If the correct transaction type is not in the drop-down list, correct the begin or end dates, then select the **Display** button.
- **Scheduled Full Time Hours Per Week:** This is required for all pay rate types. Enter the number of hours your agency considers full time for this position.
- **Scheduled Full Time Days Per Week:** If pay rate type is daily, complete in addition to Scheduled Full Time Hours Per Week. Enter the number of days your agency considers full time for this position.
- **Total Hours Worked:** Enter only if employee is a retired annuitant.

Step 11

Do you need to report special compensation?

**Yes:** Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 12.

**No:** Skip to step 16.



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 Complete the Maintain Special Compensation Details section.

Maintain Special Compensation Details

Special Compensation Category:\*

Special Compensation Type:\*

Amount:\*\$ 0.00

Save Save and Add Another

Step 14 Do you need to report additional special compensation?

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

**No:** Select the **Save** button, then continue to step 15.

Step 15 Select the **Return** link at the bottom right under the View Special Compensation section.

View Special Compensation

Select All Delete Add New

Category	Type	Amount
<input type="checkbox"/> Special Assignment Pay	Bilingual Premium	\$200.00

Select All Delete Add New

Return

Step 16 Is the record for a contributory employee?

**Yes:** Within the Contributions subsection, enter contribution amounts into the appropriate fields, then continue to step 17.

Contributions

Taxed Member Paid Contributions: \$ 0.00

1959 Survivor Contribution: \$ 0.00

Tax Deferred Member Paid Contributions: \$ 0.00

Tax Deferred Employer Paid Member Contributions: \$ 0.00

**No:** Continue to step 17.

Step 17 Do you need to report a service credit purchase deduction?

**Yes:** Within the Service Credit Purchase Deductions subsection, enter contribution amounts into the appropriate fields, then continue to step 18.

Service Credit Purchase Deductions

Taxed Member Paid Contribution: \$ 0.00

Tax Deferred Member Paid Contribution: \$ 0.00

**No:** Continue to step 18.

Step 18 Select the **Save & Exit** button.

**Note:** Repeat steps 6-18 until all payroll records are in the report.

**You have completed this scenario.**

## Scenario 3: Online Data Entry – Copy Forward

You will copy forward a previously posted payroll report to create a new earned period report.

Copy forward allows you to copy prior posted payroll records, make changes to the copied records, and then submit the report for a new earned period. This method is commonly used when earnings are the same (or similar) across earned periods.

### System Logic

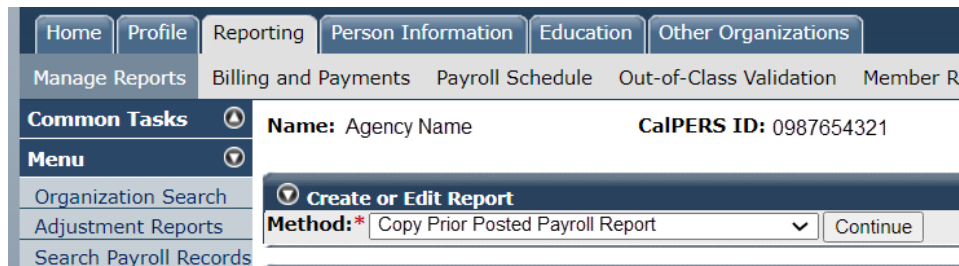
Adjustment records in an earned period report will not copy forward.

### Step Actions (5 steps)

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

---

Step 2 Within the Create or Edit Report section, select Copy Prior Posted Payroll Report from the Method drop-down list.

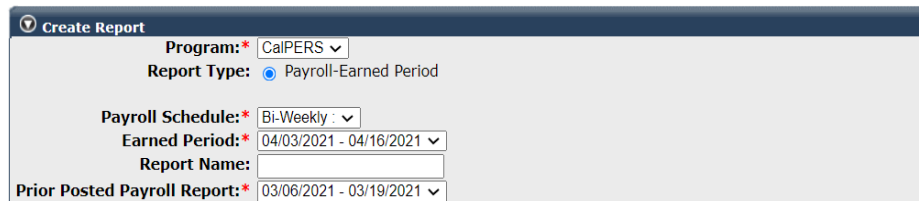


The screenshot shows a navigation menu with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Member R. A 'Common Tasks' section is expanded to show a 'Menu' with options: Organization Search, Adjustment Reports, and Search Payroll Records. The 'Create or Edit Report' option is selected, showing a 'Method' dropdown menu with 'Copy Prior Posted Payroll Report' selected and a 'Continue' button. The page also displays 'Name: Agency Name' and 'CalPERS ID: 0987654321'.

Step 3 Select the **Continue** button.

---

Step 4 Complete the Create Report section.



The screenshot shows the 'Create Report' form with the following fields: 'Program:\*' set to 'CalPERS', 'Report Type:' with 'Payroll-Earned Period' selected, 'Payroll Schedule:\*' set to 'Bi-Weekly', 'Earned Period:\*' set to '04/03/2021 - 04/16/2021', 'Report Name:' (empty), and 'Prior Posted Payroll Report:\*' set to '03/06/2021 - 03/19/2021'.

Step 5 Select the **Save & Continue** button.

**You have completed this scenario.**

---

# Unit 3: View Payroll Records Page

In this unit, you will learn how to navigate to a report's View Payroll Records page, where you can review and maintain existing records in the report as well as add new records.

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- Scenario 1: Navigate to the View Payroll Records Page ..... 12
- Scenario 2: Review the View Payroll Records Page ..... 13

## Scenario 1: Navigate to the View Payroll Records Page

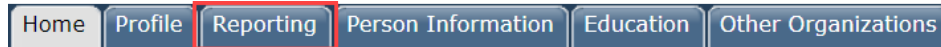
You left the View Payroll Records page and need to return to it to work on your payroll report.

### System Logic

Do not use the **Apply Mass Update Link** on the View Payroll Records page.

### Step Actions (3 steps)

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

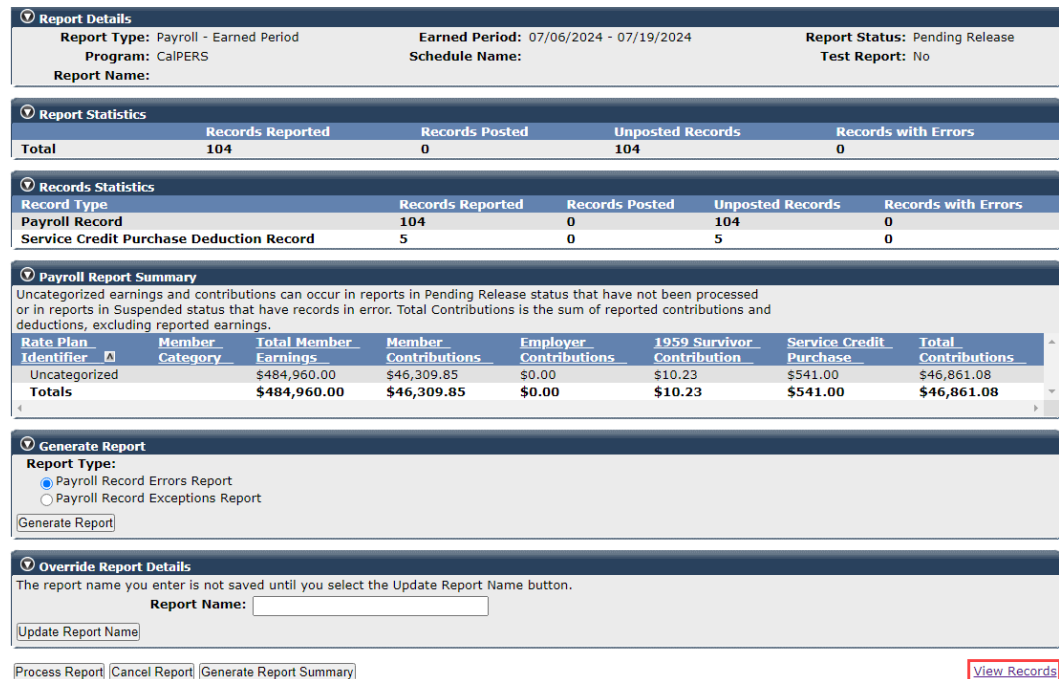


Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.



The screenshot shows the 'Work On Existing Payroll Reports' section. It includes a table with columns: Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, Test Report, and Report Name. The 'Earned Period / Adjustment Date' column has two entries: '07/06/2024 - 07/19/2024' and '06/13/2024 - 06/13/2024'. The second entry is highlighted with a red border.

Step 3 At the bottom right of the Payroll Report Detail page, select the **View Records** link to access the View Payroll Records page.



The screenshot shows the 'Payroll Report Detail' page. It includes sections for Report Details, Report Statistics, Records Statistics, Payroll Report Summary, Generate Report, and Override Report Details. At the bottom right, there is a 'View Records' link highlighted with a red border.

You have completed this scenario.

## Scenario 2: Review the View Payroll Records Page

The View Payroll Records Page contains three sections: Report Details, Search and Add New Records to the Report, and Records Present in the Report.

### Report Details

**Report Type:** Payroll - Earned Period      **Earned Period:** 08/03/2024 - 08/16/2024      **Report Status:** Pending Release  
**Program:** CalPERS      **Schedule Name:**      **Test Report:** No  
**Report Name:** Test Earned Period Report

### Search and Add New Record to the Report

To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

**SSN:**       **Last Name:**   
**CalPERS ID:**   
**Record Type:**       **Transaction Type:**   
**Member Category:**   
**Division:**       **Rate Plan:**   
**Record Status:**   
**Error Message:**

### Records Present in the Report

[Apply Mass Update](#)

SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation
<input type="checkbox"/> xxx-xx-4095	4106079499	Agency Name	Al Bidany, Elizabeth	08/03/2024- 08/16/2024	Miscellaneous	Pending Validation	\$3,327.60	\$0.00
<input type="checkbox"/> xxx-xx-9157	1658871068		Al Bidany, Marion	08/03/2024- 08/16/2024	Safety - Fire	Pending Validation	\$5,407.04	\$438.77
<input type="checkbox"/> xxx-xx-5016	3394429613	Agency Name	Alemu, Manuel	08/03/2024- 08/16/2024	Miscellaneous	Valid	\$3,484.70	\$45.00
<input type="checkbox"/> xxx-xx-4918	7213906293	Agency Name	Algaoch, Francis	08/03/2024- 08/16/2024	Miscellaneous	Valid	\$4,186.60	\$0.00
<input type="checkbox"/> xxx-xx-3234	3720832865	Agency Name	Barron, Setsuko	08/03/2024- 08/16/2024	Miscellaneous	Error	\$2,333.30	\$103.34
<input type="checkbox"/> xxx-xx-8898	2648464347	Agency Name	Caprice, Manuel F	08/03/2024- 08/16/2024	Miscellaneous	Error	\$0.00	\$0.00
<input type="checkbox"/> xxx-xx-8898	2648464347	Agency Name	Caprice, Manuel	08/03/2024- 08/16/2024	Miscellaneous	Valid But Held	\$2,839.80	\$211.10
<input type="checkbox"/> xxx-xx-0450	1898391026	Agency Name	Catinojos, Raquel B	08/03/2024- 08/16/2024	Miscellaneous	Error	\$0.00	\$0.00
<input type="checkbox"/> xxx-xx-0450	1898391026	Agency Name	Catinojos, Raquel	08/03/2024- 08/16/2024	Miscellaneous	Valid But Held	\$3,668.80	\$48.00

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

## Report Details

This section displays the payroll report's earned period, status, and name.

### Report Details

**Report Type:** Payroll - Earned Period      **Earned Period:** 08/03/2024 - 08/16/2024      **Report Status:** Pending Release  
**Program:** CalPERS      **Schedule Name:**      **Test Report:** No  
**Report Name:** Test Earned Period Report

## Search and Add New Record to the Report

This section is used to search for a record, filter records, or add records to the report.

- Search for a record by entering the employee's full SSN, last name, or CalPERS ID. You may apply additional filters before selecting the **Search** button.
- Add a record to the report by entering an employee's full SSN or CalPERS ID before selecting the **Add New** button.

### Search and Add New Record to the Report

To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

**SSN:**       **Last Name:**   
**CalPERS ID:**   
**Record Type:**       **Transaction Type:**   
**Member Category:**   
**Division:**       **Rate Plan:**   
**Record Status:**   
**Error Message:**

## Records Present in the Report

This section lists records in the report. You can select a column heading to sort it in ascending or descending order.

Records Present in the Report									
<a href="#">Select All</a>   <a href="#">Delete</a>   <a href="#">Edit Selected Records</a>   <a href="#">Save Selection</a>				<a href="#">Apply Mass Update</a>					
SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation	
<input type="checkbox"/> <a href="#">xxx-xx-4095</a>	4106079499	Agency Name	Al Bidany, Elizabeth	08/03/2024- 08/16/2024	Miscellaneous	Pending Validation	\$3,327.60	\$0.00	
<input type="checkbox"/> <a href="#">xxx-xx-9157</a>	1658871068		Al Bidany, Marion	08/03/2024- 08/16/2024	Safety - Fire	Pending Validation	\$5,407.04	\$438.77	
<input type="checkbox"/> <a href="#">xxx-xx-5016</a>	3394429613	Agency Name	Alemu, Manuel	08/03/2024- 08/16/2024	Miscellaneous	Valid	\$3,484.70	\$45.00	
<input type="checkbox"/> <a href="#">xxx-xx-4918</a>	7213906293	Agency Name	Algaoch, Francis	08/03/2024- 08/16/2024	Miscellaneous	Valid	\$4,186.60	\$0.00	
<input type="checkbox"/> <a href="#">xxx-xx-3234</a>	3720832865	Agency Name	Barron, Setsuko	08/03/2024- 08/16/2024	Miscellaneous	Error	\$2,333.30	\$103.34	
<input type="checkbox"/> <a href="#">xxx-xx-8898</a>	2648464347	Agency Name	Caprice, Manuel F	08/03/2024- 08/16/2024	Miscellaneous	Error	\$0.00	\$0.00	
<input type="checkbox"/> <a href="#">xxx-xx-8898</a>	2648464347	Agency Name	Caprice, Manuel	08/03/2024- 08/16/2024	Miscellaneous	Valid But Held	\$2,839.80	\$211.10	
<input type="checkbox"/> <a href="#">xxx-xx-0450</a>	1898391026	Agency Name	Catinojos, Raquel B	08/03/2024- 08/16/2024	Miscellaneous	Error	\$0.00	\$0.00	
<input type="checkbox"/> <a href="#">xxx-xx-0450</a>	1898391026	Agency Name	Catinojos, Raquel	08/03/2024- 08/16/2024	Miscellaneous	Valid But Held	\$3,668.80	\$48.00	

[View Normal](#)

[Select All](#) | [Delete](#) | [Edit Selected Records](#) | [Save Selection](#)

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

- **Select All:** Selects all the records displayed on the current page.
- **Delete:** Deletes any selected records.
- **Edit Selected Records:** Queues the selected records and displays the first record's Maintain Payroll Record page. After saving, the next record in the queue displays.
- **Save Selection:** Saves selected records on the current page to a queue. You can add more records from other pages to the queue by navigating to the page, selecting the record's checkbox, and selecting the **Save Selection** button again. Select the **Edit Selected Records** button to start reviewing the queued records. Alternately, select the **View Max** link at the bottom of the Records Present in the Report section to display all records on one page.
- **Apply Mass Update:** *Do not use this link.*
- **Process Report:** Processes the payroll report.
- **Generate Report Summary:** Runs the Payroll Report Summary report.
- **View Payroll Report Summary:** Returns you to the Payroll Report Detail page.

### Status Column

The Status column in the Records Present in the Report section will display one of the following:

- **Error** – Record needs to be corrected.
- **Pending Validation** – Record has not been validated.
- **Posted** – Record is error free, and it has posted to the member's account.
- **Valid** – Record has passed the first level of validation and is most likely error free.
- **Valid But Held** – There are two records for one employee for the same earned period, and the other record has an error.
- **Valid With Exceptions** – Does not indicate the record has an error, but it could be an issue. Review the exception and verify that the record details are accurate.

## Unit 4: Maintain Records Within an Earned Period Payroll Report

CalPERS retirement benefits are funded by contributions paid by employers, members, and CalPERS investments. It is your agency’s responsibility to ensure your employees’ payroll is reported accurately and timely, as earned not paid, to ensure correct payment of benefits.

### System Logic

- CalPERS defines the first earned period of a new fiscal year as having an end date of July 1 or later.
- When data is not reportable for a field, that field must be left at its default (blank or 0.0).
- Do not use the **Apply Mass Update** link on the View Payroll Records page.

### Reporting Member and Employer Paid Arrears

- Do not report payroll records associated to a *member* paid arrears determination in an earned period report or an adjustment report. For reporting member paid arrears, and to learn more about the arrears process, refer to the [myCalPERS Employment Certification Functionality \(PDF\)](#) student guide.
- It is best practice to report payroll records associated to an *employer* paid arrears determination in an adjustment report. To learn more about payroll adjustment reports, refer to the [myCalPERS Payroll Adjustments \(PDF\)](#) student guide. If they are reported in an earned period report, the records will not post until the 30-day appeal period expires, causing the report to remain in suspended status past its due date, and resulting in a \$200 late reporting fee. To waive your appeal rights so the records will post, refer to the [myCalPERS Employment Certification Functionality \(PDF\)](#) student guide.
- Once Arrears Apply – Employer Paid records are processed, they will post the following day.

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## Scenario 1: Delete an Employee's Payroll Record

Your employee permanently separated. You will delete their payroll record because they didn't work during the current earned period.

### Step Actions (5 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:  Last Name:   
CalPERS ID:  Transaction Type:   
Record Type:  Member Category:   
Division:  Rate Plan:   
Record Status:  Error Message:

Step 2 Select the **Search** button.

Step 3 Within the Records Present in the Report section, select the checkbox next to the **SSN** link of the employee's record you need to delete.

Step 4 Select a **Delete** button.

**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:  Last Name:   
CalPERS ID:  Transaction Type:   
Record Type:  Member Category:   
Division:  Rate Plan:   
Record Status:  Error Message:

**Records Present in the Report**  
    [Apply Mass Update](#)

SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation
<input type="checkbox"/> <a href="#">xxx-xx-4444</a>	1234567890	Agency Name	Jones, Emily	11/14/2020- 11/27/2020	Miscellaneous	Valid With Exceptions	\$0.00	\$0.00

[View Payroll Report Summary](#)

Step 5 Confirm the deletion by selecting the **Yes** button.

**Confirmation Page**  
Do you want to delete this record?

You have completed this scenario.



## Scenario 2: Add a Payroll Record for a New Active Employee

Your new employee's PERS appointment is in myCalPERS, so you will enter their payroll details in your payroll report.

### Step Actions (13 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Add New** button.

**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:   
CalPERS ID:   
Record Type:   
Member Category:   
Division:   
Record Status:   
Error Message:   
Last Name:   
Transaction Type:   
Rate Plan:   
Search Clear **Add New**

Step 3 If needed, within the Maintain Record Details section, modify the Begin Date and End Date fields.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

**Begin Date:**   
**End Date:**    
Payroll Record Memo:   
[View Employee Rate Summary](#)

Step 4 Select the **Display** button.

Step 5 Complete the Earnings subsection.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

**Begin Date:**   
**End Date:**    
Payroll Record Memo:   
**Earnings**  
**Appointment:**  Agency Name : Appt Id - 9991754018 : 2024-07-15 : Miscellaneous : Regular  
**Transaction Type:**   
**Pay Rate Type:**   
**Pay Rate:**   
**Reportable Earnings:**   
**Scheduled Full Time Hours Per Week:**   
**Total Hours Worked:**   
**Scheduled Full Time Days Per Week:**   
**Special Compensation:**   
[View Special Compensation](#)

- **Transaction Type:** If the correct transaction type is not in the drop-down list, correct the begin or end dates, then select the **Display** button.
- **Scheduled Full Time Hours Per Week:** This is required for all pay rate types. Enter the number of hours your agency considers full time for this position.
- **Scheduled Full Time Days Per Week:** If pay rate type is daily, complete in addition to Scheduled Full Time Hours Per Week. Enter the number of days your agency considers full time for this position.
- **Total Hours Worked:** Report hours if employee is a retired annuitant.
- **Note:** Employees who start in the middle of the earned period may need their earnings and contributions adjusted for the next earned period.

Step 6 Do you need to report special compensation?

**Yes:** Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 7.

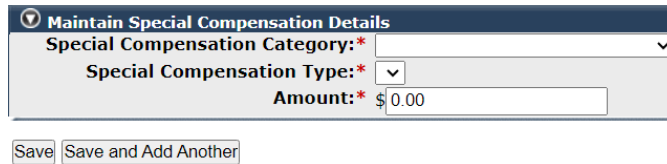
**No:** Skip to step 11.

Step 7 Within the View Special Compensation section, select the **Add New** button.



The screenshot shows the 'View Special Compensation' section. At the top, there are buttons for 'Select All' and 'Delete'. Below is a table with columns for 'Category', 'Type', and 'Amount'. The table is empty, with the text 'No results found.' displayed. At the bottom of the table, there are buttons for 'Select All', 'Delete', and 'Add New'. The 'Add New' button is highlighted with a red box.

Step 8 Complete the Maintain Special Compensation Details section.



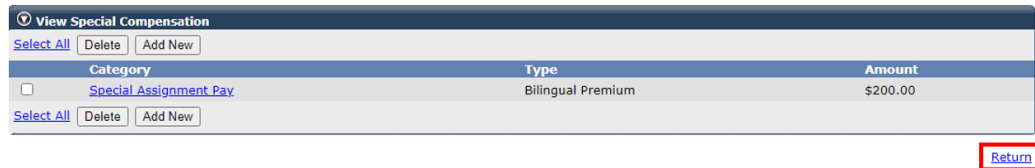
The screenshot shows the 'Maintain Special Compensation Details' section. It contains three input fields: 'Special Compensation Category:\*' (a dropdown menu), 'Special Compensation Type:\*' (a dropdown menu), and 'Amount:\*' (a text box with '\$0.00' entered). Below the input fields are two buttons: 'Save' and 'Save and Add Another'.

Step 9 Do you need to report additional special compensation?

**Yes:** Select the **Save and Add Another** button, then return to step 8.

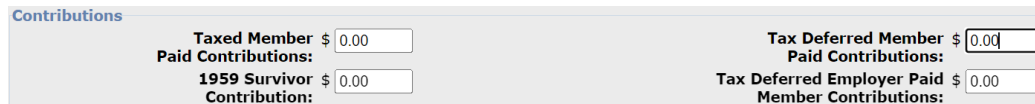
**No:** Select the **Save** button, then continue to step 10.

Step 10 Select the **Return** link at the bottom right under the View Special Compensation section.



The screenshot shows the 'View Special Compensation' section. At the top, there are buttons for 'Select All', 'Delete', and 'Add New'. Below is a table with columns for 'Category', 'Type', and 'Amount'. The table contains one entry: 'Special Assignment Pay' under the 'Category' column, 'Bilingual Premium' under the 'Type' column, and '\$200.00' under the 'Amount' column. At the bottom of the table, there are buttons for 'Select All', 'Delete', and 'Add New'. A 'Return' button is located at the bottom right of the screenshot, highlighted with a red box.

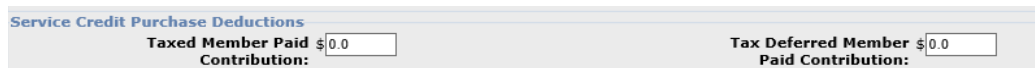
Step 11 Within the Contributions subsection, enter contribution amounts into the appropriate fields.



The screenshot shows the 'Contributions' subsection. It contains three input fields: 'Taxed Member Paid Contributions:' (a text box with '\$0.00' entered), '1959 Survivor Contribution:' (a text box with '\$0.00' entered), and 'Tax Deferred Member Paid Contributions:' (a text box with '\$0.00' entered).

Step 12 Do you need to report a service credit purchase deduction?

**Yes:** Within the Service Credit Purchase Deductions subsection, enter contribution amounts into the appropriate fields, then continue to step 13.



The screenshot shows the 'Service Credit Purchase Deductions' subsection. It contains two input fields: 'Taxed Member Paid Contribution:' (a text box with '\$0.0' entered) and 'Tax Deferred Member Paid Contribution:' (a text box with '\$0.0' entered).

**No:** Continue to step 13.

Step 13 Select the **Save & Exit** button.

**You have completed this scenario.**

## Scenario 3: Add a Payroll Record for a Non-Contributory Employee

Your new retired annuitant (RA) has an active appointment in myCalPERS, so you will enter their payroll details in your payroll report.

A non-contributory record is reported as an *Earned Period No Contribution and No Service* transaction type. Use this transaction type to report payroll for an employee who is:

- A retired annuitant (RA)
- A local alternate retirement plan (Gov. Code 20306) member
- Working in an overtime position. If the *Earned Period No Contribution and No Service* transaction type does not display in the drop-down list, contact CalPERS.

### System Logic

- For a copy-forwarded RA record, the Total Hours Worked field will reset to zero. You must update their Total Hours Worked each time you report their payroll.
- If an RA's hours cross fiscal years, report their payroll in two records (one per fiscal year).

### Step Actions (11 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Add New** button.

**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:   
CalPERS ID:   
Record Type:   
Member Category:   
Division:   
Record Status:   
Error Message:   
Last Name:   
Transaction Type:   
Rate Plan:

Step 3 If needed, within the Maintain Record Details section, modify the Begin Date and End Date fields.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

Begin Date:   
End Date:    
Payroll Record Memo:

[View Employee Rate Summary](#)

Step 4 Select the **Display** button.

Step 5 Complete the Earnings subsection.

- **Scheduled Full Time Hours Per Week:** This is required for all pay rate types. Enter the number of hours your agency considers full time for this position.
- **Scheduled Full Time Days Per Week:** If pay rate type is daily, complete in addition to Scheduled Full Time Hours Per Week. Enter the number of days your agency considers full time for this position.
- **Total Hours Worked:** Report hours only if employee is a retired annuitant.

Step 6 Do you need to report special compensation?

**Yes:** Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 7.

**No:** Skip to step 9.

Step 7 Within the View Special Compensation section, select the **Add New** button.

Step 8 Complete the Maintain Special Compensation Details section.

Step 9 Do you need to report additional special compensation?

**Yes:** Select the **Save and Add Another** button, then return to step 8.

**No:** Select the **Save** button, then continue to step 10.

Step 10 Select the **Return** link at the bottom right under the View Special Compensation section.

Step 11 Select the **Save & Exit** button.

**You have completed this scenario.**

## Scenario 4: Report a Zero-Payroll Record

Your employee didn't work during the earned period, so you will report zero-payroll for them.

You may report a zero-payroll record for both contributory and non-contributory employees who do not work the earned period. Reporting a zero-payroll record will prevent the employee from being listed during the payroll reconciliation process (refer to Unit 6: Reconcile Unposted Payroll Records), and you will not need to confirm unposted payroll for them at that time.

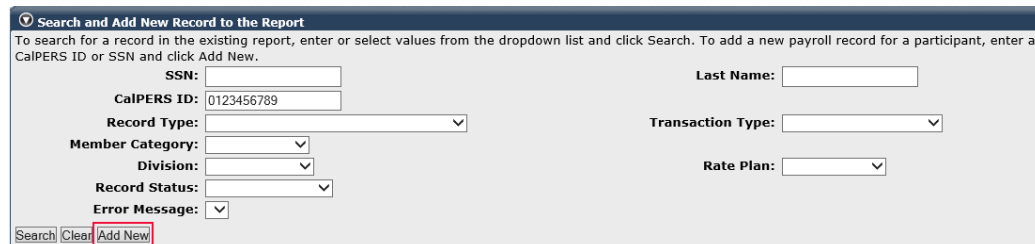
### System Logic

- Zero-payroll records will have a Valid With Exceptions record status.
- When initiating payroll reporting by the copy-forward method, zero-payroll records will copy forward. If the employee works the new earned period, modify the copied record by updating reportable earnings and all other applicable fields.
- myCalPERS permanently separates active employees with six months of unreported payroll. Entering a zero-payroll record or confirming unposted payroll will prevent automatic permanent separation.

### Step Actions (12 steps)

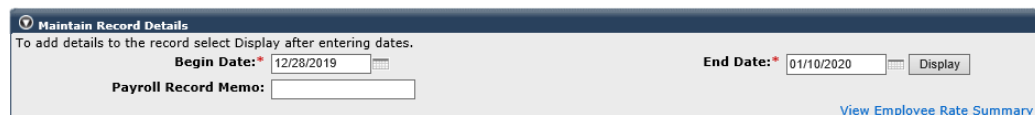
Step 1 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Add New** button.



The screenshot shows a web form titled "Search and Add New Record to the Report". The form contains several input fields and dropdown menus: SSN, CalPERS ID (with the value 0123456789), Last Name, Record Type, Transaction Type, Member Category, Division, Record Status, and Rate Plan. At the bottom left, there are three buttons: "Search", "Clear", and "Add New". The "Add New" button is highlighted with a red box.

Step 3 If needed, within the Maintain Record Details section, modify the Begin Date and End Date fields.



The screenshot shows a web form titled "Maintain Record Details". The form contains two date fields: "Begin Date" (with the value 12/28/2019) and "End Date" (with the value 01/10/2020). There is a "Display" button next to the "End Date" field. Below these fields is a "Payroll Record Memo" text area. At the bottom right, there is a link labeled "View Employee Rate Summary".

Step 4 Select the **Display** button.

Step 5 Within the Earnings subsection, select the Appointment radio button and a Transaction Type option. Leave all other fields at their default (blank or 0.0).

**Earnings**

Appointment:\*  Agency Name : Appt Id - 9991754019 : 2024-07-01 : Miscellaneous : Regular

Transaction Type:\*

Pay Rate Type:  Pay Rate: \$

Reportable Earnings: \$

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

Total Hours Worked:

Special Compensation:

Step 6 Do you need to delete existing special compensation?

**Yes:** Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 7.

**No:** Skip to step 10.

Step 7 Select the **Select All** link.

**View Special Compensation**

[Select All](#) [Delete](#) [Add New](#)

Category	Type	Amount
<input type="checkbox"/> Educational Pay	Special Class Driver's License Pay	\$2.88
<input type="checkbox"/> Special Assignment Pay	Bilingual Premium	\$133.20

[Select All](#) [Delete](#) [Add New](#)

**Note:** Special compensation should be deleted and not reported as a 0 amount.

Step 8 Select the **Delete** button.

Step 9 Select the **Return** link at the bottom right under the View Special Compensation section.

**View Special Compensation**

[Select All](#) [Delete](#)

Category	Type	Amount
No results found.		

[Select All](#) [Delete](#) [Add New](#)

[Return](#)

Step 10 Within the Contributions subsection, report zero (0) contribution amounts.

**Contributions**

Taxed Member Paid Contributions: \$

1959 Survivor Contribution: \$

Tax Deferred Member Paid Contributions: \$

Tax Deferred Employer Paid Member Contributions: \$

Step 11 Within the Service Credit Purchase Deductions subsection, report zero (0) contribution amounts.

**Service Credit Purchase Deductions**

Taxed Member Paid Contribution: \$

Tax Deferred Member Paid Contribution: \$

Step 12 Select the **Save & Exit** button.

**You have completed this scenario.**

## Scenario 5: Modify Payroll Record Due to Permanent Separation

Your employee permanently separated in the middle of the earned period, so you will modify their earned period record (*end date, reportable earnings, and contributions*).

Use the same steps to modify a record for an employee on an unpaid leave of absence.

### Step Actions (14 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you need to modify.

The screenshot shows a table titled "Records Present in the Report". The table has columns for SSN, CalPERS ID, Division, Name, Earned Period, Member Category, Status, Earnings, and Special Compensation. A single record is displayed with SSN "xxx-xx-4444", CalPERS ID "1234567890", Division "Agency Name", Name "Jones, Emily", Earned Period "11/14/2020- 11/27/2020", Member Category "Miscellaneous", Status "Valid With Exceptions", Earnings "\$0.00", and Special Compensation "\$0.00". The SSN field is highlighted with a red box. Above the table are buttons for "Select All", "Delete", "Edit Selected Records", and "Save Selection". Below the table are buttons for "Process Report" and "Generate Report Summary". A link "View Payroll Report Summary" is also present.

Step 4 Within the Maintain Record Details section, modify the **End Date** field.

The screenshot shows the "Maintain Record Details" form. It includes fields for "Begin Date" (11/23/2020) and "End Date" (11/27/2020). The "End Date" field is highlighted with a red box. There is a "Display" button next to the "End Date" field. A "Payroll Record Memo" field is also present.

Step 5 Select the **Display** button.

Step 6 Within the Earnings subsection, modify the **Reportable Earnings** field.

The screenshot shows the "Earnings" subsection. It includes fields for "Transaction Type" (Earned Period Reporting), "Pay Rate Type" (Hourly), "Pay Rate" (\$ 54.86), "Reportable Earnings" (\$ 4114.60), "Scheduled Full Time Hours Per Week" (37.5), "Total Hours Worked" (0.0), and "Special Compensation" (\$57.65). The "Reportable Earnings" field is highlighted with a red box. A link "View Special Compensation" is visible at the bottom right.

Step 7 Do you need to modify special compensation?

**Yes:** Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 8.

**No:** Skip to step 12.

Step 8 Within the View Special Compensation section, select the special compensation item's **Category** link.

The screenshot shows the "View Special Compensation" section. It includes a table with columns for Category, Type, and Amount. A single record is displayed with Category "Special Assignment Pay", Type "Shift Differential", and Amount "\$57.65". The "Special Assignment Pay" link is highlighted with a red box. Above the table are buttons for "Select All", "Delete", and "Add New". Below the table are buttons for "Select All", "Delete", and "Add New".

Step 9 Update the Maintain Special Compensation Details section.




Step 10 Select the **Save** button.

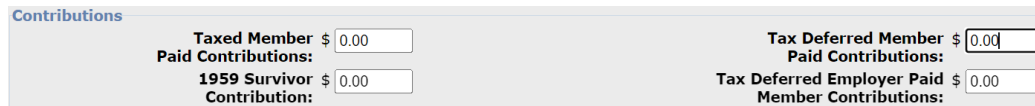
Step 11 Do you need to modify additional special compensation items?

**Yes:** Return to step 8.

**No:** Select the **Return** link at the bottom right under the View Special Compensation section, then continue to step 12.

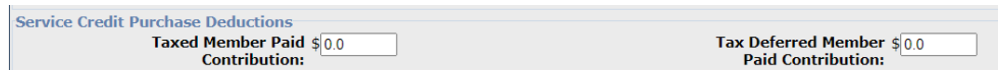


Step 12 Within the Contributions subsection, update contribution amounts in the appropriate fields.



Step 13 Do you need to modify a service credit purchase deduction?

**Yes:** Within the Service Credit Purchase Deductions subsection, update contribution amounts in the appropriate fields, then continue to step 14.



**No:** Continue to step 14.

Step 14 Select the **Save & Exit** button.

**You have completed this scenario.**



## Scenario 6: Modify a Payroll Record with a Pay Rate Increase

Your employee received a pay raise effective the beginning of the earned period. You will modify the employee's earned period payroll record to reflect the:

- New pay rate
- Increased reportable earnings
- Increased contributions for contributory employees

### Why is Pay Rate Important?

When an employee retires, their retirement benefit is calculated using a formula that includes years of service credit, age at retirement, and final compensation. Pay rate impacts final compensation; it must be reported accurately to ensure the employee retires without delay and receives the correct retirement allowance.

### Step Actions (12 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link next to the employee's record you need to modify.

**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:  Last Name:   
CalPERS ID: 1234567890  
Record Type:  Transaction Type:   
Member Category:  Rate Plan:   
Division:   
Record Status:   
Error Message:

**Records Present in the Report**

[Apply Mass Update](#)

SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation
<input type="checkbox"/> <a href="#">xxx-xx-4444</a>	1234567890	Agency Name	Jones, Emily	11/14/2020 - 11/27/2020	Miscellaneous	Valid With Exceptions	\$0.00	\$0.00

[View Payroll Report Summary](#)

Step 4 Within the Maintain Record Details section, Earnings subsection, modify the Pay Rate and Reportable Earnings fields.

**Earnings**

Appointment: \*  Agency Name : Appt Id - 24655780 : 2001-04-14 : Miscellaneous : Regular

Transaction Type: \*

Pay Rate Type:

Reportable Earnings: \$

Scheduled Full Time Hours Per Week:

Total Hours Worked:

Special Compensation: \$0.00

Scheduled Full Time Days Per Week:

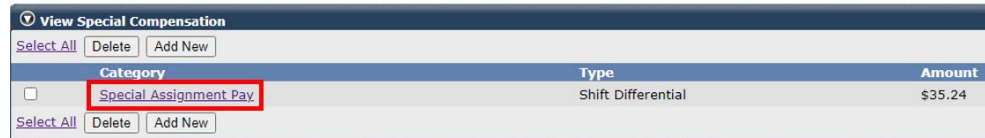
[View Special Compensation](#)

Step 5 Do you need to modify special compensation?  
**Yes:** Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 6.  
**No:** Skip to step 10.

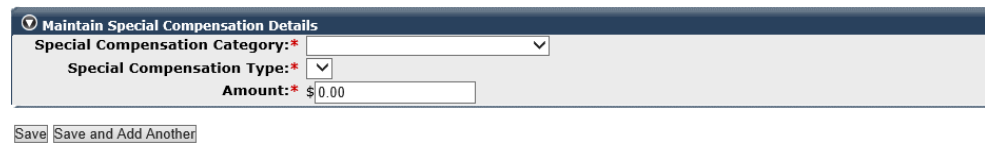
Step 6 Do you need to add new special compensation or modify an existing special compensation?  
**Add new special compensation:** Within the View Special Compensation section, select the **Add New** button, then continue to step 7.



**Modify existing special compensation:** Within the View Special Compensation section, select the special compensation item's **Category** link, then continue to step 7.



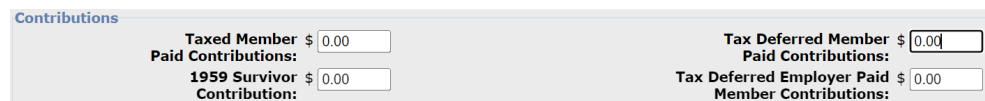
Step 7 Complete the Maintain Special Compensation Details section.



Step 8 Do you need to report additional special compensation?  
**Yes:** Select the **Save and Add Another** button, then return to step 7.  
**No:** Select the **Save** button, then continue to step 9.

Step 9 Select the **Return** link at the bottom right under the View Special Compensation section.

Step 10 Within the Contributions subsection, update contribution amounts in the appropriate fields.



Step 11 Do you need to modify a service credit purchase deduction?  
**Yes:** Within the Service Credit Purchase Deductions section, update contribution amounts in the appropriate fields, then continue to step 12.  
**No:** Continue to step 12.

Step 12 Select the **Save & Exit** button.  
**You have completed this scenario.**

## Scenario 7: Modify and Add a Payroll Record with a Mid-Earned Period Pay Rate Increase

Your employee received a raise in the middle of the earned period, so you will submit two payroll records due to the mid-earned period pay rate increase.

- First, modify the existing earned period record by changing the end date to the day before the pay rate increase, and then update the earnings and contributions that were earned within these dates.
- Next, add a second payroll record with a begin date as the first day of the pay rate increase and an end date as the last day of the earned period. The new pay rate, earnings, and contributions must reflect what was earned within these dates.

### System Logic

When initiating payroll reporting by the copy-forward method, both records will copy forward. Delete the record with the old pay rate and modify the earnings and any other applicable fields for the record with the newer pay rate.

### Step Actions (26 steps)

#### Part I: Modify Existing Record

Step 1 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you wish to modify.

**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:  Last Name:   
CalPERS ID: 1234567890  
Record Type:  Transaction Type:   
Member Category:  Division:  Rate Plan:   
Record Status:  Error Message:   
Search Clear Add New

**Records Present in the Report**  
Select All Delete Edit Selected Records Save Selection Apply Mass Update

SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation
<input type="checkbox"/> <a href="#">xxx-xx-4444</a>	1234567890	Agency Name	Jones, Emily	11/14/2020- 11/27/2020	Miscellaneous	Valid With Exceptions	\$0.00	\$0.00

Select All Delete Edit Selected Records Save Selection  
Process Report Generate Report Summary View Payroll Report Summary

Step 4 Within the Maintain Record Details section, modify the **End Date** field to the day before the pay rate increase.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

Begin Date: 11/23/2020 End Date: 11/27/2020 Display  
Payroll Record Memo:

Step 5 Select the **Display** button.

Step 6 Within the Earnings subsection, modify the **Reportable Earnings** field.

Earnings

Appointment:\* Agency Name : Appt Id - 24655780 : 2001-04-14 : Miscellaneous : Regular

Transaction Type:\* Earned Period Reporting

Pay Rate Type: Hourly Pay Rate: \$ 38.55

**Reportable Earnings: \$ 693.90**

Scheduled Full Time 40.0 Scheduled Full Time 0.0

Hours Per Week: Total Hours Worked: 0.0 Days Per Week:

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

Step 7 Do you need to modify special compensation?

**Yes:** Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 8.

**No:** Skip to step 12.

Step 8 Within the View Special Compensation section, select the special compensation item's **Category** link.

View Special Compensation

Select All Delete Add New

Category	Type	Amount
<a href="#">Special Assignment Pay</a>	Shift Differential	\$57.65

Select All Delete Add New

Step 9 Update the Maintain Special Compensation Details section.

Maintain Special Compensation Details

Special Compensation Category:\*

Special Compensation Type:\*

Amount:\* \$0.00

Save Save and Add Another

Step 10 Select the **Save** button.

Step 11 Do you need to modify additional special compensation items?

**Yes:** Return to step 8.

**No:** Select the **Return** link at the bottom right under the View Special Compensation section, then continue to step 12.

View Special Compensation

Select All Delete Add New

Category	Type	Amount
<a href="#">Special Assignment Pay</a>	Shift Differential	\$35.24

Select All Delete Add New

[Return](#)

Step 12 Within the Contributions subsection, update contribution amounts in the appropriate fields.

Contributions

Taxed Member \$ 0.00

Paid Contributions:

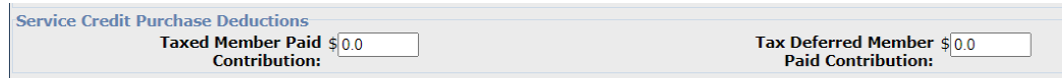
1959 Survivor Contribution: \$ 0.00

Tax Deferred Member Paid Contributions: \$ 0.00

Tax Deferred Employer Paid Member Contributions: \$ 0.00

Step 13 Do you need to modify a service credit purchase deduction?

**Yes:** Within the Service Credit Purchase Deductions subsection, update contribution amounts in the appropriate fields, then continue to step 14.



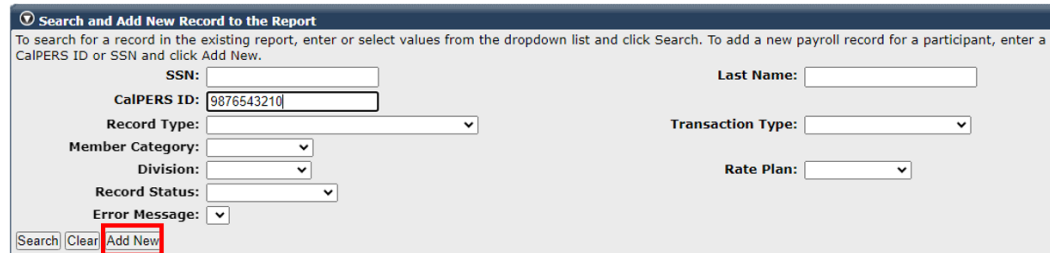
The screenshot shows the 'Service Credit Purchase Deductions' section. It contains two input fields: 'Taxed Member Paid Contribution' with a value of \$0.00 and 'Tax Deferred Member Paid Contribution' with a value of \$0.00.

**No:** Continue to step 14.

Step 14 Select the **Save & Continue** button.

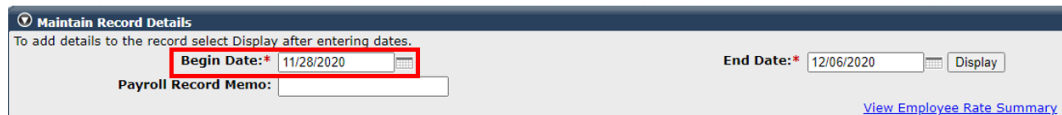
## Part II: Add Second Record Reflecting New Pay Rate

Step 15 Within the Search and Add New Record to the Report section, select the **Add New** button.



The screenshot shows the 'Search and Add New Record to the Report' form. It includes fields for SSN, CalPERS ID (9876543210), Last Name, Record Type, Member Category, Division, Record Status, Error Message, Transaction Type, and Rate Plan. There are 'Search', 'Clear', and 'Add New' buttons at the bottom. The 'Add New' button is highlighted with a red box.

Step 16 Within the Maintain Record Details section, modify the Begin Date field to the first day of the pay increase.



The screenshot shows the 'Maintain Record Details' form. It includes fields for 'Begin Date' (11/28/2020) and 'End Date' (12/06/2020). There is a 'Display' button and a 'Payroll Record Memo' field. The 'Begin Date' field is highlighted with a red box.

Step 17 Select the **Display** button.

Step 18 Complete the Earnings subsection.



The screenshot shows the 'Earnings' subsection. It includes fields for 'Appointment' (Agency Name : Appt Id - 92442505 : 2017-02-11 : Miscellaneous : Regular), 'Transaction Type' (Earned Period Reporting), 'Pay Rate Type', 'Reportable Earnings' (\$0.00), 'Scheduled Full Time Hours Per Week' (0.0), 'Total Hours Worked' (0.0), 'Special Compensation' (0.00), 'Pay Rate' (\$0.00), and 'Scheduled Full Time Days Per Week' (0.0). There is a 'View Special Compensation' link at the bottom right.

- **Scheduled Full Time Hours Per Week:** This is required for all pay rate types. Enter the number of hours your agency considers full time for this position.
- **Scheduled Full Time Days Per Week:** If pay rate type is daily, complete in addition to Scheduled Full Time Hours Per Week. Enter the number of days your agency considers full time for this position.
- **Total Hours Worked:** Enter only if employee is a retired annuitant.

Step 19 Do you need to report special compensation?

**Yes:** Select the **View Special Compensation** link on the right side of the Earnings subsection, then continue to step 20.

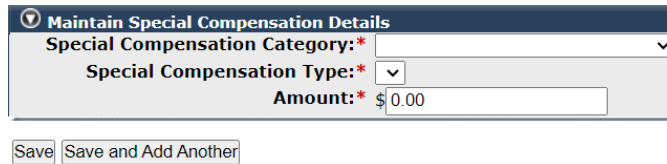
**No:** Skip to step 24.

Step 20 Within the View Special Compensation section, select the **Add New** button.



The screenshot shows the 'View Special Compensation' section. At the top, there are links for 'Select All' and 'Delete'. Below is a table with columns for 'Category', 'Type', and 'Amount'. The table is empty with the message 'No results found.' Below the table, there are links for 'Select All', 'Delete', and a red-bordered 'Add New' button.

Step 21 Complete the Maintain Special Compensation Details section.



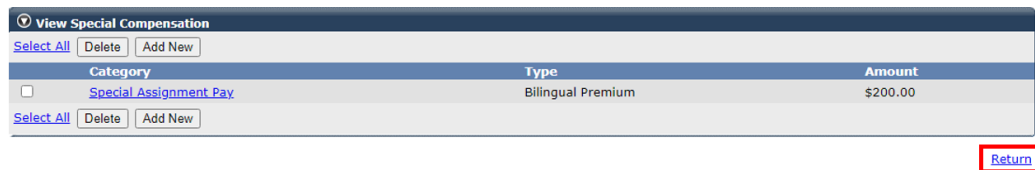
The screenshot shows the 'Maintain Special Compensation Details' section. It includes three input fields: 'Special Compensation Category:\*' (a dropdown menu), 'Special Compensation Type:\*' (a dropdown menu), and 'Amount:\*' (a text box containing '\$0.00'). At the bottom, there are two buttons: 'Save' and 'Save and Add Another'.

Step 22 Do you need to report additional special compensation?

**Yes:** Select the **Save and Add Another** button, then return to step 21.

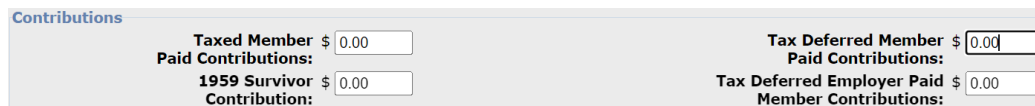
**No:** Select the **Save** button, then continue to step 23.

Step 23 Select the **Return** link at the bottom right under the View Special Compensation section.



The screenshot shows the 'View Special Compensation' section. At the top, there are links for 'Select All', 'Delete', and 'Add New'. Below is a table with columns for 'Category', 'Type', and 'Amount'. The table contains one entry: 'Special Assignment Pay' under the 'Category' column, 'Bilingual Premium' under the 'Type' column, and '\$200.00' under the 'Amount' column. Below the table, there are links for 'Select All', 'Delete', and 'Add New'. At the bottom right, there is a red-bordered 'Return' button.

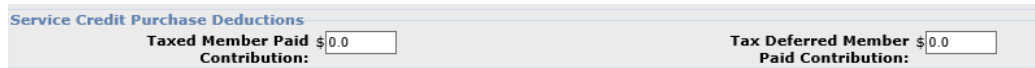
Step 24 Within the Contributions subsection, enter contribution amounts into the appropriate fields.



The screenshot shows the 'Contributions' subsection. It has four input fields: 'Taxed Member Paid Contributions:' (text box with '\$0.00'), '1959 Survivor Contribution:' (text box with '\$0.00'), 'Tax Deferred Member Paid Contributions:' (text box with '\$0.00'), and 'Tax Deferred Employer Paid Member Contributions:' (text box with '\$0.00').

Step 25 Do you need to report a service credit purchase deduction?

**Yes:** Within the Service Credit Purchase Deductions subsection, enter contribution amounts into the appropriate fields, then continue to step 26.



The screenshot shows the 'Service Credit Purchase Deductions' subsection. It has two input fields: 'Taxed Member Paid Contribution:' (text box with '\$0.0') and 'Tax Deferred Member Paid Contribution:' (text box with '\$0.0').

**No:** Continue to step 26.

Step 26 Select the **Save & Exit** button.

**You have completed this scenario.**

## Scenario 8: Modify a Payroll Record to Add Special Compensation

You will add special compensation to an employee's payroll record.

Refer to the [Special Compensation Reportability Table](#) on the CalPERS website for information on special compensation types.

### System Logic

When reporting special compensation, your agency must:

- Verify the special compensation is reportable.
- Identify the amount, type, and category of special compensation.
- Report for the pay period the special compensation was earned, not when it was paid.

### Step Actions (11 steps)

Step 1 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

Step 2 Select the **Search** button.

Step 3 Select the **SSN** link for the employee's record you wish to modify.

The screenshot displays two sections of the CalPERS system interface. The top section, titled "Search and Add New Record to the Report", contains a form with fields for SSN, CalPERS ID, Last Name, Record Type, Member Category, Division, Record Status, Transaction Type, and Rate Plan. Below the form are buttons for "Search", "Clear", and "Add New". The bottom section, titled "Records Present in the Report", shows a table with columns for SSN, CalPERS ID, Division, Name, Earned Period, Member Category, Status, Earnings, and Special Compensation. A single record is listed with SSN "xxx-xx-4444" highlighted in red. Below the table are buttons for "Select All", "Delete", "Edit Selected Records", and "Save Selection". At the bottom right of the table area is a link for "View Payroll Report Summary".

SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation
<a href="#">xxx-xx-4444</a>	1234567890	Agency Name	Jones, Emily	11/14/2020- 11/27/2020	Miscellaneous	Valid With Exceptions	\$0.00	\$0.00

Step 4 If needed, within the Maintain Record Details section, modify the Begin Date and End Date fields.

The screenshot shows the "Maintain Record Details" form. It includes a "Begin Date" field and an "End Date" field, both highlighted with red boxes. There is a "Display" button next to the "End Date" field. Below these fields is a "Payroll Record Memo" text area. At the bottom right, there is a link for "View Employee Rate Summary".

Step 5 Within the Earnings subsection, select the **View Special Compensation** link at the right side.

Earnings

Appointment:\* Agency Name : Appt Id - 91745494 : 2013-01-07 : Miscellaneous : Regular

Transaction Type:\* Earned Period Reporting

Pay Rate Type: Hourly Pay Rate: \$ 44.93

Reportable Earnings: \$ 3594.70

Scheduled Full Time Hours Per Week: 40.0 Scheduled Full Time Days Per Week: 0.0

Total Hours Worked: 0.0

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

Step 6 Within the View Special Compensation section, select the **Add New** button.

View Special Compensation

[Select All](#) [Delete](#)

Category	Type	Amount
No results found.		

[Select All](#) [Delete](#) [Add New](#)

Step 7 Complete the Maintain Special Compensation Details section.

Maintain Special Compensation Details

Special Compensation Category:\*

Special Compensation Type:\*

Amount:\* \$ 0.00

[Save](#) [Save and Add Another](#)

Step 8 Do you need to report additional special compensation?

**Yes:** Select the **Save and Add Another** button, then return to step 7.

**No:** Select the **Save** button, then continue to step 9.

Step 9 Select the **Return** link at the bottom right under the View Special Compensation section.

View Special Compensation

[Select All](#) [Delete](#) [Add New](#)

Category	Type	Amount
<input type="checkbox"/> Special Assignment Pay	Bilingual Premium	\$200.00

[Select All](#) [Delete](#) [Add New](#)

[Return](#)

Step 10 Within the Contributions subsection, update contribution amounts in the appropriate fields.

Contributions

Taxed Member Paid Contributions: \$ 0.00

1959 Survivor Contribution: \$ 0.00

Tax Deferred Member Paid Contributions: \$ 0.00

Tax Deferred Employer Paid Member Contributions: \$ 0.00

Step 11 Select the **Save & Exit** button.

**You have completed this scenario.**



## Scenario 9: Report Payroll When an Employee Has Reached the Compensation Limit

CalPERS notifies employers of the new annual compensation limits each year in a [Circular Letter](#).

The annual compensation limit does not limit the salary an employer can pay an employee, but it impacts how your agency reports this information to CalPERS. Once the compensation limit is reached, report compensation over the limit without member contributions.

You can track your employees' compensation by running the Reported Compensation by Calendar Year Summary Report throughout the year.

To submit payroll for an employee who reaches the compensation limit:

- First, modify the earned period record to reflect the compensation up to the limit and its contributions.
- Second, add another record in the same payroll report with the remaining reportable earnings that are over the limit without contributions.

### System Logic

- When initiating payroll reporting by the copy-forward method, both records will copy forward. In the copy-forwarded report, delete the record with contributions and modify the earnings and any other applicable fields for the record without contributions.
- myCalPERS tracks the reportable compensation and displays an exception message as an employee approaches the limit as well as an error message once the employee reaches the annual compensation limit for the calendar year.

### Step Actions (11 steps)

#### Part I: Modify Existing Record

Step 1 Within the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

---

Step 2 Select the **Search** button.

---

Step 3 Select the **SSN** link for the employee's record you wish to modify.

Records Present in the Report										
Select All				Delete	Edit Selected Records		Save Selection		Apply Mass Update	
SSN	CalPERS ID	Division	Name	Earned Period	Member Category	Status	Earnings	Special Compensation		
<input type="checkbox"/> xxx-xx-4444	1234567890	Agency Name	Jones, Emily	11/14/2020- 11/27/2020	Miscellaneous	Valid With Exceptions	\$0.00	\$0.00		
Select All				Delete	Edit Selected Records		Save Selection			
Process Report				Generate Report Summary		View Payroll Report Summary				

Step 4 Within the Record Details section, Earnings subsection, adjust the reportable earnings (and special compensation, if applicable) to the compensation limit.

**Earnings**  
Appointment: \* Agency Name : Appt Id - 24655780 : 2001-04-14 : Miscellaneous : Regular

Transaction Type: \* Earned Period Reporting  
Pay Rate Type: Hourly  
Pay Rate: \$ 38.55

Reportable Earnings: \$ 693.90  
Scheduled Full Time Hours Per Week: 40.0  
Total Hours Worked: 0.0  
Special Compensation: \$0.00

Scheduled Full Time Days Per Week: 0.0  
[View Special Compensation](#)

**Note:** An error will occur if an earned period record includes compensation with contributions over the Internal Revenue Code limit.

Step 5 Within the Contributions subsection, report contribution amounts in the appropriate fields for this record's compensation.

**Contributions**

Taxed Member Paid Contributions: \$ 0.00  
1959 Survivor Contribution: \$ 0.00  
Tax Deferred Member Paid Contributions: \$ 0.00  
Tax Deferred Employer Paid Member Contributions: \$ 0.00

Step 6 Select the **Save & Continue** button.

## Part II: Add Second Record

Step 7 Within the same earned period report, in the Search and Add New Record to the Report section, enter the employee's full SSN or CalPERS ID in the appropriate field.

Step 8 Select the **Add New** button.

**Search and Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the dropdown list and click Search. To add a new payroll record for a participant, enter a CalPERS ID or SSN and click Add New.

SSN:  Last Name:   
CalPERS ID: 1234567890  
Record Type:  Transaction Type:   
Member Category:  Division:  Rate Plan:   
Record Status:  Error Message:

Step 9 Within the Maintain Record Details section, the Begin Date and End Date fields should default to those of the earned period report. Ensure both dates match those of the first record, then select the **Display** button.

**Maintain Record Details**  
To add details to the record select Display after entering dates.

Begin Date: \* 11/14/2020  
End Date: \* 11/27/2020  
Payroll Record Memo:

[View Employee Rate Summary](#)

Step 10

Within the Earnings subsection, complete the payroll information.

- Enter the reportable earnings (and special compensation, if applicable) that is over the compensation limit.
- Contributions remain at their default (\$0.00).

**Earnings**

Appointment:\*  Agency Name : Appt Id - 93657214 : 2022-02-19 : Miscellaneous : Regular

Transaction Type:\*

Pay Rate Type:  Pay Rate: \$

Reportable Earnings: \$

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

Total Hours Worked:

Special Compensation: \$88.80 [View Special Compensation](#)

**Contributions**

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

Tax Deferred Employer Paid Member Contributions: \$

**Service Credit Purchase Deductions**

Taxed Member Paid Contribution: \$  Tax Deferred Member Paid Contribution: \$

[Return to View Records page](#) [View Employee Rate Summary](#)

Step 11

Select the **Save and Exit** button.

**You have completed this scenario.**

## Scenario 10: Verify Monthly Pay Rates Over Threshold

Your agency must verify all pay rates reported over \$25,000 per month in myCalPERS. In addition, all pay rates reported over \$35,000 per month require verification by both your agency and CalPERS prior to the payroll records being posted. Once a pay rate is verified, it does *not* need to be reverified until the pay rate increases by over 5%.

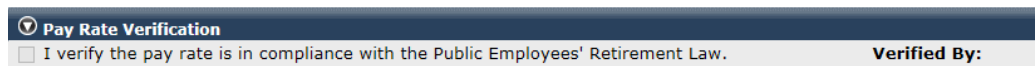
### Step Actions

#### Verify Records with Monthly Pay Rates Over \$25,000 (3 steps)

Step 1 When the monthly pay rate reaches the first threshold (\$25,000), an error code CRB00249 will display at the top of the page.

---

Step 2 A new Pay Rate Verification section displays at the bottom of the payroll record that requires you to select the “I verify the pay rate is in compliance with the Public Employees’ Retirement Law” check box.



<b>Pay Rate Verification</b>	<b>Verified By:</b>
<input type="checkbox"/> I verify the pay rate is in compliance with the Public Employees' Retirement Law.	

Step 3 The error will clear, and the payroll record will process. If the pay rate increases by 5%, complete the same steps to reverify.

---

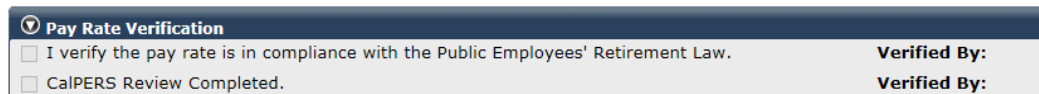
#### Verify Records with Monthly Pay Rates Over \$35,000 (3 steps)

Step 1 If the monthly pay rate reaches the second threshold, an error code CRB00250 will display at the top of the page.

---

Step 2 A new Pay Rate Verification section displays at the bottom of the payroll record that requires you to select the “I verify the pay rate is in compliance with the Public Employees’ Retirement Law” check box.

You must also email [payrateverification@calpers.ca.gov](mailto:payrateverification@calpers.ca.gov) with the member’s name, CalPERS ID, job title, and your agency’s publicly available salary schedule for CalPERS to verify the pay rate reported.



<b>Pay Rate Verification</b>	<b>Verified By:</b>
<input type="checkbox"/> I verify the pay rate is in compliance with the Public Employees' Retirement Law.	
<input type="checkbox"/> CalPERS Review Completed.	<b>Verified By:</b>

Step 3 Once the pay rate is verified by CalPERS, the error will clear, and the payroll record can be processed. If the pay rate increases by 5%, complete the same steps to reverify.

**You have completed this scenario.**

---

## Unit 5: Process an Earned Period Payroll Report

In this unit, you will learn how to submit a payroll report.

Earned period reports must be submitted and posted on or before 30 calendar days following the last day of the earned period. You must also reconcile unposted payroll records within this time (refer to Unit 6). If you do not, a \$200 late reporting fee will be assessed as well as an additional \$200 fee for each unreported or unconfirmed retired annuitant.

If the report suspends due to records with errors, you can accept the valid records to post to member accounts. You have 60 days from the date you first selected the **Process Report** button to correct the errors and reprocess the report; otherwise, a \$200 late correction fee will be assessed on day 61 and every 30 days after until the report is in Posted status.

### Payroll Report Statuses

Select the **Reporting** global navigation tab to display the Manage Reports page. The Work on Existing Payroll reports section displays earned period and adjustment reports. The Status column indicates if a report is pending release, processing, posted, or suspended.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report	Report Name
	08/03/2024 - 08/16/2024	Pending Release	Payroll - Earned Period	09/15/2024	11/19/2024			No	Test Earne
	07/20/2024 - 08/02/2024	Suspended	Payroll - Earned Period	09/01/2024	08/16/2024			No	
	07/06/2024 - 07/19/2024	Posted	Payroll - Earned Period	08/18/2024	08/05/2024	08/13/2024	08/13/2024	No	

- **Pending Release** – A new report that needs to be processed and validated.
- **Processing** – The **Process Report** button has been selected, and the report is undergoing a level two validation.
- **Posted** – Processing is complete, and the report contains no errors or arrears records. All records have posted to the members’ accounts. An adjustment is required to make any corrections.
- **Suspended** – Processing is complete, and the report contains at least one error or arrears record. You may select the **Accept Valid Records** button to post valid records, then address errors, and select the **Process Report** button again to reprocess the report.

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## Scenario 1: Review the Payroll Report Detail Page

Within the Work On Existing Payroll Reports section, select one of the **Earned Period / Adjustment Date** links to access the Payroll Report Detail Page.

Work On Existing Payroll Reports										
Program: CalPERS		Fiscal Year:		Report Status:		Report Type: Payroll - Earned Period		Report Posted Date:		Display
Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report	Report Name	
	<a href="#">10/17/2024 - 10/25/2024</a>	Pending Release	Payroll - Earned Period	11/24/2024	11/19/2024			No		
	<a href="#">08/03/2024 - 08/16/2024</a>	Pending Release	Payroll - Earned Period	09/15/2024	11/19/2024			No	Test Earne	
	<a href="#">07/20/2024 - 08/02/2024</a>	Suspended	Payroll - Earned Period	09/01/2024	08/16/2024			No		
	<a href="#">07/06/2024 - 07/19/2024</a>	Posted	Payroll - Earned Period	08/18/2024	08/05/2024	08/13/2024	08/13/2024	No		

Within the Payroll Report Detail page, the payroll report statistics (number of records reported, posted, unposted, and with errors) of the selected payroll report display.

**Report Details**

Report Type: Payroll - Earned Period      Earned Period: 12/28/2019 - 01/10/2020      Report Status: Pending Release

Program: CalPERS      Schedule Name:      Test Report: No

Report Name:

**Report Statistics**

Total	Records Reported	Records Posted	Unposted Records	Records with Errors
	84	0	84	1

**Records Statistics**

Record Type	Records Reported	Records Posted	Unposted Records	Records with Errors
Payroll Record	84	0	84	1
Service Credit Purchase Deduction Record	5	0	5	0

**Payroll Report Summary**

Uncategorized earnings and contributions can occur in reports in Pending Release status that have not been processed or in reports in Suspended status that have records in error. Total Contributions is the sum of reported contributions and deductions, excluding reported earnings.

Rate Plan Identifier	Member Category	Total Member Earnings	Member Contributions	Employer Contributions	1959 Survivor Contribution	Service Credit Purchase	Total Contributions
25846	Safety - Police	\$8,514.46	\$532.47	\$1,582.24	\$0.00	\$0.00	\$2,114.71
	Uncategorized	\$340,410.35	\$30,578.74	\$0.00	\$9.30	\$331.63	\$30,919.67
	<b>Totals</b>	<b>\$348,924.81</b>	<b>\$31,111.21</b>	<b>\$1,582.24</b>	<b>\$9.30</b>	<b>\$331.63</b>	<b>\$33,034.38</b>

**Generate Report**

Report Type:

Payroll Record Errors Report

Payroll Record Exceptions Report

Generate Report

**Override Report Details**

The report name you enter is not saved until you select the Update Report Name button.

Report Name:

Update Report Name

## Accept Valid Records

The **Accept Valid Records** button is displayed for specific report types (Earned, Adjustment, and Gap) if the report has at least one record with a Valid or Arrears Apply – Employer Paid status, the Rate Plan Identifier reflects uncategorized, and there are no records in Posted status.

- You may select the **Accept Valid Records** button once per report to post any Valid records. In addition to all valid records posting, records in the report will be categorized to their appropriate rate plan identifier and displayed in the Payroll Report Summary section.
- Arrears Apply – Employer Paid records can still be edited and removed from the report after selecting the **Accept Valid Records** button; however, they cannot be edited or removed once the **Process Report** button has been selected.

Report Statistics				
Accept Valid Records	Records Reported	Records Posted	Unposted Records	Records with Errors
Total	109	0	109	0

## Payroll Report Summary

Review the total contributions of a payroll report without having to use the **Generate Report Summary** button to generate a Cognos report.

**Payroll Report Summary**

Uncategorized earnings and contributions can occur in reports in Pending Release status that have not been processed or in reports in Suspended status that have records in error. Total Contributions is the sum of reported contributions and deductions, excluding reported earnings.

Rate Plan Identifier	Member Category	Total Member Earnings	Member Contributions	Employer Contributions	1959 Survivor Contribution	Service Credit Purchase	Total Contributions
25846	Safety - Police	\$8,514.46	\$532.47	\$1,582.24	\$0.00	\$0.00	\$2,114.71
Uncategorized		\$340,410.35	\$30,578.74	\$0.00	\$9.30	\$331.63	\$30,919.67
<b>Totals</b>		<b>\$348,924.81</b>	<b>\$31,111.21</b>	<b>\$1,582.24</b>	<b>\$9.30</b>	<b>\$331.63</b>	<b>\$33,034.38</b>

## Override Report Details

You can give your report a name to identify it more easily. Complete the Report Name field, select the **Update Report Name** button, then select the **Yes** button to confirm the name. A report name cannot be changed after the report has posted.

**Override Report Details**

The report name you enter is not saved until you select the Update Report Name button.

**Report Name:**

## Cancel Report

You can cancel reports without posted records for the following:

- For file-upload reports: Test or non-test report prior to a new file submission for the same earned period
- Adjustment report created in error
- Copy-forwarded report that is pending release or in suspended status

## Generate Report Summary

The **Generate Report Summary** button is at the bottom left of the page and is used to review a financial data summary of the payroll report in a Cognos report. Refer to Scenario 2 in this unit.

[Return to Manage Reports](#)

## Scenario 2: Process an Earned Period Payroll Report

You will select the **Process Report** button from either the Payroll Report Detail page or the View Payroll Records page. Selecting the **Process Report** button initiates a series of validations on the records within the report.

### System Logic

After selecting the **Process Report** button, Arrears Apply – Employer Paid records cannot be removed from the report, and they will not post to myCalPERS until the 30-day appeal period expires. If you waive your appeal rights so the records will post, refer to the [myCalPERS Employment Certification Functionality \(PDF\)](#) student guide.

### Step Actions

#### Process From the Payroll Report Detail Page (5 steps)

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

Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report	Report Name
	07/05/2024 – 07/19/2024	Pending Release	Payroll - Earned Period	08/18/2024	10/29/2024			No	Jones, J
	06/13/2024 – 06/13/2024	Posted	Payroll - Adjustments		06/13/2024	06/13/2024		No	Jones, J

Step 3 At the bottom left of the Payroll Report Detail page, select the **Process Report** button.

**Override Report Details**  
The report name you enter is not saved until you select the Update Report Name button.

Report Name:

Update Report Name

**Process Report** Cancel Report Generate Report Summary [View Records](#)

[Return to Manage Reports](#)

Step 4 Under the Confirmation Page section, select the **Yes** button to confirm the request to process the report.

**Confirmation Page**  
Do you want to process this report?

Yes No

Step 5 Select the **Save & Exit** button.

**You have completed this scenario.**



## Process From the View Payroll Records Page (5 steps)

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

Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.

The screenshot shows the 'Reporting' section of the system. The 'Work On Existing Payroll Reports' section is active, displaying a table of reports. The table has columns for Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, Test Report, and Report Name. Two rows are visible, with the 'Earned Period / Adjustment Date' column highlighted in red for both rows: '07/05/2024 - 07/19/2024' and '06/13/2024 - 06/13/2024'.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report	Report Name
	07/05/2024 - 07/19/2024	Pending Release	Payroll - Earned Period	08/18/2024	10/29/2024			No	
	06/13/2024 - 06/13/2024	Posted	Payroll - Adjustments		06/13/2024	06/13/2024		No	Jones, J

Step 3 At the bottom right of the Payroll Report Detail page, select the **View Records** link to access the records within the report.

The screenshot shows the 'Override Report Details' page. It contains a text input field for 'Report Name' and an 'Update Report Name' button. Below the input field are buttons for 'Process Report', 'Cancel Report', and 'Generate Report Summary'. A 'View Records' link is highlighted with a red box at the bottom right of the page.

[View Records](#)

Step 4 At the bottom left of the page, select the **Process Report** button.

The screenshot shows the bottom left of the page. It includes a pagination bar with 'Showing records 1 - 25 | First << Previous 1 2 3 4 5 Next >> Last | View Max'. Below the pagination bar are buttons for 'Select All', 'Delete', 'Edit Selected Records', and 'Save Selection'. At the bottom, there are buttons for 'Process Report' (highlighted with a red box) and 'Generate Report Summary'.

[Process Report](#) [Generate Report Summary](#)

Step 5 Under the Confirmation Page section, select the **Yes** button to confirm the request to process the report.

The screenshot shows the 'Confirmation Page' section. It contains a text input field with the question 'Do you want to process this report?'. Below the input field are two buttons: 'Yes' and 'No'.

[Yes](#) [No](#)

**You have completed this scenario.**

## Scenario 3: Error List, Payroll Exception, and Payroll Summary Reports

Within the Payroll Report Detail page, you will run three reports:

- **Error List Report:** Lists Error records and error descriptions. File upload reporters use this report to identify the records with errors that need to be corrected or deleted.
- **Payroll Exception Report:** Lists Valid with Exception records and exception descriptions.
- **Payroll Report Summary:** Lists the report statistics and financial summary for the earned period report. You may select the **Earned Period/Payroll Adjustment Date** link to review the Contribution Detail Report to review the record details.

### System Logic

The Error List Report and the Payroll Exception Report will not retrieve pending validation and suspended records. Before running these reports, you need to validate each record (open the record and save) to update the status from Pending Validation.

### Step Actions (6 steps)

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

Step 2 Within the Work On Existing Payroll Reports section, select the appropriate **Earned Period / Adjustment Date** link.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report	Report Name
	<a href="#">07/06/2024 - 07/19/2024</a>	Pending Release	Payroll - Earned Period	08/18/2024	10/29/2024			No	
	<a href="#">06/13/2024 - 06/13/2024</a>	Posted	Payroll - Adjustments		06/13/2024	06/13/2024		No	Jones, J

Step 3 Which report do you want to run?

**Error List Report or the Payroll Exception Report:** Continue to step 4.

**Payroll Summary Report:** Skip to step 6.

Step 4 Within the Generate Report section, select the **Payroll Record Errors Report** or the **Payroll Record Exceptions Report** radio button.

**Generate Report**

**Report Type:**

Payroll Record Errors Report

Payroll Record Exceptions Report

Generate Report

Step 5 Select the **Generate Report** button.

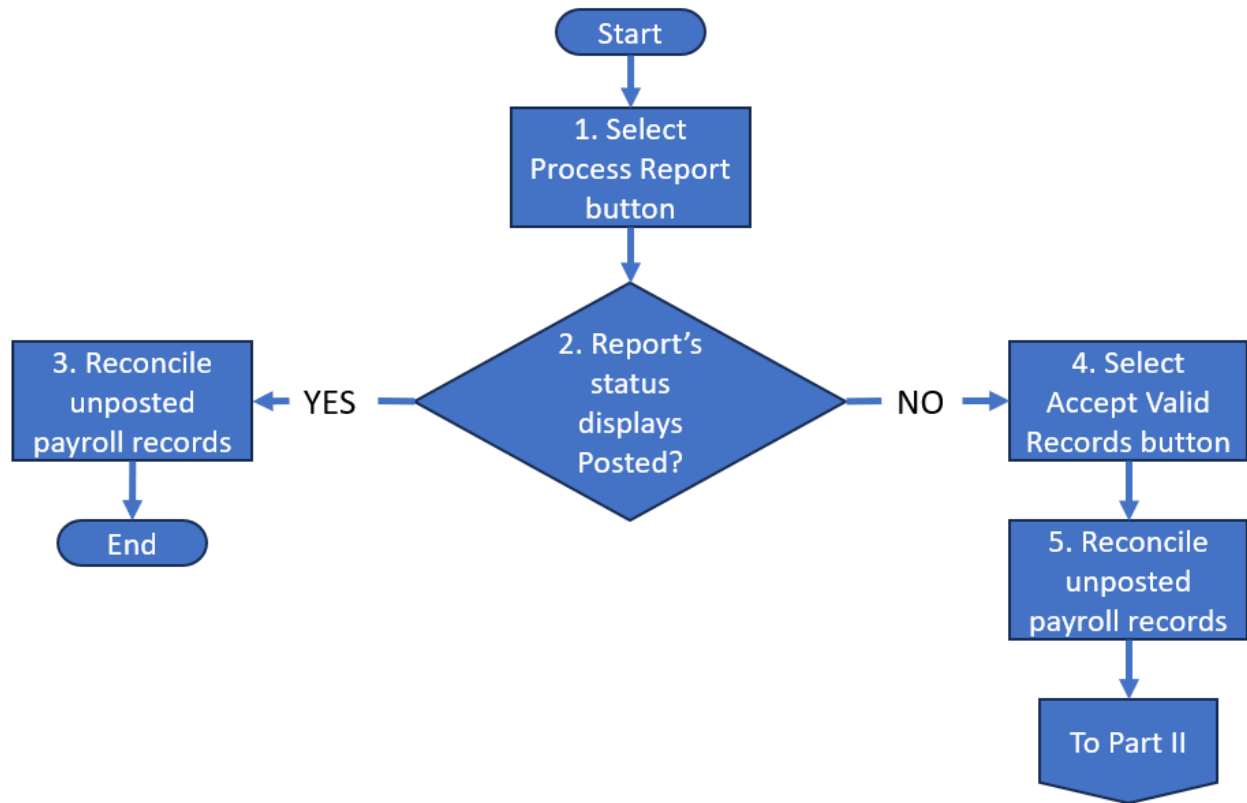
Step 6 At the bottom of the page, select the **Generate Report Summary** button to access the Payroll Report Summary as a Cognos report. This report will allow you to run the Contribution Detail Report for each rate plan.

**You have completed this scenario.**

## Payroll Report Processing Flowcharts

### Step Actions (8 steps)

Part I: Complete Within 30 Days of the Earned Period End Date



Step 1 Select the **Process Report** button (refer to Unit 5, Scenario 1).

Step 2 Does the report's status display Posted?

**Yes:** Continue to step 3.

**No:** Skip to step 4.

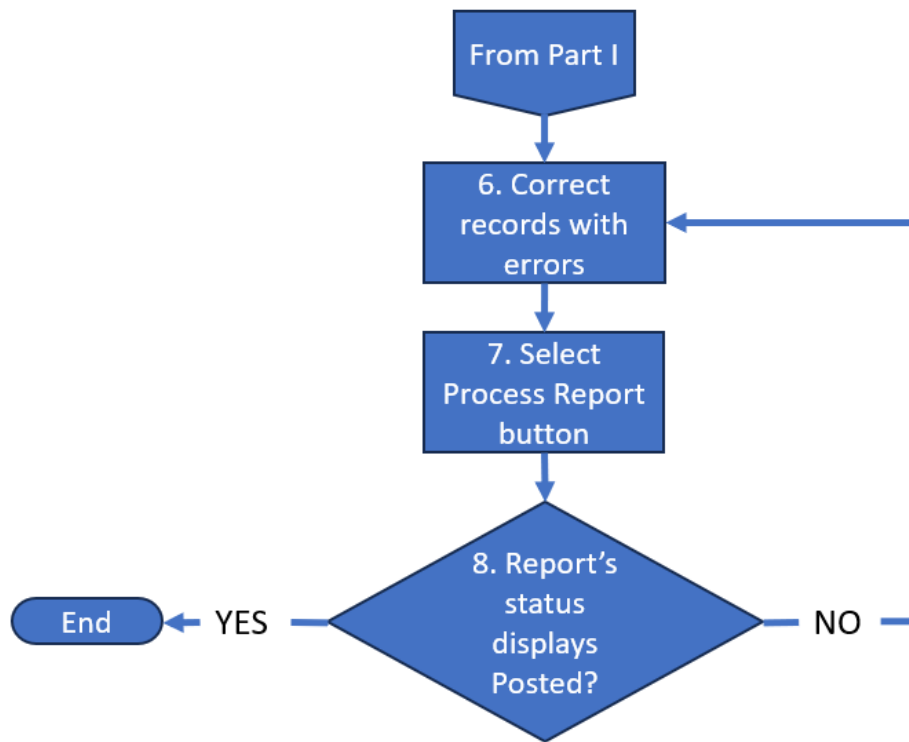
Step 3 Reconcile unposted payroll records (refer to Unit 6).

**You have completed this scenario.**

Step 4 Select the **Accept Valid Records** button.

Step 5 Reconcile unposted payroll records (refer to Unit 6).

Part II: Complete Within 60 Days of First Selecting the Process Report Button



Step 6 Correct records with errors in the report.

---

Step 7 Select the **Process Report** button to reprocess the report.

---

Step 8 Does the report's status display Posted?

**No:** Return to step 6.

**Yes:** You have completed this scenario.

---

## Unit 6: Reconcile Unposted Payroll Records

In this unit, you will learn how to use the **Payroll Schedule** local navigation link to reconcile your appointments that are missing payroll. Each earned period displays any active appointments that did not have payroll reported, so you can address them (confirm the unposted payroll or process an adjustment).

### System Logic

- In lieu of using the **Confirm Unposted Payroll** button, report zero payroll to proactively address when an employee has no earnings (refer to Unit 4, Scenario 4).
- Transactions completed outside of the Payroll Schedule page (e.g., posting payroll adjustment records or updating their appointment) will update the list after a nightly batch.
- If you have the Business Partner Retirement Enrollment access role, you may use the **Maintain Enrollment** button to update an appointment (refer to the [myCalPERS Retirement Appointment Reconciliation \(PDF\)](#) student guide, Unit 2).

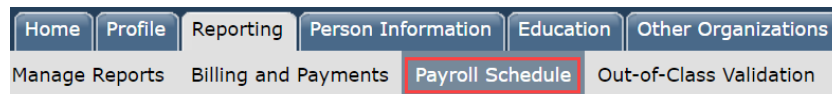
### Best Practices

- Save time by waiting to reconcile your payroll until at least one day after your payroll report posts, because only the appointments missing payroll will display.
- After payroll has been reconciled, continue to check if the **View** link displays under the Participants with Unposted Payroll column due to a retroactive new enrollment.

### Step Actions (7 steps)

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

Step 2 Select the **Payroll Schedule** local navigation link.



Step 3 Within the Existing Payroll Schedules section, select the **View Periods** link for the appropriate payroll schedule.



Step 4 Within the Payroll Periods section, select the **Display** button. You may need to change the Fiscal Year drop-down field option beforehand.



Step 5 Under the Participants with Unposted Payroll column, select the appropriate **View** link.

Payroll Periods							
Fiscal Year: 2023/2024 <input type="button" value="Display"/>							
Earned Period	Report Due Date	Report Submitted	Report Post Date	Report Status	Extension Status	Exemption Status	Participants with Unposted Payroll
06/08/2024-06/21/2024	07/21/2024						<a href="#">View</a>
05/25/2024-06/07/2024	07/07/2024						<a href="#">View</a>
05/11/2024-05/24/2024	06/23/2024	06/07/2024		Suspended			<a href="#">View</a>
04/27/2024-05/10/2024	06/09/2024	05/28/2024	06/05/2024	Posted			<a href="#">View</a>

**Note:** The **View** link displays when there is at least one appointment to reconcile. **View** links will display for future earned periods because payroll has not been initiated for those periods yet.

Step 6 Within the Participants with Unposted Payroll section, select the appropriate **Participant CalPERS ID** checkboxes for the employees with unposted payroll. Use the Search for Participants with Unposted Payroll section to filter the list if necessary.

Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Last Reported Payroll Record Status	Rate Plan	Projected Member Contributions	Projected Employer Contributions
<input type="checkbox"/>	0123456789 Al Bidany, Aleh C.	93657214	Active	Active	No	Valid	27415	\$0.00	\$0.00
<input type="checkbox"/>	1234567890 Al Bidany, Elizabeth A.	24655630	Active	Active	No	Valid	899	\$0.00	\$0.00

**Note:**

- Maintaining the appointments or confirming unposted payroll within the reconciliation page automatically updates the list.
- An employee’s appointment with an On Leave event won’t be listed if the leave:
  - Is less than six months.
  - Has an end leave date, regardless of the length of the leave.
- You can select the **Generate Excel Report** button at the bottom left of the page to run a report listing the participants before you start confirming unposted payroll.

Step 7 Select the **Confirm Unposted Payroll** button.

Participants with Unposted Payroll									
Payroll has not been posted for the following participants. Please report payroll or select the applicable appointments to confirm payroll is not reportable or maintain the enrollment.									
<a href="#">Select All</a>									
Maintain Enrollment: <input type="checkbox"/> Confirm Unposted Payroll <input checked="" type="checkbox"/>									
Show 25 entries									
Showing 1 to 25 of 132 entries									
<div style="text-align: right;"> <a href="#">First</a> <a href="#">Previous</a> <input type="text" value="1"/> <a href="#">2</a> <a href="#">3</a> <a href="#">4</a> <a href="#">5</a> <a href="#">6</a> <a href="#">Next</a> <a href="#">Last</a> </div>									
Participant CalPERS ID	Name	Appt ID	Appt Status	Member Account Status	Retired Annuitant	Last Reported Payroll Record Status	Rate Plan	Projected Member Contributions	Projected Employer Contributions
<input checked="" type="checkbox"/>	0123456789 Al Bidany, Aleh C.	93657214	Active	Active	No	Valid	27415	\$0.00	\$0.00
<input checked="" type="checkbox"/>	1234567890 Al Bidany, Elizabeth A.	24655630	Active	Active	No	Valid	899	\$0.00	\$0.00

**Note:** The Confirmation of No Payroll Contributions Reportable Report can be run to review the participants who were confirmed with no payroll, which employee confirmed them, and the confirmation date.

**You have completed this scenario.**

## Unit 7: Add Payroll Schedules

In this unit, you will learn how to request a new payroll schedule, such as monthly, semi-monthly, bi-weekly, or quadri-weekly.

Changes in the earned period dates must be approved by CalPERS in advance. After CalPERS approves a new payroll schedule, you will be contacted within five business days, and then you may report payroll using the new schedule.

### Step Actions (6 steps)

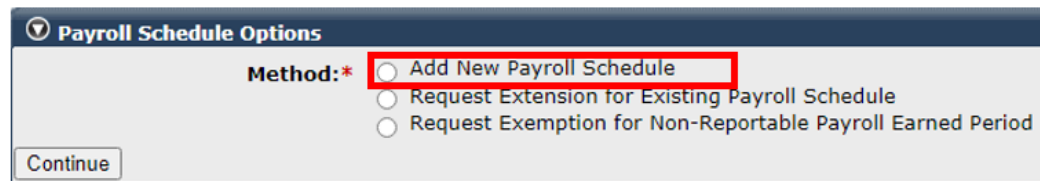
Step 1 Select the **Reporting** global navigation tab.

---

Step 2 Select the **Payroll Schedule** local navigation link.

---

Step 3 Within the Payroll Schedule Options section, select the **Add New Payroll Schedule** radio button.



Payroll Schedule Options

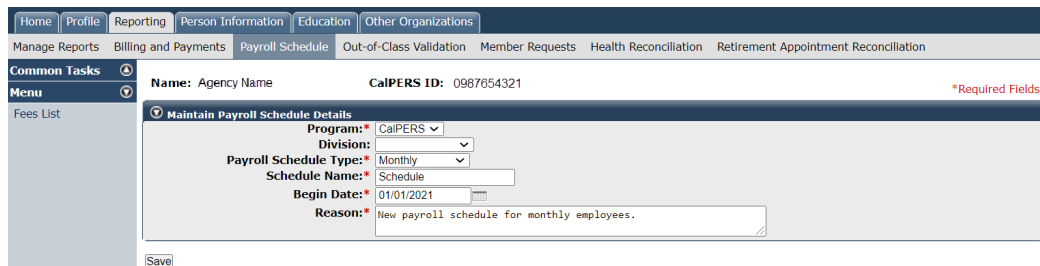
Method:\*  Add New Payroll Schedule  
 Request Extension for Existing Payroll Schedule  
 Request Exemption for Non-Reportable Payroll Earned Period

Continue

Step 4 Select the **Continue** button.

---

Step 5 Complete the Maintain Payroll Schedule Details section.



Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation Member Requests Health Reconciliation Retirement Appointment Reconciliation

Common Tasks

Menu

Fees List

Name: Agency Name CalPERS ID: 0987654321 \*Required Fields

Maintain Payroll Schedule Details

Program:\* CalPERS  
Division:  
Payroll Schedule Type:\* Monthly  
Schedule Name:\* Schedule  
Begin Date:\* 01/01/2021  
Reason:\* New payroll schedule for monthly employees.

Save

Step 6 Select the **Save** button.  
**You have completed this scenario.**

---

## Unit 8: Request Due-Date Extension or Waiver

In this unit, you will learn how to request a payroll extension and a waiver.

Payroll extension requests must be made at least 10 business days prior to the payroll due date and no more than 30 days before the due date. Otherwise, myCalPERS will not provide an extension request option.

If myCalPERS does not provide an extension request option and a late fee has been assessed for the selected earned period, you may request a waiver of penalties through the waiver request and dispute process.

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## Scenario 1: Request a Due-Date Extension

You will submit an extension request for an earned period payroll report.

**Note:** If an extension is granted for a report, it's due date cannot be extended again.

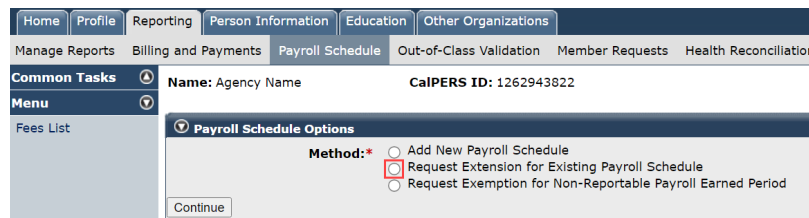
### Step Actions (10 steps)

#### Part I: Submit an Extension Request

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

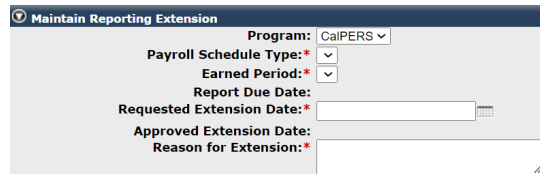
Step 2 Select the **Payroll Schedule** local navigation link.

Step 3 Within the Payroll Schedule Options section, select the **Request Extension for Existing Payroll Schedule** radio button.



Step 4 Select the **Continue** button.

Step 5 Complete the Maintain Reporting Extension section.



Step 6 Select the **Save** button.

#### Part II: Within 2-5 Business Days, Review Request Status.

Step 7 Select the **Reporting** global navigation tab.

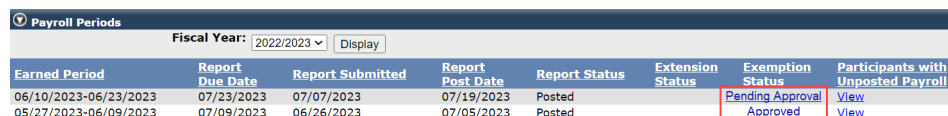
Step 8 Select the **Payroll Schedule** local navigation link.

Step 9 Within the Existing Payroll Schedules section, select the **View Periods** link for the appropriate payroll schedule.



Type	Name	Begin Date	End Date	Status	View Periods
Bi-Weekly		06/19/1982		Approved	<a href="#">View Periods</a>

Step 10 Within the Payroll Periods section, review the status of your request under the Exemption Status column.



Earned Period	Report Due Date	Report Submitted	Report Post Date	Report Status	Extension Status	Exemption Status	Participants with Unposted Payroll
06/10/2023-06/23/2023	07/23/2023	07/07/2023	07/19/2023	Posted		Pending Approval	<a href="#">View</a>
05/27/2023-06/09/2023	07/09/2023	06/26/2023	07/05/2023	Posted		Approved	<a href="#">View</a>

**You have completed this scenario.**

## Scenario 2: Request a Waiver

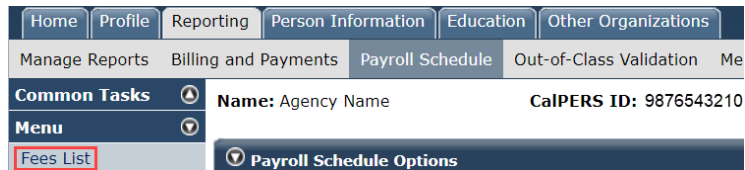
### Step Actions (12 Steps)

#### Part I: Submit the Waiver Request

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

Step 2 Select the **Payroll Schedule** local navigation link.

Step 3 Select the **Fees List** left-side link.



Step 4 Within the Fee List section, select the **Fee ID** link.

The screenshot shows the 'Fee List' section with a dropdown for 'Programs' set to 'California Public Employees' Retirement System' and a 'Fiscal Year' dropdown set to '2022/2023'. A 'Display' button is visible. The table below has columns for Fee Type, Fee Reason, Division, Fee ID, Date Assessed, Fee Amount, and Fee Status. The first row has 'Admin Fee - Retired Annuitant Late Fee' as the Fee Type and Reason, 'Agency Name' as the Division, and '100000016855547' as the Fee ID, which is highlighted with a red box. The Date Assessed is 07/06/2022, Fee Amount is \$0.00, and Fee Status is 'Open'. The second and third rows have 'Admin Fee - Late Payroll Reporting' as the Fee Type and Reason, 'Agency Name' as the Division, and Fee IDs '100000016868354' and '100000016878392' respectively. Their Date Assessed are 07/12/2022 and 07/26/2022, Fee Amount is \$0.00, and Fee Status is 'Paid'.

**Note:** You can only request a waiver if Fee Status column displays *Open*.

Step 5 Are you requesting a waiver of an Admin Fee - Retired Annuitant Late Fee?

**Yes:** Select the checkboxes for the listed employees, then continue to step 6.

**No:** Continue to step 6.

Step 6 Complete the Reason for Appeal field.

The screenshot shows the 'Fee Appeal Details' form. The 'Reason for Appeal:\*' field is a large text area. Below the form is a 'Save' button and a link to 'Generate Fee Status Report'.

**Note:** Selecting the **Generate Fee Status Report** link will run the Retired Annuitant Late Fee Status Report if appealing a Retired Annuitant Late Fee.

Step 7 Select the **Save** button.

#### Part II: Review Request Status

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

Step 9 Select the **Payroll Schedule** local navigation link.

Step 10 Select the **Fees List** left-side link.

The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are links for Manage Reports, Billing and Payments, Payroll Schedule, and Out-of-Class Validation. A 'Common Tasks' section contains a 'Fees List' link highlighted with a red box. Other elements include 'Name: Agency Name', 'CalPERS ID: 9876543210', and a 'Payroll Schedule Options' button.

Step 11 Select the **Display** button. You may need to change the Fiscal Year drop-down field option beforehand.

The screenshot shows the 'Fee List' header. It includes a dropdown for 'Programs' (California Public Employees' Retirement System), a 'Fiscal Year' dropdown (2024/2025), and a 'Display' button highlighted with a red box. Below the header is a table with columns: Fee Type, Fee Reason, Division, Fee ID, Date Assessed, Fee Amount, and Fee Status. The text 'No results found.' is visible below the table.

Step 12 Select the **Fee ID** link to review the reason for the approval or rejection. **Note:** The Fee Status column indicates the status of the waiver request.

The screenshot shows the 'Fee List' table with the 'Fee ID' column highlighted in a red box. The table contains the following data:

Fee Type	Fee Reason	Division	Fee ID	Date Assessed	Fee Amount	Fee Status
Admin Fee - Retired Annuitant Late Fee	Admin Fee - Retired Annuitant Late Fee		<a href="#">100000017247764</a>	08/03/2023	\$0.00	Closed
Admin Fee - Retired Annuitant Late Fee	Admin Fee - Retired Annuitant Late Fee		<a href="#">100000017308299</a>	10/05/2023	\$0.00	Closed
Admin Fee - Late Payroll Reporting	Missing report 02/03/2024 - 02/16/2024 fees	Agency Name	<a href="#">100000017489274</a>	03/19/2024	\$0.00	Waived
GASB 68 Reporting Services Fee	GASB 68 Reporting Services Fee		<a href="#">100000017504898</a>	04/11/2024	\$0.00	Closed
GASB 68 Reporting Services Fee	GASB 68 Reporting Services Fee		<a href="#">100000017504899</a>	04/11/2024	\$0.00	Closed
Admin Fee - Retired Annuitant Late Fee	Admin Fee - Retired Annuitant Late Fee		<a href="#">100000017530951</a>	05/03/2024	\$0.00	Closed
Admin Fee - Late Payroll Reporting	Missing report 03/30/2024 - 04/12/2024 fees	Agency Name	<a href="#">100000017545962</a>	05/14/2024	\$0.00	Waived

**You have completed this scenario.**

## CalPERS Resources

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

- [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
- [Self-Paced Online Classes](#) (log in to myCalPERS, select the **Education** global navigation tab, then the **Classes** local navigation link)
  - Business Rules
    - The Importance of Accurately Reporting Payroll
    - Special Compensation for Public Agencies & Schools
  - myCalPERS
    - Copy Forward an Earned Period Report
    - Maintain Payroll Records
    - Manage Records in a Payroll Report
    - Report a Zero Payroll Record
    - Reporting & Adjusting Special Compensation
    - Reporting Earnings Over the Compensation Limit
    - Request Extension for an Earned Period Report
    - Adjustment Reports
    - View Service & Transaction History
    - Service Credit Purchase & Arrears
    - Out-of-Class Reporting
- [myCalPERS Technical Requirements](#)  
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements
- [Special Compensation Reportability Table](#)  
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > Special Compensation Reportability Table
- [Circular Letters](#)  
**Pathway:** CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Agency & Schools Reference Guide \(PDF\)](#)  
**Pathway:** CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [Public Employees' Retirement Law \(PERL\)](#)  
**Pathway:** CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)

- [myCalPERS Employer Reports \(Cognos\) Catalog](#)

**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

Some common reports that are run for payroll:

- Collective Outstanding Payroll Error Report
- Collective Outstanding Payroll Exception Report
- Collective Outstanding Payroll Records by Participant Report
- Confirmation of No Payroll Contributions Reportable Report
- Contribution Summary for a Fiscal Year Report
- Priority Unposted Payroll Report
- Reported Compensation by Calendar Year Detail Report
- Reported Compensation by Calendar Year Summary Report
- Reported Member Summary Report
- Reported Member Detail Report
- Automatic Permanent Separation-Potential Appointments Report
- Automatic Permanent Separation – Completed Appointments Report
- To review a list of employees at risk of permanent separation due to unposted payroll:
  - Business Partner Info Report
  - Participant Appointment Details Report
  - Business Partner On Leave Report

# CalPERS Contacts

## Email

- To contact the [Employer Educators](#) for questions and inquiries, 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 [CalPERS Membership Unit](#) for questions regarding membership eligibility or if a non-contributory employee does not have the Earned Period No Contribution and No Service in the Transaction Type drop-down list, email **membership\_reporting@calpers.ca.gov**.
- To contact the [Audit Compliance and Resolution Unit](#) for questions regarding Publicly Available Pay Schedules, reportable payrates and special compensation, labor policies or agreements, Out-of-Class reporting, and compensation reportability related to settlement agreements, email **mou\_review@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 select the **Submit Inquiry** link to submit a question or request.