

myCalPERS Retirement Contract

Student Guide

August 10, 2024



Introduction

This student guide will assist you with reviewing and amending your retirement contract.

Disclaimer

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

System Access

If myCalPERS does not allow you to perform 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 summarize the laws defined by the California Public Employees' Retirement Law (PERL).

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Unit 1: Review Your Agency's Retirement Contract

Within this unit, you will review your contract benefits and employer rates by member category and benefit level.

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Scenario 1: Review Your Contract Benefits

Step Actions

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Retirement Contract Information section, select the **View Benefit Information** link.



Step 4 Within the Benefit Summary section, select the appropriate **Member Category** check box(es).

The screenshot shows the Benefit Summary section. The 'Miscellaneous' member category check box is selected. Other categories include Safety - Fire and Safety - Police. A 'Display Benefit Levels' button is visible at the bottom.

Member Category	Number of Benefit Levels	Merger	Additional Benefits
<input checked="" type="checkbox"/> Miscellaneous	(3)	Yes	Yes
<input type="checkbox"/> Safety - Fire	(3)	No	Yes
<input type="checkbox"/> Safety - Police	(3)	No	Yes

Step 5 Select the **Display Benefit Levels** button.

Step 6 Within the Benefit Levels section, select a **Benefit Level** radio button.

The screenshot shows the Benefit Levels section. The 'First Level - Misc.' radio button is selected. Other benefit levels include Second Level - Misc. and PEPR New Members - Misc. A 'Display Benefit Provisions' button is visible at the bottom.

Benefit Level	Enroll Effective Date	Formula	Member Rate	SSA	Contribution Modification	Pooled	Rate Plan Identifier	Status
<input checked="" type="radio"/> First Level - Misc.	08/01/1965	2.7% @ 55	8.0	None	No	899	Active	
<input type="radio"/> Second Level - Misc.	06/08/2012	2.5% @ 55	8.0	None	No	30555	Active	
<input type="radio"/> PEPR New Members - Misc.	01/01/2013	2% @ 62	6.75	None	No	27415	Active	

Step 7 Select the **Display Benefit Provisions** button.

Step 8 Review the Provision Details section.

The screenshot shows the Provision Details section. The 'Effective As Of Date' is set to 05/14/2018. The 'Provision Type' is set to 'Military/Relocation Credit'. The table below lists the provisions.

Effective As Of Date: 05/14/2018 Display Provision Type: View All

Provision Type	Provision Name	Government Code Section	Effective Begin Date	Effective End Date
Military/Relocation Credit	Public Service Credit for Peace Corps, AmeriCorps VISTA, or AmeriCorps Service	Section 21023.5	05/24/2002	
SR Benefit Formula	2% @ 55 Formula for Local Miscellaneous Members	Section 21354	12/16/2000	
Death Benefits	Pre-Retirement Option 2W Death Benefit	Section 21548	12/16/2000	
Death Benefits	Pre Retirement Death Benefits to continue after remarriage of survivor	Section 21551	01/01/2000	

Step 9 Repeat steps 4-8 to review another benefit level's provisions.

You have completed this scenario.

Scenario 2: Review Retirement Contract Merger Information

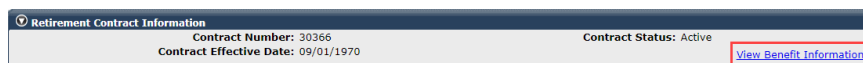
Step Actions

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Retirement Contract Information section, select the **View Benefit Information** link.



Step 4 Within the Benefit Levels section, review the merger information.

Member Category	Number of Benefit Levels	Merged Benefit Levels	Additional Benefits	Terminated
<input checked="" type="checkbox"/> Miscellaneous	(3)	Yes	Yes	No
<input type="checkbox"/> Safety - Fire	(3)	No	Yes	No
<input type="checkbox"/> Safety - Police	(3)	No	Yes	No

Benefit Level	Enroll Effective Date	Formula	Employee Rate	SS Type	Contribution Modification	Pooled	Rate Plan Identifier
<input checked="" type="radio"/> First Level - Misc.	08/01/1965	2.7% @ 55	8.0	None		No	123
<input type="radio"/> Second Level - Misc.	06/08/2012	2.5% @ 55	8.0	None		No	456
<input type="radio"/> PEPR New Members - Misc.	01/01/2013	2% @ 62	7.25	None		No	12345

Benefit Level	Source Agency	Merged Date	Full or Partial Merge	Partial Merge Type	Pooled	Rate Plan Identifier
<input type="radio"/> First Level - Misc.	Toon Town	12/29/1975	Full			
<input type="radio"/> First Level - Misc.	City of Tomorrow	12/29/1975	Full		No	

Step 5 Select a **Benefit Level** radio button.

Benefit Level	Source Agency	Merged Date	Full or Partial Merge	Partial Merge Type	Pooled	Rate Plan Identifier
<input type="radio"/> Misc.	Merger	12/29/1975	Partial	Individual		
<input checked="" type="radio"/> First Level - Misc.	East Bay Redevelopment Agency	12/29/1975	Full		No	32131

Provision Details

This page lists the benefit provisions effective for selected member category during the specified date range. You can use the **Effective As Of Date** Textbox and **Display** Button to view different date ranges of effective provisions.

Effective As Of Date: Provision Type:

Show 25 rows Search:

Provision Type	Provision Name	Government Code Section	Effective Begin Date	Effective End Date
SR Benefit Formula	2.7% @ 55 Formula for Local Miscellaneous Members	Section 21354.5	06/19/2004	
Death Benefits	Pre-Retirement Death Benefits to Continue After Remarriage of Survivor	Section 21551	01/01/2000	
Cost of Living Allowance	2% Annual Cost-of-Living Allowance Increase	Section 21329	04/01/1971	
Death Benefits	\$500 Retired Death Benefit	Section 21620	12/01/1969	
Final Compensation Period	Final Compensation 3 Years	Section 20037	08/01/1965	
Prior Service	Prior Service	Section 20055	08/01/1965	

Step 6 Select the **Display Benefit Provisions** button to review the details.

You have completed this scenario.

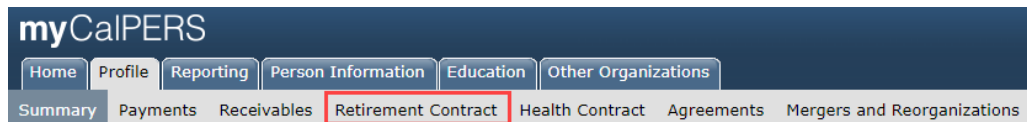
Scenario 3: Review Your Employer Rate

Employer contributions are determined by annual valuations. These valuations are based on the benefit formulas the agency provides and the employee groups covered. Refer to unit 2 on how to access your valuation report. Visit the [Public Agency Required Employer Contributions page](#) to review your agency’s contribution rate(s).

Step Actions

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select **Retirement Contract** local navigation link.



Step 3 Within the Rate Summary section, select the **View More Records>>** link.

The screenshot shows the 'Rate Summary' section of the myCalPERS website. The 'View More Records>>' link is highlighted with a red box. Below the link is a table with the following data:

Member Category	Benefit Level	Effective Date	Rate Plan Identifier	Effective Employer Rate	Employee Rate	Employee Rate Modifier	Net Employee Rate	Total Rate
Miscellaneous	First	08/01/1965	899	11.302%	8%	0%	8%	19.302%
Miscellaneous	Second	06/08/2012	30555	11.302%	8%	0%	8%	19.302%
Miscellaneous	PEPRA	01/01/2013	27415	11.302%	6.75%	0%	6.75%	18.052%
Safety - Fire	First	07/01/1976	30556	14.151%	9%	4%	13%	27.151%

Step 4 Within the Rate Summary section, review the employer rates for each member category and benefit level.

The screenshot shows the 'Rate Summary' section of the myCalPERS website. The table displays the following data:

Member Category	Benefit Level	Effective Date	Rate Plan Identifier	Effective Employer Rate	Employee Rate	Employee Rate Modifier	Net Employee Rate	Total Rate
Miscellaneous	First	06/01/1948	161	7.783%	7%	0%	7%	14.783%
Miscellaneous	PEPRA	01/01/2013	26088	7.783%	6.25%	0%	6.25%	14.033%
Safety - County Peace Officer	First	06/01/1948	30266	16.959%	9%	0%	9%	25.959%
Safety - County Peace Officer	Second	01/09/1982	30265	16.959%	9%	0%	9%	25.959%
Safety - County Peace Officer	Third	11/05/2011	30267	16.959%	9%	0%	9%	25.959%
Safety - County Peace Officer	PEPRA	01/01/2013	25137	16.959%	10.75%	0%	10.75%	27.709%
Safety - Fire	First	06/01/1948	162	16.959%	9%	0%	9%	25.959%

Step 5 Do you want to review the employer rate history?

Yes: Select the appropriate **rate** link under the Effective Employer Rate column and continue to step 6.

No: You have completed this scenario.

Step 6 Review the Rate History section.

▼ Rate History					
Rate Effective Date	Rate Type	Total Employer Rate	Effective Employer Rate	Valuation Report	Rate Replaced
07/01/2018	Annual	7.972	7.972	View	No
07/01/2017	Annual	7.783	7.783	View	No
07/01/2016	Annual	13.257	13.257	View	No
07/01/2015	Annual	12.846	12.846	View	No
07/01/2014	Annual	11.776	11.776	View	No
07/01/2013	Annual	10.926	10.926	View	No
07/01/2012	Annual	10.769	10.769	View	No
07/01/2011	Converted Rate	10.856	10.856		No
07/01/2010	Converted Rate	10.125	10.125		No
07/01/2009	Converted Rate	9.87	9.87		No
07/01/2008	Converted Rate	9.841	9.841		No
09/01/2007	Converted Rate	9.916	9.916		No
07/01/2007	Converted Rate	9.9	9.9		No
07/01/2006	Converted Rate	9.716	9.716		No
07/02/2005	Converted Rate	0.0	0.0		No
07/01/2004	Converted Rate	7.004	7.004		No
07/01/2003	Converted Rate	2.219	2.219		No
07/01/2002	Converted Rate	0.0	0.0		No
07/01/2001	Converted Rate	0.0	0.0		No
12/16/2000	Converted Rate	0.0	0.0		No
07/01/2000	Converted Rate	0.0	0.0		No
07/01/1999	Converted Rate	0.0	0.0		No
07/01/1998	Converted Rate	3.055	3.055		No
07/01/1997	Converted Rate	4.673	4.673		No
07/01/1996	Converted Rate	5.005	5.005		No

Showing records 1 - 25 | First << Previous 1 2 3 Next >> Last | [View Max](#)

Step 7 To view more history, select the **View Max** link at the bottom right.

Step 8 Do you want to review more details for each rate?

Yes: Select the appropriate **rate** link under the Total Employer Rate column to review rate details and continue to step 9.

No: You have completed this scenario.

Step 9 Review the Rate Details section.

▼ Rate Details	
Rate Plan Identifier: 161	Normal Cost Rate: 7.972%
Member Category: Miscellaneous	Unfunded Actuarial Liability Rate: 0.0%
Risk Pool: No	Phase Out Rate: 0.0%
Superfunded: No	Side Fund Rate: 0.0%
	Class 1 Surcharge Rate: 0.0%
Pre-paid: No	Total Employer Rate: 7.972%
0% Rate Prepayment Amount: \$0.00	Prepaid Rate Adjustment: 0.0%
Rate Plan Effective Date: 07/01/2018	Effective Employer Rate: 7.972%
Unfunded Accrued Liability Monthly Amount: \$1,972,019.00	Unfunded Accrued Liability Prepayment Amount: \$22,837,091.00

You have completed this scenario.

Scenario 4: Review Your Exclusions

The Exclusions section displays classification(s) or groups of employees not covered by your retirement contract.

Step Actions

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Exclusions section, select the **View More Actions & Records>>** link.

Exclusion	Exclusion Effective Date	Removal Date	Removed Prospectively
Other - MEMBERS OF BOARDS AND COMMISSIONS APPOINTED BY MAYOR AND CITY COUNCIL	09/01/1970		No
Other - BOARD OF EDUCATION EMPLOYEES AND MEMBERS	09/01/1970		No
Other - PERSONS EMPLOYED ON PROVISIONAL APPOINTMENTS PURSUANT TO THE CITY OF CHARTER, SECTION 903, OTHER THAN THE CITY OF EMPLOYEES WHO ARE MEMBERS OF THE PUBLIC EMPLOYEES' RETIREMENT SYSTEM AND ACCEPT SUCH APPOINTMENT AFTER SEPTEMBER 1, 1970	09/01/1970		No
Other - Permanent part-time employees hired prior to September 1, 1970 were excluded from membership in the Public Employees' Retirement System prior to July 4, 1981 because they were not eligible for membership in the Municipal Employees' Retirement System and could not execute a waiver of rights pursuant to paragraph 4.a. of this contract. This exclusion shall not apply to those employees in employment of public agency on or after July 4, 1981.	07/04/1981		No

Step 4 Review the expanded Exclusions section.

Exclusion	Exclusion Effective Date	Removal Date	Removed Prospectively
Other - MEMBERS OF BOARDS AND COMMISSIONS APPOINTED BY MAYOR AND CITY COUNCIL	09/01/1970		No
Other - BOARD OF EDUCATION EMPLOYEES AND MEMBERS	09/01/1970		No
Other - PERSONS EMPLOYED ON PROVISIONAL APPOINTMENTS PURSUANT TO THE CITY OF CHARTER, SECTION 903, OTHER THAN THE CITY OF EMPLOYEES WHO ARE MEMBERS OF THE PUBLIC EMPLOYEES' RETIREMENT SYSTEM AND ACCEPT SUCH APPOINTMENT AFTER SEPTEMBER 1, 1970	09/01/1970		No
Other - Permanent part-time employees hired prior to September 1, 1970 were excluded from membership in the Public Employees' Retirement System prior to July 4, 1981 because they were not eligible for membership in the Municipal Employees' Retirement System and could not execute a waiver of rights pursuant to paragraph 4.a. of this contract. This exclusion shall not apply to those employees in employment of public agency on or after July 4, 1981.	07/04/1981		No
Other - Fire employees hired prior to July 1, 1976 who will remain members of the City of Fire and Police Retirement System and who did not waive their rights under the plan as of October 13, 2001.	10/13/2001		No
Other - Police employees hired prior to July 1, 1976 who will remain members of the City of Fire and Police Retirement System and who did not waive their rights under that plan as of June 21, 2003.	06/21/2003		No
Other - Miscellaneous employees hired prior to September 1, 1970 who remained members of the Municipal Employees Retirement System and who did not waive their rights under that plan as of June 19, 2004.	06/19/2004		No
Other - Miscellaneous EMPLOYEES, OTHER THAN ELECTIVE OFFICERS, WHO ENTERED PUBLIC AGENCY SERVICE PRIOR TO SEPTEMBER 1, 1970 AND WHO HAVE NOT EXECUTED AND FILED, IN ACCORDANCE WITH RESOLUTIONS OF THE CITY COUNCIL, A WAIVER OF RIGHTS UNDER THE MUNICIPAL EMPLOYEE RETIREMENT SYSTEM PRIOR TO SEPTEMBER 1, 1970, OR IN THE PERIODS FEBRUARY 15, 1973 THROUGH MARCH 15, 1973, INCLUSIVE, OR NOVEMBER 24, 1975 THROUGH DECEMBER 19, 1975, INCLUSIVE, OR MAY 15, 1981 THROUGH JUNE 15, 1981, INCLUSIVE, THE EXCLUSION OF A MEMBER EXECUTING AND FILING SUCH WAIVER IN THE PERIOD MAY 15, 1981, THROUGH JUNE 15, 1981, INCLUSIVE, SHALL CEASE AND HIS MEMBERSHIP SHALL BE EFFECTIVE ON JULY 4, 1981.	09/01/1970	06/20/2004	No
Other - Police officers hired prior to 7/1/1976.	07/01/1976	06/22/2003	No
Other - Fire fighters hired prior to 7/1/1976.	07/01/1976	10/14/2001	No
Other - POLICE OFFICERS	09/01/1970	07/02/1976	No
Other - FIRE FIGHTERS	09/01/1970	07/02/1976	No

You have completed this scenario.

Unit 2: Annual Actuarial Valuation Report

Actuarial valuation reports are available in August for the following fiscal year.

Your agency's actuarial valuation reports can be accessed on the [Public Agency Actuarial Valuation Reports](#) page.

Step Actions

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Rate Summary section, select the **View More Records>>** link.

Rate Summary									View More Records>>
Member Category	Benefit Level	Effective Date	Rate Plan Identifier	Effective Employer Rate	Employee Rate	Employee Rate Modifier	Net Employee Rate	Total Rate	View Cost Share Rate Summary
Miscellaneous	First	08/01/1965	899	11.54%	8%	0%	8%	19.54%	
Miscellaneous	Second	06/08/2012	30555	11.54%	8%	0%	8%	19.54%	
Miscellaneous	PEPRA	01/01/2013	27415	11.54%	7.25%	0%	7.25%	18.79%	
Safety - Fire	First	07/01/1976	30556	14.53%	9%	4%	13%	27.53%	

Step 4 Select the appropriate **rate** link under the Effective Employer Rate column.

Member Category	Benefit Level	CBU	Effective Date	Rate Plan Identifier	Effective Employer Rate	Employee Rate	Employee Rate Modifier	Net Employee Rate	Total Rate
Miscellaneous	First Level		08/01/1965	899	0%	8%	0%	8%	8%
Miscellaneous	Second Level		06/08/2012	30555	0%	8%	0%	8%	8%
Miscellaneous	PEPRA New Members		01/01/2013	27415	0%	6.75%	0%	6.75%	6.75%
Safety - Fire	First Level		07/01/1976	30556	-4%	9%	4%	13%	9%
Safety - Fire	Second Level		02/08/2012	30558	-4%	9%	4%	13%	9%
Safety - Fire	PEPRA New Members		01/01/2013	25845	0%	12%	0%	12%	12%

Step 5 Select the valuation report **View** link for the appropriate rate effective date.

Rate Effective Date	Rate Type	Total Employer Rate	Effective Employer Rate	Valuation Report	Rate Replaced
07/01/2015	Rate Adjustment	32,928	0.0		No
07/05/2014	Rate Adjustment	30,159	30.072	View	No
07/01/2014	Annual	30,159	30.159	View	No
07/01/2013	Annual	27,295	27.295	View	No
03/01/2013	Rate Adjustment	25,115	24.248	View	No
07/01/2012	Annual	25,115	25.115	View	No
06/08/2012	Converted Rate	23,604	23.604		No
07/01/2011	Converted Rate	23,604	23.604		No

You have completed this scenario.

Unit 3: Cost Share

Your agency may add cost sharing to your retirement contract based on member categories, bargaining units, or benefit levels. As a contracting agency, cost sharing permits employees to share a portion of their employer's pension cost.

Access the [Public Agency & Schools Reference Guide](#) (PDF) for more information.

Contact [CalPERS](#) by sending an email to **pensioncontracts@calpers.ca.gov** before following the steps in this unit. A pension contract analyst will contact you to provide further instructions.

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- Scenario 2: Associate an Employee to a Collective Bargaining Unit (CBU) – Page 12
- Scenario 3: Submit Cost Share Adjustment Memorandum Of Understanding (MOU) – Page 13

Scenario 1: Add a Collective Bargaining Unit (CBU)

Step Actions

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

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Select the **Maintain CBU** left-side navigation link.

The screenshot shows the Retirement Contract Information page. The 'Maintain CBU' link is highlighted in the left-side navigation menu. The main content area displays contract information and a table of contract events.

Retirement Contract Information		Contract Number: 30366		Contract Status: Active		
		Contract Effective Date: 09/01/1970		View Benefit Information		
Contract Event Summary			View More Actions & Records»			
Contract Event	Status	Member Category	Submission Date	Effective Date	Requested By	Amendment Status
Amendment	Approved	Safety - Police Miscellaneous	09/22/2016	12/31/2016		Completed
Amendment	Approved	Safety - Police	04/06/2016	07/30/2016		Completed
Amendment	Approved	Safety - Fire	08/26/2014	12/20/2014		Completed
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012		Completed

Step 4 Select the **Add New** button in the CBU List section.

The screenshot shows the CBU List section. The 'Add New' button is highlighted. The table below lists CBU codes and names.

CBU Code	CBU Name
01	Port SEIU
02	Port SEIU - 8%
02	Port - Local 21 6.75%
02	SEIU - 8%
03	Port - Local 21 6.75%
04	City SEIU 8%
05	City IFPTE 8%

Step 5 Complete the CBU Details section.

The screenshot shows the CBU Details form. The 'CBU Code' and 'CBU Name' fields are highlighted. The form includes 'Save', 'Save & Add Another', and 'Clear' buttons.

Step 6 Do you need to add another collective bargaining unit?

Yes: Select the **Save & Add Another** button and return to step 5.

No: Continue to step 7.

Step 7 Select the **Save** button.

You have completed this scenario.

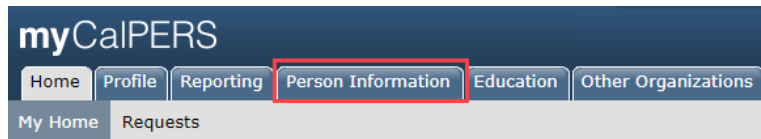
Scenario 2: Associate an Employee to a Collective Bargaining Unit (CBU)

System Logic

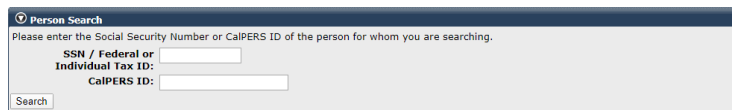
Each employee within a CBU that will have cost sharing must be associated to that CBU in myCalPERS.

Step Actions

Step 1 From the homepage, select the **Person Information** global navigation tab.

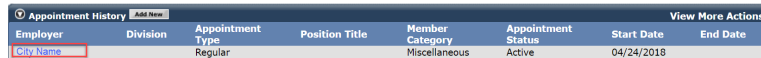


Step 2 Complete the Person Search section.

The screenshot shows the 'Person Search' form. It includes input fields for 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button is located at the bottom left of the form.

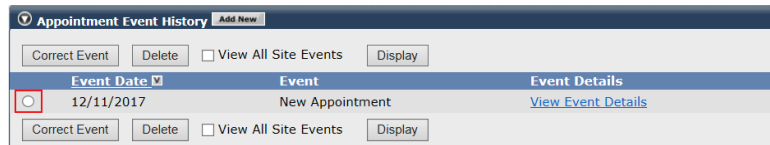
Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate active employer link.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date	View More Actions
City Name		Regular		Miscellaneous	Active	04/24/2018		

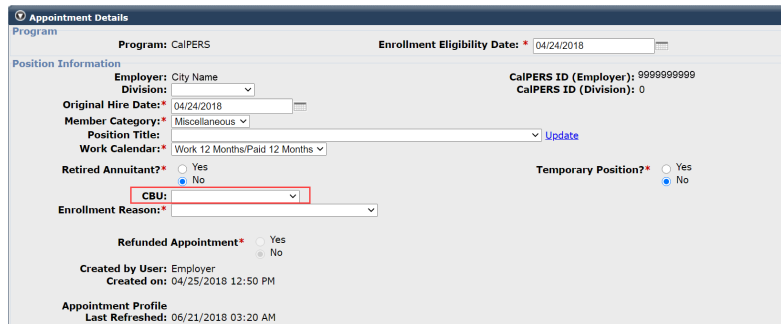
Step 5 Select the radio button of the most recent New Appointment or Appointment Change event.



Event Date	Event	Event Details
<input checked="" type="radio"/> 12/11/2017	New Appointment	View Event Details

Step 6 Select the **Correct Event** button.

Step 7 Within the Appointment Details section, update the CBU field.

The screenshot shows the 'Appointment Details' form. The 'CBU:' field is highlighted with a red box. Other fields include 'Program: CalPERS', 'Enrollment Eligibility Date: 04/24/2018', 'Original Hire Date: 04/24/2018', 'Member Category: Miscellaneous', 'Position Title', 'Work Calendar: Work 12 Months/Paid 12 Months', 'Retired Annuitant? No', 'Temporary Position? No', and 'Enrollment Reason:'. There are also buttons for 'Correct Event', 'Delete', and 'View All Site Events'.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 3: Submit Cost Share Adjustment Memorandum of Understanding (MOU)

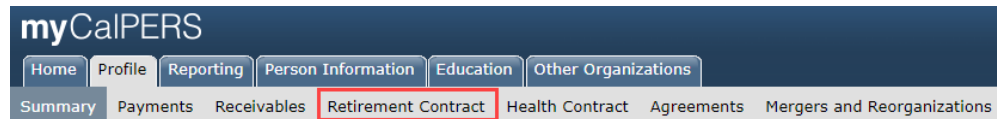
System Logic

- This optional benefit does not require an approved actuarial valuation before amending the retirement contract.
- Ensure copies of the **Cost Share Adjustment Cover Letter** and the **Cost Share Adjustment MOU** are uploaded separately.

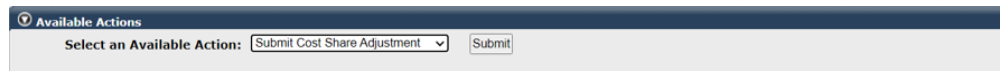
Step Actions

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.

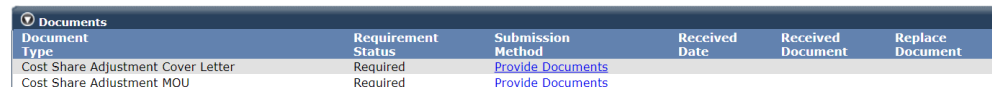


Step 3 At the bottom of the page within the Available Actions section, select the Submit Cost Share Adjustment option from the drop-down list.



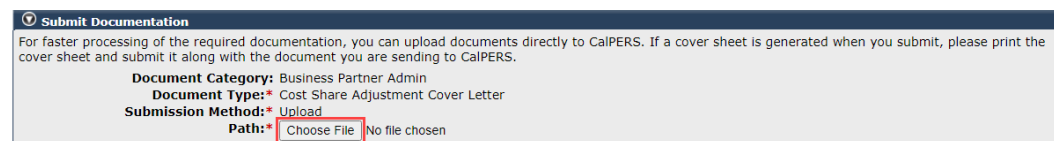
Step 4 Select the **Submit** button.

Step 5 Within the Documents section, select a **Provide Documents** link.



Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document
Cost Share Adjustment Cover Letter	Required	Provide Documents			
Cost Share Adjustment MOU	Required	Provide Documents			

Step 6 Within the Submit Documentation section, select the **Choose File** button.



The screenshot shows the Submit Documentation section. The 'Choose File' button is highlighted with a red box. The form includes the following fields:

- Document Category: Business Partner Admin
- Document Type*: Cost Share Adjustment Cover Letter
- Submission Method*: Upload
- Path*: Choose File No file chosen

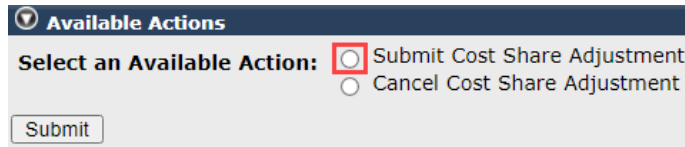
Step 7 Select your cover letter or MOU.

Step 8 Select the **Open** button.

Step 9 Select the **Submit** button.

Step 10 Repeat steps 5-9 to upload your other document (cover letter or MOU).

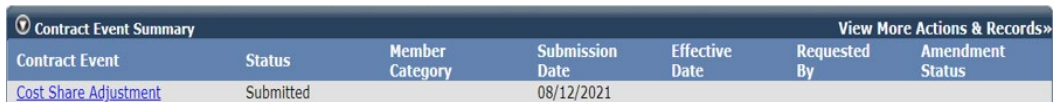
Step 11 Within the Available Actions section, select the **Submit Cost Share Adjustment** radio button.



The screenshot shows a dark blue header with a dropdown arrow and the text "Available Actions". Below the header, the text "Select an Available Action:" is followed by two radio buttons. The first radio button, labeled "Submit Cost Share Adjustment", is selected and highlighted with a red square. The second radio button is labeled "Cancel Cost Share Adjustment". Below the radio buttons is a light gray button labeled "Submit".

Step 12 Select the **Submit** button.

Step 13 Within the Contract Event Summary section, verify that the cost share adjustment displays Submitted under the Status column.



The screenshot shows a table with a dark blue header and a light gray body. The header has a dropdown arrow and the text "Contract Event Summary" on the left, and "View More Actions & Records»" on the right. The table has seven columns: "Contract Event", "Status", "Member Category", "Submission Date", "Effective Date", "Requested By", and "Amendment Status". The first row of data has the following values: "Cost Share Adjustment", "Submitted", (blank), "08/12/2021", (blank), (blank), and (blank).

Contract Event	Status	Member Category	Submission Date	Effective Date	Requested By	Amendment Status
Cost Share Adjustment	Submitted		08/12/2021			

Step 14 A CalPERS pension contract analyst will contact you for the next steps in the process.

You have completed this scenario.

Unit 4: Review Retirement Contract Amendment Documents

After you have worked with a pension contract analyst to amend your contract, your initial contract amendment documents will be created and in myCalPERS within 30 calendar days.

Contents

- Scenario 1: Download and Submit Initial Contract Amendment Documents – Page 16
- Scenario 2: Submit Final Contract Amendment Documents – Page 18
- Scenario 3: Verify Amendment Approval Through myCalPERS – Page 20

Scenario 1: Download and Submit Initial Contract Amendment Documents

CalPERS will notify your agency (based on your agency’s preferred communication method) that the Initial Contract Amendment documents are available through myCalPERS.

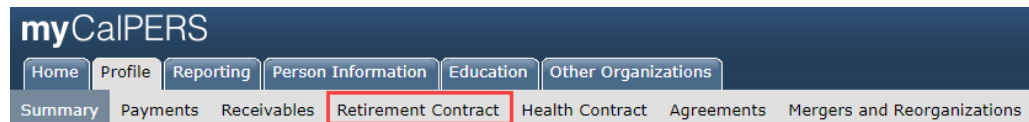
1. Download the Amendment Resolution of Intention Letter which provides instructions on completing a list of required documents and uploading them in myCalPERS.
2. Do not upload the cost share ballot(s) but save them at your agency in case of a future CalPERS review.
3. Complete and upload the Certification of Employee Election – Cost Share document.

Step Actions

Download Required Documents

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.

Contract Event Summary				View More Actions & Records»		
Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status	
Amendment	Amendment In Progress	Safety - Police	09/23/2015	09/23/2015		
Amendment	Approved	Safety - Fire Safety - Fire	08/26/2014	12/20/2014	Completed	
Amendment	Cancelled	Miscellaneous	09/23/2015	09/23/2015		
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012	Completed	

Step 4 Within the Documents section, select each **Download** link and print each document.

Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/ Template
Certification of Employee Election - Cost Share	Required	Provide Document				Download
Certification of Cost Share Form	Required	Provide Document				Download
Certification of PA Compliance with 7507	Required	Provide Document				Download
Certification of Governing Body Action Ordinance	Required	Provide Document				Download
Amendment Resolution of Intention	Required	Provide Document				Download
Cost Share Ballot for Amendment	Required	Provide Document				Download
Amendment To Contract	Required	Provide Document				Download
Cost Share Ballot for Amendment	Required	Provide Document				Download
Amendment Resolution of Intention Letter						Download
Cost Share Pre-Amendment MOU	Optional	Upload	05/31/2018	View Document	Replace	
Cost Share Pre-Amendment MOU	Optional	Upload	05/31/2018	View Document	Replace	
Cost Share Pre-Amendment Cover Letter	Optional	Upload	05/31/2018	View Document	Replace	

Complete Required Documents

Step 5 Follow the instructions in the Amendment Resolution of Intention Letter.

Step 6 Scan the completed documents to your computer.

Upload Required Documents

- Step 7 Select the **Profile** global navigation tab.
-
- Step 8 Select the **Retirement Contract** local navigation link.
-
- Step 9 Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.
-
- Step 10 Within the Documents section, complete each required document type by selecting each **Provide Document** link.

Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/ Template
Certification of Employee Election - Cost Share	Required	Provide Document				Download
Certification of Cost Share Form	Required	Provide Document				Download
Certification of PA Compliance with 7507	Required	Provide Document				Download
Certification of Governing Body Action Ordinance	Required	Provide Document				Download
Amendment Resolution of Intention	Required	Provide Document				Download
Cost Share Ballot for Amendment	Required	Provide Document				Download
Amendment To Contract	Required	Provide Document				Download
Cost Share Ballot for Amendment	Required	Provide Document				Download
Amendment Resolution of Intention Letter						Download
Cost Share Pre-Amendment MOU	Optional	Upload	05/31/2018	View Document	Replace	
Cost Share Pre-Amendment MOU	Optional	Upload	05/31/2018	View Document	Replace	
Cost Share Pre-Amendment Cover Letter	Optional	Upload	05/31/2018	View Document	Replace	

Submit Required Documents

- Step 11 Select the **Submit Initial Contract Amendment Documents** radio button.

Available Actions

Select an Available Action: *

Submit Initial Contract Amendment Documents

Submit Final Contract Amendment Documents

Cancel Amendment

- Step 12 Select the **Submit** button.
-
- You have completed this scenario.**
-

Scenario 2: Submit Final Contract Amendment Documents

After CalPERS receives the Initial Contract Amendment documents, within 10 business days, we will overnight mail a packet to your agency with the following:

- Instructional cover letter which explains which documents that must be submitted through myCalPERS and to return the original documents to CalPERS by mail

Note: Original signatures are required on all contract documents.

- Certification of Final Action of Governing Body, Form CON-5
- Two copies of the blue Amendment to Contract documents
- Pre-paid return envelope

Step Actions

Download

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

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.



Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status
Amendment	Amendment In Progress	Safety - Police	09/23/2015	09/23/2015	
Amendment	Approved	Safety - Fire	08/26/2014	12/20/2014	Completed
Amendment	Cancelled	Miscellaneous	09/23/2015	09/23/2015	
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012	Completed

Step 4 Within the Documents section, select the **Download** link for the Ordinance (city or county) or final resolution (all other public agencies).

Step 5 Print the document.

Complete

Step 6 Complete the Ordinance (city or county) or the final resolution (all other public agencies), Amendment to Contract, and Certification of Final Action of Governing Body, Form CON-5 documents.

Step 7 Scan the completed documents to your computer.

Upload

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

Step 9 Select the **Retirement Contract** local navigation link.

Step 10 Select the appropriate Contract Event **Amendment** link.

Contract Event Summary					View More Actions & Records>>	
Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status	
Amendment	Amendment In Progress	Safety - Police	09/23/2015	09/23/2015		
Amendment	Approved	Safety - Fire	08/26/2014	12/20/2014	Completed	
Amendment	Cancelled	Miscellaneous	09/23/2015	09/23/2015		
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012	Completed	

Step 11 Within the Submit Documentation section, complete each required document type by selecting each **Provide Document** link.

Submit

Step 12 Select the **Submit Final Contract Amendment Documents** radio button.

Available Actions

Select an Available Action: *

Submit Initial Contract Amendment Documents

Submit Final Contract Amendment Documents

Cancel Amendment

Step 13 Select the **Submit** button.

You have completed this scenario.

Scenario 3: Verify Amendment Approval Through myCalPERS

CalPERS will review all submitted documents. If the review is successful, we will approve the amendment and send both amendment documents to the appropriate authorized person.

Scenario

You will verify your agency's amendment status in myCalPERS.

Step Actions

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

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Contract Event Summary section, verify that the amendment displays Approved under the Status column.

Contract Event Summary					View More Actions»
Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status
Amendment	Approved	Miscellaneous Safety - Police	03/20/2018	07/08/2018	Completed
Contract Initiation	Active	Miscellaneous Safety - Fire Safety - Police	08/30/1967	08/31/1967	

You have completed this scenario.

Unit 5: Employer Paid Member Contributions (EPMC)

Contact CalPERS before following the steps in this unit. A pension contract analyst will contact you to provide further instructions.

Follow the step actions to:

- Adopt a resolution for EPMC for the first time
- Revise a resolution for EPMC on file by increasing or decreasing the EPMC amount

Step Actions

Download the CalPERS Resolution

Step 1 From the CalPERS website, locate the [Resolution for Employer Paid Member Contributions](#) document.

Pathway: CalPERS website > Forms & Publications: View All link > Search box: Resolution

The screenshot shows the CalPERS website interface. At the top, there is a navigation bar with the CalPERS logo and links for INVESTMENTS, NEWSROOM, CONTACT, and ABOUT. A search box is located on the right side of the navigation bar. Below the navigation bar, there is a secondary navigation bar with links for Home, Active Members, Retirees, and Employers, along with a 'my|CalPERS Log In' button. The main content area is titled 'Forms & Publications' and contains a search bar with the word 'Resolution' entered. Below the search bar, there is a list of search results. The first result is 'Resolution for Employer Paid Member Contributions (DOCX)', which is highlighted with a red box. Other results include 'Employer Resolution for Tax Deferred Deduction Plan for Service Credit Purchases (DOCX)', 'Resolution for Employer Paid Member Contributions with Time-in-Grade Exceptions (DOCX)', 'Resolution for Paying and Reporting the Value of Employer Paid Member Contributions (DOCX)', 'Resolution for Paying and Reporting the Value of Employer Paid Member Contributions with Time-in-Grade Exception (DOCX)', and 'Resolution to Tax Defer Member Paid Contributions - IRC 414(h)(2) Employer Pick-Up (DOCX)'. The page also shows a 'Filter Documents' sidebar on the left and a 'Showing 1 to 6 of 6 entries (filtered from 740 total entries)' message at the bottom.

Step 2 Select the **Resolution for Employer Paid Member Contributions (DOCX)** link.

Complete the Resolution

Step 3 Complete the Resolution for Employer Paid Member Contributions document, which must include the governing body's signature.

Step 4 Save the completed and approved resolution document to your computer.

Upload Resolution

Step 5 From the homepage, select the **Profile** global navigation tab.

Step 6 Select the **Retirement Contract** local navigation link.



Step 7 Within the Employer Resolutions/Written Labor Agreements section, select the **Add New** button.

Resolution Type	Status	Submission Date	Effective Date	Affected Group	Resolution Status
Tax-Deferred Member Contribution	Active	02/04/2013	01/01/2013		Completed
Two Year Additional Service Credit	Active	10/20/2009	06/03/2009		Completed
Two Year Additional Service Credit	Active	06/30/2009	06/03/2009		Completed
Employer Paid Member Contribution	Active	06/03/1996	06/04/1996		Completed

Step 8 Select the **Employer Paid Member Contribution** radio button.

Select Resolution/Agreement Type
Select Resolution/Agreement Type

Employer Paid Member Contribution
(EPMC) Resolution (Employers may select to pay a portion of the member contribution: Government Code 20691 or Report the Value of EPMC - 20636 (c)(4))

Tax-Deferred Member Contribution
Resolution (The member's contribution deduction is pre-taxed: Internal Revenue Code (IRC) 414 (h)(2))

Tax-Deferred Service Credit Purchase
Resolution (The member's service credit purchase deduction is pre-taxed)

Two Year Additional Service Credit
(Golden Handshake) Resolution (Selected members are granted additional service credit if they retire during a designated window period)

Special Compensation Written Labor Agreement
(Selected members will report different types of special compensation depending on the type of written labor agreement: California Code of Regulations (CCR) 571(a) and (b))

[Continue](#)

Step 9 Select the **Continue** button.

Step 10 Complete the Employer Paid Member Contributions EPMC Details section.

Employer Paid Member Contributions EPMC Details
EPMC Details

Please enter the details about your EPMC resolution.

Resolution Effective Date:

What Portion of the member contribution will be covered? *

Fixed Percent
 Relative Adjustment
 Dollar Adjustment

Fixed Percent(%): For example: If your members pay 7% member contributions, you can enter 7% to pay the entire contribution for your members.

Does the resolution include time-in-grade? (New hires must be vested within five years to be eligible for EPMC):*

Yes
 No

EPMC as Compensation

Will the value of EPMC be considered compensation? *

Yes
 No

[Save & Continue](#) [Clear](#)

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

Step 12 Within the Identify Covered Employees section, select a radio button.

Identify Covered Employees
Please identify the covered employees.

Select Members

Choose your method of selecting members below. You can include all of your employees or identify specific covered employees. *

Include all employees
 Identify specific group of covered employees

[Save & Continue](#) [Clear](#)

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

Step 14 Will this resolution cover all employees?
Yes: Skip to step 19.
No: Complete the Select Criteria section.

Select Criteria

Criteria Name:*

Please click the Select link to choose/modify criteria values for groups of employees.

Member Category: 0 selected [Select](#)

Collective Bargaining Unit: 0 selected [Select](#)

Position: 0 selected [Select](#)

Division: 0 selected [Select](#)

I need to identify a group of Employees not classified by the above criteria:*

Yes No

[Save & Continue](#) [Clear](#)

Step 15 Within the Select Criteria Values section, select one or all items in the Criteria Values box.

Select Criteria Values

Please select one or more values from the choices listed on the left and move them to the list on the right by selecting the > button. If you wish to move multiple choices, press and hold the Ctrl key as you select each choice with your mouse.

Criteria: Member Category

Criteria Values:

Safety - Police
Miscellaneous

Selected Criteria Values:

Safety - Fire

Add Criteria > [Add All Criteria](#)

Remove Criteria < [Remove All Criteria](#)

[Save](#)

Step 16 Select the **Add Criteria >** button.

Step 17 Select the **Save** button.

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

Step 19 Within the Documents section, select the Resolution for EPMC **Provide Document** link.

Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/Template
Memorandum of Understanding (MOU)	Required	Provide Document				Download
Resolution for EPMC	Required	Provide Document				Download

Step 20 Within the Submit Documentation section, choose the submission method for sending the approved resolution.

Submit Documentation

For faster processing of the required documentation, you can upload documents directly to CalPERS. If a cover sheet is generated when you submit, please print the cover sheet and submit it along with the document you are sending to CalPERS.

Document Category: Retirement Contract

Document Type: Resolution for EPMC

Submission Method:* Upload

Path:* [Browse...](#)

[Submit](#)

Step 21 Select the **Submit** button to upload the completed resolution document.

Step 22 Within the Documents section, select the Memorandum of Understanding (MOU) **Download** link.

Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/Template
Resolution for EPMC	Required	Upload	08/10/2018	View Document	Replace	Download
Memorandum of Understanding (MOU)	Required	Provide Document				Download

Step 23 Save the MOU to your computer.

Step 24 Close the MOU.

Step 25 Select the Memorandum of Understanding (MOU) **Provide Document** link.

Step 26 Complete the Submit Documentation section to attach the MOU.

Submit Documentation

For faster processing of the required documentation, you can upload documents directly to CalPERS. If a cover sheet is generated when you submit, please print the cover sheet and submit it along with the document you are sending to CalPERS.

Document Category: Retirement Contract
Document Type: Memorandum of Understanding (MOU)
Submission Method:
Path:

Step 27 Select the **Submit** button.

Submit Resolution

Step 28 Select the **Submit Resolution** radio button.

Available Actions

Select An Action:* Submit Resolution
 Cancel Resolution

Step 29 Select the **Submit** button.

Step 30 Verify that your resolution displays a Submitted status.

Thank you for your Resolution submission. CalPERS will notify you of when you may begin to report EPMC.

Resolution Type	Status	Submission Date	Effective Date	Affected Group	Resolution Status
Two Year Additional Service Credit	Active	06/30/2009	06/03/2009		Completed
Tax-Deferred Member Contribution	Active	01/05/2009	01/06/2009		Completed
Tax-Deferred Member Contribution	Active	02/04/2013	01/01/2013		Completed
Employer Paid Member Contribution	Active	06/03/1996	06/04/1996		Completed
Two Year Additional Service Credit	Active	10/20/2009	06/03/2009		Completed
Tax-Deferred Service Credit Purchase	Active	03/29/2009	03/30/2009		Completed
Tax-Deferred Member Contribution	Cancelled	01/24/2013	01/01/2013	Temp	
Employer Paid Member Contribution	Submitted	01/26/2016	01/01/2016	2016 EPMC	

You have completed this scenario.

Unit 6: Pay and Report the Value of Employer Paid Member Contributions (EPMC)

Contact CalPERS before following the steps in this unit. A CalPERS pension contract analyst will contact you to provide further instructions.

System Logic

Follow the step actions in this scenario to:

- Adopt a resolution for Paying and Reporting the Value of Employer Paid Member Contributions (EPMC) resolution for the first time
- Revise a resolution for Paying and Reporting the Value of EPMC on file by increasing or decreasing the EPMC amount

Step Actions

Download the CalPERS Resolution

Step 1 From the CalPERS website, locate the [Resolution for Paying and Reporting the Value of Employer Paid Member Contributions \(DOCX\)](#)

Pathway: CalPERS website > Forms & Publications: View All link > Search box: Resolution

The screenshot shows the CalPERS website interface. At the top, there is a navigation bar with the CalPERS logo and links for INVESTMENTS, NEWSROOM, CONTACT, and ABOUT. A search box is located on the right side of the navigation bar. Below the navigation bar, there is a secondary navigation bar with links for Home, Active Members, Retirees, Employers, and my|CalPERS Log In. The main content area is titled "Forms & Publications" and contains a search bar with the text "Resolution" entered. Below the search bar, there is a list of search results. The first result is "Resolution for Paying and Reporting the Value of Employer Paid Member Contributions (DOCX)", which is highlighted with a red box. To the left of the search results, there is a "Filter Documents" sidebar with a "Clear All" button and a list of filters under "Active Members". The filters include: All Active Members Documents (90), Beneficiaries (8), Community Property (3), Deferred Compensation (1), Health Benefits (13), Member News (5), Refunds & Reciprocity (3), Retirement Benefits (39), Service Credit (15), and Trusts & Power of Attorney (3). At the bottom of the search results, there is a pagination control showing "Showing 1 to 6 of 6 entries (filtered from 740 total entries)" and buttons for "Previous", "1", and "Next".

Step 2 Select the **Resolution for Paying and Reporting the Value of Employer Paid Member Contributions (DOCX)** document link.

Complete Resolution

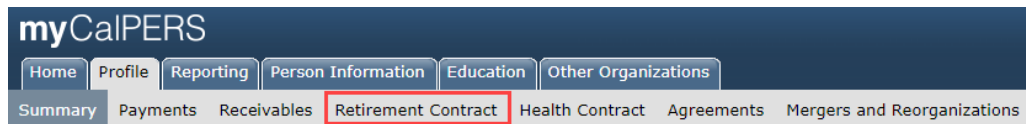
Step 3 Complete the **Resolution for Paying and Reporting the Value of Employer Paid Member Contributions** document, which must include your agency's governing body's signature.

Step 4 Scan the completed and approved resolution document to your computer.

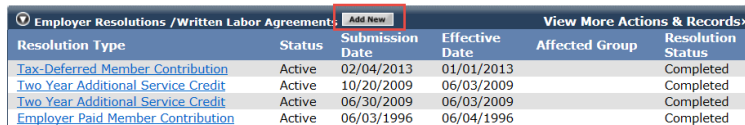
Upload Resolution

Step 5 From the homepage, select the **Profile** global navigation tab.

Step 6 Select the **Retirement Contract** local navigation link.



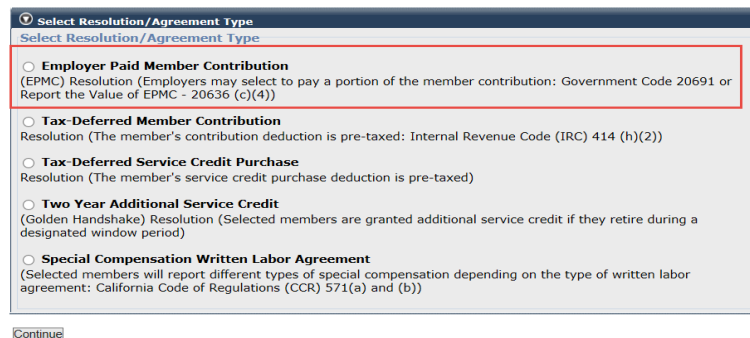
Step 7 Within the Employer Resolutions/Written Labor Agreements section, select the **Add New** button.



The screenshot shows the 'Employer Resolutions /Written Labor Agreements' section. The 'Add New' button is highlighted with a red box. Below the button is a table with columns: Resolution Type, Status, Submission Date, Effective Date, Affected Group, and Resolution Status.

Resolution Type	Status	Submission Date	Effective Date	Affected Group	Resolution Status
Tax-Deferred Member Contribution	Active	02/04/2013	01/01/2013		Completed
Two Year Additional Service Credit	Active	10/20/2009	06/03/2009		Completed
Two Year Additional Service Credit	Active	06/30/2009	06/03/2009		Completed
Employer Paid Member Contribution	Active	06/03/1996	06/04/1996		Completed

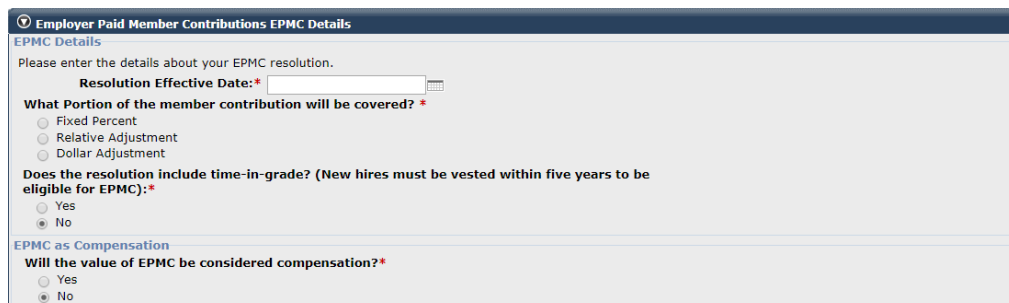
Step 8 Select the **Employer Paid Member Contribution** radio button.



The screenshot shows the 'Select Resolution/Agreement Type' form. The 'Employer Paid Member Contribution' radio button is highlighted with a red box. The form includes several other options: Tax-Deferred Member Contribution, Tax-Deferred Service Credit Purchase, Two Year Additional Service Credit, and Special Compensation Written Labor Agreement. A 'Continue' button is visible at the bottom.

Step 9 Select the **Continue** button.

Step 10 Complete the Employer Paid Member Contributions EPMC Details section.



The screenshot shows the 'Employer Paid Member Contributions EPMC Details' form. The form includes a date field for 'Resolution Effective Date', a radio button selection for 'What Portion of the member contribution will be covered?' (Fixed Percent, Relative Adjustment, Dollar Adjustment), a radio button selection for 'Does the resolution include time-in-grade?' (Yes, No), and a radio button selection for 'EPMC as Compensation' (Yes, No).

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

Step 12 Complete the Identify Covered Employees section.

Identify Covered Employees
Please identify the covered employees.
[Select Members](#)
Choose your method of selecting members below. You can include all of your employees or identify specific covered employees. *
 Include all employees
 Identify specific group of covered employees

[Save & Continue](#) [Clear](#)

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

Step 14 Will this resolution cover all employees?

Yes: Skip to step 19.

No: Complete the Select Criteria section, and then continue to step 15.

Select Criteria
Criteria Name: *

Please click the Select link to choose/modify criteria values for groups of employees.
Member Category: 0 selected [Select](#)
Collective Bargaining Unit: 0 selected [Select](#)
Position: 0 selected [Select](#)
Division: 0 selected [Select](#)

I need to identify a group of Employees not classified by the above criteria: *
 Yes No

[Save & Continue](#) [Clear](#)

Step 15 Select one or all items in the Criteria Values box.

Select Criteria Values
Please select one or more values from the choices listed on the left and move them to the list on the right by selecting the > button. If you wish to move multiple choices, press and hold the Ctrl key as you select each choice with your mouse.
Criteria: Member Category
Criteria Values:
Safety - Police
Miscellaneous
Selected Criteria Values:
Safety - Fire

[Add Criteria >](#) [Add All Criteria](#) [Remove Criteria <](#) [Remove All Criteria](#)

[Save](#)

Step 16 Select the **Add Criteria >** button.

Step 17 Select the **Save** button.

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

Step 19 Within the Documents section, select the Resolution for Paying and Reporting EMPC **Provide Document** link.

Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/Template
Resolution for Paying and Reporting EPMC	Required	Provide Document				Download
Memorandum of Understanding (MOU)	Required	Provide Document				Download

Step 20 Complete the Submit Documentation section to attach the recently approved and scanned resolution document.

Step 21 Select the **Submit** button to upload the completed resolution document.

Step 22 Select the Memorandum of Understanding (MOU) **Download** link.

Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/Template
Resolution for Paying and Reporting EPMC	Required	Upload	08/10/2018	View Document	Replace	Download
Memorandum of Understanding (MOU)	Required	Provide Document				Download

Step 23 Save the MOU in PDF.

Step 24 Close the MOU.

Step 25 Select the Memorandum of Understanding (MOU) **Provide Document** link.

Step 26 Complete the Submit Documentation section to attach the MOU.

Step 27 Select the **Submit** button to upload the MOU.

Submit Resolution

Step 28 Select the **Submit Resolution** radio button.

Step 29 Select the **Submit** button.

Step 30 Verify that the resolution displays a Submitted status.

Thank you for your Resolution submission. CalPERS will notify you of when you may begin to report EPMC.

Resolution Type	Status	Submission Date	Effective Date	Affected Group	Resolution Status
Two Year Additional Service Credit	Active	06/30/2009	06/03/2009		Completed
Tax-Deferred Member Contribution	Active	01/05/2009	01/06/2009		Completed
Tax-Deferred Member Contribution	Active	02/04/2013	01/01/2013		Completed
Employer Paid Member Contribution	Active	06/03/1996	06/04/1996		Completed
Two Year Additional Service Credit	Active	10/20/2009	06/03/2009		Completed
Tax-Deferred Service Credit Purchase	Active	03/29/2009	03/30/2009		Completed
Tax-Deferred Member Contribution	Cancelled	01/24/2013	01/01/2013	Temp	
Employer Paid Member Contribution	Submitted	01/26/2016	01/01/2016	2016 EPMC	

You have completed this scenario.

Unit 7: Two Years Additional Service Credit (Golden Handshake)

Contact CalPERS before following the steps in this unit and a pension contract analyst will contact you to provide further instructions.

Contents

- Scenario 1: Request Contract Amendment for Two Years Additional Service Credit – Page 30
- Scenario 2: Download and Submit Initial Contract Amendment Documents – Page 32
- Scenario 3: Submit Final Contract Amendment Documents – Page 34
- Scenario 4: Verify Amendment Approval – Page 36
- Scenario 5: Request a Golden Handshake Window Period – Page 36

Scenario 1: Request Contract Amendment for Two Years Additional Service Credit

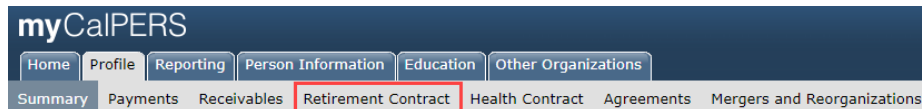
System Logic

Only one contract amendment can be submitted at a time.

Step Actions

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.

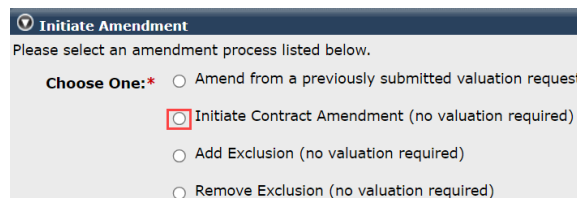


Step 3 At the bottom of the page, within the Available Actions section, select the *Request Amendment to Contract* option from the drop-down list.



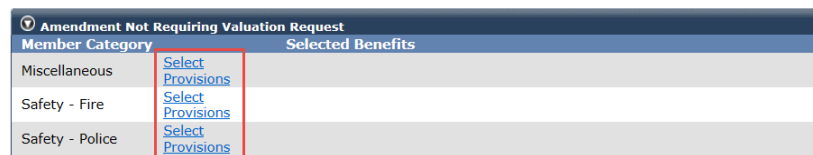
Step 4 Select the **Submit** button.

Step 5 Select the **Initiate Contract Amendment (no valuation required)** radio button.

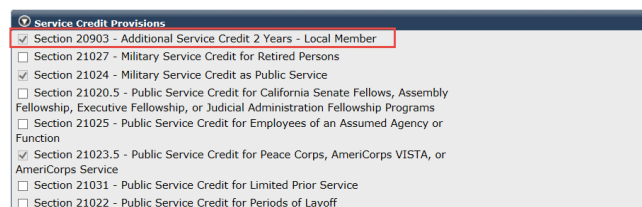


Step 6 Select the **Continue** button.

Step 7 Within the Amendment Not Requiring Valuation Request section, select the **Select Provisions** link for the appropriate member category.



Step 8 Within the Service Credit Provisions section, select the appropriate check box.



Step 9 Select the **Save & Continue** button.

Step 10 If you would like to add additional benefits to another member category, repeat steps 7-9.

Step 11 Select the **Continue** button, located below the Amendment Not Requiring Valuation Request section.

Step 12 Within the Anticipated Schedule of Agency Actions section, select the **Add Anticipated Schedule of Agency Actions** link.

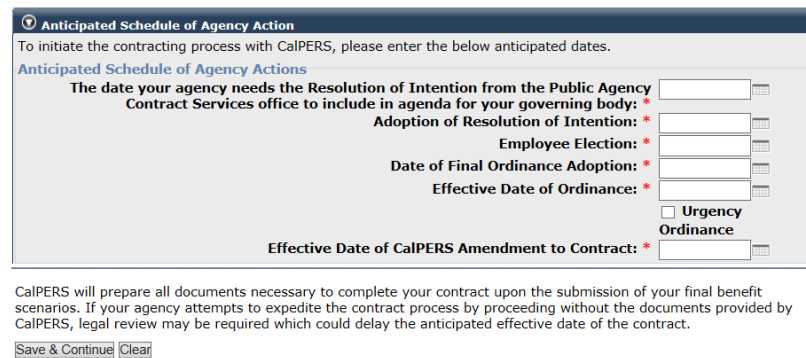


Anticipated Schedule of Agency Actions

[Add Anticipated Schedule of Agency Actions](#)

Agency Need by Date for Resolution of intention:	Final Ordinance/Resolution Adoption:
Adoption of Resolution of Intention:	Effective Date of Ordinance/Resolution:
Employee Election:	Effective Date of Amendment:

Step 13 Complete the Anticipated Schedule of Agency Action section. Refer to unit 7 for more details.



Anticipated Schedule of Agency Action

To initiate the contracting process with CalPERS, please enter the below anticipated dates.

Anticipated Schedule of Agency Actions

The date your agency needs the Resolution of Intention from the Public Agency Contract Services office to include in agenda for your governing body: *

Adoption of Resolution of Intention: *

Employee Election: *

Date of Final Ordinance Adoption: *

Effective Date of Ordinance: *

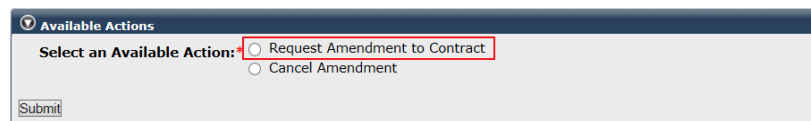
Urgency Ordinance

Effective Date of CalPERS Amendment to Contract: *

CalPERS will prepare all documents necessary to complete your contract upon the submission of your final benefit scenarios. If your agency attempts to expedite the contract process by proceeding without the documents provided by CalPERS, legal review may be required which could delay the anticipated effective date of the contract.

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

Step 15 Within the Available Actions section, select the **Request Amendment to Contract** radio button.



Available Actions

Select an Available Action: Request Amendment to Contract
 Cancel Amendment

Step 16 Select the **Submit** button.

You have completed this scenario.

Scenario 2: Receive Initial Contract Amendment Documents

To request a contract amendment, contact [CalPERS](mailto:pensioncontracts@calpers.ca.gov) by sending an email to pensioncontracts@calpers.ca.gov before following the steps in this unit. A pension contract analyst will contact you to provide further instructions.

CalPERS will notify your agency (based on your preferred communication method) that the Initial Contract Amendment documents are available in myCalPERS.

Scenario

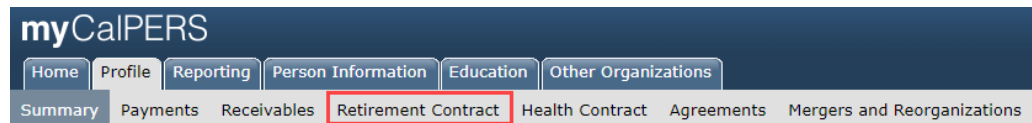
You will download the **Amendment Resolution of Intention Letter** which includes detailed instructions on completing the required documents and uploading them in myCalPERS.

Step Actions

Download Required Documents

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.



Contract Event Summary				View More Actions & Records»		
Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status	
Amendment	Amendment In Progress	Safety - Police	09/23/2015	09/23/2015		
Amendment	Approved	Safety - Fire	08/26/2014	12/20/2014	Completed	
Amendment	Cancelled	Miscellaneous	09/23/2015	09/23/2015		
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012	Completed	

Step 4 Select the **Download** link for each document type.

Complete Required Documents

Step 5 Follow the instructions in the Amendment Resolution of Intention Letter.

Step 6 Complete each document before scanning and saving to your computer.

Upload Required Documents

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

Step 8 Select the **Retirement Contract** local navigation link.

Step 9 Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.

Step 10 Within the Documents section, select each **Provide Document** link.

Document Type	Requirement Status	Submission Method	Received Date	Received Document	Replace Document	Coversheet/Template
Uploaded Documentation Notification						Download
Amendment Resolution of Intention Letter						Download
Amendment Resolution of Intention	Required	Provide Document				Download
Amendment To Contract	Required	Provide Document				Download
Certification of Governing Body Action	Required	Provide Document				Download
Certification of PA Compliance with 7507	Required	Provide Document				Download
Ordinance	Required	Provide Document				Download

Submit Required Documents

Step 11 Select the **Submit Initial Contract Amendment Documents** radio button.

Available Actions

Select an Available Action:*

- Submit Initial Contract Amendment Documents
- Submit Final Contract Amendment Documents
- Cancel Amendment

Step 12 Select the **Submit** button.

You have completed this scenario.

Scenario 3: Receive Final Contract Amendment Documents

After CalPERS receives the Initial Contract Amendment documents, we will overnight mail a packet which will include the following:

- A pre-paid envelope
- Certification of Final Action of Governing Body, Form CON-5
- Two copies of the blue Amendment to Contract
- An instructional cover letter:
 - The following documents must be submitted in myCalPERS, and the original documents must be returned to CalPERS by mail:
 - » Amendment to Contract, two original executed sets
 - » Ordinance (city or county) or the final resolution (all other public agencies)
 - » Certification of Final Action of Governing Body, Form CON-5
 - Original signatures are required on all contracts.

Step Actions

Download Required Documents

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.

Step 3 Within the Contract Event Summary section, select the appropriate Contract Event **Amendment** link.

Contract Event Summary				View More Actions & Records»		
Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status	
Amendment	Amendment In Progress	Safety - Police	09/23/2015	09/23/2015		
Amendment	Approved	Safety - Fire	08/26/2014	12/20/2014	Completed	
Amendment	Cancelled	Miscellaneous	09/23/2015	09/23/2015		
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012	Completed	

Step 4 Within the Documents section, select the **Download** link for the Ordinance (city or county) or the final resolution (all other public agencies), and then print the document.

Complete Required Documents

Step 5 Complete the Ordinance (city or county) or the final resolution (all other public agencies), Amendment to Contract, and Certification of Final Action of Governing Body, Form CON-5 documents.

Step 6 Scan the completed documents to your computer.

Upload Required Documents

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

Step 8 Select the **Retirement Contract** local navigation link.



Step 9 Select the appropriate Contract Event **Amendment** link.

Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status
Amendment	Amendment In Progress	Safety - Police	09/23/2015	09/23/2015	
Amendment	Approved	Safety - Fire	08/26/2014	12/20/2014	Completed
Amendment	Cancelled	Miscellaneous	09/23/2015	09/23/2015	
Amendment	Approved	Miscellaneous	08/08/2012	06/08/2012	Completed

Step 10 Within the Submit Documentation section, select each **Provide Document** link.

Submit Documentation
For faster processing of the required documentation, you can upload documents directly to CalPERS. If a cover sheet is generated when you submit, please print the cover sheet and submit it along with the document you are sending to CalPERS.
Document Category: Business Partner Admin
Document Type:* Cost Share Adjustment Cover Letter
Submission Method:* Upload
Path:* Browse...

Submit Required Documents

Step 11 Select the **Submit Final Contract Amendment Documents** radio button.

Available Actions
Select an Available Action:* Submit Initial Contract Amendment Documents
 Submit Final Contract Amendment Documents
 Cancel Amendment

Step 12 Select the **Submit** button.

You have completed this scenario.

Scenario 4: Verify Amendment Approval

CalPERS will review all submitted documents. If the review is successful, we will approve the amendment and send both Amendment to Contract documents to the authorized people.

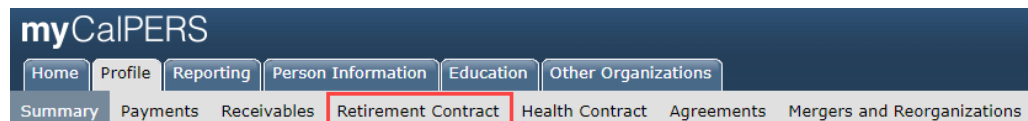
Process and Employer Notification

1. A CalPERS pension contract analyst receives the signed hard copy documents and reviews them for approval within five business days.
2. Upon approval, the contract amendment is activated in myCalPERS with the effective date.
3. The documents are reviewed and then signed by the CalPERS Pension Contracts & Prefunding Programs Division chief. An executed copy is sent to your agency.
4. You may check the status of the amendment to determine if approved. If there are issues with documents, a pension contract analyst will contact your agency and provide guidance.

Step Actions

Step 1 From the homepage, select the **Profile** global navigation tab.

Step 2 Select the **Retirement Contract** local navigation link.



Step 3 Within the Contract Event Summary section, verify that the amendment displays Approved under the Status column.

Contract Event Summary					View More Actions»
Contract Event	Status	Member Category	Submission Date	Effective Date	Amendment Status
Amendment	Approved	Miscellaneous Safety - Police	03/20/2018	07/08/2018	Completed
Contract Initiation	Active	Miscellaneous Safety - Fire Safety - Police	08/30/1967	08/31/1967	

You have completed this scenario.

Scenario 5: Request a Golden Handshake Window Period

A public agency must contract for Section 20903 Two Years Additional Service Credit, also known as Golden Handshake (GHS), to open a GHS window period.

Note: Send an email to pensioncontracts@calpers.ca.gov to add this benefit by a contract amendment. A pension contract analyst will contact you with further instructions.

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 Guide
- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > I Want To...: Attend Training & Events > Business Rules & myCalPERS Classes
- [myCalPERS Technical Requirements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [CalPERS Public Agency & Schools Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [Circular Letters](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation, & Regulations > Public Employees' Retirement Law (PERL)
- [Forms & Publications](#)
Pathway: CalPERS website > Forms & Publications View All > Search Box: Resolution
 - Employer Resolution for Tax Deferred Deduction Plan for Service Credit Purchases
 - Resolution for Employer Paid Member Contributions
 - Resolution for Employer Paid Member Contributions with Time-in-Grade Exceptions
 - Resolution for Paying and Reporting the Value of Employer Paid Member Contributions
 - Resolution for Paying and Reporting the Value of Employer Paid Member Contributions with Time-in-Grade Exception
 - Resolution to Tax Defer Member Paid Contributions - IRC 414(h)(2) Employer Pick-Up
- [Agency Changes](#)
Pathway: CalPERS website > Employers > Contracts > Agency Changes
- [Amendments](#)
Pathway: CalPERS website > Employers > Contracts > Amendments
- [Optional Benefits Listing \(PERS-CON-40\) \(PDF\)](#)
Pathway: CalPERS website > Employers > Amendments > Optional Benefits Listing (PERS-CON-40) (PDF)
- [Public Agency Required Employer Contributions](#)
Pathway: CalPERS website > Employers > Actuarial Services > Employer Contributions > Public Agency Required Employer Contributions

- [Public Agency Actuarial Valuation Reports](#)

Pathway: CalPERS website > Employers > Actuarial Services> Public Agency Actuarial Valuation Reports

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

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

– Business Partner Info Report

– Contract Detail Report

CalPERS Contacts

Email

- To contact [employer educators](#) for questions and requests, email calpers_employer_communications@calpers.ca.gov.
- To contact a [pension contract](#) analyst, email pensioncontracts@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.

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.