

# myCalPERS Out-of-Class Reporting

Student Guide

**March 14, 2025**



# Introduction

Using myCalPERS, employers are responsible for reporting out-of-class hours worked in vacant positions.

myCalPERS allows you to:

- Verify out-of-class hours to report
- Submit out-of-class records for employees who meet out-of-class hours worked criteria
- Review penalties that have been assessed in accordance with Gov. Code section 20480
- Associate labor agreements and salary schedules to out-of-class records
- Review and pay out-of-class receivables and administrative penalties

## Disclaimer

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

## 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: Out-of-Class Reporting

An out-of-class appointment is an appointment to an upgraded position or higher classification by an employer or governing board or body that is vacant position for a limited duration.

A vacant position is a position that is **vacant during recruitment** for a permanent appointment. A vacant position does not refer to a position that is temporarily available due to another employee's leave of absence.

### Employer Notifications

CalPERS will mail up to two notification letters to all contracting public agency and school employers to their preferred address in myCalPERS.

#### Annual Notice – (June)

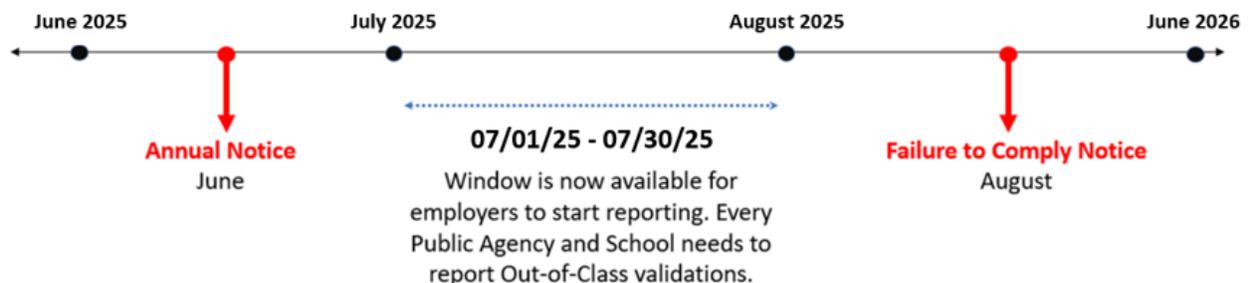
The notice informs employers to report all out-of-class appointments in myCalPERS by July 30 for the prior fiscal year.

#### Failure to Comply Notice – (August)

This notice informs non-compliant employers that report payroll directly to CalPERS that we have not received the required information. Penalties and/or administrative fees may be assessed.

### Out-of-Class Reporting Timeline

- **June 2025:** Annual Notice sent.
- **July 1-30, 2025:** Window is now available for employers to start reporting. Every Public Agency and School needs to report out-of-class validations.
- **August 2025:** Failure to Comply Notification sent.



## Penalties

Penalties incurred with reporting out-of-class appointments that exceed 960 hours are anticipated to be generated the following June after the out-of-class review period. For example, reporting out-of-class appointments for fiscal year 2024/2025 completed by July 30, 2025 will be invoiced June 2026.

Employers who violate this provision must make payments to CalPERS equal to three times the amount of the difference between member and employer contributions for the out-of-class appointment and the member and employer contributions reported to the system for the member's permanent position. The penalty shall be applied for the entire period(s) the member served in an out-of-class appointment. In addition, the employer will be responsible for a \$200 fee to cover administrative expenses.

Penalties paid are not normal contributions or additional contributions that are credited to an employee's individual PERS account. The employee shall bear no liability, obligation, or expense because of the unlawful actions of the employer.

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## Scenario 1: Report No Out-of-Class Appointments

Using the out-of-class validation process, you will report that there are no out-of-class appointments for the fiscal year by July 30.

### Step Actions (6 steps)

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

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Step 2 Select the **Out-of-Class Validation** local navigation link.

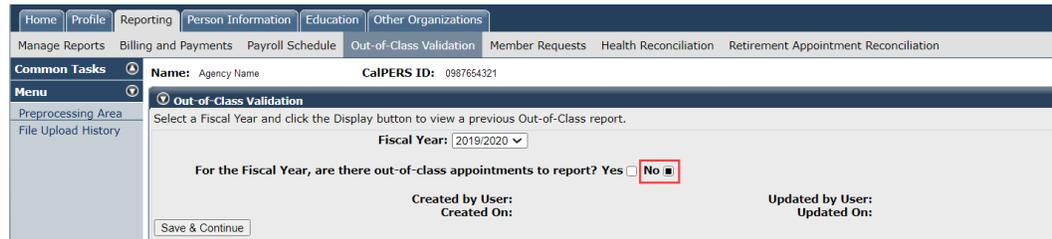
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Step 3 Within the Out-of-Class Validation section, select from the Fiscal Year drop-down list.



The screenshot shows the 'Out-of-Class Validation' form. The 'Fiscal Year' dropdown menu is open, showing '2019/2020' selected. Below the dropdown, the text reads: 'For the Fiscal Year, are there out-of-class appointments to report? Yes  No '. The 'No' checkbox is selected. The form also includes fields for 'Created by User', 'Created On', and 'Updated by User', 'Updated On', and a 'Save & Continue' button.

Step 4 Within the Out-of-Class Validation section, select the **No** check box.

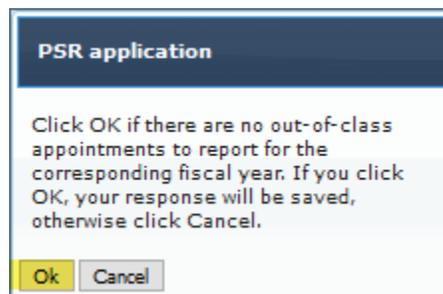


The screenshot shows the 'Out-of-Class Validation' form. The 'Fiscal Year' dropdown menu is open, showing '2019/2020' selected. Below the dropdown, the text reads: 'For the Fiscal Year, are there out-of-class appointments to report? Yes  No '. The 'No' checkbox is selected. The form also includes fields for 'Created by User', 'Created On', and 'Updated by User', 'Updated On', and a 'Save & Continue' button.

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

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Step 6 Select the **Ok** button.



The screenshot shows a dialog box titled 'PSR application'. The text inside reads: 'Click OK if there are no out-of-class appointments to report for the corresponding fiscal year. If you click OK, your response will be saved, otherwise click Cancel.' The 'Ok' button is highlighted in yellow.

**You have completed this scenario.**

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## Scenario 2: Report Out-of-Class Appointments

CalPERS requires employers to verify out-of-class hours worked in each vacant position by July 30.

### Scenario

Using the out-of-class validation process, you will:

- Verify there are out-of-class hours to report
- Submit records for employees who meet the out-of-class hours worked criteria
- Review penalties that were assessed in accordance with Gov. Code section 20480
- Associate labor agreements and salary schedules to out-of-class records

### System Logic

Begin and end dates must be within the selected fiscal year.

### Step Actions (33 steps)

#### Out-of-Class Validation

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

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Step 2 Select the **Out-of-Class Validation** local navigation link.

---

Step 3 Within the Out-of-Class Validation section, select from the Fiscal Year drop-down list.



Step 4 Within the Out-of-Class Validation section, keep the **Yes** check box checked.

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

---

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

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Step 7 Select the **Add New** button.

**Search or Add New Record to the Report**  
To search for a record in the existing report, enter or select values from the drop-down list and click Search. To add a new Out-of-Class record for a participant, enter a CalPERS ID or SSN and click Add New. To upload an Out-of-Class data file, select the Upload File link.

SSN:   
CalPERS ID:   
Division:   
Record Status:

[Upload File](#)

Step 8 Within the Out-of-Class Appointment Validation section, is the Out-of-Class Appointment a vacant position?

**Yes:** Select the **Yes** check box, then skip to step 10

**No:** Select the **No** check box. The following error message will display: Due to the position not being vacant and recruited for, the record does not meet the criteria for an Out-of-Class appointment and does not require further validation information.

Step 9 Select the **Return to View Records** link to either add a new person or update the report status to **No** if no additional record is required.

**You have completed this scenario.**

Step 10 Within the Out-of-Class Appointment Validation section, is the Out-of-Class Appointment in a recruitment?

**Yes:** Select the **Yes** check box, then skip to step 12

**No:** Select the **No** check box. The following error message will display: Due to the position not being vacant and recruited for, the record does not meet the criteria for an Out-of-Class appointment and does not require further validation information

Step 11 Select the **Return to View Records** link to either add a new person or update the report status to **No** if no additional record is required.

**You have completed this scenario.**

Step 12 Within the Maintain Record Details section, complete the **Begin** and **End Date** fields.

Step 13 Select the appropriate **Appointment** radio button.

**Maintain Record Details**  
Provide the date range for the Out-Of-Class assignment and then select Display.

Begin Date: \*    
End Date: \*

Appointment:  92103579 : City of Elk Grove - Miscellaneous - 12/10/2014

## Active Appointment

**Step 14** Within the Active Appointment subsection, complete all appropriate fields pursuant to information for the member's original appointment before working in an out-of-class appointment.

**Note:** Within the **Total Earnings** field, enter what the employee would have earned if they worked in the original position during the out-of-class-period.

**Active Appointment**

Position Title: *	<input type="text" value="Office Clerk"/>	Pay Rate: *	<input type="text" value="25.00"/>
Pay Rate Type: *	<input type="text" value="Hourly"/>		
Total Earnings: *	<input type="text" value="2000.00"/>		
Member Contributions:	Employer Contributions:		

## Out-of-Class Appointment

**Step 15** Within the Out-of-Class Appointment subsection, complete all appropriate fields pursuant to information for the out-of-class appointment.

**Note:** For the **Total Earnings** and **Total Paid Additional Compensation for Out-of-Class Appointment**, if employee was moved into the higher position, the actual amount paid to the member for the entire reporting period should be entered into the Total Earnings field. The total Paid Additional Compensation for Out-of-Class Appointment field should be blank. If employee remains in their Active Appointment, the **Pay Rate** and **Total Earnings** field should be the same as the Active Appointment. The extra compensation paid to the employee should be entered into the **Total Paid Additional Compensation for the Out-of-Class Appointment** field.

**Out-of-Class Assignment**

For Total Earnings, if the member is placed into the Out-of-Class appointment and receiving compensation of the position pursuant to the publicly available pay schedule, report the payrate and earnings of the Out-of-Class appointment for the position. For Total Paid Additional Compensation for the Out-of-Class appointment, report any additional compensation associated with the Out-of-Class appointment if the member is not placed into the Out-of-Class appointment and receiving compensation of the position pursuant to the publicly available pay schedule.

Position Title: *	<input type="text" value="Staff Services Manager I"/>	Pay Rate: *	<input type="text" value="30"/>
Pay Rate Type: *	<input type="text" value="Hourly"/>		
Total Earnings: *	<input type="text" value="2400"/>	Total Paid Additional Compensation for the Out-of-Class Appointment:	<input type="text" value="0"/>
Member Contributions:	Employer Contributions:		

## Out-of-Class Hours Reported

**Step 16** Within the Out-of-Class Hours Reported subsection, complete the **Total Out-of-Class Hours Worked for this Period** field. Include vacation, sick leave, or overtime hours the employee received paid compensation.

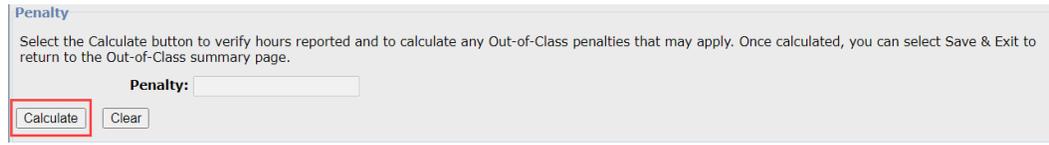
**Out-of-Class Hours Reported**

Report all Out-of-Class hours worked and any additional hours reported for which the participant received compensation (i.e. Vacation or Sick Leave).

Total Out-of-Class Hours Worked for this Period: *	<input type="text" value="80"/>
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## Review Penalties

Step 17 Within the Penalty subsection, select the **Calculate** button.



The screenshot shows a section titled "Penalty" with a text box for "Penalty:" and two buttons: "Calculate" and "Clear". The "Calculate" button is highlighted with a red box. Above the text box, there is a paragraph of instructions: "Select the Calculate button to verify hours reported and to calculate any Out-of-Class penalties that may apply. Once calculated, you can select Save & Exit to return to the Out-of-Class summary page."

## Associate Labor Agreements/Salary Schedules

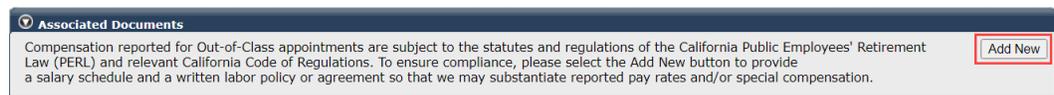
Step 18 Do you need to provide a salary schedule or written labor policy/agreement?

**Yes:** Continue to step 19

**No:** Skip to step 33

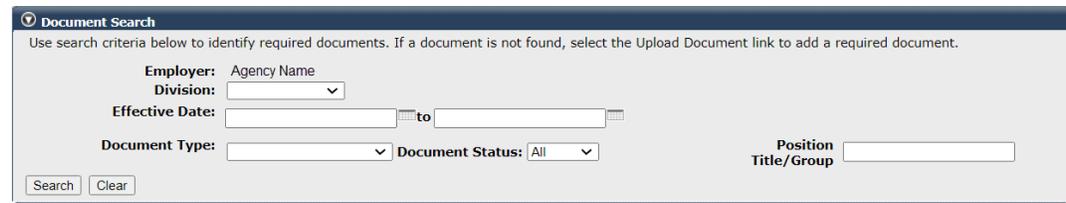
**Note:** The salary schedule/written labor agreement must be submitted for all employees who have worked more than 960 hours in a fiscal year.

Step 19 Within the Associated Documents section, select the **Add New** button.



The screenshot shows a section titled "Associated Documents" with a paragraph of instructions: "Compensation reported for Out-of-Class appointments are subject to the statutes and regulations of the California Public Employees' Retirement Law (PERL) and relevant California Code of Regulations. To ensure compliance, please select the Add New button to provide a salary schedule and a written labor policy or agreement so that we may substantiate reported pay rates and/or special compensation." An "Add New" button is highlighted with a red box.

Step 20 Within the Document Search section, populate the fields as necessary.



The screenshot shows a section titled "Document Search" with a paragraph of instructions: "Use search criteria below to identify required documents. If a document is not found, select the Upload Document link to add a required document." Below the instructions are several input fields: "Employer: Agency Name", "Division:" with a dropdown arrow, "Effective Date:" with two date pickers and "to" between them, "Document Type:" with a dropdown arrow, "Document Status:" with a dropdown arrow set to "All", and "Position Title/Group" with a text box. There are "Search" and "Clear" buttons at the bottom left.

Step 21 Select the **Search** button.

Step 22 Do you need to upload a new document?

**Yes:** Continue to step 23

**No:** Skip to step 31

Step 23 In the Search Results section, select the **Upload Document** link.



The screenshot shows a section titled "Search Results" with three buttons: "Associate to Appointment", "Inactivate Document", and "Upload Document". The "Upload Document" button is highlighted with a red box.

Step 24 Within the Upload Compensation Review Supporting Document section, select the **Browse** button.



Step 25 Select the supporting PDF document.

Step 26 Select the **Open** button.

Step 27 Within the Upload Compensation Review Supporting Document section, complete the Position Title/Group field.



Step 28 Select the **Save** button.

Step 29 Within the Search Results section, select appropriate document check box(s).



Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
<input checked="" type="checkbox"/> PaySchedule.01122019.pdf	Pay Schedule	01/01/2018	03/12/2019	Active	

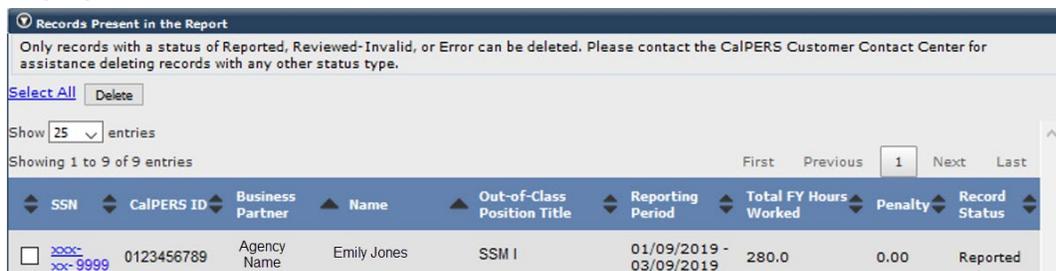
Step 30 Select the **Associate to Appointment** button.



Step 31 Select the **Return** button in the bottom left corner.

Step 32 Select the **Save & Exit** button.

Step 33 Within the Records Present in the Report section, your out-of-class record displays.



Only records with a status of Reported, Reviewed-Invalid, or Error can be deleted. Please contact the CalPERS Customer Contact Center for assistance deleting records with any other status type.

Select All Delete

Show 25 entries

Showing 1 to 9 of 9 entries

SSN	CalPERS ID	Business Partner	Name	Out-of-Class Position Title	Reporting Period	Total FY Hours Worked	Penalty	Record Status
<input type="checkbox"/> 300c-30c-9999	0123456789	Agency Name	Emily Jones	SSM I	01/09/2019 - 03/09/2019	280.0	0.00	Reported

**You have completed this scenario.**

## Scenario 3: Out-of-Class File Upload

You will report your out-of-class validations through file upload.

### Step Actions (14 steps)

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

Step 2 Select the **Out-of-Class Validation** local navigation link.

Step 3 Within the Out-of-Class Validation section, select from the **Fiscal Year** drop-down list.

The screenshot shows the 'Out-of-Class Validation' section. 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, Member Requests, Health Reconciliation, and Retirement Appointment Reconciliation. The 'Out-of-Class Validation' sub-tab is active. The main content area has a header with 'Name: Agency Name' and 'CalPERS ID: 0987654321'. Below this is a section titled 'Out-of-Class Validation' with instructions: 'Select a Fiscal Year and click the Display button to view a previous Out-of-Class report.' A dropdown menu for 'Fiscal Year' is set to '2019/2020'. Below the dropdown is a question: 'For the Fiscal Year, are there out-of-class appointments to report?' with 'Yes' checked and 'No' unchecked. At the bottom, there are fields for 'Created by User', 'Created On', and 'Updated by User', 'Updated On', and a 'Save & Continue' button.

Step 4 Within the Out-of-Class Validation section, keep the **Yes** check box checked.

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

Step 6 Within the Search or Add New Record to the Report section, select the **Upload File** link.

The screenshot shows the 'Search or Add New Record to the Report' section. It contains instructions: 'To search for a record in the existing report, enter or select values from the drop-down list and click Search. To add a new Out-of-Class record for a participant, enter a CalPERS ID or SSN and click Add New. To upload an Out-of-Class data file, select the Upload File link.' Below the instructions are input fields for 'SSN', 'CalPERS ID', 'Division' (a dropdown menu), and 'Record Status' (a dropdown menu). There are 'Search', 'Clear', and 'Add New' buttons. A yellow 'Upload File' link is highlighted.

Step 7 Within the Upload File section, select the **Browse** button.

The screenshot shows the 'Upload File' section. It contains instructions: 'Select Browse to locate a file to upload prior to selecting the Upload File button.' Below the instructions is a 'Path:' field with a 'Browse...' button and the text 'No file selected.' At the bottom, there is an 'Upload File' button.

Step 8 Select the CSV document.

Step 9 Select the **Upload File** button.

Step 10 After your out-of-class appointment has been uploaded and has a Ready file status, select the **F5** key on your keyboard to refresh your totals.

File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
Out-of-Class Appointments	04/19/2019	Ready		20190412125022_000_10055.csv			

Step 11 Your file has been validated and displays the number of records in the Valid and Error columns.



A screenshot of a table titled "File Upload History". The table has columns for File Type, Upload Date, File Status, Batch Job Status, File Name, Valid, Error, and Total. The data row shows "Out-of-Class Appointments" uploaded on "04/19/2019" with a status of "Accepted" and "Completed", a file name of "20190412125022\_000\_10055.csv", 9 valid records, 0 errors, and a total of 9 records.

File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
Out-of-Class Appointments	04/19/2019	Accepted	Completed	20190412125022_000_10055.csv	9	0	9

### Review Your Reported Out-of-Class Appointments

Step 12 Select the **Reporting** global navigation tab.

Step 13 Select the **Out-of-Class Validation** local navigation link.

Step 14 Within the Records Present in the Report section, your out-of-class record displays.



A screenshot of the "Records Present in the Report" section. It includes a warning message, "Select All" and "Delete" buttons, a "Show 25 entries" dropdown, and a table with 9 entries. The first entry is highlighted. The table columns are SSN, CalPERS ID, Business Partner, Name, Out-of-Class Position Title, Reporting Period, Total FY Hours Worked, Penalty, and Record Status.

Only records with a status of Reported, Reviewed-Invalid, or Error can be deleted. Please contact the CalPERS Customer Contact Center for assistance deleting records with any other status type.

Select All Delete

Show 25 entries

Showing 1 to 9 of 9 entries

First Previous 1 Next Last

SSN	CalPERS ID	Business Partner	Name	Out-of-Class Position Title	Reporting Period	Total FY Hours Worked	Penalty	Record Status
<input type="checkbox"/> <a href="#">xxx-xxx-9999</a>	0123456789	Agency Name	Emily Jones	SSM I	01/09/2019 - 03/09/2019	280.0	0.00	Reported

**You have completed this scenario.**

# Unit 2: Maintaining Supporting Documents

In this unit, you will learn how to maintain your supporting documents used for out-of-class validations.

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## Scenario 1: Upload New Supporting Documents

You will upload a new salary schedule or written labor policy/agreement.

### Step Actions (10 steps)

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

Step 2 Select the **Maintain Employer Supporting Documents** left-side navigation link.

The screenshot shows the CalPERS Reporting interface. The 'Reporting' tab is selected. The 'Common Tasks' section shows 'Name: Agency Name' and 'CalPERS ID: 0987654321'. The 'Menu' section is expanded, and 'Maintain Employer Supporting Documents' is highlighted with a red box. Below the menu is a table of payroll reports.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020	11/30/2020	No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020	11/16/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020	11/03/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020		No
	10/31/2020 - 11/13/2020	Posted	Payroll - Earned Period	12/13/2020	11/25/2020	11/30/2020	11/30/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No

Step 3 Within the Document Search section, complete all necessary fields.

The screenshot shows the 'Document Search' form. It includes the following fields: 'Employer: Agency Name', 'Division: [dropdown]', 'Effective Date: [date picker] to [date picker]', 'Document Type: [dropdown]', 'Document Status: All [dropdown]', and 'Position Title/Group: [text input]'. There are 'Search' and 'Clear' buttons at the bottom left.

Step 4 Select the **Search** button.

Step 5 In the Search Results section, select the **Upload Document** link.

The screenshot shows the 'Search Results' section. It contains an 'Inactivate Document' button and an 'Upload Document' link, which is highlighted with a red box.

Step 6 Within the Upload Compensation Review Supporting Document section, select the **Choose File** button.

The screenshot shows the 'Upload Compensation Review Supporting Document' form. It includes the following fields: 'Employer: Agency Name', 'Document Type: Pay Schedule', 'Path: [Choose File] No file chosen', 'Document Name: [text input]', 'Effective Date: [date picker]', and 'Position Title/Group: [text input]'. There are 'Save' and 'Cancel' buttons at the bottom left.

Step 7 Select the supporting PDF document.

Step 8 Select the **Open** button.

Step 9 Complete the Upload Compensation Review Supporting Document section, including the Position Title/Group field.

The screenshot shows a web form titled "Upload Compensation Review Supporting Document". The form contains the following fields and controls:

- Employer:** Agency Name
- Document Type:** Pay Schedule
- Path:** Choose File | Payroll Schedule.pdf
- Document Name:** \* [Text input field]
- Effective Date:** \* [Date picker]
- Position Title/Group:** [Text input field]
- Buttons:** Save, Cancel

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Step 10 Select the **Save** button.

**You have completed this scenario.**

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## Scenario 2: Update Supporting Document Details

You will update supporting document details such as the type, effective date, status, and position title/group.

### Step Actions (7 steps)

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

Step 2 Select the **Maintain Employer Supporting Documents** left-side navigation link.

The screenshot shows the CalPERS Reporting interface. The top navigation bar includes tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. The main content area displays the 'Maintain Employer Supporting Documents' section. A table lists payroll reports with columns for Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, and Test Report. The 'Maintain Employer Supporting Documents' link in the left navigation menu is highlighted with a red box.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020	11/30/2020	No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020	11/16/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020	11/03/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020	11/03/2020	No
	10/31/2020 - 11/13/2020	Posted	Payroll - Earned Period	12/13/2020	11/25/2020	11/30/2020	11/30/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No

Step 3 Within the Document Search section, complete all necessary fields.

The screenshot shows the 'Document Search' form. It includes the following fields: Employer (Agency Name), Division (dropdown), Effective Date (date range), Document Type (dropdown), Document Status (All), and Position Title/Group (text input). There are 'Search' and 'Clear' buttons at the bottom.

Step 4 Select the **Search** button.

Step 5 Within the Search Results section, locate the appropriate supporting document, then select the **Update Details** link.

The screenshot shows the 'Search Results' section. It includes a table with columns for Document Name, Document Type, Effective Date, Upload Date, Document Status, and Position Title/Group. The document 'PaySchedule.01122019.pdf' is listed with a status of 'Active'. The 'Update Details' link is highlighted in yellow.

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
PaySchedule.01122019.pdf	Pay Schedule	01/12/2019	02/20/2019	Active	

Step 6 Update the Upload Compensation Review Supporting Document section.

The screenshot shows the 'Upload Compensation Review Supporting Document' form. It includes the following fields: Employer (Agency Name), Document Type (Pay Schedule), Path (Choose File | Payroll Schedule.pdf), Document Name (text input), Effective Date (date input), and Position Title/Group (text input). There are 'Save' and 'Cancel' buttons at the bottom.

Step 7 Select the **Save** button.

**You have completed this scenario.**

## Scenario 3: Inactivate Supporting Documents

You will inactivate a supporting document.

### Step Actions (6 steps)

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

Step 2 Select the **Maintain Employer Supporting Documents** left-side navigation link.

The screenshot shows the CalPERS Reporting interface. The left navigation menu has 'Maintain Employer Supporting Documents' highlighted with a red box. The main content area shows a table of payroll reports with columns for Schedule Name, Earned Period / Adjustment Date, Status, Report Type, Due Date, Submit Date, Initial Record Posted Date, Report Posted Date, and Test Report.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020	11/30/2020	No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020	11/16/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020	11/03/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020		No
	10/31/2020 - 11/13/2020	Posted	Payroll - Earned Period	12/13/2020	11/25/2020	11/30/2020	11/30/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No

Step 3 Within the Document Search section, complete all necessary fields.

The screenshot shows the 'Document Search' form. Fields include: Employer (Agency Name), Division (dropdown), Effective Date (date range), Document Type (dropdown), Document Status (All), and Position Title/Group (text input). There are 'Search' and 'Clear' buttons.

Step 4 Select the **Search** button.

Step 5 Within the Search Results section, select appropriate document check box(s).

The screenshot shows the 'Search Results' table. The 'Pay Schedule' document is selected with a checked checkbox. The table has columns for Document Name, Document Type, Effective Date, Upload Date, Document Status, and Position Title/Group.

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
<input checked="" type="checkbox"/> Pay Schedule	Pay Schedule	03/18/2021	03/18/2021	Active	

Step 6 Select the **Inactivate Document** button.

The screenshot shows the 'Search Results' table. The 'Inactivate Document' button is highlighted with a red box. The table has columns for Document Name, Document Type, Effective Date, Upload Date, Document Status, and Position Title/Group.

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
<input type="checkbox"/> Pay Schedule	Pay Schedule	03/18/2021	03/18/2021	Active	

You have completed this scenario.

## Scenario 4: Reactivate Supporting Documents

You will reactivate a supporting document.

### Step Actions (6 steps)

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

Step 2 Select the **Maintain Employer Supporting Documents** left-side navigation link.

The screenshot shows the 'Reporting' menu with 'Maintain Employer Supporting Documents' highlighted in red. Below it is the 'Work On Existing Payroll Reports' section with a table of reports.

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Initial Record Posted Date	Report Posted Date	Test Report
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020	11/30/2020	No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/30/2020 - 11/30/2020	Posted	Payroll - Adjustments		11/30/2020	11/30/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020		No
	11/16/2020 - 11/16/2020	Posted	Payroll - Adjustments		11/16/2020	11/16/2020	11/16/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020	11/03/2020	No
	11/03/2020 - 11/03/2020	Posted	Payroll - Adjustments		11/03/2020	11/03/2020		No
	10/31/2020 - 11/13/2020	Posted	Payroll - Earned Period	12/13/2020	11/25/2020	11/30/2020	11/30/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No
	10/19/2020 - 10/19/2020	Posted	Payroll - Adjustments		10/19/2020	10/19/2020	10/19/2020	No

Step 3 Within the Document Search section, complete all necessary fields.

The screenshot shows the 'Document Search' form with the following fields:

- Employer: Agency Name
- Division: [Dropdown]
- Effective Date: [Date] to [Date]
- Document Type: [Dropdown]
- Document Status: All [Dropdown]
- Position Title/Group: [Text]

Buttons: Search, Clear

Step 4 Select the **Search** button.

Step 5 Within the Search Results section, find the appropriate inactive supporting document, then select the **Update Details** link.

The screenshot shows the 'Search Results' table with the following data:

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
<input type="checkbox"/> PaySchedule.01122019.pdf	Pay Schedule	01/12/2019	02/20/2019	Active	

Buttons: Inactivate Document, Upload Document

Step 6 Select the **Reactivate Document** button.

The screenshot shows the 'Upload Compensation Review Supporting Document' form with the following fields:

- Employer: Agency Name
- Document Name: \* Pay Schedule
- Effective Date: \* 12/28/2019
- Document Type: Pay Schedule
- Position Title/Group: [Text]

Buttons: Save, Cancel, Reactivate Document

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

- [Out-of-Class Reporting Data Element Definitions Document \(PDF\)](#)  
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > Technical Resources > Employers (+) Reporting Out-of-Class Hours Worked (section) > Out-of-Class Hours Worked Reporting (PDF)
- [Out-of-Class Reporting Frequently Asked Questions \(PDF\)](#)  
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > Technical Resources > Employers (+) Reporting Out-of-Class Hours Worked (section) > Frequently Asked Questions (PDF)
- [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
  - myCalPERS
    - Out-of-Class Reporting
- [myCalPERS Technical Requirements](#)  
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements
- [Public Agency & Schools Reference Guide \(PDF\)](#)  
**Pathway:** CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide (PDF)
- [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)
- [myCalPERS Employer Reports \(Cognos\) Catalog](#)  
**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

## 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.