

School Employer Advisory Committee

February 12, 2025

Housekeeping (1 of 2)

Webinar is being recorded

Attendee mics are muted

Meeting materials available on www.calpers.ca.gov

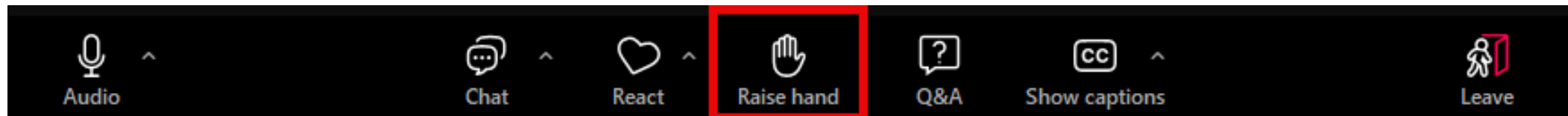
- Will be updated in a week with the latest screenshots

Email: CalPERS_SEAC@calpers.ca.gov

Housekeeping (2 of 2)

Options to submit a question for panelist(s):

- Q&A feature
- Raise Hand feature
 - Use raise hand feature to indicate you have a question. The host will call on you to unmute your mic and pose your question.
 - While unmuted, your profile picture and name will display to the host and panelists
 - Only your name will display to the other attendees
 - Select **Lower Hand** to lower, if needed. **Note:** This will not mute your mic if you're unmuted



Agenda (1 of 2)

Charter School Reporting – Andrew Harris and Andy Nguyen

Summer Reporting and Compensation Updates – Kenneth Noss

myCalPERS Updates and System Enhancements – Pua Yang

Classic Benefit Validation – Veronica Silva-Gil

Retired Annuitant Updates – Heather Porter

Break – 10 minutes

Agenda (2 of 2)

Golden Handshake – Andy Nguyen

Compensation Compliance Webpage – Kenneth Noss

Employer Training – Christopher Vega

Multifactor Authentication – Brad Hanson

Roundtable Discussion – Brad Hanson, Heather Porter, and Dianne Cooper

Charter School Reporting

Andrew Harris – Employer Account Management Division (EAMD)

Andy Nguyen – Pension Contracts & Prefunding Programs (PCPP)

Charter School Reporting Objectives

Provide background on charter school participation

Review membership eligibility and reporting for charter schools

Explain contracting process for charter schools that want to participate

Charter School Reporting Background

CalPERS law allows for optional participation of charter schools

Charter schools can include employees in, or exclude from CalPERS through its charter

CalPERS has recently identified issues with the reporting of charter school employees to the system

Membership Eligibility

A charter school that chooses CalPERS coverage for its classified employees will be treated as a school district

Once a charter school chooses CalPERS coverage for its employees, all provisions of the Public Employees' Retirement Law (PERL) pertaining to school employers and their employees apply to the charter school

Non-participating charter school employees are excluded from CalPERS membership

Charter School Reporting in myCalPERS

Must report employee appointments in myCalPERS under the charter school

Must report compensation in accordance with the Publicly Available Pay Schedule

Non-participating charter school employees cannot be reported

- Cannot be reported under another district or county office

Charter School Contracting Reporting

Andy Nguyen
PCPP

Charter School Eligibility Criteria

Nonsectarian, tuition-free public school

Charter school state statute

Statutory right to participate in the system

Fiscal responsibility

Ownership of assets upon dissolution or liquidation

New Charter School: Processing Timelines (Phase I)

Internal Revenue Code (IRC) 414(d) eligibility determination and financial analysis are performed concurrently

Review the application and request missing documents¹

- 1 - 4 Weeks

IRC 414(d) eligibility determination

Financial analysis

- 2 - 8 Weeks

¹Timeline is dependent on employer

New Charter School: Processing Timelines (Phase II)

Create myCalPERS profile

Notify charter school the profile is active

Work with payroll unit to set up payroll schedule

Start reporting members to the system¹

- 9 - 10 Weeks

¹Timeline is dependent on employer

Charter School Reporting Contact Information

Email

- pensioncontracts@calpers.ca.gov

Webpage

- [New Pension Contracts](#)

Charter School Reporting Resources

Public Agency & Schools Reference Guide

CalPERS Employer Contact Center

- 888 CalPERS (888-225-7377)

CalPERS Website

- www.calpers.ca.gov

Email

- Membership_Reporting@calpers.ca.gov

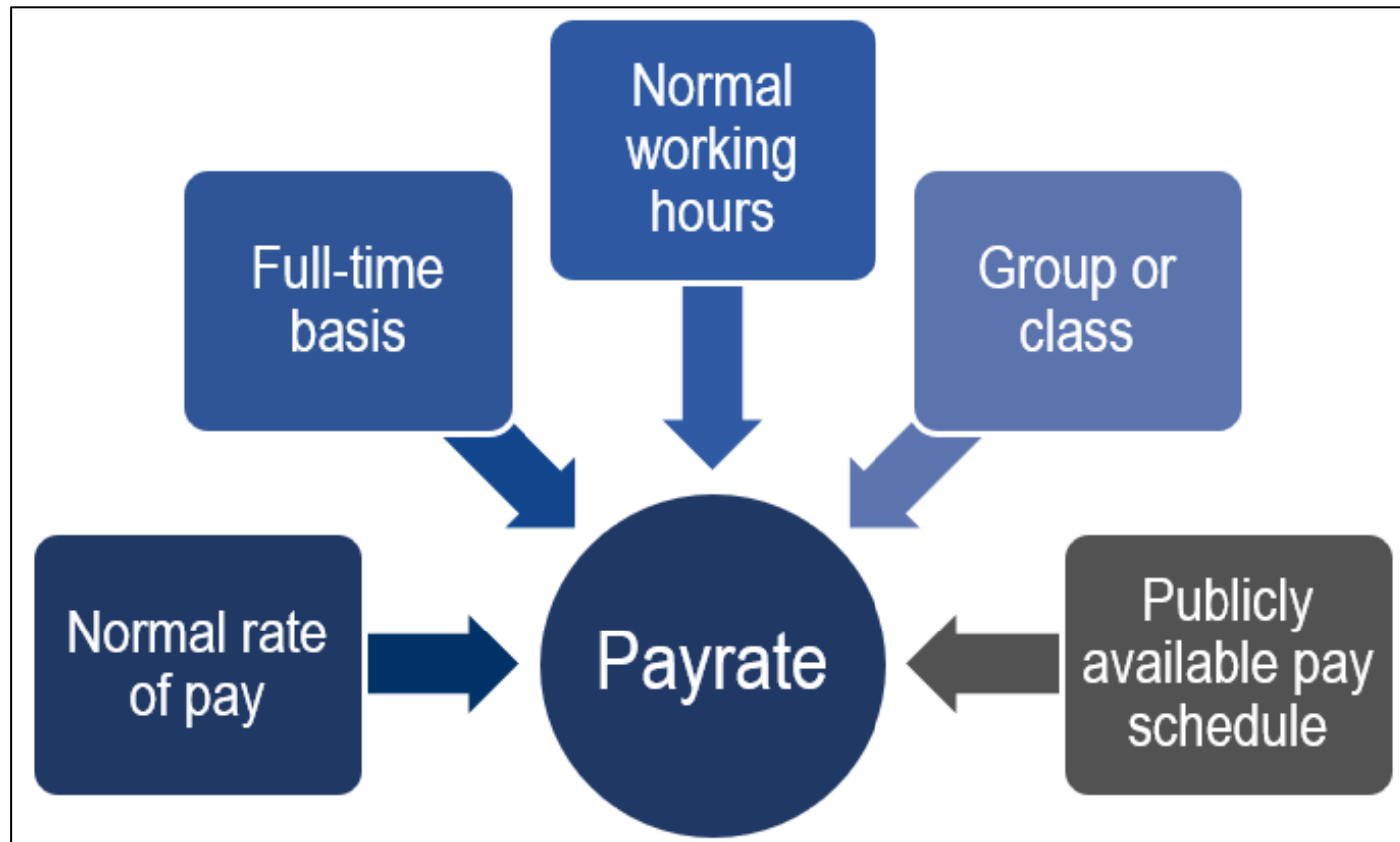
Charter School Reporting Questions

Summer Reporting and Compensation Updates

Kenneth Noss
EAMD

Summer Reporting

Government Code § 20636.1(b)(1)



Payrate – Classified Members

Full time is 40 hours per week

- Hours in excess of 40 per week is considered overtime

Services rendered in all months of the year

Government Code § 20635.1

Services performed in excess of 40 hours of work per week

Concurrent service in two or more positions, one or more of which is full time

- Part-time position shall constitute overtime
- If two or more positions are permanent and full time, the position with the highest payrate shall be reported

Summer Months

Reporting Compensation as Earned

- [Circular Letter 200-204-05 \(PDF\)](#)

Proper Reporting of Overtime Rates & Summer Reporting

- [Circular Letter 200-211-05 \(PDF\)](#)

Reporting Compensation as Earned Examples

- [Circular Letter 200-006-07 \(PDF\)](#)

Compensation Updates

California Code of Regulations (CCR) § 574(c)

CCR 574(c) defines full-time employment for CalPERS classified members

Amendment effective January 1, 2025

Amendment to CCR § 574(c) (1 of 3)

Previous 2024 text, in part:

“For purposes of ... determining compensation earnable and pensionable compensation for classified members, “full-time” employment means 40 hours per week; payments for services rendered, not to exceed 40 hours per week, shall be reported as compensation earnable or pensionable compensation for all months of the year in which work is performed.”

Amendment to CCR § 574(c) (2 of 3)

Current 2025 text:

“(1) For purposes of reporting a classified member’s full-time payrate, an employer shall report the classified member’s hourly, daily, or monthly full-time equivalent (FTE) payrate. The FTE payrates shall be calculated to the nearest cent and shall be determined as set forth below. ...

(A) The classified member’s hourly FTE payrate shall be determined by dividing the classified member’s annual base salary by the number of work days per year, then dividing the result by the number of hours in a work day.”

Amendment to CCR § 574(c) (3 of 3)

Current text:

“(B) The classified member’s daily FTE payrate shall be determined by dividing the classified member’s annual base salary by the number of work days per year, dividing the result by the number of hours in a work day, then multiplying the result by 8.

(C) The classified member’s monthly FTE payrate shall be determined by dividing the classified member’s annual base salary by the number of work days per year, dividing the result by the number of hours in a work day, then multiplying the result by the result of multiplying 52 by 40 then dividing by 12.”

Payrate Reporting for Classified School Members Circular Letters

Circular Letter 200-014-24

- Amended on January 6, 2025

Circular Letter 200-003-25

- Published on January 6, 2025

Compensation Resources

CalPERS Website

- [Compliance in Compensation Reporting](#)
- [Circular Letters](#)
- [Public Agency & Schools Reference Guide](#)
- [Public Employees' Retirement Law \(PERL\)](#)
- [Full-Time Equivalent Pay Rate Calculator \(Classified School Members\)](#)

Audit Compliance & Resolution Unit 1

- Email: MOU_Review@calpers.ca.gov

Summer Reporting and Compensation Updates Questions

myCalPERS Updates and System Enhancements

Pua Yang
EAMD

Test Environment Hyperlinks (1 of 2)

Test environment hyperlinks are on the [Technical Resources](#) page under the File Readiness Testing section

The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact | About' and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located on the right side of the navigation bar. The main content area has a breadcrumb trail: 'Home > Employers > myCalPERS Technical Requirements > Technical Resources'. The title 'Technical Resources' is prominently displayed. Below the title, there is introductory text about resources for employers and DAVs. A section titled 'File Readiness Testing' is highlighted with a red border. It contains instructions to log in to myCalPERS and a list of two links: 'Test environment and production access*' and 'Test environment access only'. To the right of the main content, there are sections for 'myCalPERS Technical Requirements' and 'Resources', each with several links to various documents and guides.

Test Environment Hyperlinks (2 of 2)

Two test environment hyperlinks are available on the Technical Resources webpage:

- Test environment and production access
 - For existing accounts already loaded into the test environment (i.e., added prior to the most recent monthly refresh)
- Test environment access only
 - For new accounts created in the test environment after the most recent monthly refresh

Cognos Reports in Testing Environment

External users are unable to run reports in the test environment effective December 20, 2024

Reports remain accessible in the production environment

If assistance is needed in the test environment, email our Employer Technical Support team

- EmployerTechnicalSupport@calpers.ca.gov

System Enhancements (1 of 3)

Retroactive Salary Adjustment Payrate Type Validation

Deployed January 18, 2025

New validation to ensure the payrate type reported in a retroactive salary adjustment record matches what was originally reported in the earned period record

If the payrate type does not match, the payroll record will error, and an error message will appear

System Enhancements (2 of 3)

Maintain Payroll Records

Phase 1 – March 1, 2025

- When payroll records are reversed using the Maintain Payroll Records functionality, the records and associated financials will be reversed as originally reported
 - Employers will be able to correct payroll data for rate plan changes (e.g., PEPPRA/classic enrollment) without requiring CalPERS' assistance
 - The changes will ensure financials are credited and posted correctly

System Enhancements (3 of 3)

Maintain Payroll Records

Phase 2 – April 26, 2025

- The functionality will be updated to allow employers to adjust payroll across multiple appointments with the employer
- Employers will be able to review and adjust payroll records associated to an arrears determination

myCalPERS Updates and System Enhancements Questions

Classic Benefit Validation

Veronica Silva-Gil

EAMD

Classic Benefit Validation Agenda

Classic Enrollment Validation

Why Does it Originate?

Who Receives the Form?

Process

Current Workload

Employer Responsibilities

Member Elections Team Resources

Classic Enrollment Validation

New process

Result of an internal review

Validating classic benefits

Hold is added to a member's account, prohibiting them from refunding or retiring until the validation is complete

Why Does it Originate?

New employee completes the Reciprocal Self-Certification Form (CalPERS-1187)

Based on their information they are enrolled in classic benefits

CalPERS will verify and adjust as needed

Process

Letter and form are sent to the member requesting verification of reciprocal membership

Verification is complete with one of the following:

- Established reciprocity
- Proof of reciprocity
- Member contacts their previous reciprocal system to complete form

Once validation is complete, the hold will be removed

Who Receives the Form

Members enrolled in classic benefits after one year of employment

If members establish reciprocity in the first year, the letter and form will not be generated

Current Workload

CalPERS pulled a list of members that have fallen into this category over the last 10 years

Currently we have about 1,500 members (state, school, and public agency)

Prioritizing cases based on urgency (retirement, refunds, death, etc.)

Members might be upset if changes are required

Employer Responsibilities

If enrollment changes are required, complete adjustments

Familiarize yourself with this process and refer questions to
CalPERS

Classic Benefit Validation Resources

Member_Elections@calpers.ca.gov

888 CalPERS (or **888-225-7377**)

Classic Benefit Validation Questions

Retired Annuitant Updates

Heather Porter
EAMD

Extra Help Circular Letter

Circular Letter 200-035-24

- Published December 18, 2024

Clarification that substitutes can be retired annuitants (RAs) when the need is present and only for a limited duration

Cannot be an indefinite appointment

During an emergency to prevent the stoppage of business

RAs should not be considered permanent solutions to business needs

Extra Help Retired Annuitants Compliance Review

If a compliance review is conducted, CalPERS may ask for:

- Hiring documentation
- The need for the RA
 - Backlog of work, special project, or emergency to prevent the stoppage of business
- Signs of an active recruitment, if using an RA while experiencing staffing issues
 - What has been done to fill that void with non-retirees?

Retired Annuitant Updates Questions

Break

Golden Handshake

Andy Nguyen
PCPP

Two-Years Additional Service Credit for School Employers (1 of 2)

Government Code § 20904

Benefits

- Offer an additional two years of service for eligible school members who retire during a designated period
- Reduces staffing and provides immediate payroll saving

Eligible School Members

- Must be employed by the school during the designated period
- Did not receive any unemployment insurance payments during the designated period

Two-Years Additional Service Credit for School Employers (2 of 2)

CA Government Code § 20904

The County Superintendent of Schools must:

- Certify the golden handshake offering, which will result in a net saving to the district, and/or
- Certify the golden handshake offering, which will result in a reduction in the workforce with at least one vacancy to remain permanently unfilled
- Pay off the costs of the golden handshake in full or over a five year installment payment schedule

Compliance Observations for School Employers (1 of 2)

Required golden handshake conditions not supported

- Net savings was not supported or
- Permanent vacancy was not created
- Curtailment of, or change in the manner of performing, services were not supported

Ineligible employee offered golden handshake benefit

- Golden handshake was provided to employees who received unemployment benefits during the designated period

Compliance Observations for School Employers (2 of 2)

Eligible employee not offered golden handshake benefit

- Did not offer the golden handshake benefit due to a miscalculation of the net saving or eligibility provision in the labor agreement

Certified and adopted the resolutions during or after the designated period

- Did not approve the golden handshake resolutions timely

Next Steps for CalPERS Pension Contracting Team (1 of 2)

Informational packets included documentation to assist school employers in understanding the intent of the golden handshake and requirements

[Golden Handshake FAQ's – For Public Agency Employers \(PDF\)](#)

Require school employers to provide documents to support their golden handshake request, such as:

- Net savings cost analysis documentation
- Labor agreement(s) related to the offering
- Board agendas and minutes for the adoption of the golden handshake resolutions

Next Steps for CalPERS Pension Contracting Team (2 of 2)

Require school employers to provide documents to support their golden handshake request, such as:

- Net savings cost analysis documentation
- Labor agreement(s) related to the offering
- Board agendas and minutes for the adoption of the golden handshake resolutions

Pension Contracts Contact Information

Email

- pensioncontracts@calpers.ca.gov

Webpage

- [Pension Contract Amendments & Agency Updates](#)

Golden Handshake Questions

Compliance in Compensation Reporting Webpage

Kenneth Noss
EAMD

Compliance in Compensation Reporting Webpage

Resource for school employers including:

- Compensation compliance information
- Circular Letters
- Examples
- Checklists
- Sample language

CalPERS Website

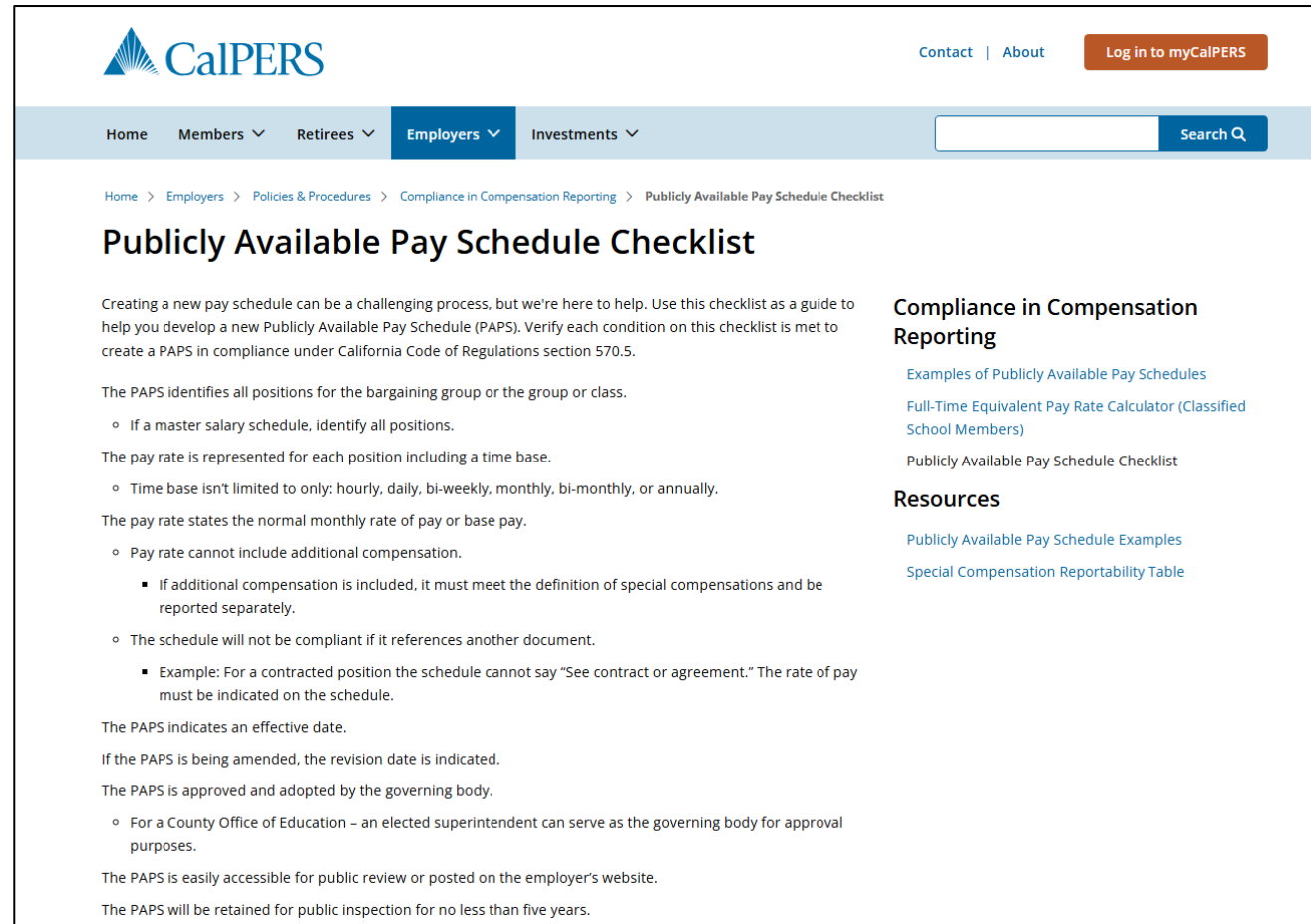
www.calpers.ca.gov

The screenshot shows the CalPERS website homepage. At the top left is the CalPERS logo. To the right are links for "Contact" and "About", and a "Log in to myCalPERS" button. Below this is a navigation bar with "Home" selected, and dropdown menus for "Members", "Retirees", "Employers", and "Investments". A search bar on the right contains the text "compliance" and a "Search Q" button. Below the navigation bar are five service icons: "New To CalPERS" (person with plus), "Life Events" (calendar), "Estimate Your Retirement" (calculator), "Health Plans & Rates" (gears), and "Pay Days" (calendar with checkmark). Below these icons is a banner for the "Glendale Regional Office Open for Appointments". The banner includes a photo of the office interior and text stating: "Our Regional Office in Glendale is open for in-person services. Schedule a phone, video, or in-person appointment to discuss your retirement or health benefits." A "Make an Appointment" button is located at the bottom of the banner.

Compliance in Compensation Reporting Resources

The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is on the right. The main content area has a breadcrumb trail: 'Home > Employers > Policies & Procedures > Compliance in Compensation Reporting'. The title is 'Compliance in Compensation Reporting'. The text explains that compliance with the Public Employees' Retirement Law (PERL) requires accurate reporting of member information. Below this is a section titled 'Audit Compliance & Resolution' which describes the team's role in reviewing labor policies and pay schedules. On the right side, there is a 'Policies & Procedures' sidebar with links to 'Affordable Care Act (ACA) Guidance', 'Circular Letters', 'Compliance in Compensation Reporting', 'Employment Certification', 'Health Procedures', 'Pension Reform Impacts', and 'Reference & Health Guides'. At the bottom of the page, there are three expandable sections: '+ Reporting Compensation', '+ Pay Schedules', and '+ Calculate Full-Time Equivalent (FTE) Pay Rate for Classified School Members'. A red box highlights the 'Resources' section in the sidebar, which includes 'Publicly Available Pay Schedule Checklist', 'Publicly Available Pay Schedule Examples', and 'Special Compensation Reportability Table'.

Publicly Available Pay Schedule Checklist



The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located on the right side of the navigation bar. The main content area has a breadcrumb trail: 'Home > Employers > Policies & Procedures > Compliance in Compensation Reporting > Publicly Available Pay Schedule Checklist'. The title 'Publicly Available Pay Schedule Checklist' is prominently displayed. The main text explains that creating a new pay schedule is challenging and provides a checklist to help. It lists several conditions that must be met, such as identifying all positions, representing pay rates with time bases, and ensuring the schedule is accessible for public review. On the right side, there are sections for 'Compliance in Compensation Reporting' with links to 'Examples of Publicly Available Pay Schedules', 'Full-Time Equivalent Pay Rate Calculator (Classified School Members)', and 'Publicly Available Pay Schedule Checklist'. Below that is a 'Resources' section with links to 'Publicly Available Pay Schedule Examples' and 'Special Compensation Reportability Table'.

Publicly Available Pay Schedule Checklist

Creating a new pay schedule can be a challenging process, but we're here to help. Use this checklist as a guide to help you develop a new Publicly Available Pay Schedule (PAPS). Verify each condition on this checklist is met to create a PAPS in compliance under California Code of Regulations section 570.5.

The PAPS identifies all positions for the bargaining group or the group or class.

- If a master salary schedule, identify all positions.

The pay rate is represented for each position including a time base.

- Time base isn't limited to only: hourly, daily, bi-weekly, monthly, bi-monthly, or annually.

The pay rate states the normal monthly rate of pay or base pay.

- Pay rate cannot include additional compensation.
 - If additional compensation is included, it must meet the definition of special compensations and be reported separately.
- The schedule will not be compliant if it references another document.
 - Example: For a contracted position the schedule cannot say "See contract or agreement." The rate of pay must be indicated on the schedule.

The PAPS indicates an effective date.

If the PAPS is being amended, the revision date is indicated.

The PAPS is approved and adopted by the governing body.

- For a County Office of Education – an elected superintendent can serve as the governing body for approval purposes.

The PAPS is easily accessible for public review or posted on the employer's website.

The PAPS will be retained for public inspection for no less than five years.

Compliance in Compensation Reporting

- [Examples of Publicly Available Pay Schedules](#)
- [Full-Time Equivalent Pay Rate Calculator \(Classified School Members\)](#)
- [Publicly Available Pay Schedule Checklist](#)

Resources

- [Publicly Available Pay Schedule Examples](#)
- [Special Compensation Reportability Table](#)

Publicly Available Pay Schedule Examples

The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a 'Log in to myCalPERS' button. Below this is a navigation menu with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is located on the right side of the menu. The main content area has a breadcrumb trail: 'Home > Employers > Policies & Procedures > Compliance in Compensation Reporting > Examples of Publicly Available Pay Schedules'. The title 'Examples of Publicly Available Pay Schedules' is prominently displayed. Below the title, a paragraph states: 'The sections below provide examples of properly formatted Publicly Available Pay Schedules (PAPS). Refer to these examples when establishing new pay schedules.' There are three expandable sections, each with a red border around the plus icon and text: '+ Step Example', '+ Range Example', and '+ Matrix Example'. To the right of the main content, there are two sections: 'Compliance in Compensation Reporting' with links to 'Examples of Publicly Available Pay Schedules', 'Full-Time Equivalent Pay Rate Calculator (Classified School Members)', and 'Publicly Available Pay Schedule Checklist'; and 'Resources' with links to 'Publicly Available Pay Schedules Checklist' and 'Special Compensation Reportability Table'. At the bottom left, there is a 'Contact Information' section with the text: 'For additional assistance, email us or call 888 CalPERS (or 888-225-7377).'

Special Compensation Reportability Table

Home > Employers > myCalPERS Technical Requirements > Special Compensation Reportability Table

Special Compensation Reportability Table

The table below provides reportability details for each member category within the identified Special Compensation category and type. Note, the employer must also comply with the CCR sections 571(b) for classic members and section 571.1(a) for PEPRAs for reporting.

How to Use this Table

- Select the tab for the appropriate Special Compensation category
- Locate the desired Special Compensation type within that table

The resulting information for the row will identify if the Special Compensation is reportable for the desired member category.

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

The table below provides reportability details for each member category within the identified Special Compensation category and type. Note, the employer must also comply with the CCR sections 571(b) for classic members and section 571.1(a) for PEPRAs for reporting.

Compliance in Compensation Reporting Resources

CalPERS Website

- [Compliance in Compensation Reporting](#)
- [Circular Letters](#)
- [Public Agency & Schools Reference Guide \(PDF\)](#)
- [Public Employees' Retirement Law](#)
- [Full-Time Equivalent Pay Rate Calculator \(Classified School Members\)](#)

Audit Compliance and Resolution Unit 1

- Email: MOU_Review@calpers.ca.gov

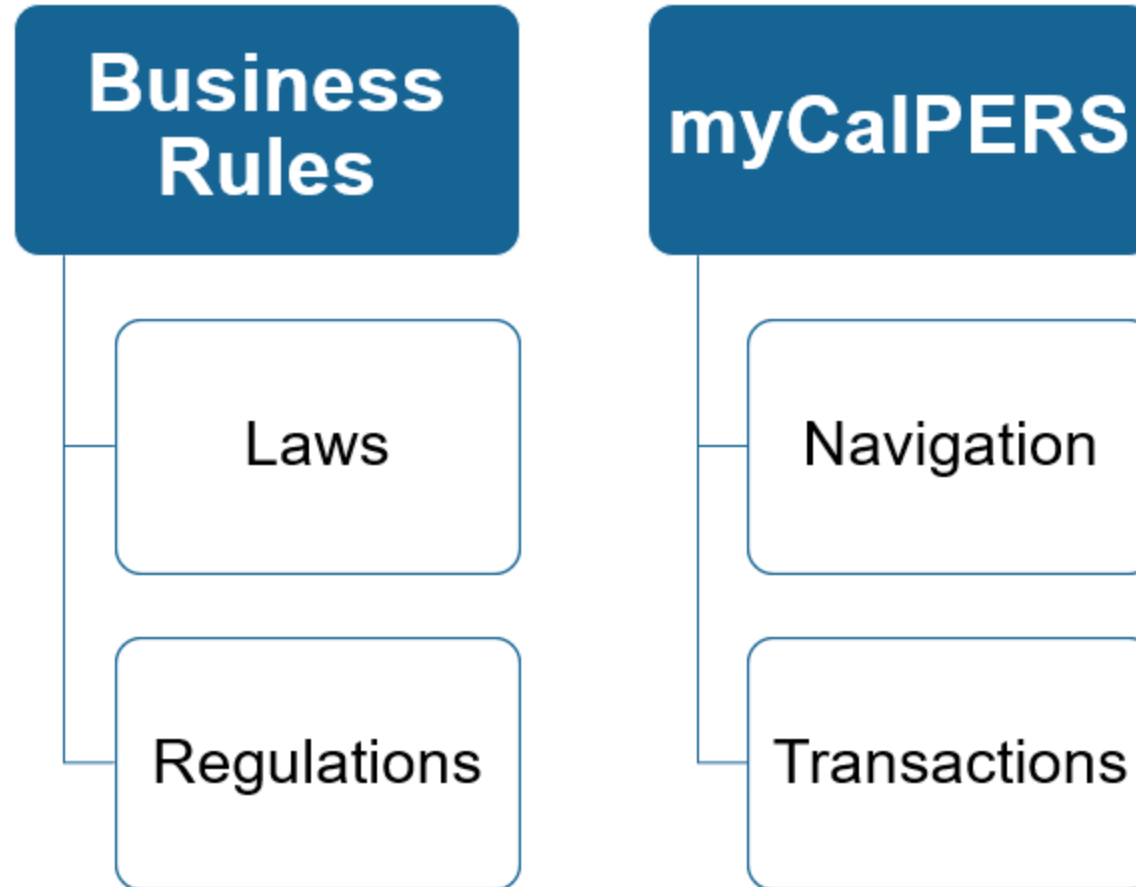
Compliance in Compensation Reporting Webpage Questions

Employer Training

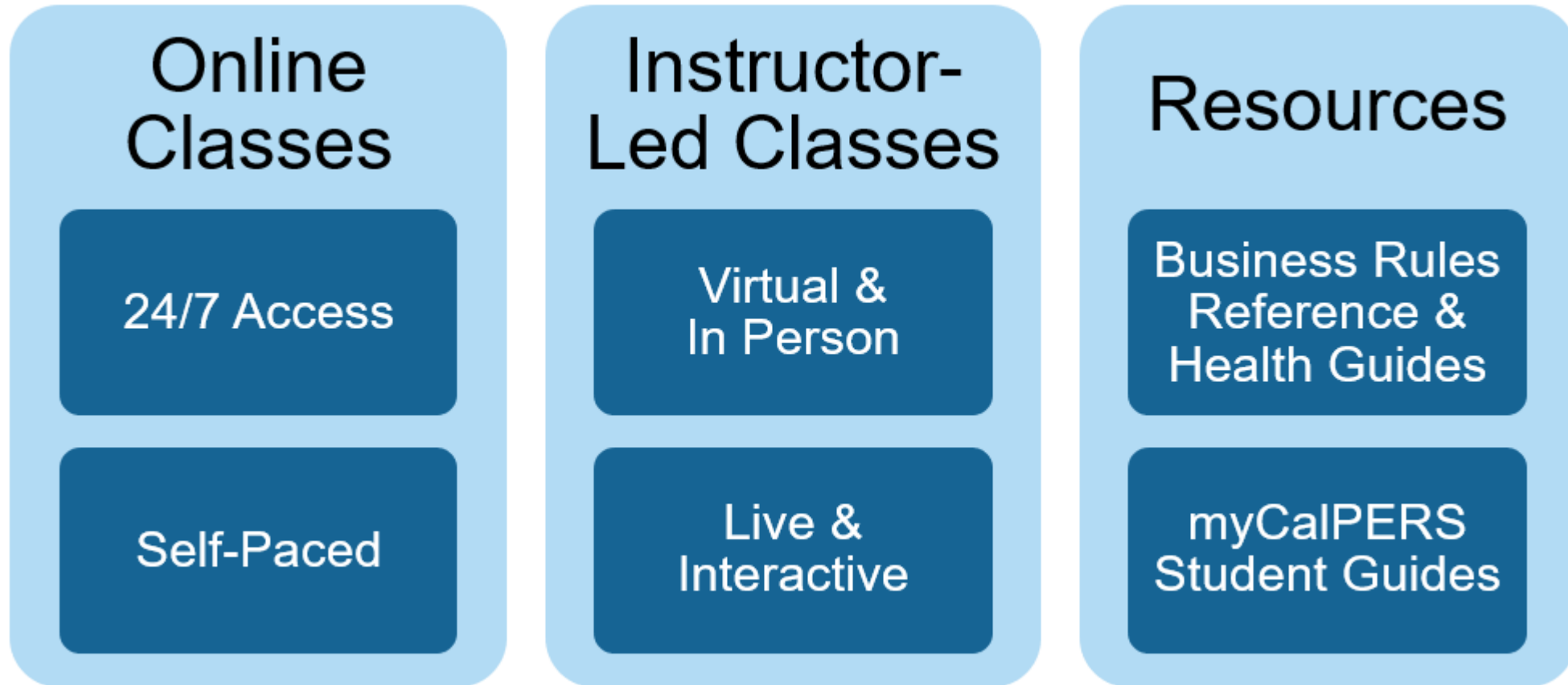
Christopher Vega

Customer Education Outreach Division (CEOD)

Employer Education Class Types



Employer Education Delivery & Resources



Common Questions



Common Questions – Health Enrollment

Q: Does an employee have to move to a new zip code for it to count as a qualifying event to change health plans?

A: No, a move from one address to another qualifies for a plan change.

Common Questions – Retirement Enrollment (1 of 2)

Q: Should I enroll an employee into membership even if they are only hired as part time?

A: If they are a current member, enroll them regardless of the time base/tenure of the position (unless excluded by contract).

Common Questions – Retirement Enrollment (2 of 2)

Q: Do I only need to report unpaid leave of absence for my employees?

A: All leaves of absence should be reported in myCalPERS, whether a paid or unpaid leave.

Common Questions – Payroll Reporting

Q: Will selecting the process report button before the payroll reporting due date avoid a late reporting fee?

A: Before the due date, you must process the report with all valid records and clear the reconciliation page.

Common Questions – General

Q: What is the cost to have a trainer come out to our agency to provide training?

A: Absolutely free.

Specials

Specials

- Tailored trainings based on your agency's contract and needs
- myCalPERS and Business Rules training in person or virtually
- Flexible scheduling

Upcoming Class Schedule



Where to Find Upcoming Trainings & Events

The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. The 'Employers' link is highlighted with a red box. Below the navigation bar is a grid of menu items. The 'Employer Education' link under the 'Resources' section is also highlighted with a red box. At the bottom of the grid is a link to 'Explore All Employer Topics >'.

Actuarial Resources	Benefit Programs	Contracts	Policies & Procedures
Governmental Accounting Standards Board (GASB)	California Employers' Pension Prefunding Trust (CEPPT) Fund	Health Program Contracts	Affordable Care Act (ACA) Guidance
Managing the Unfunded Accrued Liability	California Employers' Retiree Benefit Trust (CERBT) Fund	New Pension Contracts	Circular Letters
Pension Outlook Overview	CalPERS 457 Plan	Pension Contract Agency Eligibility	Compliance in Compensation Reporting
Public Agency Actuarial Valuation Reports	Health Benefits	Pension Contract Amendments & Agency Updates	Employment Certification
Required Employer Contributions	Retirement Benefits (Employers)	Pension Contracts Frequently Asked Questions	Health Procedures
Risk Pooling	Social Security & Medicare	Pension Contracts Inactive Agencies	Pension Reform Impacts
Summary of Valuation Results Overview		myCalPERS Technical Requirements	Reference & Health Guides
		myCalPERS Employer Reports (Cognos) Catalog	Resources
		Special Compensation Reportability Table	Forms & Publications
		System Access Administrators	Employer Education
		System Enhancements	
		Technical Resources	

[Explore All Employer Topics >](#)

Employer Education Webpage

CalPERS Contact | About Log in to myCalPERS

Home Members Retirees Employers Investments Search

Home > Education Center > Employer Education

Employer Education

We offer a variety of training and informational events to assist you with your CalPERS-related business responsibilities. Our classes, workshops, and meetings are offered on multiple dates. Select the class or event name for complete schedules and more information.

Subscribe to our [Employer Bulletin](#) for customized news and event updates. If you're interested in member-related training for employees, refer to [Member Education](#).

Upcoming Events

Name	Description	Format
Pathways for Women Conference	Pathways for Women is a dynamic forum meant to inspire career growth and advance women of all backgrounds and professions forward. Stay tuned for upcoming event dates and details.	Conference
CalPERS Educational Forum	Attend this annual event to learn more about CalPERS benefit programs and services. Highlights include informative sessions, exhibits, and private consultations.	Conference

Classes & Workshops

Name	Description	Format
Business Rules & myCalPERS Classes	Learn about laws and rules associated with your agency's retirement and/or health contract as well as how to navigate and process transactions in myCalPERS. To register for classes, log in to your myCalPERS business partner account, then select Education .	Instructor-Led and Online

Education Center

- [Employer Education](#)
- [Member Education](#)
- [Using myCalPERS](#)

Resources

- [Education & Training Classes by Business Role \(PDF\)](#)
- [Headquarters & Regional Offices](#)
- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
- [myCalPERS Student Guides & Resources](#)
- [myCalPERS Technical Requirements](#)
- [Reference & Health Guides](#)
- [System Access Administrators](#)

Forms & Publications

- [Disability Retirement Resource Guide \(PDF\)](#)
- [Public Agency & Schools Health Benefits Guide \(PDF, 1.2 MB\)](#)
- [Public Agency & Schools Reference Guide \(PDF, 2.9 MB\)](#)
- [State Health Benefits Guide \(PDF, 1.3 MB\)](#)
- [State Reference Guide \(PDF, 2.8 MB\)](#)

Business Rules Classes (1 of 2)

The screenshot shows the CalPERS website interface. At the top left is the CalPERS logo. To the right are links for 'Contact' and 'About', and a 'Log in to myCalPERS' button. Below this is a navigation bar with 'Home', 'Members', 'Retirees', 'Employers', and 'Investments'. A search bar is on the right. The main content area has a breadcrumb trail: 'Home > Education Center > Employer Education > Business Rules & myCalPERS Classes'. The title is 'Business Rules & myCalPERS Classes'. The text describes instructor-led and self-paced online classes. It provides instructions on how to register for classes and contact the employer education team. A list of resources is on the right, including 'Employer Education' and 'Resources'. A red box highlights the link '+ 2025 Business Rules Class Schedule' in the left sidebar.

CalPERS Contact | About Log in to myCalPERS

Home Members Retirees Employers Investments Search Q

Home > Education Center > Employer Education > Business Rules & myCalPERS Classes

Business Rules & myCalPERS Classes

Our instructor-led and self-paced online employer classes are designed to help you understand your business-related reporting responsibilities. You'll learn how to effectively use myCalPERS and avoid late fees and administrative costs.

Register for classes by logging in to your [myCalPERS](#) business partner account, and then selecting the **Education** tab. We recommend taking the Business Rules classes before the myCalPERS classes to ensure a comprehensive and well-structured CalPERS education experience.

If you don't have myCalPERS access, contact your agency's [system access administrator](#).

To request training at your office, contact our employer education team at CalPERS_Employer_Communications@calpers.ca.gov. Our educators can visit your agency to provide tailored education and training at no cost.

Join our in-person and virtual classes with live instructors. You can learn retirement and health business rules or how to navigate and process transactions in myCalPERS.

Business Rules

Gain a better understanding of the laws and rules associated with your agency's retirement and/or health contract. Our classes are employer-specific and customized to your employer type: school, public agency, or state.

- + Business Rules Classes
- + 2025 Business Rules Class Schedule

Employer Education

- 457 Deferred Compensation Plan Workshops
- Business Rules & myCalPERS Classes
- CalPERS Educational Forum
- CalPERS Health Program Workshops
- CalPERS Local Safety Disability Retirement Employer Webinars Registration
- Employer Leadership Dialogues
- Pre-Retirement Survivor Benefits Employer Webinars
- Prefunding Programs Workshops
- School Employer Advisory Committee (SEAC) Meeting Materials
- Social Security & Medicare Webinars

Resources

- Education & Training Classes by Business Role (PDF)
- Employers Bulletins
- myCalPERS Student Guides & Resources
- Reference & Health Guides

Business Rules Classes (2 of 2)

2025 Business Rules Class Schedule

Our classes are organized in a specific sequence across three days. Each class is unique and requires separate registration through myCalPERS. This allows you to attend the classes necessary for your business partner role.

Business Rules In-Person or Virtual Instructor-Led Training

Class Day	Class Time	Delivery Method	Topic
Day 1	1:00-4:00 p.m.	In Person or Virtual	Business Rules for School Employers
Day 2	8:30-11:30 a.m.	Virtual	Business Rules for Public Agency Employers
Day 2	9:00 a.m.-12:00 p.m.	In Person	Business Rules for Public Agency Employers
Day 2	1:00-3:30 p.m.	In Person or Virtual	Business Rules: Health for Public Agency and School Employers
Day 3	8:30-10:00 a.m.	Virtual	Advanced Compensation
Day 3	9:00-10:30 a.m.	In Person	Advanced Compensation
Day 3	10:30 a.m.-12:00 p.m.	Virtual	Advanced Membership
Day 3	11:00 a.m.-12:30 p.m.	In Person	Advanced Membership

State Business Rules classes are offered periodically on day three of training or by request.

State Business Rules classes are offered periodically on day three of training or by request.

2025 Business Rules Classes

Dates	Venue
Jan 7-9	Virtual
Jan 28-30	Shasta County Office of Education
Feb 4-6	Virtual
Mar 4-6	Virtual
Mar 18-20	Fresno Regional Office
Apr 1-3	Virtual
Apr 15-17	Orange Regional Office
May 6-8	Virtual
May 20-22	Walnut Creek Regional Office
May 27-29	Sacramento Regional Office
Jun 3-5	Virtual
Jun 17-19	San Diego Regional Office

Log in to your [myCalPERS](#) business partner account for the most updated schedule that may include added classes or changes.

myCalPERS Classes (1 of 2)

[Home](#) > [Education Center](#) > [Employer Education](#) > [Business Rules & myCalPERS Classes](#)

Business Rules & myCalPERS Classes

Our instructor-led and self-paced online employer classes are designed to help you understand your business-related reporting responsibilities. You'll learn how to effectively use myCalPERS and avoid late fees and administrative costs.

Register for classes by logging in to your [myCalPERS](#) business partner account, and then selecting the **Education** tab. We recommend taking the Business Rules classes before the myCalPERS classes to ensure a comprehensive and well-structured CalPERS education experience.

If you don't have myCalPERS access, contact your agency's [system access administrator](#).

To request training at your office, contact our employer education team at CalPERS_Employer_Communications@calpers.ca.gov. Our educators can visit your agency to provide tailored education and training at no cost.

Join our in-person and virtual classes with live instructors. You can learn retirement and health business rules or how to navigate and process transactions in myCalPERS.

Business Rules

Gain a better understanding of the laws and rules associated with your agency's retirement and/or health contract. Our classes are employer-specific and customized to your employer type: school, public agency, or state.

- + [Business Rules Classes](#)
- + [2025 Business Rules Class Schedule](#)

myCalPERS

Learn how to navigate and process transactions in myCalPERS. Attend an in-person class for a hands-on experience where you can complete transactions in a training environment. Or join a virtual class where an instructor will demonstrate the scenarios in our student guides.

- + [myCalPERS Classes](#)
- + [2025 myCalPERS Class Schedule](#)

Employer Education

- [457 Deferred Compensation Plan Workshops](#)
- [Business Rules & myCalPERS Classes](#)
- [CalPERS Educational Forum](#)
- [CalPERS Health Program Workshops](#)
- [CalPERS Local Safety Disability Retirement Employer Webinars Registration](#)
- [Employer Leadership Dialogues](#)
- [Pre-Retirement Survivor Benefits Employer Webinars](#)
- [Prefunding Programs Workshops](#)
- [School Employer Advisory Committee \(SEAC\) Meeting Materials](#)
- [Social Security & Medicare Webinars](#)

Resources

- [Education & Training Classes by Business Role \(PDF\)](#)
- [Employers Bulletins](#)
- [myCalPERS Student Guides & Resources](#)
- [Reference & Health Guides](#)

myCalPERS Classes (2 of 2)

2025 myCalPERS Class Schedule

Our classes are organized in a specific sequence across three days. Each class is unique and requires separate registration through myCalPERS. This allows you to attend the classes necessary for your business partner role.

myCalPERS In-Person or Virtual Instructor-Led Training

Class Day	Class Time	Delivery Method	Topic
Day 1	8:30-11:30 a.m.	In Person or Virtual	myCalPERS Health Enrollment
Day 1	12:30-3:00 p.m.	In Person	myCalPERS Retirement Enrollment
Day 1	1:00-3:30 p.m.	Virtual	myCalPERS Retirement Enrollment
Day 2	8:30-11:00 a.m.	In Person or Virtual	myCalPERS Payroll Reporting
Day 2	12:00-2:30 p.m.	In Person	myCalPERS Payroll Adjustments
Day 2	1:00-3:30 p.m.	Virtual	myCalPERS Payroll Adjustments
Day 3	8:30-10:00 a.m.	In Person or Virtual	Employer Reports (Cognos)
Day 3	1:00-3:00 p.m. (every other month)	Virtual	myCalPERS System Access Administration

2025 myCalPERS Class Schedule

Date	Venue
Jan 14-16	San Jose Regional Office
Jan 21-23	Virtual (Including myCalPERS System Access Administration)
Jan 28-30	San Diego Regional Office
Feb 11-13	Virtual
Feb 18-20	Sacramento Regional Office
Feb 25-27	Orange Regional Office
Mar 11-13	Virtual (Including myCalPERS System Access Administration)
Mar 18-20	Walnut Creek Regional Office
Mar 25-27	San Bernardino Regional Office
Apr 8-10	Virtual
Apr 15-17	Fresno Regional Office
Apr 22-24	Glendale Regional Office
May 13-15	Virtual (Including myCalPERS System Access Administration)
Jun 10-12	Virtual

Log in to your [myCalPERS](#) business partner account for the most updated schedule that may include added classes or changes.

Employer Training Contact Information

Email our employer educators

- calpers_employer_communications@calpers.ca.gov

Employer Training Questions

Multifactor Authentication

Brad Hanson
EAMD

Multifactor Authentication Questions

Roundtable

Brad Hanson, Heather Porter, and Dianne Cooper
EAMD

Thank you