
From: Lena Young-Gallardo
Sent: Tuesday, July 13, 2021 2:54 PM
To: BSD-CBO List; persadmin; newpy; BSD-Community College; BSD-Fiscal Srvs Mgrs List
Cc: BSD-ExecutiveStaffList; BSD-FinMgrsMeet List
Subject: CalPERS Out of Class Reporting
Attachments: Bulletin -CalPERS Reporting Out-of-Class Hours Worked.pdf; CalPERS Out-of-class-reporting-guide 4.24.21.pdf

Good afternoon,

Please see the attached bulletin for details on reporting CalPERS Out of Class Hours. The hours for fiscal year 2020-21 must be reported through myCalPERS by July 30, 2021. The most recent CalPERS reporting guide is also attached for your convenience.

Thanks,
Lena



Transforming lives through education

Lena Young-Gallardo, Director

District Financial Services

San Bernardino County Superintendent of Schools

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DATE: July 13, 2021

TO: Chief Business Officials, Directors of Fiscal Services, Personnel Administrators, and Payroll Technicians
San Bernardino County School Districts (K-12, Community Colleges, ROP's)

SUBJECT: CalPERS Reporting Out-of-Class Hours Worked

Effective January 1, 2018, Assembly Bill (AB) 1487 added Government Code (GC) Section 20480 which requires agencies to report hours worked in an out-of-class position to the California Public Employees' Retirement System (CalPERS). CalPERS states that the purpose of this legislation is to create transparency and to give others an opportunity to be in the vacant position. This mandate pertains to both CalPERS Classic and PEPRAs members.

CalPERS requires employers to certify Out-of-Class appointments through myCalPERS. Attached are the detailed step-by-step instructions given by CalPERS on how to use the new employer verification pages. District Financial Services has given those individuals at your district who currently have access to myCalPERS, the ability to report out-of-class hours. If you need a list of these individuals, please email Michelle Johnston at Michelle.Johnston@sbcss.net. Your district will be required to either report out-of-class hours or confirm there are no out-of-class hours to report by July 30, 2021.

Beginning June 2019, CalPERS will mail up to two notification letters to each employer's preferred address on file.

1. Annual Notice: CalPERS will send this letter in June to advise employers that the out-of-class hours reporting is due by July 30 for the prior fiscal year.
2. Failure to Comply Notice: CalPERS will send this letter in August to employers that did not submit the out-of-class hours report.

Below are some definitions outlined in GC Section 20480:

- **Out-of-Class** is an appointment of an employee to an upgraded position or higher classification by the employer or governing board or body in a vacant position for a limited duration.
- **Vacant Position** is a position that is vacant during recruitment for a permanent appointment. "Vacant position" does not refer to a position that is temporarily available due to an employee's leave of absence.

GC Section 20480 parts (a) to (e) require that:

- a) Employees assigned to an out-of-class position can work a maximum of 960 hours in a fiscal year. *Remember to include hours docked when reporting the total hours worked.* The employee can work two different out-of-class assignments in which neither should exceed the 960-hour limit without penalty.

Bulletin: CalPERS Reporting Out-of-Class Hours

July 13, 2021

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- b) Employers must track and report the hours that an employee worked within thirty (30) days after the end of the fiscal year (by July 30th).
- c) As customary, compensation paid to the employee should be delineated in a collective bargaining agreement or a publicly available pay schedule.
- d) Penalties: Employers who violate GC Section 20480 will be assessed penalties equal to three times the employee and employer contributions for the difference between the compensation paid for the out-of-class appointment and the compensation paid and reported to the system for the member's permanent position. If the employee worked 961 hours, the penalty will be calculated on the total 961 hours (not the 1-hour excess). In addition, the district will be invoiced \$200 by CalPERS for administrative expenses.
- e) Employees are not liable for exceeding the 960 hours. Employers are prohibited from passing on the penalties to employees.

Example:

The Director position is vacant because the Director retired. The Assistant Director is temporarily appointed to the Director's position to continue daily business operations while recruitment is in progress. The hours that the Assistant Director works while in the Director position, must be reported per GC Section 20480.

Another employee is then appointed to backfill the Assistant Director's position. Because this position belongs to the Assistant Director, it is not a true vacancy and therefore the employee's hours should not be reported to CalPERS.

In the scenario above, only one position will result in an out-of-class appointment according to GC Section 20480. For the purpose of this law, out-of-class hours reporting is only required for truly vacant positions.

If you have any questions regarding this bulletin, please contact Michelle Johnston at Michelle.Johnston@sbcss.net.

Sincerely,

Ted Alejandre
County Superintendent of Schools

Signed Lena Young-Gallardo

Lena Young-Gallardo, Director
District Financial Services

LYG:kb
Attachments

myCalPERS Out-of-Class Reporting

Student Guide

April 24, 2021



Introduction

Using myCalPERS, employers report out-of-class hours worked in vacant positions in accordance with Government (Gov.) Code section 20480.

Assembly Bill (AB) 1487, effective January 1, 2018, affects California Public Employees' Retirement System (CalPERS) contracted employers. AB 1487 adds Government Code section 20480 which prohibits an out-of-class appointment by a public agency or school employer with employees serving a limited term appointment in a vacant position from exceeding 960 hours worked within each fiscal year. This pertains to classic and new Public Employees' Pension Reform Act (PEPRA) members.

myCalPERS allows you to:

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

To assist you with tracking and reporting hours worked in a vacant position, you will learn:

- The definition of an out-of-class appointment
- When notifications are sent to employers
- How penalties are assessed

Definition of Out-of-Class Appointment

Gov. Code section 20480 of the Public Employees' Retirement Law (PERL) defines an “out-of-class appointment” as an appointment to an upgraded position or higher classification by an employer or governing board or body into a vacant position for a limited duration.

A “vacant position” refers to 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

Beginning June 2019, CalPERS will mail up to two notification letters to all contracting public agency and school employers to their preferred address in myCalPERS.

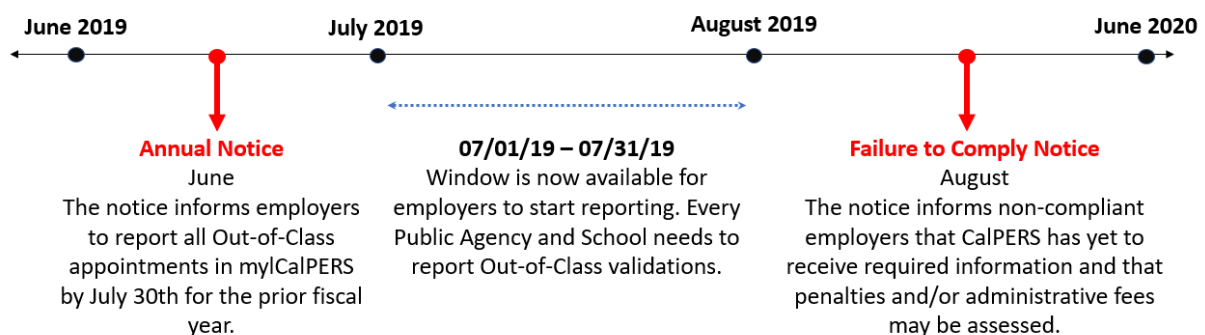
Annual Notification – (June)

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

Failure to Comply Notification – (August)

All non-compliant public agency and school employers that report payroll directly to CalPERS will be informed that we have not received the required information. Penalties and/or administrative fees may be assessed.

Out-of-Class Reporting Timeline



Penalties

Penalties incurred with reporting out-of-class appointments 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 2018/2019 completed by July 30, 2019 will be invoiced June 2020.

Employers who violate this provision must make payments to CalPERS equal to three times the amount of money for 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 to the system are not normal contributions or additional contributions that would usually be 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

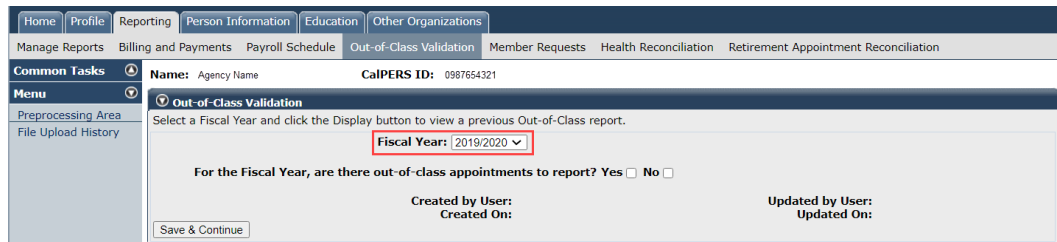
Using the out-of-class validation process, you will report that there are no out-of-class appointments for the fiscal year.

Step Actions

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

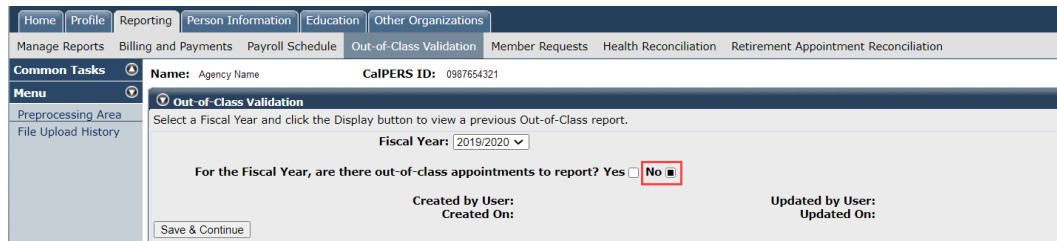
Step 2 Select the **Out-of-Class Validation** local navigation link.

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' form. The 'Fiscal Year' dropdown menu is highlighted with a red box and set to '2019/2020'. The form includes a 'Name' field, a 'CaPERS ID' field, and a 'Save & Continue' button. The question 'For the Fiscal Year, are there out-of-class appointments to report?' has 'Yes' and 'No' radio buttons, with 'No' currently selected.

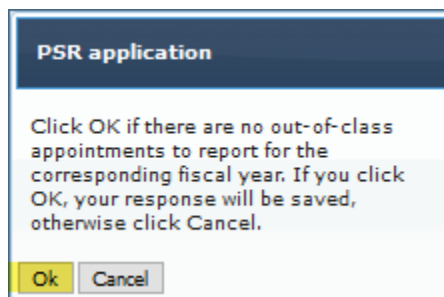
Step 4 Within the Out-of-Class Validation section, select the **No** check box.



The screenshot shows the 'Out-of-Class Validation' form. The 'No' radio button is highlighted with a red box. The form includes a 'Name' field, a 'CaPERS ID' field, and a 'Save & Continue' button. The question 'For the Fiscal Year, are there out-of-class appointments to report?' has 'Yes' and 'No' radio buttons, with 'No' currently selected.

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

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.' There are 'Ok' and 'Cancel' buttons at the bottom.

You have completed this scenario.

Scenario 2: Report Out-of-Class Appointments

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

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
- View 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 selected fiscal year.

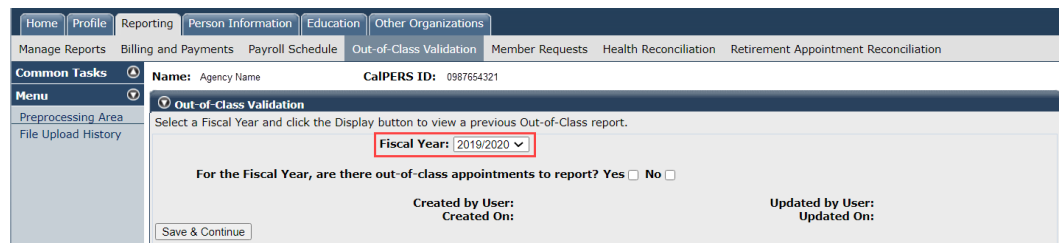
Step Actions

Out-of-Class Validation

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.

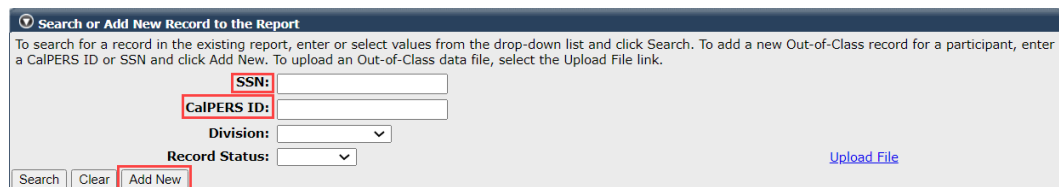


Step 4 Within the Out-of-Class Validation section, keep the **Yes** check box checked.

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

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

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



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 and continue to step 9

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.

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

You have completed this scenario.

Step 9 Within the Out-of-Class Appointment Validation section, is the Out-of-Class Appointment in a recruitment?

Yes: Select the **Yes** check box and continue 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.

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

You have completed this scenario.

Step 10 Within the Maintain Record Details section, enter the **Begin** and **End Dates**.

Step 11 Select the **Display** button.

Step 12 Select the appropriate **Appointment** radio button.

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

Begin Date: * 07/01/2018

End Date: * 12/31/2018

Appointment: *

- 91808641 : Agency Name - Miscellaneous - 07/22/2013
- 91886411 : Agency Name - Miscellaneous - 02/02/2012

Active Appointment

Step 13 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 original position during the out-of class-period.

Active Appointment

Position Title: *	Office Clerk	Pay Rate: *	25.00
Pay Rate Type: *	Hourly		
Total Earnings: *	2000.00		
Member Contributions:		Employer Contributions:	

Out-of-Class Appointment

Step 14 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 Temporary Upgrade Pay** fields, report the actual amount paid to the member for the entire reporting period, even if the compensation was not reported to CalPERS through regular payroll reporting.

Out-of-Class Appointment

For Total Earnings and Total Paid Temporary Upgrade Pay, report the actual amount paid to the member for the entire reporting period, even if the compensation was not reported to CalPERS through regular payroll reporting.

Position Title: *	Staff Service Manager I	Pay Rate: *	30
Pay Rate Type: *	Hourly	Total Paid Temporary Upgrade Pay: *	0
Total Earnings: *	2400.00		
Member Contributions:		Employer Contributions:	

Out-of-Class Hours Reported

Step 15 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: *	80
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View Penalties

Step 16 Within the Penalty subsection, select the **Calculate** button.

Penalty

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.

Penalty: 0.00
<input type="button" value="Calculate"/> <input type="button" value="Clear"/>

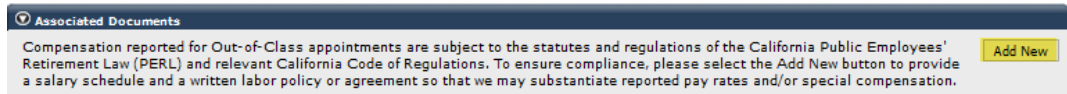
Associate Labor Agreements/Salary Schedules

Step 17 Do you need to provide a salary schedule or written labor policy/agreement?

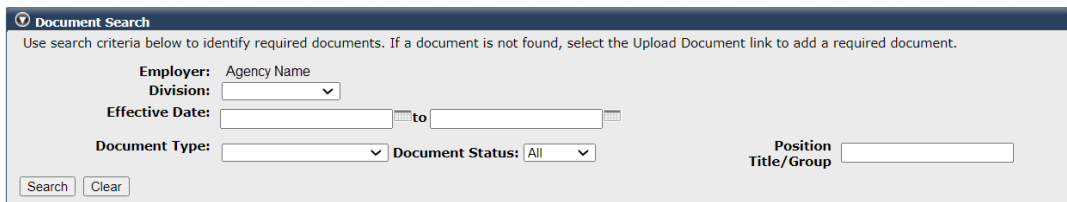
Yes: Continue to step 18

No: Skip to step 31

Step 18 Within the Associated Documents section, select the **Add New** button.



Step 19 Within the Document Search section, populate the following fields as necessary.



Step 20 Select the **Search** button.

Step 21 Do you need to upload a new document?

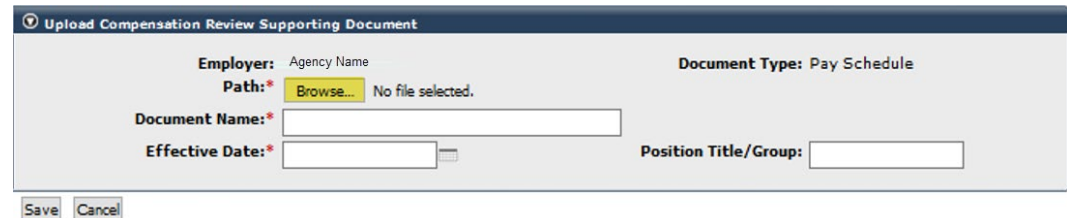
Yes: Continue to step 22

No: Continue to step 29

Step 22 In the Search Results section, select the **Upload Document** link.



Step 23 Within the Upload Compensation Review Supporting Document section, select the **Browse** button.



Step 24 Select the supporting PDF document.

Step 25 Select the **Open** button.

Step 26 Within the Upload Compensation Review Supporting Document section, complete the Position Title/Group field.

Upload Compensation Review Supporting Document

Employer: Agency Name

Document Type: Pay Schedule

Path: Payroll Schedule eff 01012019.pdf

Document Name:

Effective Date:

Position Title/Group:

Step 27 Select the **Save** button.

Step 28 Within the Search Results section, select appropriate document check box(s).

Search Results

[Upload Document](#)

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

Step 29 Select the **Associate to Appointment** button.

Search Results

[Upload Document](#)

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

Step 30 Select the **Return** button in the bottom left corner.

Step 31 Select the **Save & Exit** button.

Step 32 Within the Records Present in the Report section, your out-of-class record displays.

Records Present in the Report

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](#)

Show entries

Showing 1 to 9 of 9 entries

First Previous 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"/> xxx-xx-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

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 checkbox question: 'For the Fiscal Year, are there out-of-class appointments to report? Yes No '. At the bottom, there are fields for 'Created by User', 'Created On', 'Updated by User', and '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. The 'Upload File' link is highlighted in yellow.

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.' There is an 'Upload File' button.

Step 8 Select the CSV document.

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

Step 10 Once your out-of-class appointment has been uploaded and the file status displays as "Ready," 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.

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

View 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.

SSN	CalPERS ID	Business Partner	Name	Out-of-Class Position Title	Reporting Period	Total FY Hours Worked	Penalty	Record Status
<input type="checkbox"/> xxx-xx-9999	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 3: Inactivate Supporting Document 17
- Scenario 4: Reactivate Supporting Document 18

Scenario 1: Upload New Supporting Document

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

Step Actions

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

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

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.

Document Search

Use search criteria below to identify required documents. If a document is not found, select the Upload Document link to add a required document.

Employer: Agency Name
Division:
Effective Date: to
Document Type: Document Status: All
Position Title/Group:

Search Clear

Step 4 Select the **Search** button.

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

Search Results

Inactivate Document [Upload Document](#)

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

Upload Compensation Review Supporting Document

Employer: Agency Name
Document Type: Pay Schedule
Path: Choose File No file chosen
Document Name:
Effective Date: Position Title/Group:

Save Cancel

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.

Upload Compensation Review Supporting Document

Employer: Agency Name Document Type: Pay Schedule

Path: Payroll Schedule.pdf

Document Name:

Effective Date:

Position Title/Group:

Step 10 Select the **Save** button.

You have completed this scenario.

Scenario 2: Update Supporting Document Details

You will update supporting document details such as the document name, effective date, or position/title group.

Step Actions

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' tab selected in the top navigation bar. The left sidebar contains a 'Menu' section with 'Maintain Employer Supporting Documents' highlighted in red. The main content area displays 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. The table contains several rows of data, with the last row highlighted in blue.

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 with the following fields: Employer (Agency Name), Division (dropdown), Effective Date (two date pickers), Document Type (dropdown), Document Status (All, dropdown), 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 with a table of search results. The first row is highlighted in blue and has an 'Update Details' link next to it.

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	

Step 6

Update the Upload Compensation Review Supporting Document section.

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

- Employer:** Agency Name
- Document Type:** Pay Schedule
- Path:** * Choose File | Payroll Schedule.pdf
- Document Name:** *
- Effective Date:** * (with a calendar icon)
- Position Title/Group:** *

At the bottom of the form are two buttons: "Save" and "Cancel".

Step 7

Select the **Save** button.

You have completed this scenario.

Scenario 3: Inactivate Supporting Document

You will inactivate a supporting document.

Step Actions

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 'Work On Existing Payroll Reports' with 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. Fields include: Employer (Agency Name), Division (dropdown), Effective Date (date range), Document Type (dropdown), Document Status (All), and Position Title/Group (text input). Search and Clear buttons are at the bottom.

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' section. A table lists search results with a checked checkbox for the document 'PaySchedule.01122019.pdf'.

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

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

The screenshot shows the 'Search Results' section with the 'Inactivate Document' button highlighted in yellow.

You have completed this scenario.

Scenario 4: Reactivate Supporting Document

Scenario

You will reactivate a supporting document.

Step Actions

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' tab selected in the top navigation bar. The left-hand navigation menu has 'Maintain Employer Supporting Documents' highlighted with a red box. The main content area displays 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	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 fields for 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, find the appropriate inactive supporting document, then select the **Update Details** link.

The screenshot shows the 'Search Results' section with a table of search results. The first row is highlighted, showing a document named 'PaySchedule.01122019.pdf' with an 'Update Details' link highlighted in yellow.

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	

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

The screenshot shows the 'Upload Compensation Review Supporting Document' form. It includes fields for Employer (Agency Name), Document Name (Pay Schedule), Effective Date (12/28/2019), and Document Type (Pay Schedule). The 'Reactivate Document' button is highlighted with a red box.

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.

- [Out-of-Class Reporting Data Element Definitions Document \(PDF\)](#)
Pathway: 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: 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...: Find myCalPERS Student Guides
- [Online Classes for Employers \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides > Online Classes for Employers (PDF)
- [Employer Education Schedule \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides > Employer Education Schedule (PDF)
- [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 [Compensation Compliance & Review Unit](#) for special compensation questions and inquiries, 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.