



District Business & Advisory Services

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Bulletin: 18-004

Date: July 7, 2017

To: District Chief Business Officers
District Fiscal Directors
Personnel and Payroll Directors

From: Nghia Do, Advisor – DBAS

Re: Reporting Retired Annuitants' Post Retirement Employment to the California Public Employees' Retirement System (CalPERS)

The purpose of this bulletin is to communicate with Districts on reporting retired annuitants' post retirement employment to CalPERS.

BACKGROUND: Current law allows retired CalPERS members to return to employment with a CalPERS employer while receiving a retirement allowance under certain specified conditions (CalPERS Circular Letter 200-002-14):

1. A break-in service of 180 days between the date of retirement and the return-to-work date
2. A limitation of 960 working hours per year
3. A stipulation that retired members may not accrue service credit or make contributions to CalPERS during their post-retirement employment.

On February 17, 2017, CalPERS submitted Assembly Bill (AB) 1309 proposing that CalPERS be authorized to assess a fee to incentivize CalPERS employers to enroll retirees and provide timely information to CalPERS about retired annuitants working during retirement. If it is passed, AB 1309 will take effect January 1, 2018.

For administrative recordkeeping purposes, CalPERS requires school employers:

1. To enroll a retired member employed in any capacity, without reinstatement, within 30 days of the effective date of hire.
2. To report the pay rate and the number of hours worked by a retired member employed in any capacity, without reinstatement, within 30 days following the last day of the pay period in which the retired member worked.
3. To pay a fee of \$200.00 per retired member per month until the retired member is enrolled and the payroll information is reported if a district fails to fulfil these CalPERS requirement.

Please distribute this memo within your District as deemed appropriate.

ACTION NEEDED:

 Districts:

1. Review the list of employees that is emailed to your district by your service team's advisor. This list includes the employees who currently are coded as RS: 04 – PERS Retired in W4 screen (this list was generated by the QCC Personnel Downloader on 05/02/2017)
2. Identify all retired members who continue to work for district in fiscal year 2017-18 and enroll them in myCalPERS (see attachment)
3. Maintain on a monthly basis an excel spreadsheet that includes all retired members' payroll information such as pay rate, pay rate type, total hours worked, earnings etc.
4. Provide to your DBAS service team's accounting specialist the retired members' spreadsheet by the 10th of each month for your district.

 DBAS:

1. The service team's accounting specialist will input the retired members' payroll information manually in myCalPERS online each month.

ENROLL AND REPORT A RETIRED ANNUITANT WHO RETURNS TO EMPLOYMENT WITH CalPERS EMPLOYER

DISTRICT'S RESPONSIBILITIES:

Enrolling a Retired Annuitant in myCalPERS online:

✚ In myCalPERS online, enroll any retired member employed in any capacity, without reinstatement, within 30 days of the effective date of hire

1. Log in to myCalPERS
2. Click Accept
3. Select Person Search from the Home page
4. Enter either the SS# or CalPERS ID and click Search
5. Select Add New (next to the Appointment History from the Person Information page)
6. Fill in the required information:
 - a) Enrollment Eligibility Date
 - b) Division: select from the drop-down menu
 - c) Original Hire Date
 - d) Member Category: select Miscellaneous from the drop-down list
 - e) Work Calendar: select Work Calendar from the drop-down list
 - f) **Retired Annuitant: YES**
 - g) Temporary Position: YES/NO
 - h) Refunded Appointment: NO
 - i) Reciprocal Member Indicator: NO
7. Click Save

Appointment Details

Program
Program: CalPERS Enrollment Eligibility Date: CPE *

Position Information
Employer: Santa Clara County Schools CalPERS ID (Employer): 4808924344
Division: CalPERS ID (Division): 0
Original Hire Date: *
Member Category: *
Position Title: [Update](#)
Work Calendar: *

Retired Annuitant? * Yes Temporary Position? * Yes
 No No

CBU:

Refunded Appointment * Yes
 No

Reciprocity
Reciprocity
Reciprocal Member Indicator: Yes
 No

ENROLL AND REPORT A RETIRED ANNUITANT WHO RETURNS TO EMPLOYMENT WITH CalPERS EMPLOYER

Reporting a Retired Annuitant’s Payroll Information to CalPERS:

✚ In QCC, a retired member should be set up as follow:

1. W4 Screen: Primary RS = 04 - PERS Retired
2. PR Screen: St-Ded = TMNN; AC-P-C = 00-0-0.

✚ In absence of QCC feature, districts need to maintain an excel spreadsheet to report to CalPERS a retired member’s pay rate and number hours worked in any capacity, without reinstatement, within 30 days of following the last day of the pay period in which the retired member worked. The template should be similar to the one below:

DISTRICT NAME: ABC									
REPORTING MONTH: March 2017									
SS#	CalPERS ID	Appointment ID	Retirees (Last, First Name)	Beginning Date	Ending Date	Pay Rate	Pay Type	Earnings	Hours Worked
xxx-xx-xxxx	xxxxxxxxxxx	xxxxxxx	Example, One	3/1/2017	3/31/2017	67.98	Hourly	1,087.68	16

✚ Email the spreadsheet to the service team’s accounting specialist by **the 10th of each month.**