



District Business and Advisory Services

Judy Lee Kershaw, Director - DBAS: 408-453-6599

Bulletin: 19-038

Date: June 11, 2019

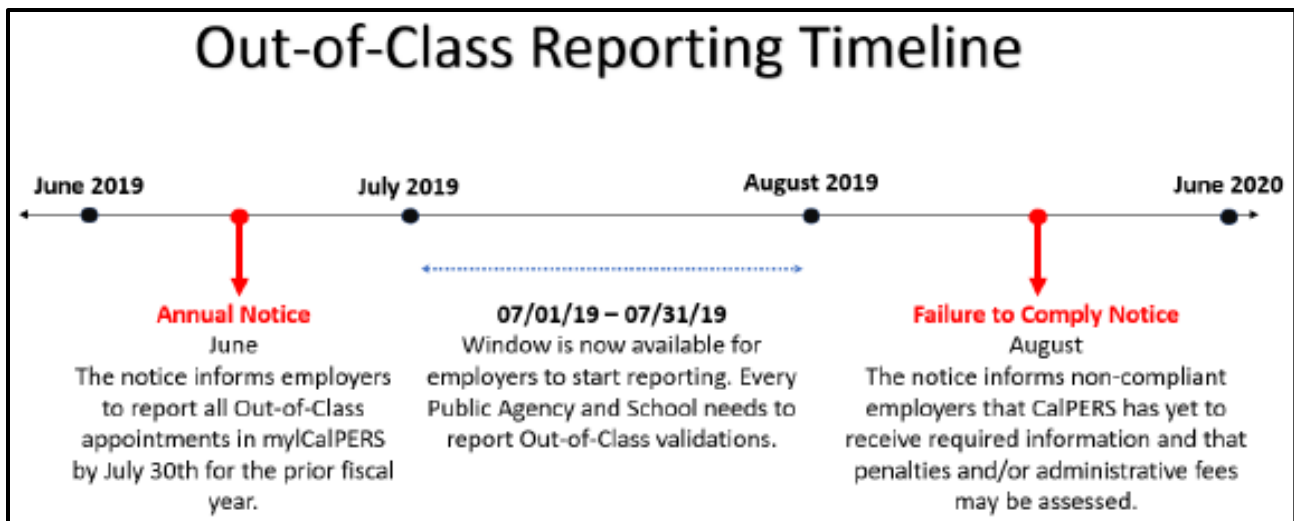
To: District Chief Business Officers
District Fiscal Directors
District Personnel and Payroll Directors

From: Nghia Do, District Business Advisor

Re: **Action Required:** Fiscal Year 2018-19 Out-of-Class Appointment Validation

The purpose of this bulletin is to inform Districts that a new reporting functionality is available within my|CalPERS to provide Districts the ability to report out-of-class hours worked in accordance with Government Code (G.C.) 20480. Effective July 1, 2019 the Out-of-Class Appointment Employer Certification form will no longer be accepted by the California Public Employees' Retirement System (CalPERS). Districts are required to certify out-of-class appointment through my|CalPERS.

CalPERS has provided the following timeline for reporting employees working in an out-of-class appointment during fiscal year 2018-19:



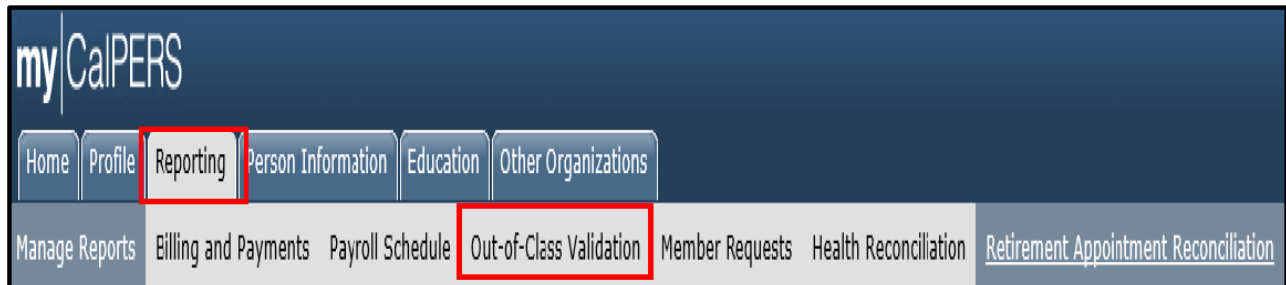
CalPERS Actions

CalPERS will mail the following notices to each district beginning June 2019:

- An annual notice will be sent during the month of June to remind Districts of the mandatory requirement to report by July 30, the number of hours an employee has worked out-of-class in a vacant upgraded position.
- A Failure-to-Comply notice will be sent during the month of August to inform non-compliant Districts that CalPERS has not received the required information and that penalties and/or administrative fees may be assessed.

District's Responsibilities

- Track hours worked per fiscal year for each vacant position occupied by an employee working out-of-class.
- Use the new reporting functionality within my|CalPERS to report all hours worked in vacant position(s).
 - ✚ Log into my|CalPERS.
 - ✚ Select the Reporting Tab, then select the Out-of-Class Validation tab.



- ✚ Follow the step-by-step instructions in the attached my|CalPERS Student Guide to report all hours worked by employees in an out-of-class appointment while occupying a vacant position(s). This action must be completed by **July 30** each year.
- Upload the appropriate labor agreements and pay schedules during the out-of-class reporting as instructed.
- Make timely payments of penalties that may be assessed in accordance with G.C. 20480.

Penalties

Districts who violate the provision must:

- Make payments to CalPERS equal to three (3) times the employer and employee contributions that would otherwise be paid to CalPERS. This amount is computed based on the difference between the compensation paid for the out-of-class position and the compensation paid and reported to CalPERS for the employee's permanent position. The penalty will be applied to the entire period the employee serves in an out-of-class appointment.
- Pay an additional fee of \$200.00 to cover administrative expenses.

Employees working out-of-class shall bear no liability, obligation, or expenses as a result of the unlawful actions of the employer with respect to G.C. 20480.

Please refer to CalPERS circular letter 200-018-19 (<https://www.calpers.ca.gov/docs/circular-letters/2019/200-018-19.pdf>) for more information.

Please distribute this memo within your District as deemed appropriate.

my|CalPERS Out-of-Class Reporting

Student Guide

May 24, 2019



Introduction

A new my|CalPERS reporting process has been designed to help 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 (Gov.) Code section 20480 which prohibits an out-of-class appointment by a public agency or school employer with employees serving a limited term (LT) appointment in a vacant position from exceeding 960 hours worked within each fiscal year (FY). This pertains to Classic and New Members (Public Employees' Pension Reform Act).

The new functionality within my|CalPERS allows you to:

- Verify out-of-class hours to report
- Submit record 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 in this procedure guide.

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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:

- Understand 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 in 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.

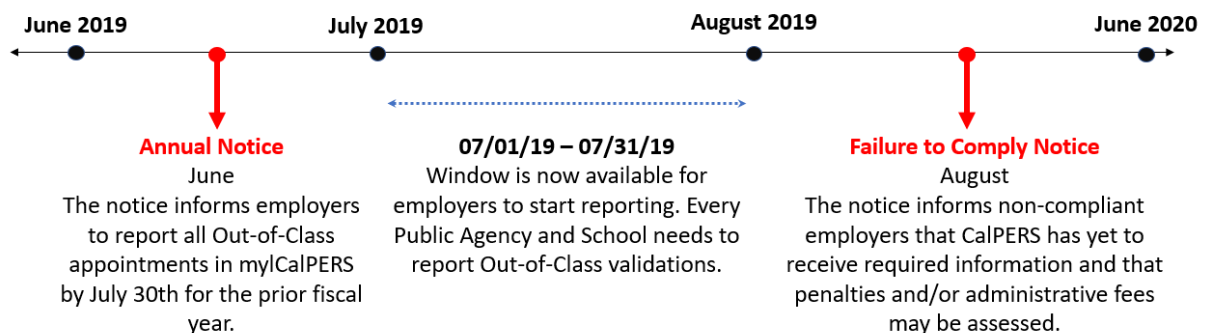
Annual Notification – (June)

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 yet to receive 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 the compensation paid for the out-of-class appointment and the compensation paid and 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

Scenario

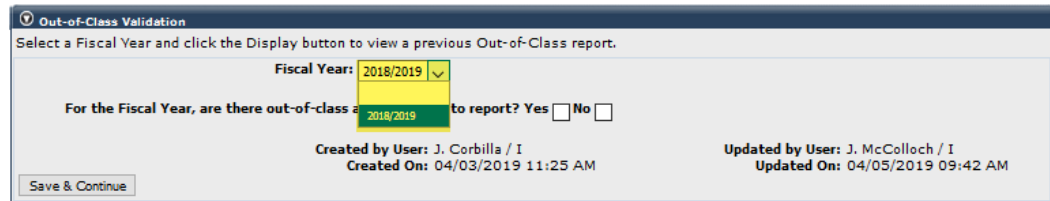
Using the out-of-class validation process, you will report to CalPERS that there are no out-of-class appointments for the selected fiscal year.

Step Actions

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

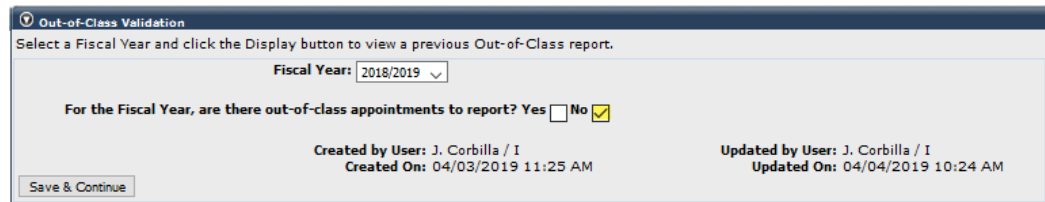
Step 2 Select the **Out-of-Class Validation** local navigation link.

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. At the top, it says 'Select a Fiscal Year and click the Display button to view a previous Out-of-Class report.' Below this, there is a 'Fiscal Year' dropdown menu with '2018/2019' selected. The main question is 'For the Fiscal Year, are there out-of-class appointments to report? Yes No '. The 'No' checkbox is currently unchecked. At the bottom, there is a 'Save & Continue' button. Metadata includes 'Created by User: J. Corbilla / I' and 'Updated by User: J. McColloch / I'.

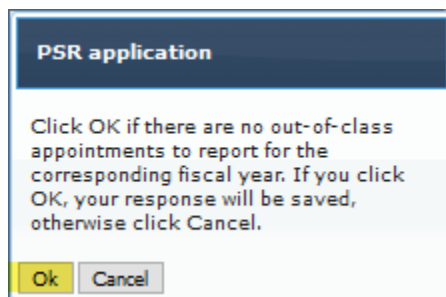
Step 4 Within the Out-of-Class Validation section, select the **No** checkbox.



The screenshot shows the 'Out-of-Class Validation' form. The 'Fiscal Year' dropdown menu is still set to '2018/2019'. The main question is 'For the Fiscal Year, are there out-of-class appointments to report? Yes No '. The 'No' checkbox is now checked. At the bottom, there is a 'Save & Continue' button. Metadata includes 'Created by User: J. Corbilla / I' and 'Updated by User: J. Corbilla / I'.

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.' At the bottom, there are two buttons: 'Ok' and 'Cancel'. The 'Ok' button is highlighted in yellow.

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 record 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.

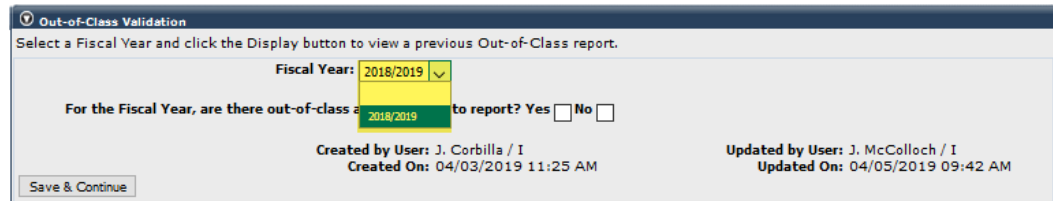
Step Actions

Out-of-Class Validation

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

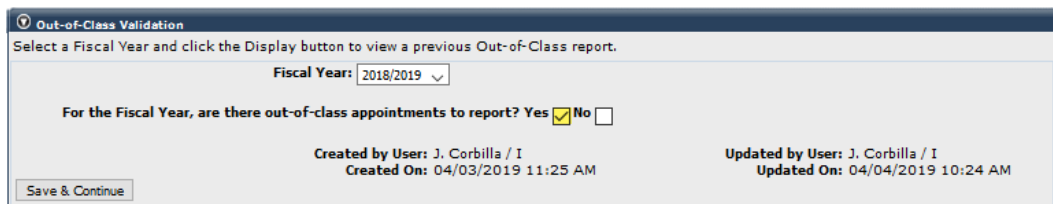
Step 2 Select the **Out-of-Class Validation** local navigation link.

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



The screenshot shows the 'Out-of-Class Validation' form. At the top, it says 'Select a Fiscal Year and click the Display button to view a previous Out-of-Class report.' Below this, there is a 'Fiscal Year:' label followed by a dropdown menu showing '2018/2019'. The main question is 'For the Fiscal Year, are there out-of-class appointments to report?' with 'Yes' and 'No' radio buttons. The 'Yes' button is currently unselected. At the bottom, there is a 'Save & Continue' button. Metadata includes 'Created by User: J. Corbilla / I' and 'Updated by User: J. McColloch / I'.

Step 5 Within the Out-of-Class Validation section, select the **Yes** checkbox.



The screenshot shows the 'Out-of-Class Validation' form. The 'Fiscal Year' dropdown is still set to '2018/2019'. The 'Yes' radio button is now selected. The 'Save & Continue' button is visible at the bottom. Metadata includes 'Created by User: J. Corbilla / I' and 'Updated by User: J. Corbilla / I'.

Step 6 Select the **Save & Continue** button.

Step 7 Within the Search or Add New Record to the Report section, enter the employee's **SSN** or **CalPERS ID** in the appropriate field.

Step 8 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 9 Within the Out-of-Class Appointment Validation section, answer the validation criteria questions.

Step 10 Is the Out-of-Class Appointment a vacant position?

Yes: Select the **Yes** checkbox and continue to step 11

No: Select the **No** checkbox. 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 11 Is the Out-of-Class Appointment in a recruitment?

Yes: Select the **Yes** checkbox and continue to step 12

No: Select the **No** checkbox. 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 12 Within the Maintain Record Details section, enter the **Begin** and **End Dates**.

Step 13 Select the **Display** button.

Step 14 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 Display

Appointment: * 91808641 : CalPERS Employer - Miscellaneous - 07/22/2013
 91886411 : CalPERS Employer - Miscellaneous - 02/02/2012

Active Appointment

Step 15 Within the Active Appointment subsection, populate all appropriate fields pursuant to information for the member's original appointment before working in an out-of-class appointment:

- Position Title
- Pay Rate Type
- Pay Rate
- Total Earnings (Earnings employee would have earned if they worked in original position during 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 16 Within the Out-of-Class Appointment subsection, populate all appropriate fields pursuant to information for the out-of-class appointment:

- Position Title
- Pay Rate Type
- Pay Rate
- Total Earnings*
- Total Reported Temporary Upgrade Pay*

***Note:** 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.

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.

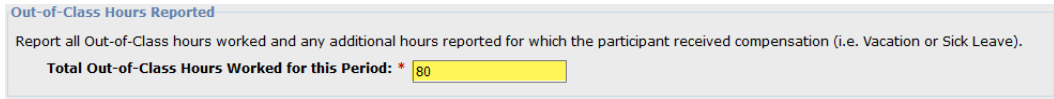
Position Title: * Staff Service Manager I Pay Rate: * 30

Pay Rate Type: * Hourly Total Earnings: * 2400.00 Total Paid Temporary Upgrade Pay: * 0

Member Contributions: Employer Contributions:

Out-of-Class Hours Reported

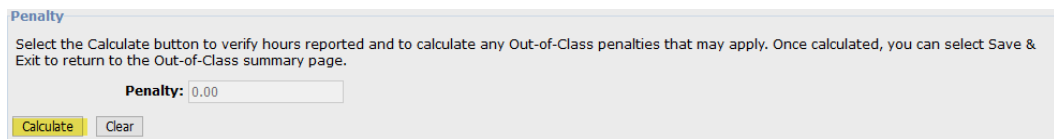
Step 17 Within the Out-of-Class Hours Reported subsection, provide the Total Out-of-Class Hours Worked for this Period (include vacation, sick leave, or overtime hours the employee received paid compensation).



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: *

View Penalties

Step 18 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:

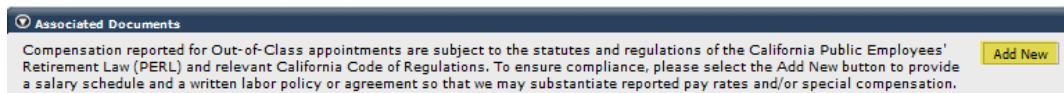
Associate Labor Agreements/Salary Schedules

Step 19 Do you need to provide a salary schedule or written labor policy/agreement?

Yes: Continue to step 20

No: Skip to step 34

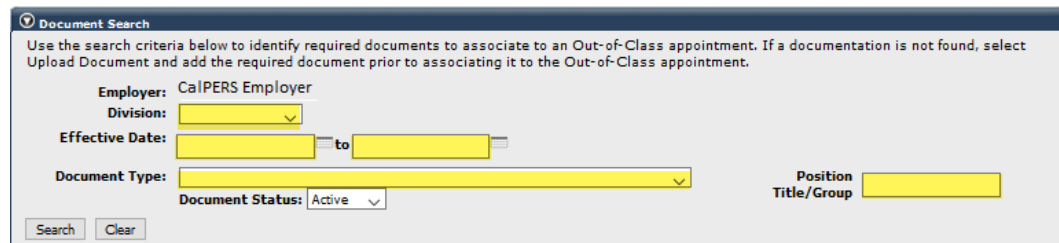
Step 20 Within the Associated Documents section, select the **Add New** button.



Associated Documents
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.

Step 21 Within the Document Search section, populate the following fields as necessary:

- Division
- Effective Date
- Document Type
- Position Title/Group



Document Search
Use the search criteria below to identify required documents to associate to an Out-of-Class appointment. If a documentation is not found, select Upload Document and add the required document prior to associating it to the Out-of-Class appointment.
Employer: CalPERS Employer
Division:
Effective Date: to
Document Type:
Document Status: Active
Position Title/Group:

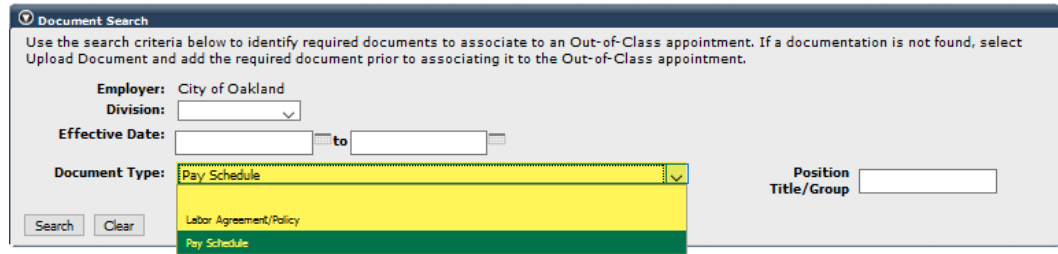
Step 22 Select the **Search** button.

Step 23 Do you need to upload a new document?

Yes: Continue to step 24

No: Continue to step 31

Step 24 Select a document type from the **Document Type** drop-down list.



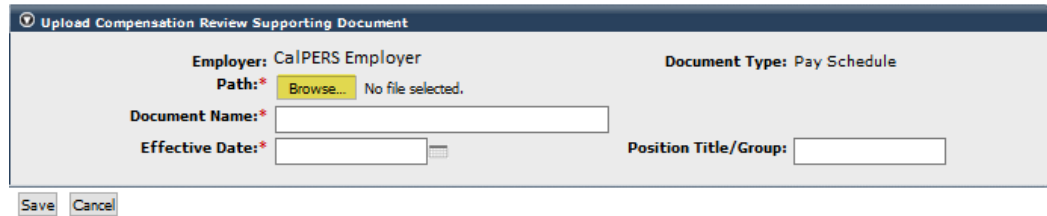
The screenshot shows a 'Document Search' window. At the top, it says 'Use the search criteria below to identify required documents to associate to an Out-of-Class appointment. If a documentation is not found, select Upload Document and add the required document prior to associating it to the Out-of-Class appointment.' The form includes fields for 'Employer' (City of Oakland), 'Division' (a dropdown menu), 'Effective Date' (two date pickers with 'to' in between), 'Document Type' (a dropdown menu with 'Pay Schedule' selected), and 'Position Title/Group' (a text box). There are 'Search' and 'Clear' buttons at the bottom left.

Step 25 In the Search Results section, select the Upload Document link.



The screenshot shows a 'Search Results' window. It has a tab labeled 'Inactivate Document' and a yellow button labeled 'Upload Document' on the right side.

Step 26 Within the Upload Compensation Review Supporting Document selection, select the **Browse** button.



The screenshot shows an 'Upload Compensation Review Supporting Document' window. It includes fields for 'Employer' (CaIPERS Employer), 'Document Type' (Pay Schedule), 'Path' (with a 'Browse...' button and 'No file selected.' text), 'Document Name' (a text box), 'Effective Date' (a date picker), and 'Position Title/Group' (a text box). There are 'Save' and 'Cancel' buttons at the bottom left.

Step 27 Select the supporting PDF document.

Step 28 Select the **Open** button.

Step 29 Complete the Upload Compensation Review Supporting Document section as necessary:

- Document Name
- Effective Date
- Position Title/Group

Upload Compensation Review Supporting Document

Employer: CalPERS Employer Document Type: Pay Schedule

Path: Browse...

Document Name:

Effective Date: Position Title/Group:

Save Cancel

Step 30 Select the **Save** button.

Step 31 Within the Search Results section, select appropriate document checkbox(s).

Search Results

Associate to Appointment Inactivate Document Upload Document

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	

Update Details

Step 32 Select the Associate to Appointment button.

Search Results

Associate to Appointment Inactivate Document Upload Document

Document Name	Document Type	Effective Date	Upload Date	Document Status	Position Title/Group
---------------	---------------	----------------	-------------	-----------------	----------------------

Step 33 Select the Return button in the bottom left corner.

Step 34 Select the Save & Exit button.

Step 35 Within the Records Present in the Report section, your out-of-class record will display.

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 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"/> xxx-xx-9999	0123456789	CalPERS Employer	Jerm Korbeya	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

Scenario

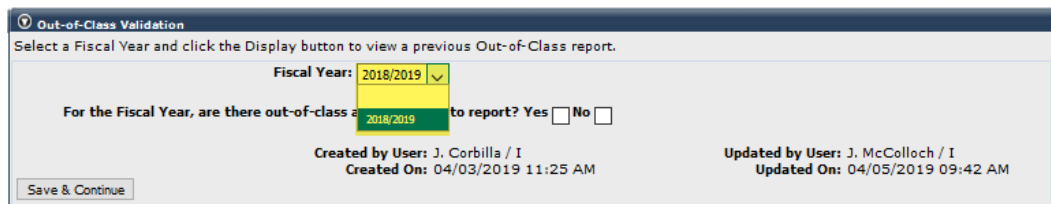
You will report to CalPERS your out-of-class validations through file upload.

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.

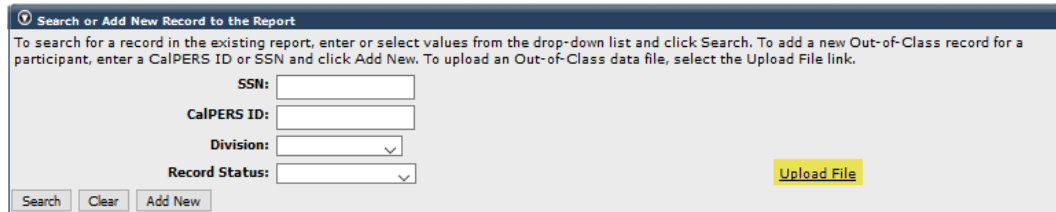


The screenshot shows the 'Out-of-Class Validation' form. It includes a 'Fiscal Year' dropdown menu set to '2018/2019'. Below it, there is a question: 'For the Fiscal Year, are there out-of-class appointments to report?' with 'Yes' and 'No' checkboxes. The 'Yes' checkbox is selected. At the bottom, there are 'Created by User' and 'Updated by User' fields, both showing 'J. Corbilla / I' and 'J. McColloch / I' respectively, along with their creation and update timestamps. A 'Save & Continue' button is located at the bottom left.

Step 4 Within the Out-of-Class Validation section, select the **Yes** checkbox.

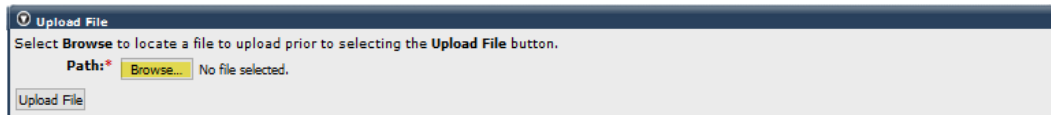
Step 5 Select the **Save & Continue** button.

Step 6 Within the Out-of-Class Validation section, select the **Upload File** link.



The screenshot shows the 'Search or Add New Record to the Report' form. It contains input fields for 'SSN', 'CalPERS ID', 'Division', and 'Record Status'. There are 'Search', 'Clear', and 'Add New' buttons at the bottom left. A yellow 'Upload File' button is located on the right side.

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

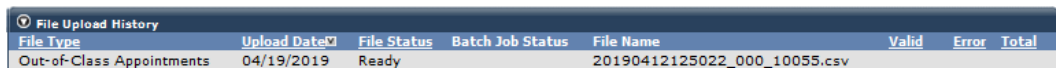


The screenshot shows the 'Upload File' form. It has a 'Path:' label followed by a 'Browse...' button and the text 'No file selected.' Below this is an 'Upload File' button.

Step 8 Select the CSV document.

Step 9 Select **Upload File** button.

Step 10 Once your Out-of-Class Appointment has been uploaded and File Status is ready. Press 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 'File Upload History' table. 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 '20190412125022_000_10055.csv', 9 valid records, 0 errors, and a total of 9 records.

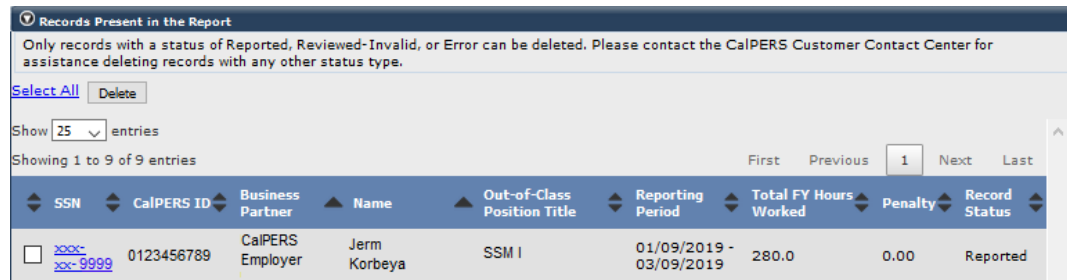
File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
Out-of-Class Appointments	04/19/2019	Accepted	Completed	20190412125022_000_10055.csv	9	0	9

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 will display.



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 for Jerm Korbeya, an SSM I, with a reporting period from 01/09/2019 to 03/09/2019, 280.0 total FY hours worked, a 0.00 penalty, and a 'Reported' status.

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	CalPERS Employer	Jerm Korbeya	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 to support out-of-class validations.

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Scenario 1: Upload New Supporting Document

Scenario

In this scenario you will upload a new salary schedule or written labor policy/agreement.

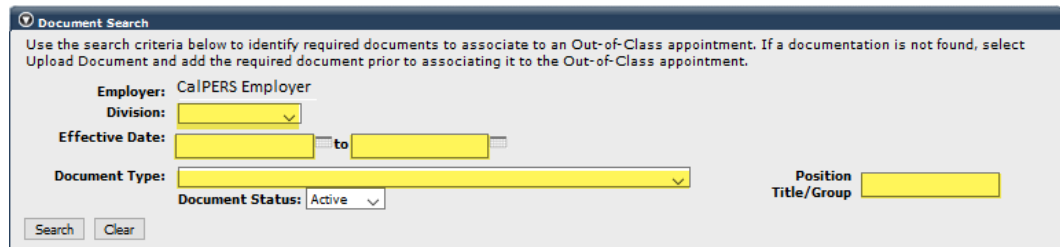
Step Actions

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

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

Step 3 Within the Document Search section, populate the following fields as necessary:

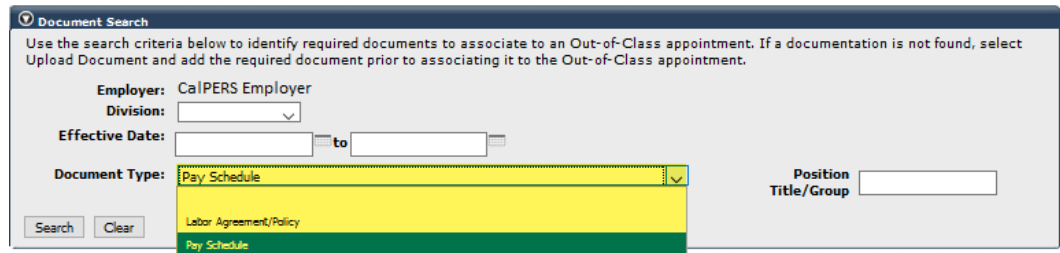
- Division
- Effective Date
- Document Type
- Position Title/Group



The screenshot shows the 'Document Search' form. It includes the following fields: 'Employer' (set to 'CalPERS Employer'), 'Division' (a dropdown menu), 'Effective Date' (two date input fields with a 'to' separator), 'Document Type' (a dropdown menu), 'Document Status' (set to 'Active'), and 'Position Title/Group' (a text input field). There are 'Search' and 'Clear' buttons at the bottom left.


Step 4 Select the **Search** button.

Step 5 Select a document type from the **Document Type** drop-down list.



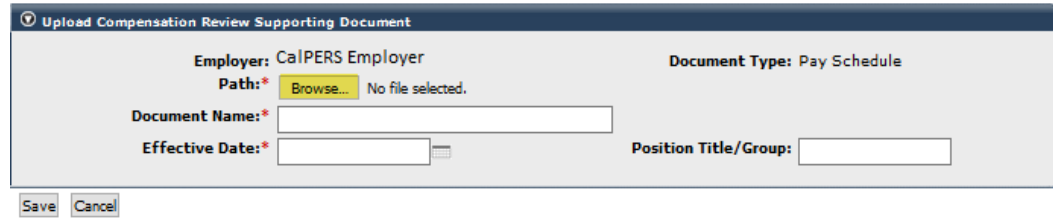
The screenshot shows the 'Document Search' form with the 'Document Type' dropdown menu open. The dropdown list contains three options: 'Pay Schedule' (highlighted in green), 'Labor Agreement/Policy', and 'Pay Schedule'. The 'Search' and 'Clear' buttons are visible at the bottom left.

Step 6 In the Search Results section, select the **Upload Document** link.



The screenshot shows the 'Search Results' section. It contains two buttons: 'Inactivate Document' and 'Upload Document' (highlighted in yellow).

Step 7 Within the Upload Compensation Review Supporting Document section, select the **Browse** button.



Upload Compensation Review Supporting Document

Employer: CalPERS Employer Document Type: Pay Schedule

Path: No file selected.

Document Name:

Effective Date:

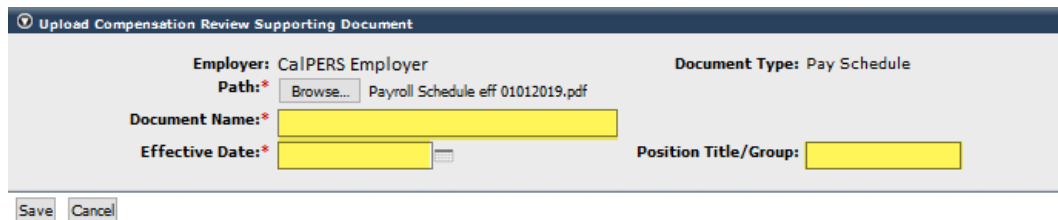
Position Title/Group:

Step 8 Select the supporting PDF document.

Step 9 Select the **Open** button.

Step 10 Complete the Upload Compensation Review Supporting Document section as necessary:

- Document Name
- Effective Date
- Position Title/Group



Upload Compensation Review Supporting Document

Employer: CalPERS Employer Document Type: Pay Schedule

Path: Payroll Schedule eff 01012019.pdf

Document Name:

Effective Date:

Position Title/Group:

Step 11 Select the **Save** button.

You have completed this scenario.

Scenario 2: Update Supporting Document Details

Scenario

In this scenario, you will update supporting document details such as 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.

Step 3 Within the Document Search section, populate the following fields as necessary:

- Division
- Effective Date
- Document Type
- Position Title/Group

Document Search

Use the search criteria below to identify required documents to associate to an Out-of-Class appointment. If a documentation is not found, select Upload Document and add the required document prior to associating it to the Out-of-Class appointment.

Employer: CalPERS Employer

Division:

Effective Date: to

Document Type:

Document Status: Active

Position Title/Group:

Step 4 Select the **Search** button.

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

Search Results

[Upload Document](#)

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

Step 6 Within the Upload Compensation Review Supporting Document section, update the following fields as necessary:

- Document Name
- Effective Date
- Position Title/Group

Upload Compensation Review Supporting Document

Employer: CalPERS Employer Document Type: Pay Schedule

Document Name: * PaySchedule.01122019

Effective Date: * 01/12/2019 Position Title/Group:

Save Cancel

Step 7 Select the **Save** button.

You have completed this scenario.

Scenario 3: Inactivate Supporting Document

Scenario

In this scenario, 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.

Step 3 Within the Document Search section, populate the following fields as necessary:

- Division
- Effective Date
- Document Type
- Position Title/Group

Document Search
Use the search criteria below to identify required documents to associate to an Out-of-Class appointment. If a documentation is not found, select Upload Document and add the required document prior to associating it to the Out-of-Class appointment.

Employer: CalPERS Employer
Division:
Effective Date: to
Document Type:
Document Status: Active
Position Title/Group:

Step 4 Select the **Search** button.

Step 5 Within the Search Results section, select appropriate document checkbox(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	01/12/2019	02/20/2019	Active	

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

Search Results
 [Upload Document](#)

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

You have completed this scenario.

Scenario 4: Reactivate Supporting Document

Scenario

In this 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.

Step 3 Within the Document Search section, populate the following fields as necessary:

- Division
- Effective Date
- Document Type
- Position Title/Group

The screenshot shows a 'Document Search' form with the following fields: Employer (set to 'CalPERS Employer'), Division (dropdown), Effective Date (date range), Document Type (dropdown), Document Status (set to 'Active'), 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 a '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	

There is an 'Update Details' link next to the document name and an 'Upload Document' link at the top right.

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

The screenshot shows a 'Reactivate Document' form with the following fields: Employer (set to 'CalPERS Employer'), Document Name (set to 'PaySchedule.01122019'), Effective Date (set to '01/12/2019'), Document Type (set to 'Pay Schedule'), and Position Title/Group (text input). There are 'Save', 'Cancel', and 'Reactivate Document' buttons at the bottom.

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.

Resources Links

- [Out-of-Class Reporting Data Element Definitions Document](#)
Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements
- [Out-of-Class Reporting Frequently Asked Questions](#)
Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements
- [my|CalPERS Student Guides](#)
Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides
- [Employer Education Schedule \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To... : Find my|CalPERS Student Guides > Employer Education Schedule
- [Online Classes for Employers \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To... : Find my|CalPERS Student Guides > Online Classes for Employers
- [my|CalPERS Technical Requirements](#)
Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements
- [CalPERS Public Agency & Schools Reference Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide
- [Circular Letters](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [California Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)
- [my|CalPERS Employer Reports \(Cognos\)](#)
Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > Employer Reports (Cognos)

CalPERS Contacts

Contact CalPERS via 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 [membership reporting](#) if a non-contributory employee doesn't have the correct Earned Period No Contribution and No Service transaction type and other membership questions, email Membership_Reporting@CalPERS.CA.GOV
- To contact the [Compensation Review Unit](#) for special compensation questions, email MOU_Review@CalPERS.CA.GOV

Contact CalPERS by 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 my|CalPERS. Expand the **Common Tasks** left-side navigation folder, and then select the **Submit Inquiry** link to submit a question or request.