CalPers – New Employees

1. Look up all new employees in MyCalPers. Also, the following:
    a. Substitutes
    b. Part time employees
    c. Employees in non-qualifying positions
2. Confirm if the new employee is one of the following:
    a. Existing member of Pers – Set up as member
    b. CalPers retiree – Set up as Pers retiree
    c. Terminated and refunded – Set up as non-member unless they are hired in a qualifying position
3. All existing members of Pers should be set up as a member if they are working in a classified position at your district. Even if the position is part-time or a substitute.
4. Retirees returning to work in a classified position should also be reported to Pers.
5. New employees that are not in a qualifying position (and not existing members of Pers) should be monitored. Each month, run the Retire09 report to monitor employees that may have reached 1,000 hours in a fiscal year. Upon qualification, employee should be made a member no later than the first of the following month. Even if the employee does not work that month.
6. Remember… *"Once a member, always a member"*

CalPers – Paperwork

1. Enrollment form
    a. New employees
    b. Returning employees
    c. Substitutes
    d. Returning retirees (asap – there is a $200.00 late fee)
    e. Leave of absence
    f. Name and address changes
    g. Separations, including retirement

2. Snapshot of MyCalPers screen
   a. Look up employee in MyCalPers
   b. Take a snapshot of the screen (even if it's blank)
   c. This will verify whether the employee is an existing member, retiree or non-member
   d. If your password is expired, needs to be reset, or you don't have access to MyCalPers, please contact Maria Aguayo at maguayo@scoe.org for assistance
3. Reciprocal Self-Certification Form
   a. This form is required by CalPers for all new employees
   b. Include a copy of the completed form with the enrollment form and snapshot
   c. Keep the original in your file for Pers auditing purposes
   d. This form serves as a means to identify if the employee has worked at a reciprocal agency
   e. Reciprocity with a former employer could determine the plan option should be Pre-2013
4. ES-372 form
   a. This form is required if an employee is hired in a classified position and wants to elect CalStrs
      i. Must be an existing member of CalStrs
      ii. Election must be made within 60 days of hire date
   b. This form can also be used if an employee is hired in a certificated position and wants to elect CalPers
      i. Must be existing member of Pers
      ii. Must have 5 years' service credit
      iii. If member does not meet required 5 years' service credit, they must have an active appointment in CalPers with a school employer in order to qualify
      iv. Election must be made within 60 days of hire date
   c. Please forward completed form to retirement analyst for signature. Completed form will be uploaded to CalPers and sent to Calstrs for final approval
   d. If request for election to alternate retirement system is denied, employee and employer will be notified

CalPers Retirees

1. CalPers retirees can return to work as long as the position meets certain criteria
   a. Mandatory 180 day wait period
   b. Classified position
   c. Positions that are temporary and of limited duration
   d. Extra help positions
   e. Vacant positions only during active recruitment
   f. No more than 960 hours in a fiscal year
2. CalPers retirees cannot…
   a. Be hired in a permanent position
   b. Receive any additional benefits…
      i. No special compensation
      ii. No Vacation or Sick Leave
   c. Should not pay into OASDI (in most cases)
3. If a retiree returns to work in a certificated position, it must be reported to CalStrs, not CalPers. Even if the retiree elected to remain in Pers for a certificated position from which they originally retired.
4. Remember… "Retirement follows the position, not the person"

Retirement Tab

1. The retirement tab should be completed even if an employee is not a member of either retirement system.
2. The retirement tab should include the following:
   a. Begin date
   b. Retirement Plan
   c. Member Status
   d. Plan Option
   e. Primary Plan
   f. Member Type
   g. Work Schedule

3. The retirement tab can be set up with dual retirement for employees that are members of both retirement systems.
4. Please maintain the retirement tab as employees terminate and/or retire.
5. When you use an add-on to pay an employee, please review the section "3 – Retirement" in adjust payroll:
    a. Confirm all of the required fields are populated
    b. Months should point to the correct pay period
    c. Include correct pay rate
6. Always view the snapshot in adjust payroll even if you are not using an add-on to confirm contributions are taken and reporting to the correct retirement system.