

Escape Setup – Certificated PERS Member with an Annual Salary Schedule

PERS Work Schedule Code must be **173 for Monthly** to report Service Credit correctly

Example: Certificated position that qualifies for STRS and the employee in the assignment elected to remain in PERS

The screenshot shows the 'Retirement Setup Information' form in the HR/Payroll - Employment - Employee Management system. The 'Retirement:2' tab is selected. The 'PERS Work Schedule' field is set to '173 {Monthly}' and is highlighted with a red box. A red arrow points from this field to a 'PERS Work Schedule' dialog box. The dialog box shows a list of work schedule codes and descriptions, with '173 Monthly' selected and highlighted with a red box.

Code	Description
000	None
050	Daily
163	Monthly
173	Monthly
375	Hourly
400	Hourly

Service Credit

Service credit earned for each year or partial year you work for as a CalPERS-covered employer. It accumulates on a fiscal year basis (July 1 - June 30) and is one of the factors to calculate future retirement benefits.

Defined Benefits are based on:

- Age at Retirement
- Highest salary for either 1 or 3 year period (Depending on your employer's contract)
- Years of service credit


A full year of service credit in a fiscal year:

- 1,720 hours (Hourly pay employees)
- 215 Days (Daily pay employees)
- 10 month full time (monthly pay employees)

GOVERNMENT CODE

20962.

(a) One year of service credit shall be granted for service rendered and compensated in a fiscal year in full-time employment for any of the following:

 (1) One academic year of service for persons employed on an academic year basis by the University of California, the California State University system, or school employees who are certificated members, under terms and conditions prescribed by the board.

(2) Ten months of service for persons employed on a monthly basis.

(3) Two hundred fifteen days of service after June 30, 1951, and 250 days prior to July 1, 1951, for persons employed on a daily basis.

(4) One thousand seven hundred twenty hours of service after June 30, 1951, and 2,000 hours prior to July 1, 1951, for persons employed on an hourly basis.

(5) Nine months of service for state employees represented by State Bargaining Unit 3 and subject to the 9–12 pay plan or leave plan, provided a memorandum of understanding has been agreed to by the state employer and the recognized employee organization to become subject to this subdivision.

(b) A fractional year of credit shall be given for service rendered in a fiscal year in full-time employment for less than the time prescribed in this section.

(Amended by Stats. 2009, Ch. 130, Sec. 24. (AB 966) Effective January 1, 2010.)

Example: Incorrect PERS Reporting for Certificated PERS Member 1.0 FTE

Pay99

Employee Payroll Snapshot

CE0A #3 - Cert 10 Month Aug-May															
Employee Address	[Redacted]				Pay Period 3, 10/01/17 - 10/31/17 on 10/31/17	Status	Closed								
Pay Check Site	[Redacted]				(Last Final Computed CES#3 - Ending 09/30/17 on 10/10/17)	FTE	1.00000	Benefit FTE	1.00000						
Time Sheet Site	[Redacted]				Bargaining Unit	1T	Empld	000497	Approved	10/24/2017					
PERS RETIREMENT DETAIL					Service Period	MO	YR	T	Pay Cd	Pay Rate	Earnings	Overtime	Contributions Cd	Amount	Work Schd Code
POSITION #29-10(0)					10	17	0	8		353.83	6,510.40		11	455.73	50
Retirement Total											6,510.40			455.73	

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Summary Health Enrollment

Common Tasks

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- View Service History
- View Transaction History
- Employee Rate Summary

Participant Name: [Redacted] **CalPERS ID:** [Redacted]

Program Details

Program: CalPERS Account Type: Member
 Status: Active Member Name: [Redacted]

Balance Details

Taxed Contributions:	\$0.00	Posted Interest:	\$6,915.56	Service Credit:	7.565
Tax Deferred Contributions:	\$27,492.54	Current Interest:	\$1,128.47	Last Reporting Date:	11/30/2017
Total Contributions:	\$27,492.54	Total Interest:	\$8,044.03	Current Fiscal Year:	0.00
				Hours Reported:	
				Total Balance:	\$35,536.57

Service History by Fiscal Year

The Member's Service History by Fiscal Year is displayed below. To view the existing service periods, select individual fiscal years and the View History button.

[View History](#)

Fiscal Year	Earnings	Special Compensation	Service Credit	Taxed Contributions	Tax Deferred Contributions	Service Credit Purchase Available	1959 Survivor
<input type="checkbox"/> 2017/2018	\$26,548.32	\$0.00	0.392	\$0.00	\$1,858.39	No	\$0.00
<input type="checkbox"/> 2016/2017	\$59,227.53	\$0.00	0.863	\$0.00	\$4,145.92	No	\$0.00
<input type="checkbox"/> 2015/2016	\$55,621.60	\$0.00	0.861	\$0.00	\$3,893.54	No	\$0.00
<input type="checkbox"/> 2014/2015	\$51,682.13	\$979.36	0.860	\$0.00	\$3,686.35	No	\$0.00
<input type="checkbox"/> 2013/2014	\$47,402.00	\$3,913.00	0.856	\$0.00	\$3,592.01	No	\$0.00

Showing records 1 - 5 | First << Previous 1 2 3 Next >> Last | View Max

Example: Correct PERS Reporting for Certificated PERS Member 1.0 FTE

Pay99

Employee Payroll Snapshot

CE0A #4 - Cert 10 Month Aug-May												
Employee Address	Pay Period 4, 11/01/17 - 11/30/17 on 11/30/17 (Last Final Computed CES#4 - Ending 10/31/17 on 11/09/17)						Status	Closed				
Pay Check Site	FTE 1.00000		Benefit FTE 1.00000		Empld 000497		Approved	11/21/2017				
Time Sheet Site	Bargaining Unit 1T				Last Calc'd		[REDACTED]					
PERS RETIREMENT DETAIL												
	Service Period	MO	YR	T	Pay Cd	Pay Rate	Earnings	Overtime	Contributions Cd	Amount	Work Sched Code	M B R
	POSITION #29-10(0)	11	17	0	1	6,510.40	6,510.40		11	455.73	173	1
	Retirement Total						6,510.40			455.73		

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Summary Health Enrollment

Common Tasks **Menu**

Appointment History Payroll Information Contributory Appointment History View Service History View Transaction History Employee Rate Summary

Participant Name: [REDACTED] **CalPERS ID:** [REDACTED]

Program Details

Program: CalPERS Account Type: Member
 Status: Active Member Name: [REDACTED]

Balance Details

Taxed Contributions: \$0.00 Posted Interest: \$27,839.79 Service Credit: 16.463
 Tax Deferred Contributions: \$58,923.39 Current Interest: \$2,887.29 Last Reporting Date: 11/30/2017
 Total Contributions: \$58,923.39 Total Interest: \$30,727.08 Current Fiscal Year 0.00 Hours Reported: Total Balance: \$89,650.47

Service History by Fiscal Year

The Member's Service History by Fiscal Year is displayed below. To view the existing service periods, select individual fiscal years and the View History button.

Fiscal Year	Earnings	Special Compensation	Service Credit	Taxed Contributions	Tax Deferred Contributions	Service Credit Purchase Available	1959 Survivor
<input type="checkbox"/> 2017/2018	\$31,556.40	\$1,011.20	0.400	\$0.00	\$2,279.76	No	\$0.00
<input type="checkbox"/> 2016/2017	\$78,890.91	\$773.44	1.000	\$0.00	\$5,576.54	No	\$0.00
<input type="checkbox"/> 2015/2016	\$75,039.28	\$1,490.18	1.000	\$0.00	\$5,357.10	No	\$0.00
<input type="checkbox"/> 2014/2015	\$72,114.00	\$0.00	1.000	\$0.00	\$5,048.00	No	\$0.00
<input type="checkbox"/> 2013/2014	\$66,385.00	\$0.00	1.000	\$0.00	\$4,646.93	No	\$0.00

Showing records 1 - 5 | First << Previous 1 2 3 4 Next >> Last | View Max

Escape Setup – Classified STRS Member working on Calendar with “Pay Actual Days”

Example: Classified position that qualifies for PERS and the employee in the assignment elected to remain in STRS

Working to find solution to this issue

Pay22a		Payroll Errors by Pay Date			
Pay Dates 01/31/2018 - 01/31/2018					
Employee Name	(ID) SSN4	Pay Cycle	Category	Msg Code	Message
Pay Date 01/31/2018					
[REDACTED]	[REDACTED]	CL1A/#6	General	44	Pos #32 - 9 is setup using a calendar (CLASS190) with a special payroll calculation method and cannot be used in the STRS retirement system.

General	44	Pos #<PosId> - <AssignmentId> is setup using a calendar <CalendarId> with a special payroll calculation method and cannot be used in the STRS retirement system.	The calendar is set up with one of the “pay actual days” pay calculation options. This is incompatible with the STRS retirement system. You must change the calendar for this assignment.
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REAP Single Person/Account

Search by ID Search by DB Exception

[Mass Update](#)

Search

Hide

Tax ID Client ID LAUSD Number 145-54-7088

Search Reset

[REDACTED] Tax ID: [REDACTED] Client ID: [REDACTED] LAUSD Number:

Retirement Formula : 2% at 60

Hide

Gender: M Birth Date: 04/11/1965 (v) Death Date: Coverage: B
DB Status: MEMBER DB Date: 10/01/1999 CB Status: CB Date:

Person / Account DB Contribution Lines Service Credit Balance Update

Fiscal Year Service Credit

Fiscal Year 2016-2017

Include Subsequent Year Activity

Activity	Service Credit
BEG BAL 07/01/2016	14.603
08/01/2016 06/30/2017	0.913
SUBSEQUENT YEAR	0.000
END BAL 06/30/2017	15.516

Example:
FTE 1.0
Calendar Days: 217
Service Credit: 1.0