

School Employer Advisory Committee

February 3, 2021



William Greenhalgh and Susan Forrer

Employer Response Team

Employer Account Management Division

Housekeeping

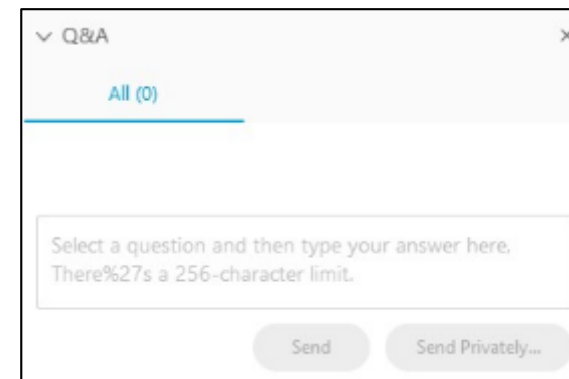
Webinar is being recorded

Attendee mics are muted

Meeting materials available on www.calpers.ca.gov

Email: CaIPERS_SEAC@calpers.ca.gov

Use the Q&A feature to send questions to all panelists





Andrea Peters

Legislative Affairs Division

Legislative Update



Brad Hanson

Employer Account Management Division

Certificated School Members Update

Reporting Certificated School Members

Government (Gov.) Code section 20962.1

Contracted school employers are responsible for accurately reporting certificated school members. Pursuant to Gov. Code section 20962, full-time service – basis of employment is defined as:

(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 school members, under terms and conditions prescribed by the CalPERS board.

Certificated School Members

One year of service credit per academic year

One year of service credit per fiscal year

Regardless of hours worked

myCalPERS Enhancements

Certificated School Members

- Enrollment Indicator on appointment detail screen
- **Certificated Members with Less than a Full Year of Service Credit Report (Cognos) – March 2021**
- XML enrollment requirement – June 2021

New Reporting Process

Begins 2022/2023 fiscal year:

1. Employer enrolls certificated members into myCalPERS
2. CalPERS runs a query of certificated members
 - Sends letter to the district if certificated member has not attained 1 year of service credit
3. Employer corrects payroll to ensure member receives full-service credit

Existing Enrollments

Clean Up Project

- CalPERS will reach out for list of impacted members
- Employers can start updating appointments in myCalPERS now

Certificated Member Resources

[Circular Letter: 200-005-21](#)

[Employer Technical Resources](#)

[myCalPERS Retirement Enrollment Student Guide](#)

Certificated School Member Questions



Dan Nguyen

Employer Account Management Division

Retired Annuitant COVID-19 Exemption Appointments

COVID-19 Exemption Appointments

Hours worked not counted toward 960-hour limit

Suspension of:

- 180-day wait period
- Bona fide separation

Must contact CalHR at CAstateofemergency@calhr.ca.gov

Interim/Vacant Positions

Governor's Executive Order N-84-20

Limitation of being appointed once lifted

Requirements not lifted by governor's executive order

- Must be appointed by agency's governing body (County Office of Education (COE))
- During recruitment

Retirees in Permanent Positions

COVID-19 related turnovers and vacancies

Retirees assisting with ensuring adequate staffing

Retirees must vacate position once order is lifted

Retired Annuitant COVID-19 Exemption Appointments Questions



Christina Rollins

Employer Account Management Division

State Social Security Administrator Update



Official State Social Security Administrator

Overview

Rehired annuitant Social Security coverage

School district updates:

- Social Security agreement invoices
- Annual Information Request (AIR)

Resources



Rehired Annuitant Social Security Coverage



Retirement System Ineligibles

Ineligible for retirement system due to personal disqualification

- E.g., hours worked, receiving a pension from the same retirement system

Must be ineligible for retirement system membership on the date the employee first occupied the position

- If an employee optionally declines membership, they are not retirement system ineligible

Ineligibles may be covered by Section 218 Agreement

Rehired annuitants are a type of retirement system ineligible



Rehired Annuitant

A rehired annuitant is a retiree of a state, political subdivision, or instrumentality who:

- Participated in a retirement system
- Is rehired by their former employer or another employer that participates in the same retirement system the individual's pension is coming from
- Is either receiving a retirement benefit from the retirement system or has reached retirement age under the retirement system



School District Social Security Coverage

Modification 315

- Covers all school districts in California
- Divided vote
- Covers classified positions under CalPERS
- Does not contain language to cover retirement system ineligible

Some school districts have entered into additional modification agreements to provide coverage for retirement system ineligible



Additional Information About Coverage

Rehired annuitants may still be covered under Social Security if:

- Employee does not meet the definition of Social Security’s “rehired annuitant”
- Employer entered into a modification agreement to cover retirement system ineligibles (either of CalPERS/CalSTRS or both)

Note: Anyone hired or rehired after April 1, 1986, is covered mandatorily for Medicare



Rehired Annuitant Information Needed

Which school district are they being rehired into?

What position will they be occupying?

What retirement benefits are offered to someone in this position who is not a rehired annuitant?

Which system are they receiving their annuity from?



Sample Inquiry: Example 1

COE is hiring an annuitant who is:

- Receiving a CalPERS pension
- Hired into a position covered under CalPERS

School District does not have any additional modification to provide coverage to retirement system ineligible

Guidance: The rehired annuitant is:

- Not covered under a Section 218 Agreement and is not subject to Mandatory Social Security
- Subject to Medicare



Sample Inquiry: Example 2

COE is hiring an annuitant who is:

- Receiving a CalPERS pension
- Hired into a position covered under CalPERS

School District has a modification to provide coverage to retirement system ineligible

Guidance: The rehired annuitant is:

- Covered for Social Security and Medicare under the school district's Section 218 Agreement



School District Social Security Agreement Invoices



Official State Social Security Administrator

School District Invoices

Request employee count January-February for invoices issued in late March

Invoices sent to County Offices of Education for their respective school districts

- Include the school districts' CIDs for easy identification



School District AIR



Official State Social Security Administrator

About the AIR

All school districts will be issued an AIR in myCalPERS

Questions about tax withholding for both CalPERS and CalSTRS members

Request for total number of employees at each school district

System access requires Business Partner Social Security permission set



myCalPERS Log In Screen



How to Access the AIR (1 of 2)

Skip to: Content | Footer | Welcome Test | Help | Contact Us | Log out **January 06, 2021**
THIS IS A TEST ENVIRONMENT

myCalPERS

Home **Profile** Reporting Person Information Education Other Organizations

Summary Receivables Agreements

Common Tasks

Menu

- Contacts
- View Service Relationships
- Health Invoice History
- SSA Annual Information Request**

Summary

Profile

CalPERS ID: [REDACTED] **Status:** [REDACTED] [Request Update](#)

Federal Tax ID: [REDACTED] **Name:** [REDACTED]

Category: [REDACTED] **Division Of:** [REDACTED]

Regional Office: [REDACTED] **County:** [REDACTED]

Governing Body: [REDACTED] **School District Code:** County Office of Education

Merged Agency: No

Addresses

Physical: [REDACTED] **Mailing:** [REDACTED]

Undeliverable: No **Undeliverable:** No

Communication Information

Preferred Communication: Mail

Primary Email: PSR_TEST@calpers.ca.gov **Primary Phone Number:**



How to Access the AIR (2 of 2)

Skip to: Content | Footer | Welcome Test | Help | Contact Us | Log out **January 06, 2021**
THIS IS A TEST ENVIRONMENT

myCalPERS

Home | Profile | Reporting | Person Information | Education | Other Organizations

Summary | Receivables | Agreements

Common Tasks ▲

Menu ▼

- Contacts
- View Service Relationships
- Health Invoice History
- SSA Annual Information Request

Name: [REDACTED] CalPERS ID: [REDACTED]

▼ SSA 218 - Annual Information Request

Request Date	Status
03/03/2020	Not Submitted
03/04/2019	Completed: Non-Electronic Filing

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DataSource Shifter | Time Shifter | Developer Console



AIR Questions

Annual Information Request

Federal Tax ID: 00-0000000

Has the employer had any name changes in the past year?
 Yes No

In addition to CalPERS and CalSTRS, does the Employer offer a FICA replacement plan? (i.e. APPLE, iCMA, PARS, etc.)
 Yes No

Please provide total number of ALL employees:
0

For employees who are CalPERS members, does the Employer:
Withhold both Social Security and Medicare? Yes No

For employees who are CalSTRS members, does the Employer:
Withhold both Social Security and Medicare? Yes No

For employees who are NOT member of CalPERS or CalSTRS, does the Employer:
Withhold both Social Security and Medicare? Yes No



State Social Security Administrator (SSSA) Resources



SSSA Contact Information

Email: sssa@calpers.ca.gov

Call: (916) 795-0810

Mail: CalPERS

State Social Security Administrator

P.O. Box 720720

Sacramento, CA 94229



Employer Resources

Social Security State and Local Government

- www.ssa.gov/slge

Federal, State, and Local Governments

- www.irs.gov/government-entities/federal-state-local-governments

Social Security & Medicare Webpage:

- www.calpers.ca.gov/sss

SSSA Program Newsletter

- Subscribe on the [SSSA webpage](#)



Upcoming Webinar Schedule

Introduction to Section 218 Agreements Part II

- Wednesday, February 24, 2021
 - 10:00-11:00 a.m.

What is new with the Annual Information Request

- Wednesday, March 31, 2021
 - 10:00-11:00 a.m.

Register for a [Social Security & Medicare Webinar](#)



SSSA Questions



Official State Social Security Administrator

An aerial photograph of a modern university building complex. The central feature is a tall, glass-enclosed tower with a complex, lattice-like internal structure. To its right is a large, multi-story building with a flat roof and numerous windows. The foreground shows a paved courtyard with several people walking, and a road with a crosswalk. Lush green trees are visible on the right side of the image.

Break

Kristina Bozzo-Baldenegro

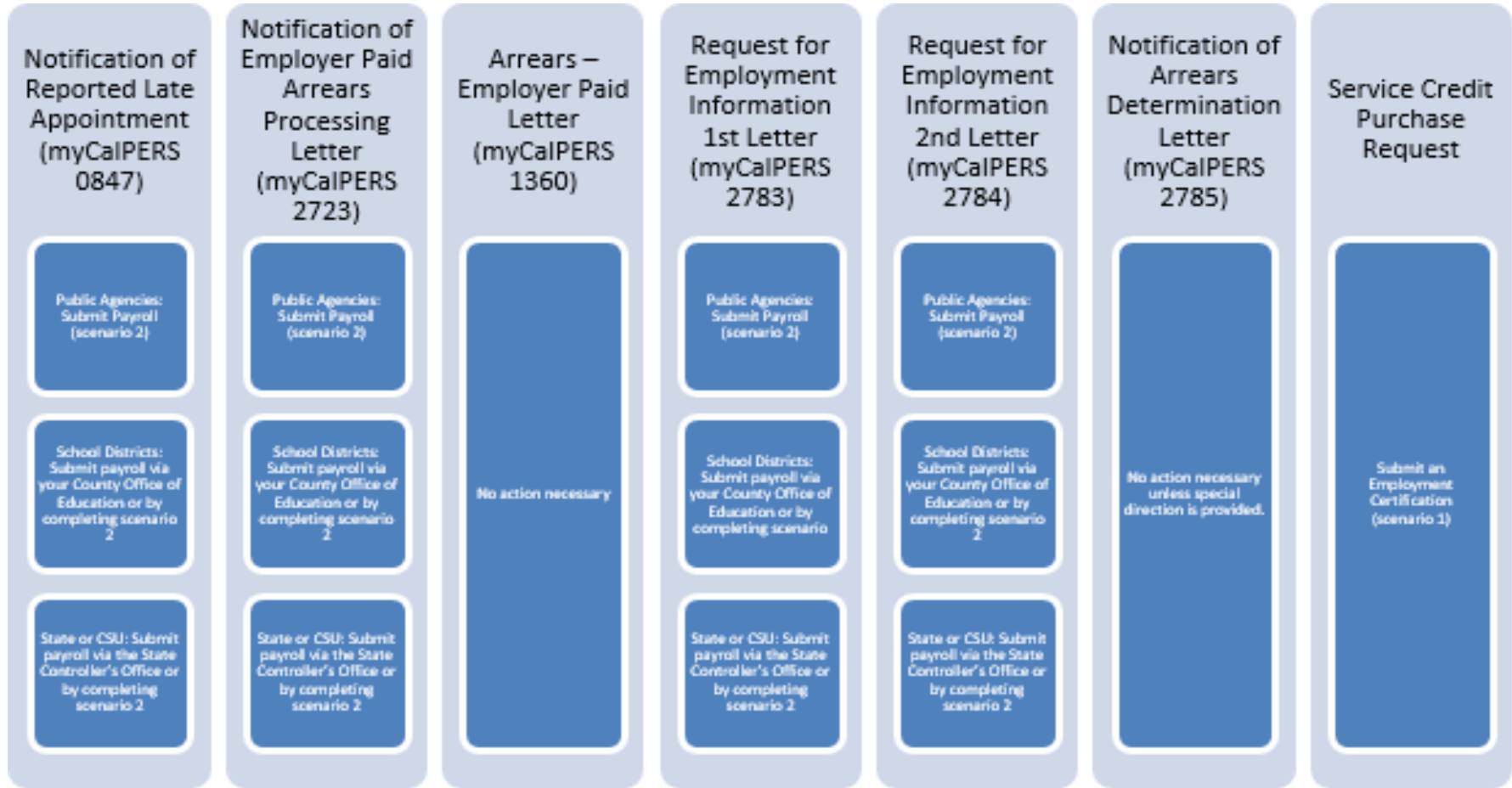
Employer Account Management Division

Membership Updates



myCalPERS Employment Certification

What's next:



Student Guide Scenarios and Helpful Hints

Scenario 1: Submit an Employment Certification

Scenario 2: Submit a Payroll

Scenario 3: Payroll File Upload

Scenario 4: View Arrears Determination

Resources

[Employment Certification Functionality Student Guide](#)

CalPERS Customer Contact Center

- **888 CaPERS** (or **888-225-7377**)

For membership specific questions:

Membership_Reporting@calpers.ca.gov



Greta Moritz

Retirement Benefit Services Division

Sick Leave Update

Discussion Topics

Sick leave

AB 1522 and sick leave

Sick Leave

Accumulating

Transfer from one district to another

Gov. Code 20963.5

Tracking

Basic vs. excess leave

Can leave earned at STRS be transferred to PERS, if a certificated member becomes a PERS member with a new employer or new qualifying position?

AB1522: Sick Leave

Can be used to qualify for the 1,000 hours?

Is it reported when a member retires?

Sick Leave Resources

Gov. Code 20963.5

AB1522

CalPERS Customer Contact Center

- **888 CalPERS** (or **888-225-7377**)

Sick Leave Questions



John Nguyen

Employer Account Management Division

Retirement System Election Update



Ryan Bieker

Employer Account Management Division

myCalPERS Enhancements

New Fields on Retirement Enrollment Screens

Enrollment reason

- “Other” reason text box

Certificated member indicator

Retired annuitant type

180-day exception indicator

- Retired annuitant (RA) exception reason
 - Upload document

Viewable executive order info

XML Retirement Enrollment Files

Mandatory – June 2021

- Certified member (optional now, **required later**)

Optional – Current

- Enrollment reason
- Retired annuitant type
- RA 180-day exception

Note: These may become required at a later date

Other Reminders

Assigned roles

- System Access Administrators

Email subscriptions

[Employer System Enhancements](#)

myCalPERS Enhancement Questions



Michael Hedin

Customer Service & Outreach Division

Virtual CalPERS Benefits Education Events (CBEE)

Virtual CBEE (1 of 4)

Two days: March 24 & 25

- 8:45 a.m. – 4:00 p.m.

Virtual platform using Cvent

- Classes and information rooms hosted through Zoom
- Marketing begins mid-February

Virtual CBEE (2 of 4)

20 information “rooms” to speak with experts

External business partners

- Social Security Administration
- California Human Resources
- Nationwide Savings Plus
- And more

CalPERS

- Health benefits
- Regional Office
- Service Credit Purchase
- Community Property

Virtual CBEE (3 of 4)

20 class offerings

- Career stage classes for health and retirement
- SSA and Deferred Compensation class offerings

Virtual CBEE (4 of 4)

[Subscribe to Member Education Bulletin](#)

- Receive educational offerings

[Member Education Resources \(PDF\)](#)

Virtual CBEE Questions



Colleen Cain-Herrback

Pension Contracts and Prefunding Programs

California Employers' Retiree
Benefit Trust (CERBT)

myCalPERS Enhancements

Prefunding Programs – CERBT (1 of 3)

Who's impacted

- CERBT contracted schools, public agencies, and state

What's new:

- CERBT Agreements now listed in myCalPERS
- Contributions to CERBT will soon be initiated through myCalPERS

Prefunding Programs – CERBT (2 of 3)

Information added to myCalPERS:

- Signed Agreement
- Delegation of Authority to Request Disbursements Form
- Account Number
- Asset Allocation Strategy
- Effective Date of Agreement

New myCalPERS permission set

- Business Partner CERBT/CEPPT

Prefunding Programs – CERBT (3 of 3)

Contact: Colleen Cain-Herrback (Program Manager)

- Office: (916) 795-2474 / Cell: (916) 505-2506
- Email: Colleen.Cain-Herrback@calpers.ca.gov
- Program mailbox: CERBT4U@calpers.ca.gov

CERBT Questions



Questions & Answers

Renee Ostrander, Brad Hanson, and Jennifer Rocco

Thank you for joining us!

CalPERS School Employer Advisory Committee