
PERS/STRS

Membership Management

May 2014

myCalPERS Retirement System

DESIRED OUTCOME

- Introduction to PERS/STRS membership data
- Obtain and Manage membership Identification numbers
- myCalPERS/FMIS Clean-up
- Questions/Comments

Intro to myCalPERS Ids's

- ❑ The Employer CalPERS ID is the 10-digit identifier that the County/District uses to report your data to my CalPERS.

- ❑ The Division ID is the 10-digit identifier that represents/identifies each district within the County.

- ❑ The Participant ID is a 10-digit identifier that is used in place of a Social Security number to identify uniquely each individual in my CalPERS.

- ❑ The Appointment ID is a different 10-digit ID that identifies the job into which the employee has been hired and includes their contribution information, along with employment category.
 - ❖ An appointment is a continuous block of employment with a single employer from the hire date (regardless of whether the employee is qualified for membership on that date) until the permanent separation date.

myCalPERS Retirement System

- Log into myCalPERS system - <https://my.calpers.ca.gov>
- Select the Person Information Tab and enter employee social security number
- Select your district

The screenshot displays the myCalPERS system interface. At the top, there is a navigation bar with links for Home, Profile, Reporting, Person Information, and Education. Below this, a search box prompts the user to enter their Social Security Number or CalPERS ID. A red box highlights the input fields for SSN / Federal or Individual Tax ID and CalPERS ID. A search button is located below the input fields.

Below the search box, there is a section for Pre-Retirement Benefit Information, which includes an Appointment History table. The table has columns for Employer, Division, and Appointment Type. The first row shows the Contra Costa County Schools as the employer, with the division being County School Service - Contra Costa Co. Schools and the appointment type being Regular. The second row shows the Contra Costa County Schools as the employer, with the division being Pittsburg Unified School District and the appointment type being Regular.

On the right side of the screenshot, there is a detailed user profile page. The profile includes the following information:

- SSN:** xxx-xx-8671
- CalPERS ID:** 4179106638
- Name:** [Redacted]
- Optional Member:** No
- Date of Birth:** 10/11/1965
- Date of Death:** [Redacted]
- Prior School Membership:** Yes
- Prior School Membership Date:** 03/05/2001
- Restrictions:** No

The profile page also includes a Communication section with the following information:

- Preferred Communication:** Mail
- Primary Phone Number:** [Redacted] (Update)
- Primary Email Address:** [Redacted] (Update)
- Mailing Address:** [Redacted] (Update)
- Physical Address:** [Redacted] (Update)
- Undeliverable Date:** [Redacted]

myCalPERS Retirement System

- ❑ This is where you would obtain the Participant (CalPERS), Employer, Division and Appointment ID

Participant Name: [REDACTED] **CalPERS ID:** 4179106638

Member Details

Appointment Event History [Add New](#)

[Correct Event](#)

Appointment Details

Programs
Program: CalPERS
Retirement System: CalPERS
Membership Status: Active
Membership Date: 03/05/2001
Enrollment Eligibility Date: 01/24/2005

Position Information
Employer: Contra Costa County Schools
Division: County School Service - Contra Costa Co. Schools
Original Hire Date: 03/05/2001
Member Category: Miscellaneous
Work Calendar: Work 12 Months/Paid 12 Months
Temporary Position: No
Is member subject to local Alternate Retirement Plan (Gov Code Section 20306)? No
Appointment ID: 29647200
Contributing Appointment Date: 01/24/2005
Leave Type:
Formula Name: 2% at 55 State, School Miscellaneous and Industrial
Cost Share: 0.0

Retired Annuitant: No
Contributing Appointment: Yes
Appointment Status: Active
Enrollment Level: Classic
Member Base Rate: 7.0
Contribution Modification:
Created by User:
Created on: 09/05/2011
Appointment Profile Last Refreshed: 09/09/2011
Refunded Appointment: No

FMIS System (MUNIS)

CA myCalPERS Participants

Navigate: Human Resources/Payroll ► Payroll ► State Specific ► West ► California ► CA myCalPERS Participants

- Add/Find Employee – If a record already exists you will receive an error message
- Enter the CalPERS Participant ID
- Select Appointments on side menu and add the Employer ID and Division ID
- ❑ PERS member must be in this file in order for their contributions to be reported to myCalPERS

CA myCalPERS Participants - Appointments

File Edit Tools Help

Accept Cancel Cut Copy Paste Find Browse Query Add Update Delete Print

Employee	SSN	Last Name	First Name	MI
1516 ...				

Appointment Info

Employer's ID	1951803396
Division's ID	5993369590
Appointment ID	29647200

CBU

Position

Member Category MIS - Miscellaneous

Work Calendar 010 - Work 12 Months/Paid 12 Months

Pay Rate Type MTY - Monthly

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OVR

myCalSTRS Retirement System

Intro to myCalSTRS Retirement System

- <https://sew.calstrs.com>
- Click on the side bar to search for employee in REAP
- Enter employee social security number

The screenshot displays the myCalSTRS Secure Employer Web Site interface. At the top left, the CALSTRS logo is visible next to the text "Secure Employer Web Site". Below this, a navigation sidebar on the left lists options: Home, Manage Files, Manage Reports, Maintain Users, Authorize Users, and REAP. The main content area shows a welcome message for Felicia Hill and a congratulatory message for logging in. A search form titled "REAP Single Person/Account" is highlighted with a red border. This form includes radio buttons for "Search by ID" (selected) and "Search by DB Exception", a "Mass Update" link, a search input field containing "999999999", and "Search" and "Reset" buttons.

myCalSTRS Retirement System

- ❑ View Membership Status
 - ❑ Member/non-member must be added to FMIS system.
- ❑ *Note: Retirement Formula*

The screenshot displays the myCalSTRS Retirement System web interface. The header includes the CALSTRS logo, "Secure Employer Web Site", and a "My Account: FHill (07)" indicator. A navigation menu on the left lists various options such as Home, Manage Files, and REAP. The main content area is titled "REAP Single Person/Account" and features search options and a "Mass Update" link. A search bar contains the text "Retirement Formula : 2% at 60", with a red arrow pointing to it. Below the search bar, there are tabs for "Person / Account", "DB Contribution Lines", "Service Credit Balance", and "Update". The "Person" section includes a "History" table with columns for Effective, Tax ID, Name, and Birth Date. The "DB Account" section displays fields for RWP Indicator, Temporary status, Retirement System, RWP Effective Date, AB1586, and System Election. An "Account History" table is also present, showing columns for Status, Status Date, Future, Permissive Election, and Report Source/Unit.

Effective	Tax ID	Name	Birth Date
10/04/2012			

Status	Status Date	Future	Permissive Election	Report Source/Unit
MEMBER	08/01/2001			07069

FMIS System (MUNIS)

CA Teacher Retirement Maintenance

- Navigate: Human Resources/Payroll ► Payroll ► State Specific ► West ► California ► CA Teacher Retirement Maintenance
- Add employee - If a record already exists you will receive an error message
 “A record for this employee already exists”
- Select Member or Non-Member
- NO Assignment code needed

CA Teacher Retirement Maintenance - Munis [CCCOE Live]

My File Edit Tools Help

Accept Cancel Cut Copy Paste Find Browse Query Add Update Delete Print

Employee SSN Last Name First Name MI

Member Code

Pay Rate

Assignment Code

AB 1586 Eligible

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OVR

myCalPERS/FMIS Clean-up

- ✓ Appointment Records – Review myCalPERS error list
- ✓ Correct Appointments in FMIS (MUNIS)
- ✓ Clean-up due by August 31, 2013 for August reporting

QUESTIONS/COMMENTS