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## Circular Letter

January 4, 2013

**TO: PUBLIC AGENCIES, SCHOOL EMPLOYERS, NON-CENTRAL STATE AGENCIES, AGRICULTURAL DISTRICTS, SENATE RULES COMMITTEE, AND ASSEMBLY RULES COMMITTEE**

**SUBJECT: REPORTING PERMANENT SEPARATION DATES AND VALIDATING PARTICIPANT APPOINTMENT DETAILS IN MY|CALPERS**

The purpose of this Circular Letter is to inform you of important information regarding reporting permanent separation dates and validating participant appointment details in my|CalPERS, including recommended actions for employers to take to confirm accurate appointment reporting.

### **Permanent Separation Dates**

With the implementation of the Public Employees' Pension Reform Act of 2013 (PEPRA) and related Public Employees' Retirement Law (PERL) amendments in Assembly Bill (AB) 340, it is extremely important that the correct membership appointment details are maintained by employers in my|CalPERS. Permanent separations should be reported once an employee ends employment with your agency, for any reason, so that accurate membership details are captured in my|CalPERS. Accurate reporting of permanent separation dates will ensure that benefits are administered timely and accurately, especially for those employees nearing retirement.

Please note that the permanent separation must be reported as the day after the last day an employee works for your agency, which is often the day after the last day on payroll. The permanent separation date will frequently be the same day as a member's retirement date or start date of a new appointment. All transactions within my|CalPERS, including health and retirement, rely on the permanent separation date to be reported in this manner. For more information on permanent separation dates, refer to [Circular Letter #200-070-11](#).

Effective January 7, 2013, my|CalPERS will validate every new enrollment to determine if a participant is a "new member", regardless of whether the enrollment is for a first-time CalPERS member or an existing CalPERS member. Timely reporting of separation dates will assist in the validation process for a member who may have established CalPERS membership prior to January 1, 2013, and is rehired by a different CalPERS employer after a break in service of greater than six months. Please review [Circular Letter #200-055-12](#) for additional information on the definition of a "new member" under PEPRA.

### **Validating Participant Appointment Details**

To ensure proper membership determinations are made and the correct member and employer rates are used when reporting payroll, we encourage all employers to validate their active appointments. Validating appointment statuses will help prevent improper posting of payroll records and avoid financial discrepancies from occurring.

To validate appointment statuses, employers will need to generate the ***Participant Appointment Details Report*** within the COGNOS utility in my|CalPERS. This report provides a detailed employment status list for all participants enrolled at their agency, including the following information:

- Employment Status
- Member Status
- Appointment Effective Begin and End dates

We recommended that employers download the ***Participant Appointment Details Report*** using .CSV format. For detailed instructions on how to generate COGNOS reports, please refer to the [Generating Reports in my|CalPERS](#) document which can be accessed by following the steps below:

1. Open CalPERS On-Line at [www.calpers.ca.gov](http://www.calpers.ca.gov)
2. Select the link **my|CalPERS for Employers**
3. Select the link **Resources for Employers**
4. Select the link **Generating Reports in my|CalPERS**.

If you have any questions, please contact the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

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Customer Account Services Division