Title	Effective Date
Appointment Change	11/01/2025

Purpose

This Job aid will help the user in their thought process when clearing Enrollment errors, specifically the Event type *Appointment Change*. This job aid does not cover all the scenarios surrounding the Event type *Appointment Change*, but this job aid should be able to give the user an idea on what to engage with, like references/resources, in order to reach a conclusion before an action is to be taken for future handling of errors.

Best Practices

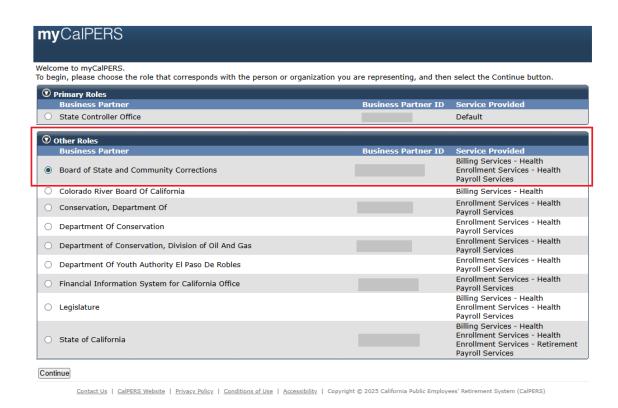
- Make sure that you check myCalPERS a day after you key a transaction in PIMS to verify that the keyed transaction was reported in myCalPERS.
- In PIMS, do not key two transactions or more of the same effective date on the same day. If you need to correct a mistake, wait 24 hours before making the correction.
- Prioritize New Appointments (NAP) event type as missing appointments, if not reported within 90 days in myCalPERS, will incur a late reporting fee.
- If an employee is determined as CalPERS eligible upon appointment, do not key the health appointment directly in myCalPERS. When keying the appointment in PIMS, check myCalPERS a day after to verify that the appointment was successfully reported in myCalPERS. If it is not reported, check the preprocessing area for an error, then clear the error.
- When keying the retirement code in PIMS, ensure that the retirement code is correct by referencing the Personnel Letters, CalHR Pay Letters, Personnel Action Manual (PAM), Payroll Procedure Manual (PPM) and other Bargaining Unit Provisions and Policy.

myCalPERS Log in Profile

Log in to the CalPERS webpage California Public Employees' Retirement System.

If your department is responsible for HR tasks for another department, be sure to log in under that department's profile to complete any HR- related corrections.

In the example below, the State Controller's Office Human Resources does the HR work for Board of State and Community Corrections. To view and clear the preprocessing errors, you must select the appropriate radio button as shown in the example below.

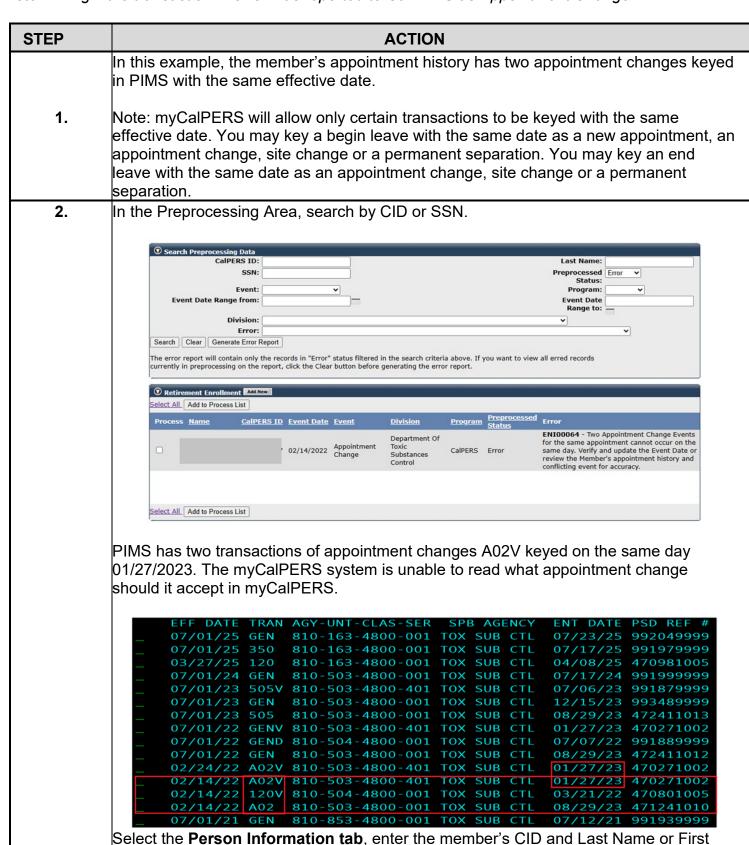


Your department's system administrator should make sure that the Communication Information is correct so communications from CalPERS are routed to the correct contact.



Steps

Determining if the transaction in error was reported to CalPERS as Appointment Change

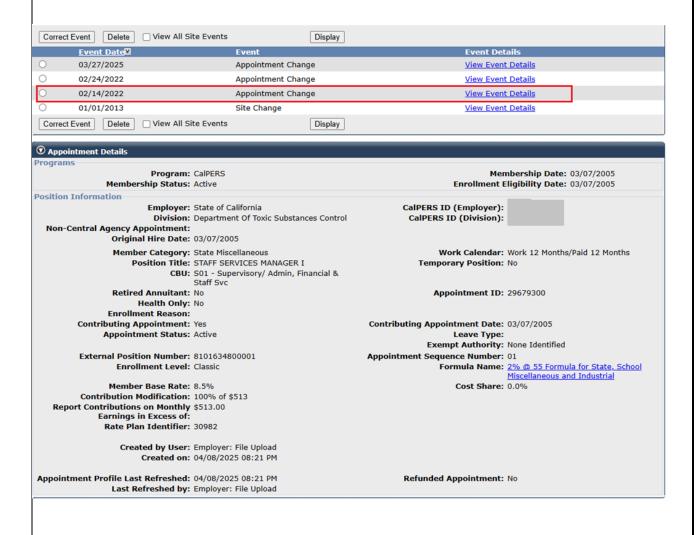


Name. Select the **Search** button. **my**CalPERS Person Information Education Other Organizations *Required Fields Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching. Date of Birth: OR CalPERS ID or SSN:* Last Name: OR First Name: Search Contact Us | CalPERS Website | Privacy Policy | Conditions of Use | Accessibility | Copyright © 2025 California Public Employees' Retirement System (CalPERS) Build: v12.3.0.c Baseline: 250728_124024_v12.3_release UID: 906 Select the State of California hyperlink in the Appointment History panel. **▼** Summary Update Personal Information SSN: CalPERS ID: Name: **Optional Member:** Date of Birth: Date of Death: **Prior School Membership: Prior School Membership Date: Membership Date: Retirement Date:** Communication **Undeliverable Date** Preferred Communication: Mail **Primary Phone Number:** <u>Update</u> **Primary Email Address:** <u>Update</u> Mailing Address: <u>Update</u> **Physical Address:** <u>Update</u> Pre-Retirement Benefit Information CalPERS - Active **Account Type: Membership Date: Taxed Contributions: Elected Service Credit: Tax Deferred Contributions:** 24-Month ARP Period: **Interest on Contributions: ARP Election Period:** Balance: **ARP Extract Date: Posted Service Credit: Normal Retirement Age: Service Credit Total: ▼** Health Benefit Information **Account Type: Qualifying Participant:** Plan Name: Coverage Type: Basic Appointment History Add New View More Actions» Start Date End Date STAFF SERVICES State of California Department Of Toxic State 29679300 Regular Active 03/07/2005 MANAGER I Miscellaneous Substances Control Select the Department in hyperlink.



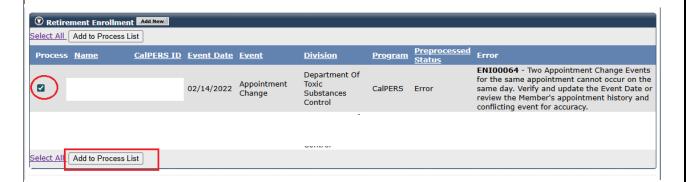
An appointment Change with effective date of 2/14/2022 is already on file. Review PIMS and compare the information in Appointment History.

In this case, the Member's record already reflects the most recent updates and information, so the error is not needed and needs to be deleted in the preprocessing area.



Go back to the Preprocessing Area and delete the error.

Select the error and Add to Process List.

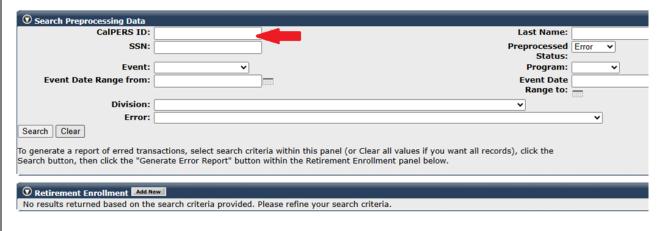


Select the **Delete** radio button and press **Continue**.



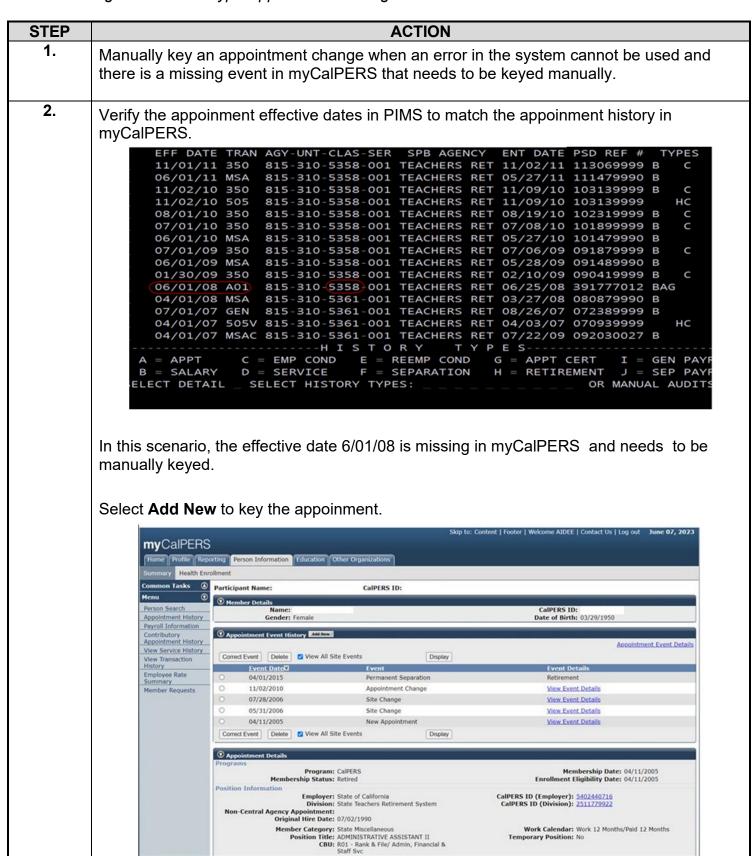
You have successfully deleted the error.

If you want to verify if the error was successfully deleted—in the Preprocessing area, enter the CID or SSN. It should show the prompt below if the error does not exist any longer.

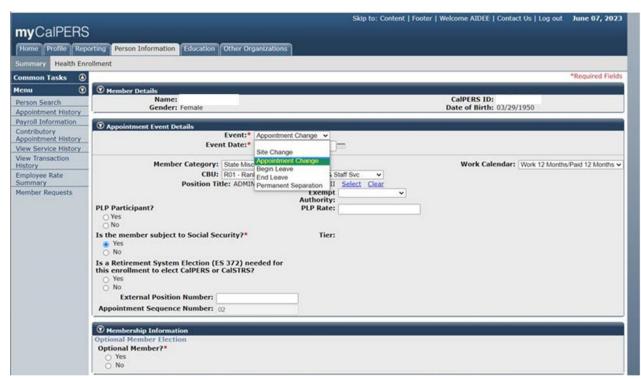


The process is complete.

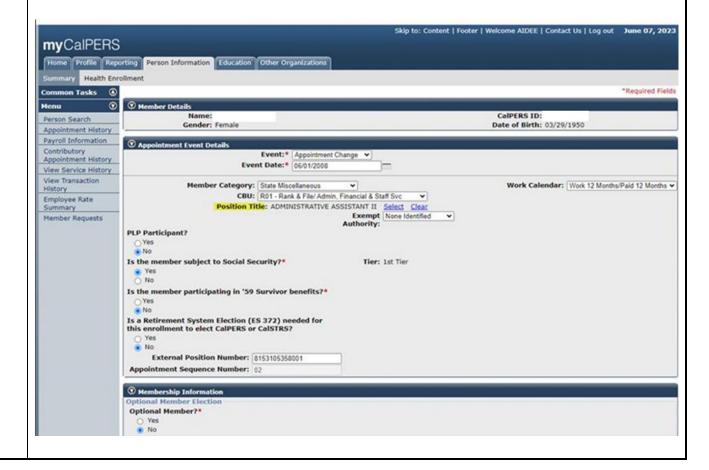
Manual Adding of the Event Type Appointment Change



Select the **Event Type** Appointment Change.



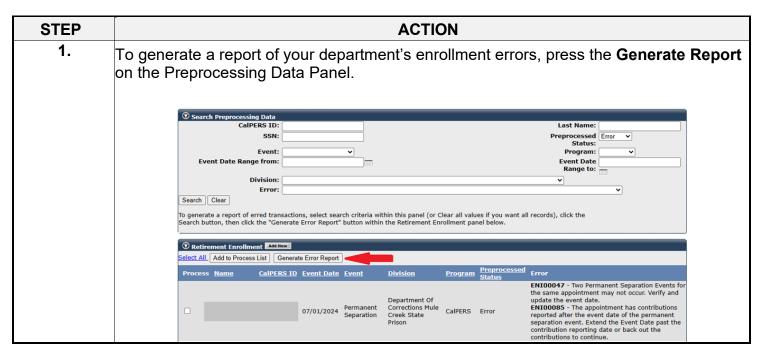
Key in the Event Date and Position Title and hit Save.



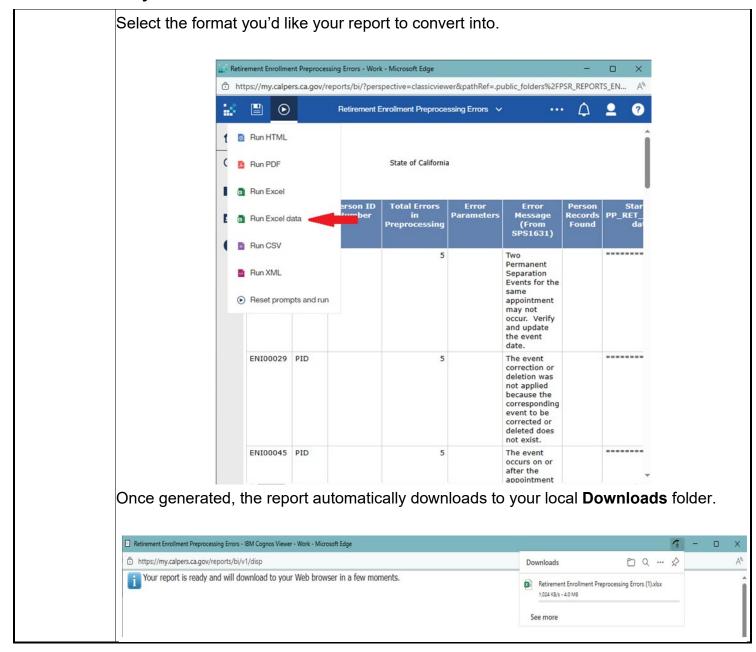


Addendum

Generating Enrollment Error Report



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REFERENCES

- o CalPERS <u>myCalPERS Student Guides & Resources | CalPERS</u>
- o CalPERS State Reference Guide (ca.gov)
- o Public Employees' Retirement Law (PERL) <u>calpers.ca.gov/docs/forms-publications/california-public-employees-retirement-law-2023.pdf</u>

Document	Title	Effective Date
Job aid 2	Appointment Change	11/01/2025

REVISIONS

- 1.0 Revisions pages remain with procedure.
- 2.0 Each updated procedure is assigned a new revision number, chronological order.
- 3.0 Multiple changes made together require one revision number.
- 4.0 A short description of each change is entered on the Revisions' page.

Revision	Description of Change(s)	Effective Date