

The State Controller's Office
Personnel and Payroll Services Division

Title	Effective Date
Site Changes	11/01/2025

Purpose

This job aid will help the user in their thought process when clearing Enrollment errors, specifically the Event type *Site Changes*. This job aid does not cover all the scenarios surrounding the Event type *Site Changes*, but this job aid should be able to give the user an idea on what to engage with, like references/sources, 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) transactions 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.
- 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.

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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.

myCalPERS

Welcome to myCalPERS.
To begin, please choose the role that corresponds with the person or organization you are representing, and then select the Continue button.

▼ Primary Roles		
Business Partner	Business Partner ID	Service Provided
☐ State Controller Office		Default

▼ Other Roles		
Business Partner	Business Partner ID	Service Provided
☒ Board of State and Community Corrections		Billing Services - Health Enrollment Services - Health Payroll Services
☐ Colorado River Board Of California		Billing Services - Health
☐ Conservation, Department Of		Enrollment Services - Health Payroll Services
☐ Department Of Conservation		Enrollment Services - Health Payroll Services
☐ Department of Conservation, Division of Oil And Gas		Enrollment Services - Health Payroll Services
☐ Department Of Youth Authority El Paso De Robles		Enrollment Services - Health Payroll Services
☐ Financial Information System for California Office		Enrollment Services - Health Payroll Services
☐ Legislature		Billing Services - Health Enrollment Services - Health Payroll Services
☐ State of California		Billing Services - Health Enrollment Services - Health Enrollment Services - Retirement Payroll Services

[Continue](#)

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

myCalPERS

[Home](#) | [Profile](#) | [Reporting](#) | [Person Information](#) | [Education](#) | [Other Organizations](#)

[Summary](#) | [Payments](#) | [Receivables](#) | [Retirement Contract](#) | [Health Contract](#) | [Agreements](#) | [Mergers and Reorganizations](#)

Common Tasks

Menu

- [Contacts](#)
- [View BP Relationships](#)
- [Divisions](#)
- [View Service Relationships](#)
- [Health Invoice History](#)
- [Findings](#)
- [Health Email Notification](#)

▼ Summary

Profile

CalPERS ID: [Redacted] **Status:** Active
Federal Tax ID: [Redacted] **Name:** State Controller Office
Category: [Redacted] **Division Of:** State of California
Regional Office: [Redacted] **County:** Sacramento
Merged Agency: [Redacted]

Addresses

Physical: [Redacted] **Mailing:** [Redacted]

Undeliverable: [Redacted] **Undeliverable:** No

Communication Information

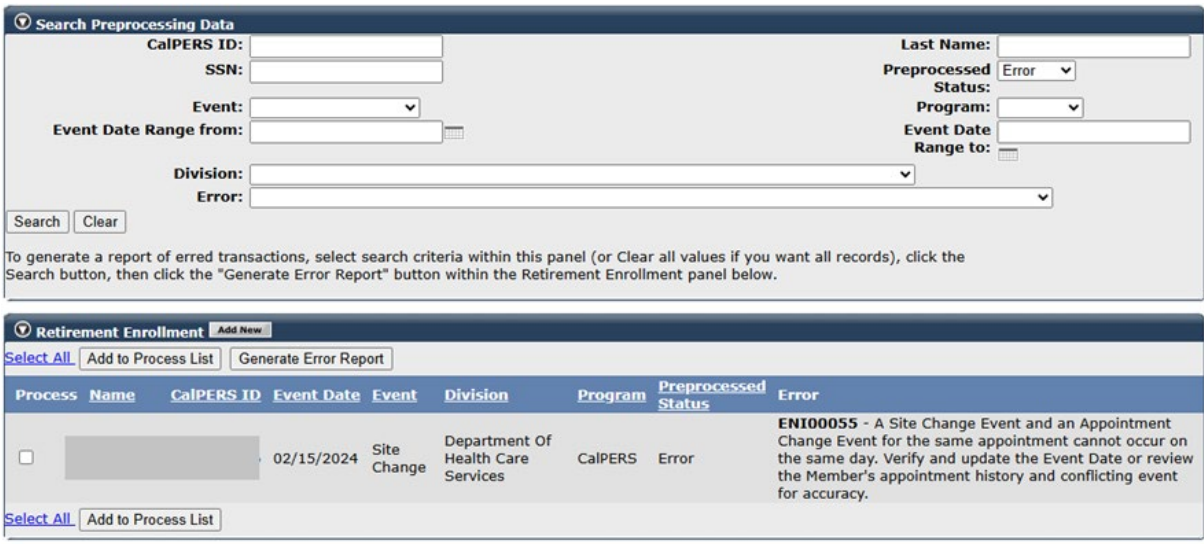
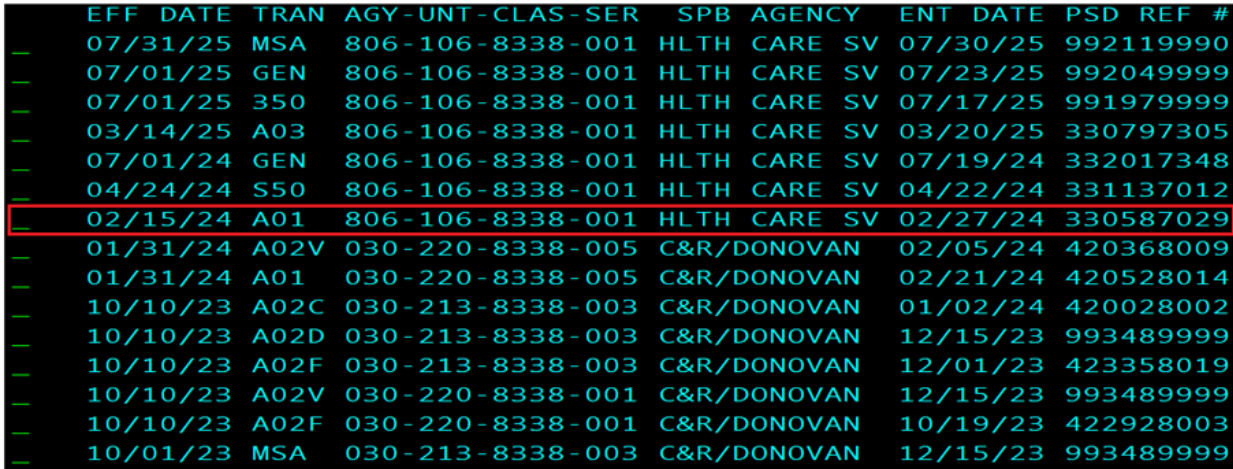
Preferred Communication: Mail

Primary Email: [Redacted] **Primary Phone Number:** [Redacted]

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Steps

Identifying a Site Change

STEP	ACTION
1.	A Site Change is when an employee or CalPERS member transfers to another agency and the agency number changes in employment history. If there is a Site change error, it will display in the Preprocessing data panel.  Contact Us CalPERS Website Privacy Policy Conditions of Use Accessibility Copyright © 2025 California Public Employees' Retirement System (CalPERS)
2.	Look up the employee's employment history in PIMS. In this example, the employee moved to another agency on an AO1 transaction. 
3.	In the Person Information tab, enter the member's CID or SSN and the Last Name. Select the Search button.

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myCalPERS

Home

Profile

Reporting

Person Information

Education

Other Organizations

*Required Fields

Person Search

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:*

AND

Date of Birth:

OR

Last Name:

OR

First Name:

Search

Select the State of California hyperlink in the Appointment History panel. *Note: This might reflect your Department's Name if you are logged in to your department's profile.*

Summary

Profile

SSN:

CalPERS ID:

Name:

Optional Member:

Date of Birth:

Date of Death:

Prior School Membership:

Prior School Membership Date:

Membership Date:

Retirement Date:

Update Personal Information

Communication

Preferred Communication:

Mail

Primary Phone Number:

Primary Email Address:

Mailing Address:

Physical Address:

Undeliverable Date

Update

Update

Update

Update

Pre-Retirement Benefit Information

CalPERS - Active

Account Type:

Member

Membership Date:

10/10/2022

Taxed Contributions:

\$0.00

Elected Service Credit:

0.000

Tax Deferred Contributions:

\$8,824.07

Interest on Contributions:

\$1,143.85

Balance:

\$9,967.92

Posted Service Credit:

1.672

Normal Retirement Age:

62 (2% @ 62 Formula for Miscellaneous/Industrial Members)

Service Credit Total:

1.672 as of 08/13/2025 4:04 PM

Health Benefit Information

Medical - Enrolled

Account Type:

Dependent

Subscriber CalPERS ID:

Plan Name:

Sharp Performance Plus California

Coverage Type:

Basic

Appointment History

Add New

View More Actions»

Appt ID	Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
93375465	State of California	Department Of Corrections R J Donovan Correctional Facility	Regular	HEALTH PROGRAM SPECIALIST I	State Industrial	Active	10/10/2022	

Select the Department of Corrections RJ Donovan Correction Facility hyperlink.

Participant Name:

CalPERS ID:

Site Change History

Employer: State of California

Program: CalPERS

Division	Position Title	Member Category	CBU	Start Date	End Date
Department Of Corrections R J Donovan Correctional Facility	HEALTH PROGRAM SPECIALIST I	State Industrial	R01	10/10/2022	

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Review the appointment history to determine if it needs to be updated based on the employment history in PIMS.

It shows below that the 02/15/2024 AO1 transaction is present in the Appointment History. To further verify if the appointment is reflecting what the employment history shows, look into the details, specifically the “External Position Number”.

Select the Effective/Event Date radio button and press the **View Event Details** hyperlink.

Appointment Event History
Add New

[Appointment Event Details](#)

☐ View All Site Events

Event Date▼	Event	Event Details
☐ 03/14/2025	End Leave	
☐ 04/24/2024	Begin Leave	State Disability Leave
☒ 02/15/2024	Appointment Change	View Event Details
☐ 01/31/2024	Appointment Change	View Event Details
☐ 10/10/2023	Appointment Change	View Event Details
☐ 01/25/2023	Appointment Change	View Event Details
☐ 10/10/2022	New Appointment	View Event Details

☐ View All Site Events

Appointment Details

Programs

Program: CalPERS
Membership Status: Active

Membership Date: 10/10/2022
Enrollment Eligibility Date: 10/10/2022

Position Information

Employer: State of California
Division: Department Of Corrections R J Donovan Correctional Facility

CalPERS ID (Employer):
CalPERS ID (Division):

Non-Central Agency Appointment:
Original Hire Date: 10/10/2022
Member Category: State Industrial
Position Title: HEALTH PROGRAM SPECIALIST I
CBU: R01 - Rank & File/ Admin, Financial & Staff Svc
Retired Annuitant: No
Health Only: No
Enrollment Reason:
Contributing Appointment: Yes
Appointment Status: Active

Work Calendar: Work 12 Months/Paid 12 Months
Temporary Position: No
Appointment ID: 93375465
Contributing Appointment Date: 10/10/2022
Leave Type:
Exempt Authority: None Identified
Appointment Sequence Number: 01
Formula Name: [2% @ 62 Formula for Miscellaneous/Industrial Members](#)
Cost Share: 0.0%

External Position Number: 8061068338001
Enrollment Level: PEPR New

Member Base Rate: 9.5%
Contribution Modification: 100% of \$513
Report Contributions on Monthly Earnings in Excess of:
Rate Plan Identifier: 28633

Changed Name	Value as of 01/31/2024	Value as of 02/15/2024
Event	Appointment Change	Appointment Change
Event Date	01/31/2024	02/15/2024
Appointment Type	Regular	Regular
Appointment Overridden	N	N
Retirement System	PERS	PERS
Created By	Employer	Employer
Create Date	02/27/2024 04:46:26 PM	02/27/2024 04:48:21 PM
Updated By		
Update Date		
Superseded?	N	N
Appointment Detail Effective Begin Date	01/31/2024	02/15/2024
Appointment Detail Effective End Date	02/14/2024	
Enrollment Eligibility Date	10/10/2022	10/10/2022
Original Hire Date	10/10/2022	10/10/2022
Employer Calpers ID		
Employer Name	State of California	State of California
Division Calpers ID		
Division Name	Department Of Corrections R J Donovan Correctional Facility	Department Of Corrections R J Donovan Correctional Facility
Sub-Division CalPERS ID		
Sub-Division Name		
Position Title	HEALTH PROGRAM SPECIALIST I	HEALTH PROGRAM SPECIALIST I
Member Category	State Industrial	State Industrial
CBU Code	R01	R01
CBU Name	Rank & File/ Admin, Financial & Staff Svc	Rank & File/ Admin, Financial & Staff Svc
External Position Number	0302208338005	8061068338001
Appointment Sequence Number	01	01

In the Preprocessing data panel, check mark the error and press **Add to Process List**.

Select **Delete** radio button, then press **Continue**.

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Retirement Enrollment
Add New

[Select All](#)
[Add to Process List](#)
[Generate Error Report](#)

Process	Name	CalPERS ID	Event Date	Event	Division	Program	Preprocessed Status	Error
Select All Add to Process List								

To Process

Order	Action	Name	CalPERS ID	Event Date	Event	Preprocessed Status
	☐ Process ☒ Delete ☐ None			02/15/2024	Site Change	ENI00055 - A Site Change Event and an Appointment Change Event for the same appointment cannot occur on the same day. Verify and update the Event Date or review the Member's appointment history and conflicting event for accuracy.

Continue

You have successfully deleted the error.

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

Search Preprocessing Data

CalPERS ID:
SSN:
Event:
Event Date Range from:
Division:
Error:

Last Name:
Preprocessed Status:
Program:
Event Date Range to:

Search
Clear

To generate a report of erred transactions, select search criteria within this panel (or Clear all values if you want all records), click the Search button, then click the "Generate Error Report" button within the Retirement Enrollment panel below.

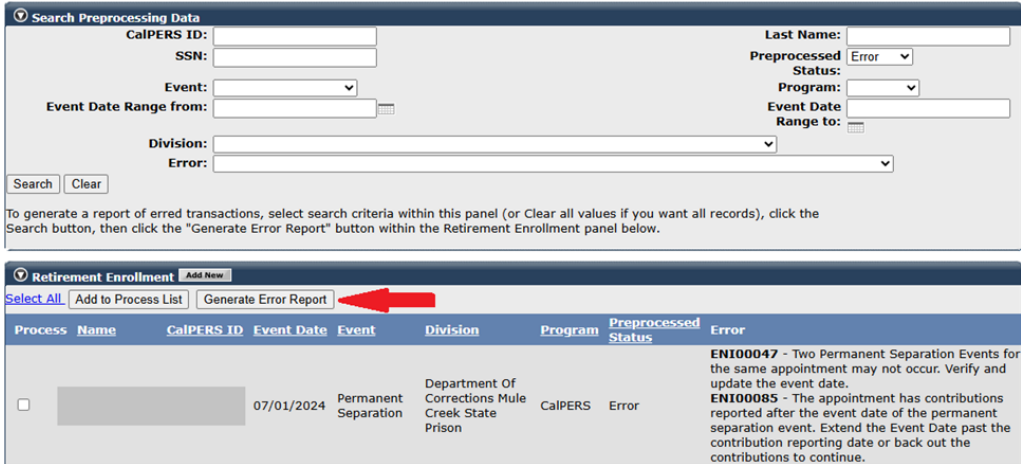
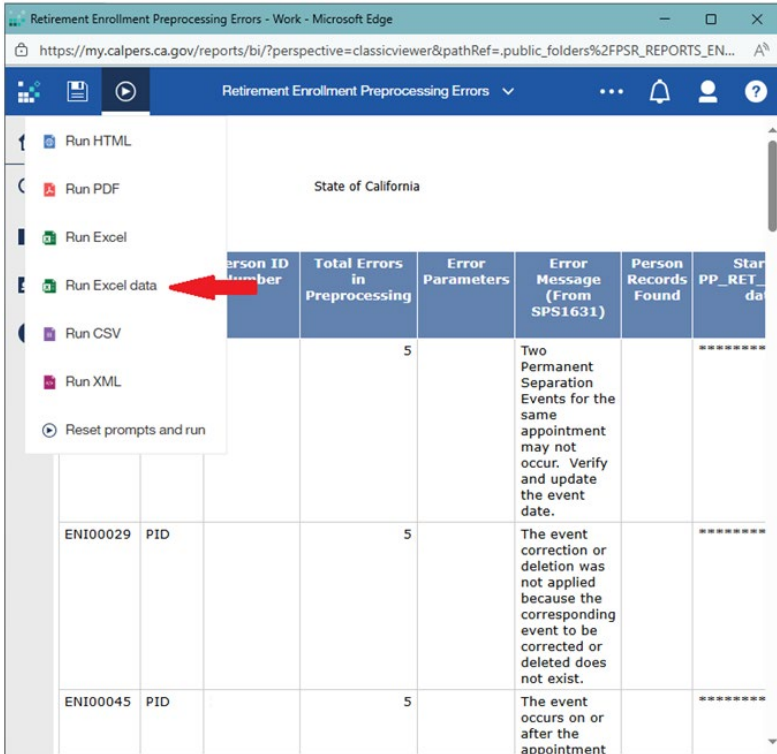
Retirement Enrollment
Add New

No results returned based on the search criteria provided. Please refine your search criteria.

The process is complete.

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Addendum

Generating Enrollment Error Report

STEP	ACTION
1.	To generate a report of your department's enrollment errors, press the Generate Report on the Preprocessing Data Panel.  Select the format you'd like your report to convert into. 

Once generated, the report automatically downloads to your local **Downloads** folder.



REFERENCES

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

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Document	Title	Effective Date
Job aid 4	Site Changes	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