

The State Controller's Office
Personnel and Payroll Services Division

Title	Effective Date
Permanent Separations	11/01/2025

Purpose

This Job aid will help the user in their thought process when clearing Enrollment errors, specifically the Event type *Permanent Separations*. This job aid does not cover all the scenarios surrounding the Event type *Permanent Separations*, 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.

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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

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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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Personnel and Payroll Services Division

Steps

Verifying the separation date on Employment History against myCalPERS' record

STEP	ACTION																																																																																																																																																
1.	From the Person Information screen in myCalPERS, review the employee’s most recent appointment history. If the separation event has already been recorded, verify that the separation date is correct. If the date is accurate, no further action is needed. Proceed to PIMS to verify the separation date matches the separation event’s date recorded in myCalPERS. Note: A Permanent Separation effective date is reported to myCalPERS +1 day except for the reason of Death which should be as exact date as in the PIMS. The below sample should reflect 01/09/2020 as the effective date in myCalPERS. <table><tr><th>EFF DATE</th><th>TRAN</th><th>AGY-UNT-CLAS-SER</th><th>SPB</th><th>AGENCY</th><th>ENT DATE</th><th>PSD REF #</th><th>TYPES</th><th>ID</th></tr><tr><td>06/10/20</td><td>S21V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>06/16/20</td><td>251680089</td><td>D</td><td>IJ</td></tr><tr><td>05/31/20</td><td>715V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>06/16/20</td><td>251680089</td><td>D</td><td>IJ 2</td></tr><tr><td>05/01/20</td><td>S57V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>05/04/20</td><td>251250001</td><td>F</td><td>IJ</td></tr><tr><td>04/30/20</td><td>715V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>04/20/20</td><td>251110004</td><td>B</td><td>D IJ 2</td></tr><tr><td>03/31/20</td><td>715V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>03/19/20</td><td>250790011</td><td>B</td><td>D IJ 2</td></tr><tr><td>02/29/20</td><td>715V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>02/20/20</td><td>250510090</td><td>B</td><td>D IJ 2</td></tr><tr><td>01/30/20</td><td>715V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>02/10/20</td><td>250410042</td><td>B</td><td>D IJ 2</td></tr><tr><td>01/08/20</td><td>S01C</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>09/14/22</td><td>252570021</td><td>BA</td><td>FD IJ</td></tr><tr><td>01/08/20</td><td>S01D</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>06/01/21</td><td>991520020</td><td>BA</td><td>FD IJ</td></tr><tr><td>12/31/19</td><td>715</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>12/19/19</td><td>253530039</td><td>B</td><td>D IJ 2</td></tr><tr><td>11/15/19</td><td>A03</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>12/03/19</td><td>253370048</td><td>B G</td><td>D IJ 2</td></tr><tr><td>10/24/19</td><td>S50V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>10/24/19</td><td>252970013</td><td></td><td>FD IJ 2</td></tr><tr><td>08/30/19</td><td>S50V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>09/20/19</td><td>252630030</td><td></td><td>FD IJ 2</td></tr><tr><td>08/29/19</td><td>715V</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>09/10/19</td><td>252530043</td><td>B</td><td>D IJ 2</td></tr><tr><td>08/29/19</td><td>715D</td><td>564-732-9587-068</td><td>FRAN</td><td>TX BD</td><td>08/21/19</td><td>252330209</td><td>B</td><td>D IJ 2</td></tr></table> -----H I S T O R Y T Y P E S----- A = APPT C = EMP COND E = REEMP COND G = APPT CERT I = GEN PAYROLL B = SALARY D = SERVICE F = SEPARATION H = RETIREMENT J = SEP PAYROLL SELECT DETAIL _ SELECT HISTORY TYPES: _ _ _ _ _ OR MANUAL AUDITS _	EFF DATE	TRAN	AGY-UNT-CLAS-SER	SPB	AGENCY	ENT DATE	PSD REF #	TYPES	ID	06/10/20	S21V	564-732-9587-068	FRAN	TX BD	06/16/20	251680089	D	IJ	05/31/20	715V	564-732-9587-068	FRAN	TX BD	06/16/20	251680089	D	IJ 2	05/01/20	S57V	564-732-9587-068	FRAN	TX BD	05/04/20	251250001	F	IJ	04/30/20	715V	564-732-9587-068	FRAN	TX BD	04/20/20	251110004	B	D IJ 2	03/31/20	715V	564-732-9587-068	FRAN	TX BD	03/19/20	250790011	B	D IJ 2	02/29/20	715V	564-732-9587-068	FRAN	TX BD	02/20/20	250510090	B	D IJ 2	01/30/20	715V	564-732-9587-068	FRAN	TX BD	02/10/20	250410042	B	D IJ 2	01/08/20	S01C	564-732-9587-068	FRAN	TX BD	09/14/22	252570021	BA	FD IJ	01/08/20	S01D	564-732-9587-068	FRAN	TX BD	06/01/21	991520020	BA	FD IJ	12/31/19	715	564-732-9587-068	FRAN	TX BD	12/19/19	253530039	B	D IJ 2	11/15/19	A03	564-732-9587-068	FRAN	TX BD	12/03/19	253370048	B G	D IJ 2	10/24/19	S50V	564-732-9587-068	FRAN	TX BD	10/24/19	252970013		FD IJ 2	08/30/19	S50V	564-732-9587-068	FRAN	TX BD	09/20/19	252630030		FD IJ 2	08/29/19	715V	564-732-9587-068	FRAN	TX BD	09/10/19	252530043	B	D IJ 2	08/29/19	715D	564-732-9587-068	FRAN	TX BD	08/21/19	252330209	B	D IJ 2
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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. Date of Birth: OR CalPERS ID or SSN:* AND Last Name: OR First Name: Search																																																																																																																																																
	In this example, the employee has been added a permanent separation for in myCalPERS.																																																																																																																																																

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Please note: CalPERS employers have up to 90 days after a member qualifies for membership to enroll a member in the myCalPERS system.

CalPERS can only provide information based on what is reported by the employer. The information displayed is subject to change.

Summary

Profile

Name:

Prior School Membership:

Date of Birth:

Member:

Membership Date:

Separation Date: 01/09/2020

Prior School Membership Date:

Date of Death:

Retired: No

Retirement Date:

Pre-Retirement Benefit Information

CalPERS - Inactive

Account Type:

Taxed Contributions:

Tax Deferred Contributions:

Interest on Contributions:

Balance:

Posted Service Credit:

Service Credit Total:

Membership Date: 06/01/2015

Elected Service Credit: 0.000

Normal Retirement Age: 62 (2% @ 62 Formula for Miscellaneous/Industrial Members)

Health Benefit Information

Medical - Not Enrolled

Account Type:

Qualifying Participant:

Appointment History

Add New

View More Actions»

Appt ID	Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
92121341	State of California	Franchise Tax Board	Regular	TAX PROGRAM TECHNICIAN I, FRANCHISE TAX BOARD	State Miscellaneous	Perm Sep	02/01/2015	01/09/2020

To verify further if the said separation is true and that the reason is correct, click on the Department's name hyperlink.

Participant Name:

CalPERS ID:

Site Change History

Employer: State of California

Program: CalPERS

Division	Position Title	Member Category	CBU	Start Date	End Date
Franchise Tax Board	TAX PROGRAM TECHNICIAN I, FRANCHISE TAX BOARD	State Miscellaneous	R04	02/01/2015	01/09/2020

It shows in this example that all the events below reflect exactly the Employment History in PIMS.

The State Controller's Office Personnel and Payroll Services Division

Participant Name: CalPERS ID:

Member Details

Name:

CalPERS ID:

Gender: Female

Date of Birth: 02/21/1983

Appointment Event History

Correct Event

Delete

View All Site Events

Display

Event Date	Event	Event Details
01/09/2020	Permanent Separation	Resigned
11/15/2019	End Leave	
05/15/2019	Begin Leave	State Disability Leave
06/01/2017	Appointment Change	View Event Details
01/17/2017	Appointment Change	View Event Details
07/01/2016	Appointment Change	View Event Details
02/16/2016	Appointment Change	View Event Details
12/02/2015	Appointment Change	View Event Details
10/01/2015	Appointment Change	View Event Details
06/02/2015	Appointment Change	View Event Details
06/01/2015	New Enrollment	View Event Details
02/01/2015	New Appointment	View Event Details

Correct Event

Delete

View All Site Events

Display

Appointment Details

Programs

Program: Health, CalPERS

Membership Status: Inactive

Membership Date: 06/01/2015

Enrollment Eligibility Date: 06/01/2015

Position Information

Employer: State of California

CalPERS ID (Employer):

Division: Franchise Tax Board

CalPERS ID (Division):

Non-Central Agency Appointment:

Original Hire Date: 02/18/2014

Member Category: State Miscellaneous

Work Calendar: Work 12 Months/Paid 12 Months

Since it was confirmed that the separation has already been added to the appointment details, return to the Preprocessing area.

Delete the error by check marking the error, then press **Add to Process List**.

Name: State of California CalPERS ID:

Search Preprocessing Data

CalPERS ID:

SSN:

Event:

Event Date Range from:

Division:

Error:

Last Name:

Preprocessed Status: Error

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

Select All

Add to Process List

Generate Error Report

Process	Name	CalPERS ID	Event Date	Event	Division	Program	Preprocessed Status	Error
☒			01/09/2020	Permanent Separation Correction	Franchise Tax Board	CalPERS	Error	EN100029 - A transaction was not applied because the event does not exist.

Select All

Add to Process List

Delete the error by selecting the **Delete** radio button.

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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			01/09/2020	Permanent Separation Correction :Resigned	

Continue

You can further verify if the error truly successfully has been deleted by entering the CID or SSN in the field box in the Preprocessing area.

It should state such, as in the prompt below, if the error was successfully deleted.

Name: State of California
CalPERS ID:

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.

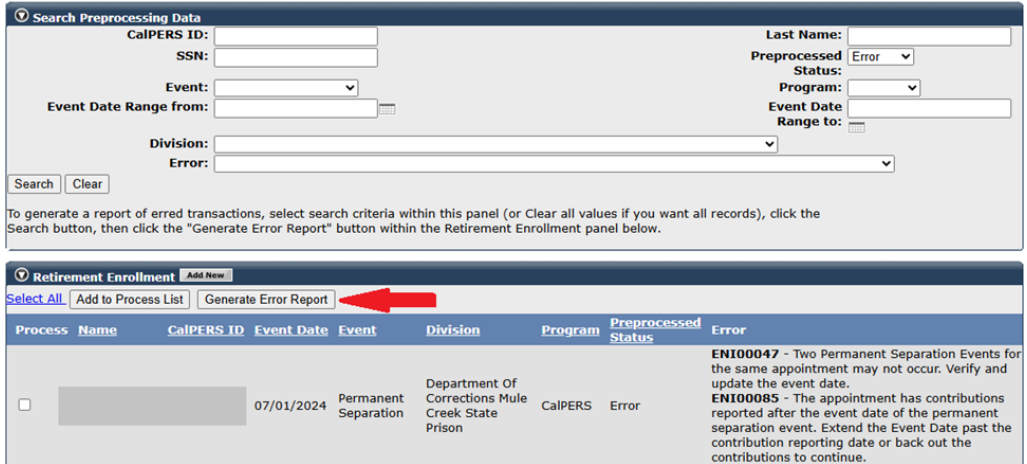
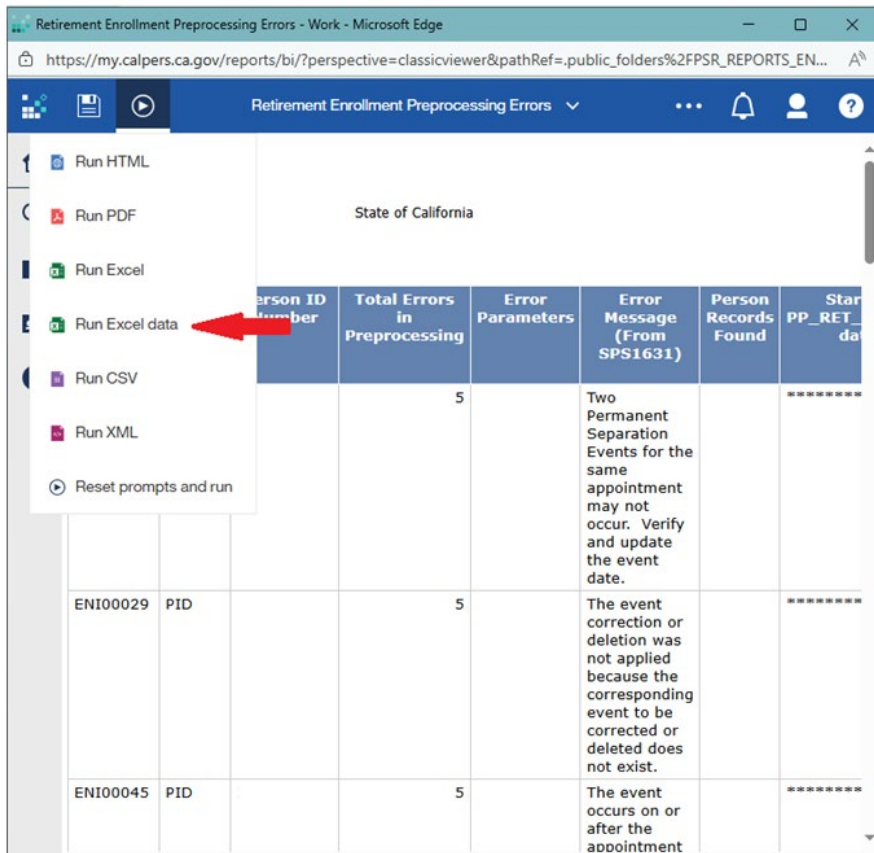
The process is complete.

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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

The State Controller's Office
Personnel and Payroll Services Division

Document	Title	Effective Date
Job aid 5	Permanent Separations	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