

**State Controller's Office
Personnel and Payroll Services Division**



**SCO 505 KEYING GUIDE FOR
CALPERS RETIREMENT
DETERMINATION LETTERS**

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Prepared for use by
the:

Personnel and Payroll
Operations Bureau

SCO 505 Keying Guide for CalPERS Retirement Determination Letters

This keying guide provides the steps needed to process a change to an employee's retirement account code upon receipt of one of the following CalPERS retirement determination letters.

To begin: Click on the applicable CalPERS letter below and follow the steps provided.

CalPERS Retirement Determination Letters

- [First or Second Tier Election Form](#)
- [Election of Optional Membership – Legislative Employee](#)
- [Election to Remain Subject to Miscellaneous Retirement Benefit Formula](#)
- [Retirement System Election \(ES372\)](#)

First or Second Tier Election Form ([PAR Sample Elected Tier Change](#))

If you received a First or Second Tier Election Form letter from CalPERS, please follow these steps:

- Step 1: Review the Required and Conditional Chart for Retirement System Information
 - PAM Section 3.126
- Step 2: Key a 505 PAR transaction (click here to see a [PAR Sample Elected Tier Change](#)). Be sure to include the following PAR items:
 - **Effective Date (PAR Item 210)**: Identifies the effective date of the transaction. (Note: This will be the beginning of the pay period. See FAQ for exceptions.)
 - **Employment History Remarks (PAR Item 215)**: Enter “ELECTED TIER CHANGE”
 - **(Retirement) Account Code (PAR Item 505)**: One or two character code used to denote employees’ retirement attributes.
 - PAR Item 515, 520, 525, and 530 will auto populate based on the account code.
- Step 3: Correct any out of sequence transactions to carry forward the new account code.
- Step 4: After keying the transaction, be sure to verify in EH that the transaction was keyed correctly.
- Step 5: Verify the transaction is reported in my|CalPERS the following business day.

*If the 505 transaction is included as part of a Do Not Key PAR package, you must submit the PAR package to SCO for keying. (See PAM Section 10.2)

- To submit to SCO, use ConnectHR and select the “CS Audits - PAR Package” dropdown menu item.

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Election of Optional Membership – Legislative Employee ([PAR Sample OPT Member](#))

If you received an Election of Optional Membership – Legislative Employee letter from CalPERS, please follow these steps:

- Step 1: Review the Required and Conditional Chart for Retirement System Information
 - PAM Section 3.126
- Step 2: Key a 505 PAR transaction (click here to see a [PAR Sample OPT Member](#)). Be sure to include the following PAR items:
 - **Effective Date (PAR Item 210)**: Identifies the effective date of the transaction. (Note: This will be the beginning of the pay period. See FAQ for exceptions.)
 - **Employment History Remarks (PAR Item 215)**: Enter “OPT MEMBER”
 - **(Retirement) Account Code (PAR Item 505)**: One or two character code used to denote employees’ retirement attributes.
 - PAR Item 515, 520, 525, and 530 will auto populate based on the account code.
- Step 3: Correct any out of sequence transactions to carry forward the new account code.
- Step 4: After keying the transaction, be sure to verify in EH that the transaction was keyed correctly.
- Step 5: Verify the transaction is reported in my|CalPERS the following business day.

*If the 505 transaction is included as part of a Do Not Key PAR package, you must submit the PAR package to SCO for keying. (See PAM Section 10.2)

- To submit to SCO, use ConnectHR and select the “CS Audits - PAR Package” dropdown menu item.

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Election to Remain Subject to Miscellaneous Retirement Benefit Formula ([PAR Sample SAF to MISC](#))

If you received an Election of Optional Membership – Legislative Employee letter from CalPERS, please follow these steps:

- Step 1: Review the Required and Conditional Chart for Retirement System Information
 - PAM Section 3.126
- Step 2: Key a 505 PAR transaction (click here to see a [PAR Sample SAF to MISC](#)). Be sure to include the following PAR items:
 - **Effective Date (PAR Item 210)**: Identifies the effective date of the transaction. (Note: This will be the beginning of the pay period, unless effective on the date of permanent separation. Also see the FAQ.)
 - **Employment History Remarks (PAR Item 215)**: Enter “SAF to MISC”
 - **(Retirement) Account Code (PAR Item 505)**: One or two character code used to denote employees’ retirement attributes.
 - PAR Item 515, 520, 525, and 530 will auto populate based on the account code.
- Step 3: Correct any out of sequence transactions to carry forward the new account code.
- Step 4: After keying the transaction, be sure to verify in EH that the transaction was keyed correctly.
- Step 5: Verify the transaction is reported in my|CalPERS the following business day.

*If the 505 transaction is included as part of a Do Not Key PAR package, you must submit the PAR package to SCO for keying. (See PAM Section 10.2)

- To submit to SCO, use ConnectHR and select the “CS Audits - PAR Package” dropdown menu item.

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Retirement System Election (ES372) ([PAR Sample RET System Election](#))

If you received a Retirement System Election letter from CalPERS, please follow these steps:

- Step 1: Review the Required and Conditional Chart for Retirement System Information
 - PAM Section 3.126
- Step 2: Key a 505 PAR transaction (click here to see a [PAR Sample RET System Election](#)). Be sure to include the following PAR items:
 - **Effective Date (PAR Item 210)**: Identifies the effective date of the transaction. (Note: This will be the beginning of the pay period, unless effective on the date of permanent separation. Also see the FAQ.)
 - **Employment History Remarks (PAR Item 215)**: Enter “RET SYS ELECT”
 - **(Retirement) Account Code (PAR Item 505)**: One or two character code used to denote employees’ retirement attributes.
 - PAR Item 515, 520, 525, and 530 will auto populate based on the account code.
- Step 3: Correct any out of sequence transactions to carry forward the new account code.
- Step 4: After keying the transaction, be sure to verify in EH that the transaction was keyed correctly.
- Step 5: Verify the transaction is reported in my|CalPERS the following business day.

*If the 505 transaction is included as part of a Do Not Key PAR package, you must submit the PAR package to SCO for keying. (See PAM Section 10.2)

- To submit to SCO, use ConnectHR and select the “CS Audits - PAR Package” dropdown menu item.

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