

STATE CONTROLLER'S OFFICE
PERSONNEL AND PAYROLL SERVICES DIVISION
P.O. BOX 942850
SACRAMENTO, CA 94250-5878

DATE: April 29, 2021

PERSONNEL LETTER #21-009

TO: All Agencies/Campuses in the Uniform State Payroll System

FROM: Jil Barraza, Chief
Personnel and Payroll Services Division

**RE: EMPLOYMENT HISTORY MASS UPDATE – CALPERS PEPRA ACCOUNT CODES AND
CALPERS ENROLLMENT LEVEL INDICATOR**

On April 30, 2021, the State Controller's Office (SCO) will implement an Employment History (EH) system modification to add a new **E-LVL** (CalPERS Enrollment Level) field in the PIMS and CSUC on the RST screen. The Enrollment Level field indicates if an employee is enrolled in a CalPERS Classic or PEPRA (Public Employees' Pension Reform Act of 2013) plan and works together with the Retirement Account Code (PAR Item 505) to track the annual Maximum Compensation limits. Employment History audits have been added to the PAR item 505. An employee is enrolled in a Classic or PEPRA plan based on their CalPERS enrollment date and if they have reciprocity. Contact the Statewide Customer Contact Center for EH keying errors questions.

CalPERS Enrollment Levels Values

B = PEPRA Member (NOT Subject to OASDI)
C = Classic Member
N = Non CalPERS contributing
P = PEPRA Member (Subject to OASDI)
S = Super Classic Member*

***Employees with a membership date prior to July 1, 1996, are not subject to Maximum Compensation limits.**

Sample PIMS and CSUC RST Screen

RETIREMENT SYSTEM TRANSACTION				TRANS CODE: RST			
-----E M P L O Y E E / M E M B E R I N F O R M A T I O N-----							
SOUNDEX	SSA NUMBER	LAST NAME		FIRST & INITIAL	BIRTH DATE	SEX	
P-350	000-00-000	SAMPLE		, EMPLOYEE E	10 / 29 / 78	M	
EMP CODE	5649	ADDRESS	4205 SOMESTREET				
		CITY/STATE	SACRAMENTO CA				95814
-----E M P L O Y M E N T I N F O R M A T I O N-----							
POSITION	NUMBER	TIME	-----APPOINTMENT-----				
AGY-UNT-CLAS-SER	BASE	TYPE	LENGTH	EXP DATE	PAY RATE /PER	PAY FREQ	
055-600-4633-010	FT	PERM		00/00/00	10861.38 / M	M	
DEPT	PUBLIC	EMPLOYEES	RETIREMENT SYSTEM	CLASS	TITLE	ASO INVESTMENT	MGR
-----R E T I R E M E N T I N F O R M A T I O N-----							
SYSTEM	E-LVL	COVERAGE	GP SURVIVOR	SS/MED	ACC CODE	RET RATE	SAFETY
OPTIONAL							
PERS-1	P	10043	NO	YES	DM	.0800	MIS

EMPLOYMENT HISTORY (EH) MASS UPDATE PROCESSING

Also, as part of the implementation on April 30, 2021, the SCO will process an EH mass update to assign the CalPERS Enrollment Level. The R01 transaction will be posted in Employee History, effective 05/01/2021 for active Civil Service and California State University employees to populate the **E-LVL** field with the appropriate Classic or PEPRAs code, based on the employee's Enrollment Level field in myCalPERS. For Civil Service employees, if an employee is assigned a PEPRAs CalPERS Enrollment Level then they will also be assigned a new PEPRAs account code within the R01 transaction. Refer to Attachment 1 for New Civil Service PEPRAs retirement account codes. All R01 transactions will have the 215 field remarks "Add CalPERS E-LVL". If an active employee does not have a CalPERS Enrollment Level, the E-LVL value will default to "N" without a R01 transaction posted in EH. PAM updates to section 505 will be released in May 2021.

The SCO requests that Agencies and Campuses only key necessary EH transactions on April 30, 2021 to minimize the mass update fallout.

MASS UPDATE EXCEPTIONS

Exceptions to the mass update must be processed manually. For example, employees with an EH record reflecting an out-of-sequence status (i.e., the effective date on the most current transactions is after May 1, 2021), will be processed manually by the Personnel and Payroll Services Division (PPSD).

The PPCS is unable to update the EH records when the employee is off pay status (e.g., on a leave of absence, or an Appointment Expiration Date prior to May 1, 2021). These employees' Item 505 – Account Code field must be updated by the appointing agency once their appointment is extended or the employee returns to active pay status following a leave of absence. Although Item 505 is not a required field when returning an employee to pay status, the new civil service PEPRAs account code must be entered on the PAR in order to reflect the correct retirement and assign the enrollment level indicator on the employee's record. If the account code is not

entered, the retirement enrollment level indicator will not be updated correctly and max compensation logic will not be correctly applied.

Incorrect member Enrollment Levels could cause errors including, but not limited to, miscalculation of employer and employee contributions, delays in processing member retirement benefits, inaccurate retirement estimates, incorrect payment of benefits, and a reduction in retirement benefits. Each Agency must ensure employees hired on or after January 1, 2013 certify in writing whether they are members of another public retirement system and are thus subject to reciprocity as defined in Code of Regulations section 579.3(b). The Agency should work with CalPERS' Employer Account Management Division (EAMD) to ensure all employees are enrolled at the appropriate Enrollment Levels and make adjustments, if necessary, to any impacted active and retired member accounts in accordance with Government Code section 20160. If you have any questions please call CalPERS' Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

For additional questions, please use the following contact information:

- Statewide Customer Contact Center (916) 372-7200
- Statewide Tax Support Program, W-2 Unit (916) 445-2847
- HR Suggestions Email (All HR Staff) ppsdhrsuggestions@sco.ca.gov
- CS Escalation Email (HR Supervisors and Managers) PPSDOps@sco.ca.gov
- CSU Inquiry ppsdcsuquiry@sco.ca.gov
- Cal Employee Connect Email connecthelp@sco.ca.gov
- Cal Employee Connect Feedback Email connectfeedback@sco.ca.gov

SCO Key Initiatives:

- [Cal Employee Connect Project](#)
- [CalATERS Replacement Project](#)
- [California State Payroll System Project](#)

JEB:AFB:PM:PPOB

Current Civil Service Retirement Account Code	New Civil Service PEPPRA Account Code 5/1/2021	Retirement Category	Social Security/Medicare**
01	B1	MIS	NO
03	B3	MIS	SS
04	B4	MIS	SS
05	B5	MIS	SS
06	B6	MIS	MED
09	B9	MIS	SS
13	C3	SAF	MED
14	C4	SAF	NO
19	C9	SAF	MED
24	D4	MIS	SS
25	D5	MIS	SS
27	D7	MIS	SS
30	E0	SAF	NO
36	E6	POF	MED
40	F0	MIS	NO
41	F1	MIS	SS
42	F2	MIS	MED
44	F4	MIS	SS
45	F5	MIS	SS
47	F7	IND	SS
48	F8	IND	MED
49	F9	IND	SS
55	G5	POF	NO
61	H1	PAT	MED
62	H2	PAT	NO
92	P2	IND	NO
95	P5	IND	SS
96	P6	IND	SS
97	P7	IND	MED
98	P8	IND	MED
0A	RA	MIS	SS
0B	RB	MIS	SS
0C	RC	MIS	SS
0D	RD	MIS	SS
0E	RE	MIS	SS
0F	RF	MIS	SS
0G	RG	MIS	SS
0H	RH	MIS	SS
1B	CB	SAF	NO

Current Civil Service Retirement Account Code	New Civil Service PEPRA Account Code 5/1/2021	Retirement Category	Social Security/ Medicare**
1C	CC	SAF	MED
1D	CD	SAF	MED
1E	CE	SAF	NO
1F	CF	SAF	MED
1G	CG	SAF	NO
1H	CH	SAF	NO
1J	CJ	SAF	MED
1K	CK	SAF	MED
1L	CL	SAF	NO
1P	CP	SAF	MED
1Q	CQ	SAF	NO
1R	CR	SAF	NO
1S	CS	SAF	MED
1T	CT	SAF	NO
1V	CV	SAF	MED
1W	CW	SAF	NO
1X	CX	SAF	MED
1Y	CY	SAF	NO
1Z	CZ	SAF	MED
2A	DA	MIS	NO
2B	DB	MIS	MED
2C	DC	MIS	SS
2D	DD	MIS	SS
2E	DE	MIS	SS
2F	DF	MIS	SS
2G	DG	MIS	SS
2H	DH	MIS	SS
2I	DI	MIS	SS
2J	DJ	MIS	SS
2K	DK	MIS	NO
2L	DL	MIS	SS
2M	DM	MIS	SS
2O	DO	MIS	SS
2P	DP	MIS	SS
2Q	DQ	MIS	NO
2R	DR	MIS	SS
2S	DS	MIS	NO
2V	DV	MIS	MED
2W	DW	MIS	SS
3A	EA	POF	NO
3B	EB	POF	MED

Current Civil Service Retirement Account Code	New Civil Service PEPRA Account Code 5/1/2021	Retirement Category	Social Security/ Medicare**
3C	EC	POF	NO
3D	ED	POF	MED
3E	EE	POF	NO
3F	EF	POF	MED
3M	EM	POF	MED
3S	ES	POF	NO
3T	ET	POF	MED
3V	EV	POF	MED
3Y	EY	POF	MED
4A	FA	MIS	SS
4B	FB	NO	SS
4D	FD	MIS	SS
4F	FF	MIS	SS
4G	FG	MIS	SS
4H	FH	MIS	SS
4L	FL	MIS	SS
4P	FP	MIS	SS
4R	FR	MIS	SS
4S	FS	MIS	SS
4T	FT	MIS	SS
4V	FV	MIS	SS
4W	FW	MIS	SS
4X	FX	MIS	SS
4Y	FY	MIS	SS
5B	GB	POF	MED
5C	GC	POF	NO
5D	GD	POF	MED
5E	GE	POF	NO
5F	GF	POF	MED
5G	GG	POF	NO
5H	GH	POF	MED
5J	GJ	POF	NO
5K	GK	POF	MED
5V	GV	POF	MED
5X	GX	POF	MED
6J	HJ	SAF	MED
6L	HL	SAF	MED
6P	HP	SAF	MED
6R	HR	SAF	NO
6S	HS	PAT	NO
6T	HT	PAT	MED

Current Civil Service Retirement Account Code	New Civil Service PEPRA Account Code 5/1/2021	Retirement Category	Social Security/Medicare**
6X	HX	SAF	NO
6Y	HY	SAF	MED
7A	SA	SAF	MED
7B	SB	SAF	NO
7C	SC	SAF	MED
7D	SD	SAF	MED
7E	SE	SAF	MED
7F	SF	SAF	NO
7G	SG	SAF	MED
7H	SH	SAF	NO
7I	SI	SAF	MED
7J	SJ	SAF	MED
7K	SK	SAF	MED
7L	SL	SAF	MED
9A	PA	IND	SS
9B	PB	IND	SS
9C	PC	IND	SS
9D	PD	IND	SS
9E	PE	IND	NO
9F	PF	IND	MED
9G	PG	IND	SS
9H	PH	IND	NO
9J	PJ	IND	MED
9L	PL	IND	SS
9M	PM	IND	SS
9N	PN	IND	SS
9P	PP	IND	SS
9R	PR	IND	NO
9S	PS	IND	MED
9T	PT	IND	NO
9V	PV	IND	MED
9W	PW	IND	SS
9X	PX	IND	SS
9Y	PY	IND	SS

**SS identifies subject to social security and medicare, MED identifies subject to medicare only, NO identifies as subject to neither social security, nor medicare