

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:
Federal Tax ID:
Category:
Regional Office:
Merged Agency:

Status: Active
Name: State Controller Office
Division Of: State of California
County: Sacramento

Addresses

Physical:
Undeliverable:

Mailing:
Undeliverable: No

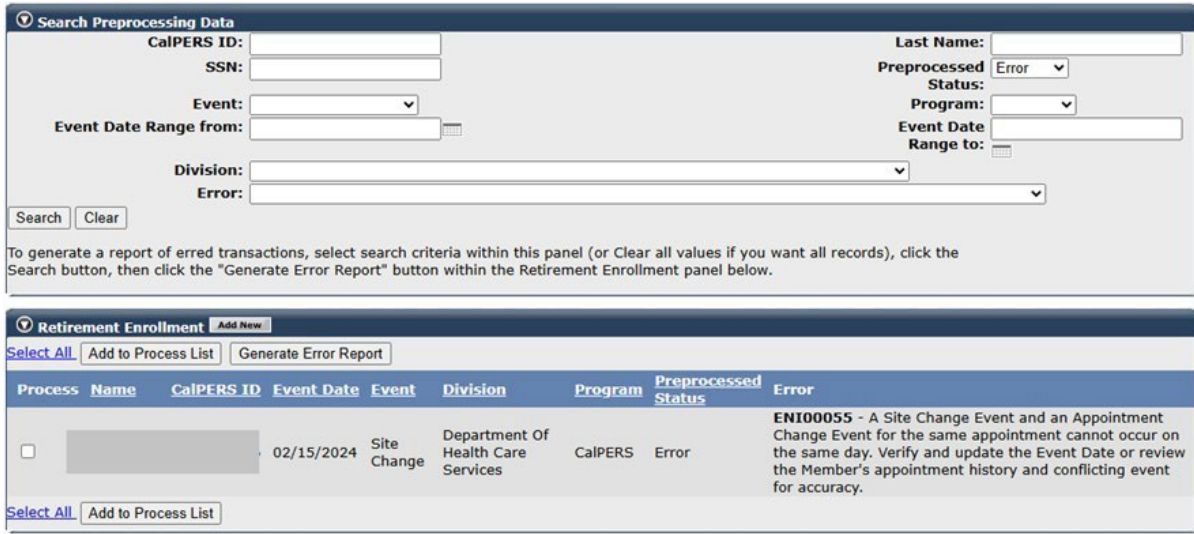
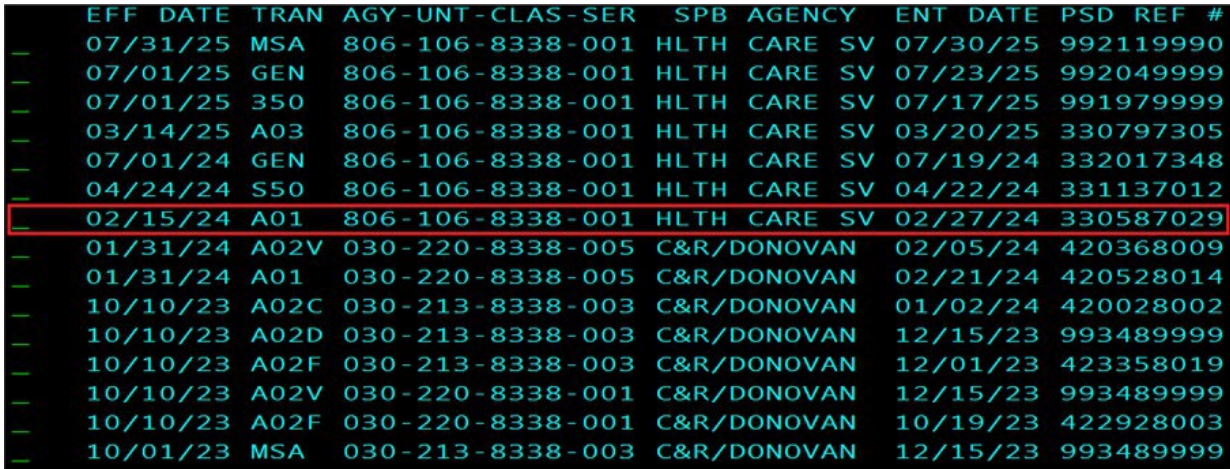
Communication Information

Preferred Communication: Mail
Primary Email: Primary Phone Number:

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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.  The screenshot displays two panels from the CalPERS system. The top panel, 'Search Preprocessing Data', contains search criteria fields: CalPERS ID, SSN, Event (dropdown), Event Date Range (calendar icon), Division (dropdown), and Error (dropdown). Below these are 'Search' and 'Clear' buttons. A note states: '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.' The bottom panel, 'Retirement Enrollment', has 'Add New', 'Select All', 'Add to Process List', and 'Generate Error Report' buttons. It contains a table with columns: Process, Name, CalPERS ID, Event Date, Event, Division, Program, Preprocessed Status, and Error. One row is highlighted with a red border, showing a 'Site Change' event for CalPERS ID 806-106-8338-001 on 02/15/2024, with a preprocessed status of 'Error' and a detailed error message: '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.'
2.	Look up the employee's employment history in PIMS. In this example, the employee moved to another agency on an AO1 transaction.  The screenshot shows a table of employment history transactions. The columns are: EFF, DATE, TRAN, AGY-UNT-CLAS-SER, SPB, AGENCY, ENT, DATE, PSD, REF, and #. The row for 02/15/24 A01 is highlighted with a red border, showing a transition from agency 806-106-8338-001 to 030-220-8338-005 on 02/15/24.
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

Taxed Contributions:

\$0.00

Tax Deferred Contributions:

\$8,824.07

Interest on Contributions:

\$1,143.85

Balance:

\$9,967.92

Posted Service Credit:

1.672

Membership Date:

10/10/2022

Elected Service Credit:

0.000

Service Credit Total:

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

Normal Retirement Age:

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

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

Correct Event

Delete

☐ View All Site Events

Display

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

Correct Event

Delete

☐ View All Site Events

Display

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

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

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%

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 Health Care Services
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	9061068338001
Appointment Sequence Number	01	01

Since it is confirmed that the AO1 is reported and currently present in the appointment history, return to the Preprocessing Area and delete the error.

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

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

Select All Add to Process List Generate Error Report

Process	Name	CalPERS ID	Event Date	Event	Division	Program	Preprocessed Status	Error
☒			02/15/2024	Site Change	Department Of Health Care Services	CalPERS	Error	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.

Select All 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

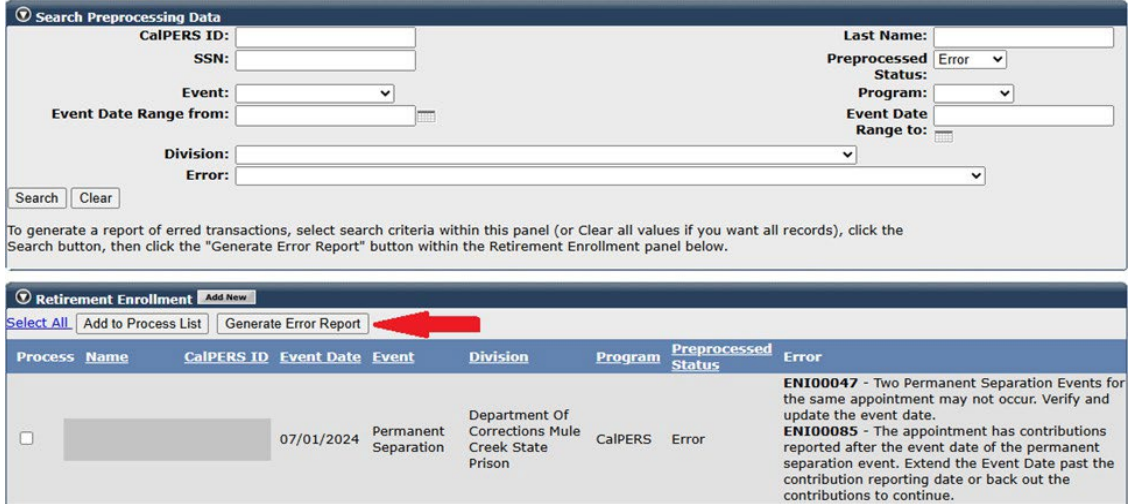
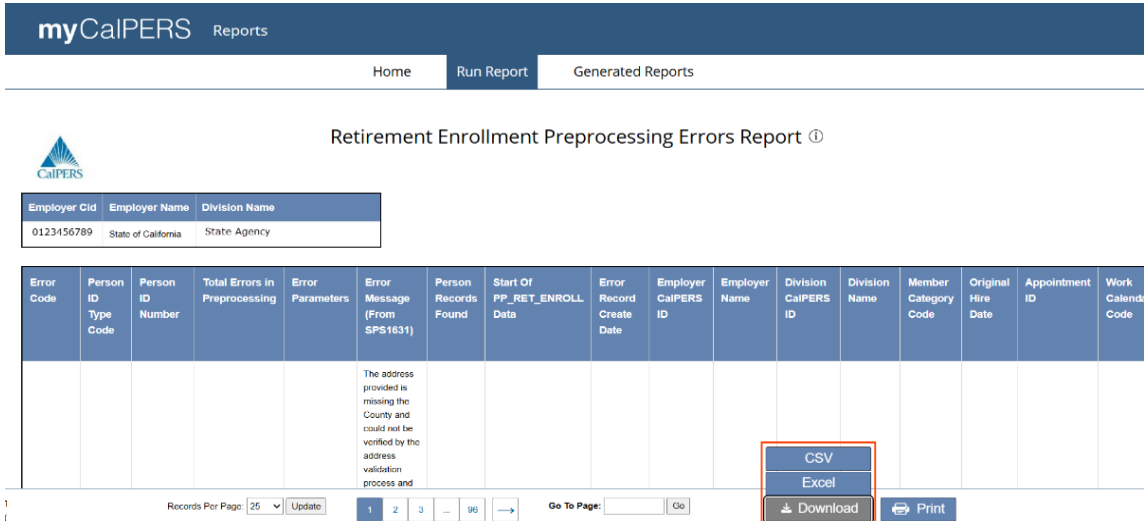
No results returned based on the search criteria provided. Please refine your search criteria.

The process is complete.

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Addendum

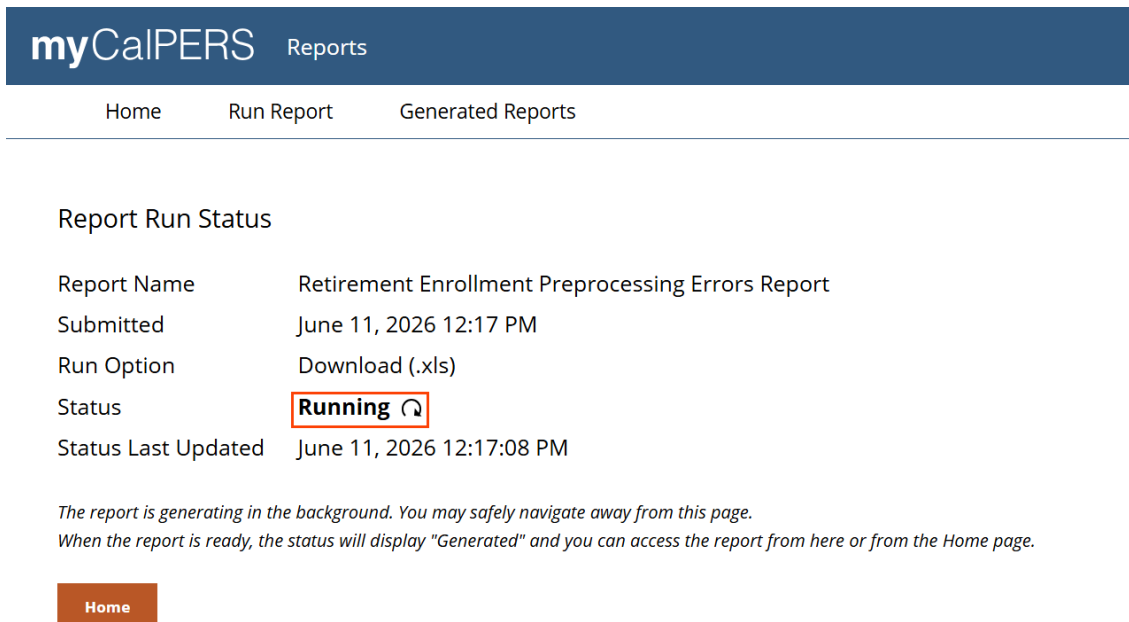
Generating Enrollment Error Report

STEP	ACTION
1.	To generate a report of your department's enrollment errors, press the Generate Error Report button on the Preprocessing Data Panel.  The screenshot shows the 'Retirement Enrollment' panel with various search criteria fields (CalPERS ID, SSN, Event, Event Date Range, Division, Error) and a 'Generate Error Report' button highlighted with a red arrow. Below the search fields is a table with columns: Process, Name, CalPERS ID, Event Date, Event, Division, Program, Preprocessed Status, and Error. A red arrow points to the 'Generate Error Report' button.
2.	The report will be displayed in an online, view-only HTML format. You can download the report from the HTML view as either a CSV or XML file.  The screenshot shows the 'Retirement Enrollment Preprocessing Errors Report' page. It includes a table with columns: Error Code, Person ID Type Code, Person ID Number, Total Errors in Preprocessing, Error Parameters, Error Message (From SPS1631), Person Records Found, Start Of PP_RET_ENROLL Data, Error Record Create Date, Employer CalPERS ID, Employer Name, Division CalPERS ID, Division Name, Member Category Code, Original Hire Date, Appointment ID, and Work Calends Code. The 'CSV' and 'Excel' download buttons are highlighted with a red box.

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3.

Once you select the format, the report will begin to generate in the background. The status will display as **Running**. The report will automatically save when complete to your Generated Reports page.



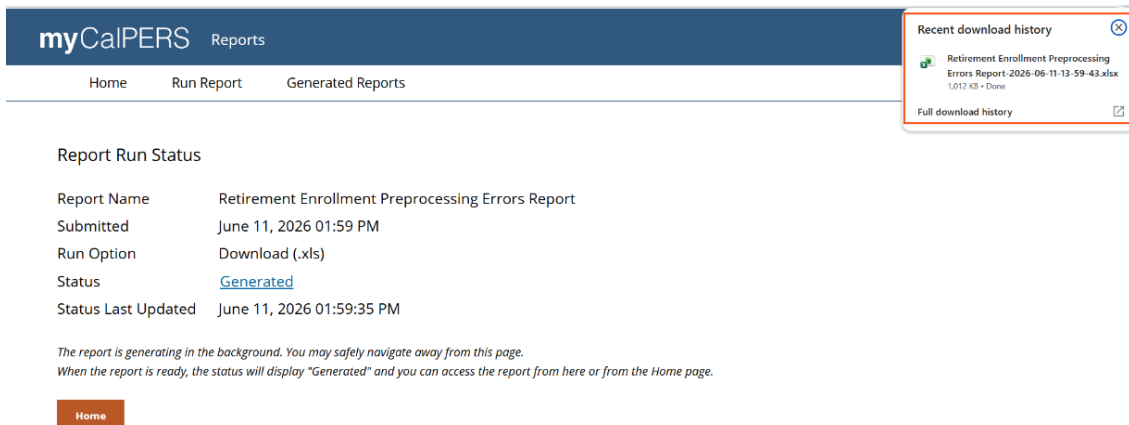
The screenshot shows the 'myCalPERS Reports' interface. At the top, there is a navigation bar with 'Home', 'Run Report', and 'Generated Reports' links. Below this, the 'Report Run Status' section displays the following information:

Report Name	Retirement Enrollment Preprocessing Errors Report
Submitted	June 11, 2026 12:17 PM
Run Option	Download (.xls)
Status	Running 
Status Last Updated	June 11, 2026 12:17:08 PM

Below the status information, there is a message: "The report is generating in the background. You may safely navigate away from this page. When the report is ready, the status will display "Generated" and you can access the report from here or from the Home page." At the bottom left, there is a 'Home' button.

4.

Once the report is complete, the status changes to **Generated**. Select the **Generated** link to download the report to your local **Downloads** folder.



The screenshot shows the 'myCalPERS Reports' interface, similar to the previous one, but with the status changed to 'Generated'. The 'Report Run Status' section displays the following information:

Report Name	Retirement Enrollment Preprocessing Errors Report
Submitted	June 11, 2026 01:59 PM
Run Option	Download (.xls)
Status	Generated
Status Last Updated	June 11, 2026 01:59:35 PM

Below the status information, there is a message: "The report is generating in the background. You may safely navigate away from this page. When the report is ready, the status will display "Generated" and you can access the report from here or from the Home page." At the bottom left, there is a 'Home' button.

On the right side of the screenshot, there is a 'Recent download history' window. It shows a list of downloaded files:

Recent download history	
	Retirement Enrollment Preprocessing Errors Report-2026-06-11-13-59-43.xlsx
	1,012 KB • Done
Full download history	

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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