CalPERS 457 Plan

# CalPERS 457 Plan Administration and Payroll Guide

## Easy-to-follow steps for 457 Plan payroll submission



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# Welcome to the CalPERS 457 Plan

The CalPERS 457 Plan is a deferred compensation plan administered by CalPERS, a California state agency. Since 1995, CalPERS has provided public agency and school employers and their employees a low-cost, convenient way to save for retirement through payroll deduction. The CalPERS 457 Plan offers diversified investment options and state-of-the-art services, delivered at low cost to participants and at no cost to employers.

As an agency that has adopted the CalPERS 457 Plan, this guide will help you administer the plan for your employees as they enroll, save, and manage their account to and through retirement. In addition to the guide, a variety of CalPERS 457 Plan resources are available to assist you and your employees. Visit **calpers-sip.com** for the Employer Resource Center, with CalPERS 457 Plan news and updates, plan forms, participant materials, employer materials, and more.

# CalPERS 457 Plan Contacts

## 457 Plan Administration and myCalPERS Payroll Support

CalPERS 457 Plan Staff are available to assist with matters pertaining to payroll processing through the myCalPERS system Monday – Friday, 8 a.m. – 5 p.m. Pacific Time.

Contact the CalPERS 457 Plan payroll support team at **CalPERS_457_Plan@calpers.ca.gov** or call us at **800-696-3907**.

## Voya Sponsor Web Team

Voya's administrative team is available to assist with matters pertaining to Employer reporting through the Sponsor Web system.

Contact the CalPERS 457 Plan team **CalPERS_457_Plan@calpers.ca.gov**.

# Enrolling New Participants

## Overview

Once an agency has adopted the CalPERS 457 Plan, all employees are eligible to join effective the following earned period. There are no minimum service requirements to fulfill and enrollees are not required to be participants in the CalPERS Pension. Participants in the CalSTRS Pension, retired annuitants, seasonal employees, part time employees and board members are also eligible to enroll.

- To enroll by form, employees must complete the forms in the **Employee Enrollment Kit**, which is available for download on the **Employer Resource Center** or from your **local Account Manager**.
- To enroll online, employees can visit **calpers457.com**. For a report to help process online enrollments, download the **Retrieving an Online Enrollment File through Voya PayCloud** guide from the **Employer Resource Center**.

## Submitting CalPERS 457 Plan Enrollment Forms

Once the **CalPERS 457 Plan Enrollment** and **Beneficiary Designation Forms** have been completed by a new enrollee and signed by the employer, the employer will submit the forms to the plan administrator.

> **Completed forms should be submitted via fax or mail as follows:**

**Fax Delivery**
Voya Financial
Attn: CalPERS
1-888-228-6185

**US Mail Delivery**
Voya Financial
Attn: CalPERS
P.O. Box 389
Hartford, CT 06141

**Overnight Delivery**
Voya Financial
Attn: CalPERS
One Orange Way
Windsor, CT 06095

> **Submit forms via email at CalPERS@voyaplans.com**

**Note:** For paper enrollments, please ensure to include an employer signature on page 2.

# Logging in to myCalPERS

## Overview

CalPERS 457 Plan participating agencies must submit payroll through the myCalPERS system.

**To log in to myCalPERS complete the steps below.**

| Step | Action |
|---|---|
| **1** | Go to **calpers.ca.gov** |
| **2** | On the CalPERS Home Page select the **myCalPERS Log In** button. |
| **3** | On the Pre-Log In page select the **Business Partner** radio button, then select **Continue**. |
| **4** | On the Business Partner Log In page enter your username and select **Continue**. |
| **5** | Enter your Password and select **Log In.** |
| **6** | To accept Conditions of Use of Employee Data for Employers select the **Accept** button. |

**Note:** The first time you log in to myCalPERS, you will be prompted to select and answer a series of security identification questions. Periodically, your password must be reset. You may reset your password through the Reset Password link on the Common Tasks left navigation menu. If you do not have a myCalPERS username or password, contact the CalPERS Employer Assistance line at **888-225-7377.**

# Required Security Access

## Overview

In order to process 457 Plan payroll, business partners are required to be granted security access to the myCalPERS system.

At least one Security Access Administrator (SAA) must be established for each business partner for access to myCalPERS.

If any of the following situations apply to the agency, the employer should contact the CalPERS employer line at **888-225-7377**:

- Does not have an SAA.
- Has an SAA, but does not have access to myCalPERS.
- Has required security role access, but are unable to view Agreements, Payroll Reporting or Payment pages.

## Required Security Access

The following table describes common 457 Plan payroll related tasks and the required access roles an employer must be granted to complete those tasks.

| | |
|---|---|
| **To create SIP-457 payroll reports** | • Business Partner Supplemental Income Plan<br>• Business Partner Payroll |
| **To access SIP-457 receivable and payment information** | • Business Partner Supplemental Income Plan<br>• Business Partner AR/Billing |
| **To access *Remittance Advice Form* and other reports** | • Business Partner Supplemental Income Plan<br>• Business Partner AR/Billing<br>• Business Partner Payroll |

**Note:** Any role ending in RO “Read Only” or limited will make affected pages accessible but the user will not be able to modify those pages.

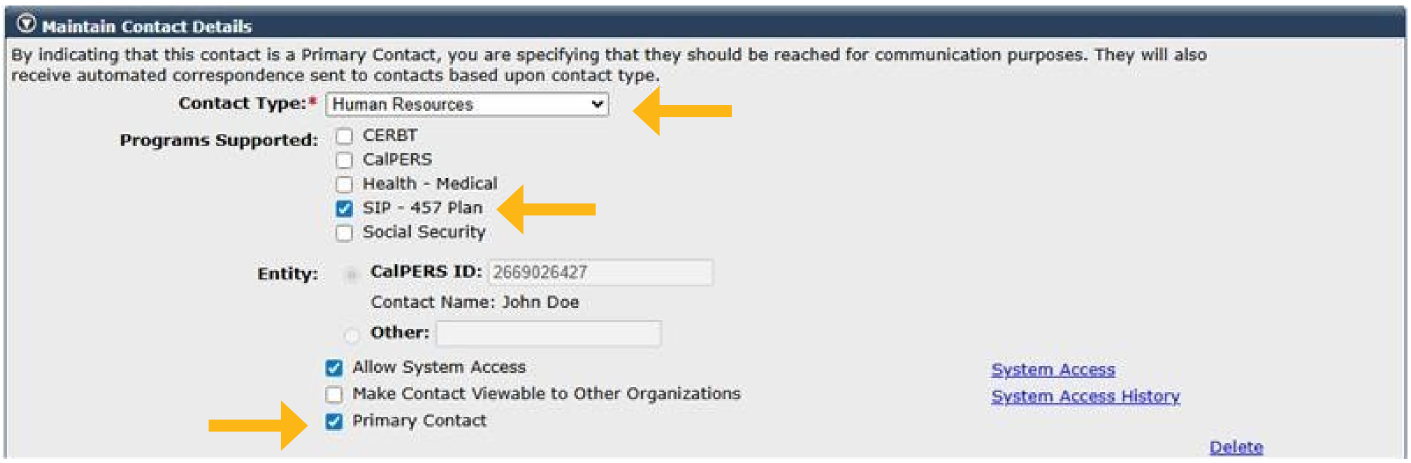
Employers who are not contracted for any CalPERS programs other than the CalPERS 457 Plan are required to grant the “Business Partner Appointment Management — Non-Pers and CalSTRS” to edit member demographic information.

# Enrollment & Contribution Change Notifications

Enrollment and contribution change notifications are automatically generated in myCalPERS and delivered through email and pop-up notifications to assigned Human Resources and Payroll contacts.

To ensure notifications are received and acted upon timely, employers must maintain appropriate contact information, program selections, and system access in myCalPERS.

## Email Notifications (Letters/Documents)




**To receive email notifications:**

- Assign **Human Resources** and **Payroll** contact roles/types in myCalPERS
- Designate a **Primary Contact** for each role
- Under Programs Supported, select the **SIP - 457 Plan** checkbox
- Keep contact information current by adding and removing contacts as staffing changes occur

**Important:**

- If multiple Human Resources or Payroll contacts are assigned to the same role, one contact should be designated as the Primary Contact to support proper notification routing.
- Only the Human Resources and Payroll contact types are used for email notification routing. Contact types such as Human Resources Benefit Officer or Human Resources Personnel will not receive notifications.

## Pop-Up Notifications


**To receive pop-up notifications:**

- Select the **SIP - 457 Plan** checkbox under Programs Supported
- Assign the **Business Partner Supplemental Income Plan** role under System Access
- Ensure appropriate staff are designated to monitor and act upon notifications

**Important:**

- Any contact type with the SIP 457 - Plan checkbox and Business Partner Supplemental Income Plan role selected will receive pop-up notifications
- Pop-up notification eligibility differs from email notification routing requirements

## Processing Payroll Changes due to Pop-Up Notifications

Enrollment and contribution change notifications are time-sensitive and may impact payroll processing. Maintaining accurate contact roles and system access helps ensure participant elections are received and implemented timely.

# Create a 457 Plan Payroll Schedule

## Overview

To begin CalPERS 457 Plan payroll reporting in myCalPERS, a 457 Plan payroll schedule must be established. You can create a request for a new 457 Plan payroll schedule in myCalPERS which must be approved by CalPERS 457 Plan staff.

## Steps to Create a 457 Plan Payroll Schedule

**To create a 457 Plan payroll schedule, follow the steps below.**

| Step | Action |
|---|---|
| **1** | From the Business Partner Summary page select the **Reporting** global navigation tab. |
| **2** | On the Manage Reports page, select the **Payroll Schedules** local navigation link. |
| **3** | On the Payroll Schedules Page in the Payroll Schedule Options section, select the **Add New Payroll Schedule Method** radio button, then select **Continue**. |
| **4** | In the Payroll Schedule Options section, select the **Continue** button. |
| **5** | On the Maintain Payroll Schedule page enter required information:<br>• Program: SIP – 457 Plan<br>• Payroll Schedule Type: (Monthly, Semi-Monthly, Bi-Weekly or Quadri-Weekly)<br>• Schedule Name: 457 Plan (Schedule Type) Payroll<br>• Begin Date: Select the first day of the NEXT earned period using the calendar widget.<br>• Reason: To create 457 Plan payroll schedule<br>**Note:** The begin date should correspond to the earned period not the pay date. |
| **6** | Select the **Save** button. |

Once the payroll schedule has been created in myCalPERS, contact the CalPERS 457 Plan payroll support team to request approval for the newly created payroll schedule at **CalPERS_457_Plan@calpers.ca.gov**.

# Update Participant Information (457 Only Employers)

## Overview

Employers who have CalPERS Pension or Health services must update participant information through the CalPERS Employer Customer Contact Center.

Employers that have the CalPERS 457 Plan but no other CalPERS services must update participant information including:

- **Personal Information**
  - Name
  - Social Security Number
  - Date of Birth
- **Contact Information**
  - Email
  - Phone Number
  - Address

In addition to security access roles required to process 457 Plan payroll, a 457 Only employer will need the following security role to enable them to update member Name, Date of Birth or SSN:

- Business Partner Appointment Management — Non-PERS and CalSTRS

**Note:** Once an Employee separates from employment, they will update their information directly through myCalPERS or Voya.

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# Update Participant Information (457 Only Employers) *(continued)*

## Steps to Update Participant Information (457 Only Employers)

**The following actions update participant information for 457 Plan Only employers.**

| Step | Action |
|---|---|
| **1** | From the My Home page, select either the **Person Search** left-side navigation link or the **Person Information** global navigation tab. |
| **2** | Enter the employee's social security number into the SSN / Federal or Individual Tax ID field in the Person Search section and then select the **Search** button. |
| **3** | From the Summary panel the employer can update the participant's information.<br>• If you would like to update the member's Name, DOB or SSN, continue to **step 4**.<br>• If you would like to update the member's email, or phone number, continue to **step 6.** |
| **4** | To update the member's Name, DOB or SSN select the **Update Person Information** link (upper right-hand corner of Summary Panel). |
| **5** | On the Maintain Personal Information Details Panel, update the participant information and select **Save**. The participant profile should reflect saved changes. |
| **6** | To update the member's phone and email select the **Update** link corresponding to the Primary Phone Number, update the participant information and select **Save**.<br>The participant profile should reflect saved changes. |

# Manually Create a 457 Plan Payroll Report

## Steps to Query an Existing Employee

Before creating a CalPERS 457 Plan Payroll Report, you will need the CalPERS ID for each of the participants to be included in the report. If you do not have a participant's CalPERS ID, the myCalPERS query feature allows you to search for a person by Social Security number (SSN).

| Step | Action |
|---|---|
| **1** | From the myCalPERS My Home page, select **Person Search** in the left-side navigation menu. |
| **2** | On the Person Search page enter the employee Social Security Number and then select the **Search** button. |

## Steps to Manually Create a 457 Plan Payroll Report

**The following steps detail how to create a 457 Plan payroll report in myCalPERS.**

| Step | Action |
|---|---|
| **1** | Select the **Reporting** global navigation tab. |
| **2** | On the Manage Reports page in the Create or Edit Report section select **Manually Enter Payroll Records** from the Method dropdown and then select the **Continue**. |
| **3** | On the Create Report page, select **SIP-457 Plan** from the Program dropdown. |
| **4** | Select the **Report Type**, **Payroll Schedule** and **Earned Period**.<br>**Note:** The Report Type radio button must be selected. |
| **5** | Select **Save** & **Continue** |

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# Manually Create a 457 Plan Payroll Report *(continued)*

## Steps to Add a Plan Participant Record

**The following steps detail how to add a participant record to a 457 Plan payroll report in myCalPERS.**

| Step | Action |
|---|---|
| **1** | Enter the CalPERS ID into the Search a Record in the Report section. |
| **2** | Select the **Add New** button in the Records Present in the Report section. |
| **3** | Select the **Display** button in the lower right corner of the Maintain Payroll Record Details section. |
| **4** | Enter the employee contribution amount in the following fields according to their contribution type:<br>• Tax-Deferred Member Paid Contributions<br>• Tax Deferred Employer Paid Member Contribution<br>• SIP After Tax Loan Payment<br>• After Tax Member Paid Roth Contributions |
| **5** | Select the **Save & Exit** button.<br><br>**Note:** In the event you receive an Error or Exception message, you will not be able to leave the page using the Save & Exit button. Instead, select the Reporting global navigation tab and re-enter the report by following the “Edit a Payroll Report” procedure.<br><br>If you have questions regarding any Error or Exception message contact the CalPERS 457 Plan payroll support team at **CalPERS_457_Plan@calpers.ca.gov**. |

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# Manually Create a 457 Plan Payroll Report *(continued)*

## Steps to Review and Process the 457 Plan Payroll Report

Before processing a 457 Plan Payroll report in myCalPERS, the system allows you to review the records within the report for accuracy. The Payroll Summary report displays the total of the entire report while SIP Contribution Detail Report displays the contributions of each participant in the Payroll Report.

**The following steps detail how review the 457 Plan payroll report prior to posting in myCalPERS.**

| Step | Action |
|---|---|
| **1** | Select the **Generate Report Summary** button to launch the Payroll Summary Report. |
| **2** | In the Financial Summary section select the **Earned Period / Payroll Adjustment Date** hyperlink to launch the SIP Contribution Detail Report. |
| **3** | Review the SIP Contribution Detail Report to verify that all participant records are correct.<br>**Note:** To print a report select **Control-P** |
| **4** | Once you have verified the accuracy of all records in the report and the sum of the report matches your internal records select **Process Report**. |

**Note:** If you find an error in a posted report with an unpaid receivable, select the **Cancel and Resubmit** button to cancel the receivable and re-open the report.

**Once the report is posted:**

- If your agency pays by **electronic payment**, go to **Make an EFT Payment**.
- If your agency pays by **check**, go to **Generate SIP Remittance Advice**.

# Copy Forward an Existing Payroll Report

## Overview

The myCalPERS system allows the payroll specialist for your agency to submit a CalPERS 457 Plan report for the current earned period by copying an existing prior posted payroll report.

## Steps to Copy Forward an Existing Payroll Report

Follow the steps below to copy forward a prior posted payroll report in myCalPERS.

| Step | Action |
|---|---|
| 1 | Select the **Reporting** global navigation tab. |
| 2 | In the Create or Edit Report section select **Copy Prior Posted Payroll Report** from the Method dropdown and then select the **Continue** button. |
| 3 | Select **SIP-457 Plan** from the Program dropdown.<br>**Note:** The Report Type, Payroll Schedule and Earned Period dropdowns will populate automatically. Ensure the desired Report Type, Payroll Schedule and Earned Period are selected. |
| 4 | Select the **Earned Period** to copy from the Prior Posted Payroll Report dropdown. |
| 5 | Select the **Save & Continue** button.<br>**Note:** On the Report Details page, you may enter any participant contribution changes. |
| 6 | Select the **Generate Report Summary** button to generate a Payroll Report Summary. |
| 7 | From within the Payroll Report Summary, select the **Earned Period/Payroll Adjustment Date** link to generate the SIP Contribution Detail Report.<br>**Note:** Use the SIP Contribution Detail Report to reconcile the myCalPERS report with your agency internal reporting. You may Add/Delete/Modify a participant record according to your internal records. |
| 8 | Select the **Process Report** button.<br>**Note:** If you find an error in a posted but unpaid report, select the **Cancel and Resubmit** button to cancel the receivable and re-open the report. |

**Once the report is posted:**

- If your agency pays by **electronic payment**, go to **Make an EFT Payment**.
- If your agency pays by **check**, go to **Generate SIP Remittance Advice**.

# Establish a Payment Account in myCalPERS

## Overview

An employer must set up at least one payment account to make Electronic Funds Transfer (EFT) payments in myCalPERS.

**Before you can create a payment account you will need the following information:**

- Account Holder Name(s)
- Bank Account Number
- Nine Digit Routing Number
- CalPERS ACH ID number: 1946207465

## Steps to Establish a Payment Account in myCalPERS

**To establish a Payment account in myCalPERS follow the steps below:**

| Step | Action |
|---|---|
| **1** | From the myCalPERS My Home page select the **Profile** global navigation tab. |
| **2** | Select the Receivables local navigation link. |
| **3** | Select the **Payment Accounts** link in the Left Side Navigation area. |
| **4** | Select the **Add New** button in the Banking Accounts section. |
| **5** | Enter the following in the Add New Banking Account section:<br>• Account Holder Name(s)<br>• Bank Account Number<br>• Re-enter Bank Account Number<br>• Nine Digit Routing Number<br>• Payment Account Nickname<br>**Note:** Employers are encouraged to make the Payment Account Nickname reflect the purpose of the payment account and/or the banking institution. |
| **6** | Select the **Save & Continue** button.<br>The system will validate the routing number as a known financial institution.<br>**Important!** More than one financial institution may be found for a routing number. Select the appropriate financial institution in the Confirm Financial Institution Name section by selecting the **Confirm** button. |
| **7** | Provide your financial institution with the **CalPERS ACH ID Number 1946207465**. |

# Make an EFT Payment in myCalPERS

## Overview

CalPERS 457 Plan payments are due as soon as the funds are deferred from a member's paycheck. Since the pay date(s) of each employer may be unique, it is the responsibility of the employer to ensure member contributions are reported and paid timely.

## Steps to Make an EFT Payment in myCalPERS

**To make an electronic payment in myCalPERS follow the steps below:**

| Step | Action |
|---|---|
| **1** | From the myCalPERS My Home page select the **Profile** global navigation tab and **Receivables** local navigation link. |
| **2** | On the Receivables Page, identify the Receivable ID associated with the 457 Plan report and select the corresponding checkbox for that Receivable ID.<br>**Note:** SIP-IRC 457 Contributions should be in the Receivable Description. |
| **3** | Select the **Make a Payment** button at the lower left side of the page.<br>Summary section displays the receivable ID, description, issue date, amount and due date. |
| **4** | Select the **Make a Payment** button at the lower left side of the page.<br>The Summary, Payment Information, Payment Method and Payment Account sections display. |
| **5** | Select the **Payment Amount Due** radio button in the Payment Information section.<br>**Note:** CalPERS 457 Plan Payment Amount Due is pre-populated and cannot be changed. |
| **6** | Select **EFT** — Debit from the Payment Method dropdown in the Payment Method section. |
| **7** | Select the appropriate Payment Account in the Payment Account section and select **Save & Continue**. |
| **8** | In the CalPERS Terms and Conditions for Electronic Payments and Automatic Payment section, select the checkbox for the statement: "I have read and understand CalPERS On-Line Terms and Conditions" |
| **9** | In the e-Signature section, select the checkbox for the statement:<br>"I have read and agree to the Electronic Signature Agreement above" |
| **10** | Select the **Save & Continue** button.<br>**Important!** Do not set up automatic payments for CalPERS 457 Plan receivables.<br>Participant contribution amounts may change. |

# Voya Partnership

CalPERS administers the 457 Plan for more than 850 public agencies and school employers throughout California. CalPERS partners with Voya® to provide recordkeeping and participant education services.

In supporting the 457 Plan on behalf of your agency, please refer to the **Who to Contact** page for more information and clarification.

Employee education, support services, and additional resources are outlined below for your reference.

| | | | |
|---|---|---|---|
| **Winnie Robinson** | Voya Team Manager | option 7 | **winnie.robinson@voya.com** |
| **Darren Wagerman** | Greater Sacramento | option 5 | **darren.wagerman@voya.com** |
| **Selam Berayes** | San Diego/Imperial | option 1 | **selam.berayes@voya,.com** |
| **Dauna Bohlken** | Orange/Inland Empire | option 3 | **dauna.bohlken@voya.com** |
| **Junior Granados** | Greater Los Angeles | option 8 | **junior.granados@voya.com** |
| **Nancy Garrity** | Bay Area | option 2 | **nancy.garrity@voya.com** |
| **Arturo Mendez** | Central | option 4 | **arturo.mendez@voya.com** |
| **David Vallerga** | Northern | option 6 | **david.vallerga@voya.com** |

Employees can go to **calpers457.timetap.com** to schedule a personal one-on-one phone or virtual appointment.

Employers can schedule on-site or online group presentations for employees by contacting their dedicated Account Manager for assistance at **888-713-8244**.

# Who to Contact for the CalPERS 457 Plan

**CalPERS 457 Plan Administration & Payroll (from CalPERS)**
Call **800-696-3907**
Email **CalPERS_457_Plan@calpers.ca.gov**

- Serves as the primary contact for all agency staff administering the CalPERS 457 Plan
- Provides support to agencies with myCalPERS system and payroll-related matters
- Assists agencies with updating employee discrepancies such as employment status and demographic information
- Provides marketing materials and tools to raise employee awareness of the CalPERS 457 Plan's benefits
- Coordinates agency-level system access to Voya Sponsor Web, the primary portal to manage employee profiles and other Plan activities

**CalPERS 457 Plan Education Team (from Voya)**
Call **888-713-8244**
Visit **calpers457.timetap.com**

- Serves as the primary contact for all current and eligible plan participants
- Delivers group presentations or personal one-on-one appointments in person, by phone, or online
- Provides information about the CalPERS 457 Plan to help with enrollment, retirement saving, and
- investment-related decisions
- Assists with participant website (**calpers.voya.com**) questions and educational tools such as myOrangeMoney
- Helps employees with completing enrollment and other participation forms
- Conducts webinars on various retirement planning topics
- Delivers dual CalPERS pension and 457 Plan seminars with local CalPERS regional offices

# Voya's Portal, Sponsor Web

Sponsor Web is Voya's secure employer portal for the CalPERS 457 Plan, providing access to participant and plan-level information, reports, and administrative resources.

To request access, contact CalPERS at **CalPERS_457_Plan@calpers.ca.gov**. After your request is acknowledged and approved, Voya will send a registration email within 5-7 business days with instructions for establishing your account. If you do not receive the email within this timeframe, please check your junk or spam folder before contacting CalPERS for assistance.

## Available resources include:

1. Participant Valuation Reports
2. Weekly Loan Feedback Reports (if your agency has adopted the Loan Provision)
3. Weekly Online Enrollment Reports
4. Weekly Online Contribution Change Reports

For guidance on accessing and utilizing Sponsor Web reports outlined above please review the **Employer Materials** section within the CalPERS **Employer Resource Center**.

# Loan Payment Reporting

## Loan Payment Reporting Overview

Once an agency has adopted the loan provision, eligible participants may request a loan from their CalPERS 457 Plan account by contacting Voya directly at **800-260-0659** or by logging into their account online.

Loan Feedback Reports are available weekly through Sponsor Web and provide information regarding newly issued loans and loans that have been paid in full. These reports contain the information necessary to establish, update, or discontinue loan repayment deductions through payroll.

Automated email notifications are sent to your agency's designated contacts when new Loan Feedback Reports become available. Agencies should review these reports regularly and process any required payroll updates in accordance with their payroll schedule. Agencies should notify CalPERS immediately of any staffing changes or updates to designated plan contacts to ensure Loan Feedback Report notifications continue to reach the appropriate individuals and to prevent delays in loan repayment processing.

For guidance on accessing Loan Feedback Reports, please refer to the **Employer Materials** section within the CalPERS **Employer Resource Center** or review the section on the **Steps to Retrieve the Loan Feedback File Via Sponsor Web**.

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# Loan Payment Reporting *(continued)*

## Steps to Retrieve the Loan Feedback File Via Sponsor Web

**The loan amortization schedule must be downloaded from Sponsor Web. To download the Loan Feedback file, perform the following steps. Agency contacts designated to receive loan notifications will receive weekly emails on Friday.**

| Step | Action |
|---|---|
| 1 | Log into Sponsor Web at **sponsor.voya.com** |
| 2 | Go to **Manage Plan** > **Payroll Processing**. |
| 3 | Search for your agency by Plan Number or Plan Name, then click **Reports**. |
| 4 | On the **Receive Reports and Files** screen:<br>• **File Type** — select **Reports**.<br>• **Activity Period** — Choose **Current Month** or the month for your report.<br>• **File Name** — Search by beginning to type the file name **Feedback Report** |
| 5 | **Search** to see the file name in the **File to download** section. |
| 6 | Click the file name **FEEDBACK_REPORT** and then click **Download**. |

**IMPORTANT** — Please review all feedback reports listed for the activity period you are searching.

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# Loan Payment Reporting *(continued)*

## Steps to Report Loan Payments

This procedure begins on the View Payroll Records page. This page is displayed after a 457 Plan payroll report has been created but has not yet been processed.

**Note:** For instruction on how to create a 457 Plan payroll report, see "**Copy Forward an Existing Payroll Report**" or "**Manually Create a 457 Plan Payroll Report**" procedures.

**To enter a loan payment in myCalPERS, follow the steps below:**

| Step | Action |
|---|---|
| **1** | In the Records Present in the Report section, select the **SSN** link. |
| **2** | Enter the contribution amount in the SIP After Tax Loan Payment Field. |
| **3** | Select the **Save & Exit** button. |

# Generate SIP Remittance Advice

## Overview

An SIP Remittance Advice Report must be submitted with all 457 Plan payments by check.

- Checks should be made payable to: ***CalPERS 457 Plan***.
- Write in the check amount and check number on the SIP Remittance Advice Report.
- Mail the check and the SIP Remittance Advice Report to:

**CalPERS 457 Plans**
**PO Box 942713**
**Sacramento CA 94229-2713**

**Overnight Delivery:**
**CalPERS**
**Attn: Cash and Payment Processing Unit**
**400 Q. St.**
**Sacramento, CA. 95811**

## Steps to Generate SIP Remittance Advice

This procedure begins on the View Payroll Records page. This page is displayed after a 457 Plan payroll report has been created but has not yet been processed.

**To generate an SIP Remittance Advice Report, follow the steps below:**

| Step | Action |
|---|---|
| 1 | Select the **Reporting** global navigation tab. |
| 2 | Select the **Billing and Payment Summary** local navigation link. |
| 3 | On the Supplemental Income Plan panel, select the **Remittance Advice for Manual Check** link. |
| 4 | The system will display the SIP Remittance Advice Report. |
| 5 | Right click the report and select **Print** to print the report. |

# 457 Plan Adjustment Reports

## Overview

Once a CalPERS 457 Plan payroll report has been posted and paid, any changes to the report will require an adjustment report for the pay period. These steps describe how to create a negative or a positive adjustment report. A negative adjustment report is required for a refund of contributions. A positive adjustment report is created when additional contributions need to be reported and paid.

**Important! Negative and positive adjustments cannot be submitted on the same report.**

## Steps to Create a 457 Plan Adjustment Report

**To create a 457 Plan adjustment report, follow the steps below.**

| Step | Action |
|---|---|
| **1** | From the myCalPERS My Home page select the **Reporting** global navigation tab. |
| **2** | Select the **Adjustment Reports** link in the Menu dropdown from the left navigation. |
| **3** | In the Create New Adjustment Report section, select **Manually Enter Adjustment Records** from the Method dropdown and then select the **Continue** button. |
| **4** | On the Create Report Panel, Program: SIP-457 Plan, Select the **Supplemental Income Plan – Adjustments** radio button. Select the **Payroll Schedule** that corresponds to the original report to be adjusted.<br>Select the **Save & Continue** button.<br>**Note:** Entering a Report Name is an optional field. |
| **5** | Enter the participant CalPERS ID select **Add New**. |
| **6** | Enter the Begin Date and the End Date of the desired earned period and select the **Display** link.<br>**Note:** Payroll Record Memo is an optional field. |
| **7** | Enter the dollar amount of the adjustment in the field corresponding to the contribution type:<br>Tax Deferred Member Paid Contributions<br>Tax Deferred Employer Paid Member Contributions<br>SIP After Tax Loan Payment<br>After Tax Roth Contribution |
| **8** | Select the **Save & Exit** button. |
| **9** | Repeat Steps 5-8 for any additional adjustment records. |

# Adding a 457 Plan Provision

## Overview

Any agency which has adopted the CalPERS 457 Plan may add the Loan provision for the benefit of their employees. Please contact the CalPERS 457 Plan team at **CalPERS_457_Plan@calpers.ca.gov** to initiate adoption of the Loan Provision.

- **Loan Overview**
- **Employer Loan Provision Form**

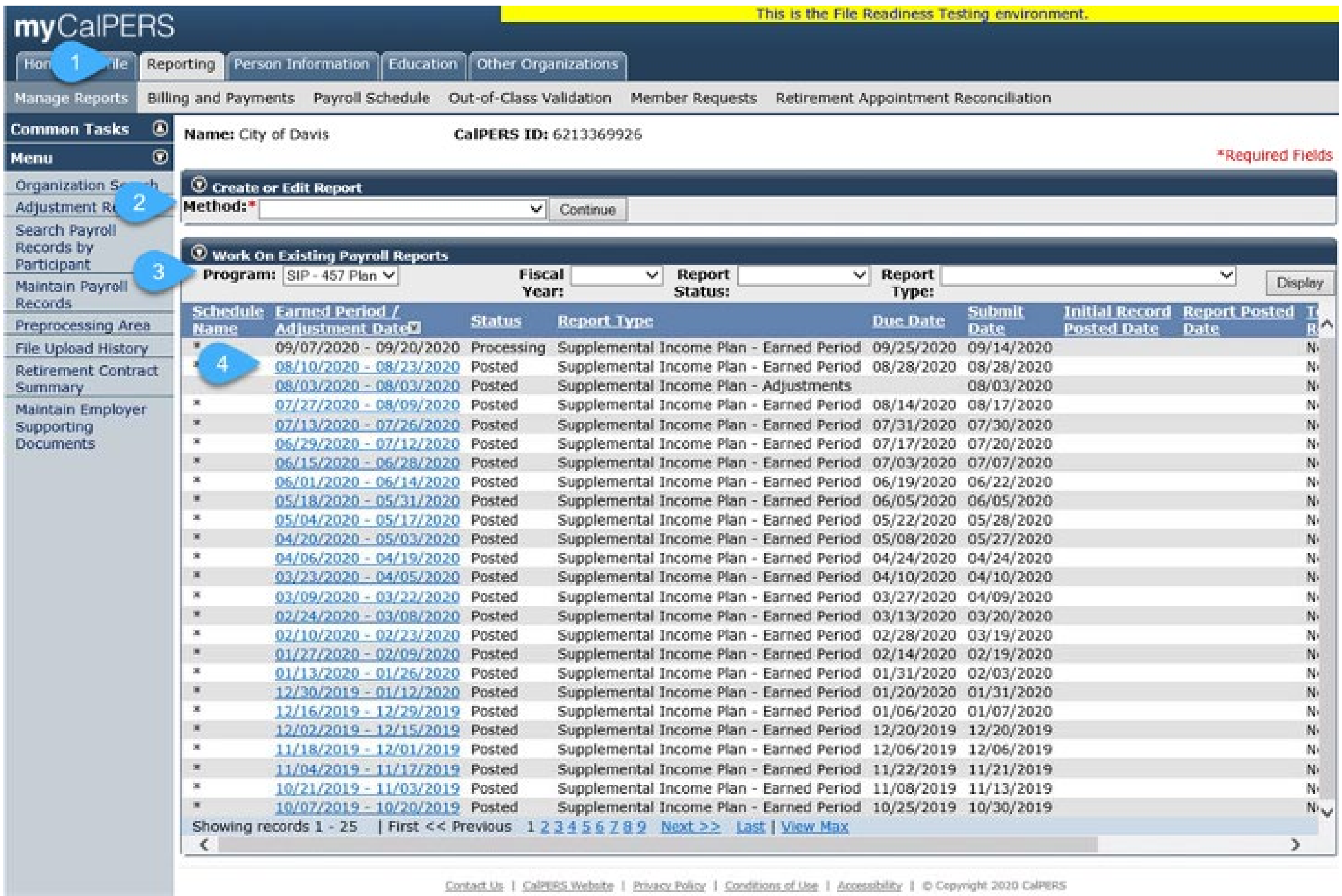
# myCalPERS Reporting Tab

## Overview

All myCalPERS reports must be processed through the myCalPERS reporting Global Navigation Tab. Under the Reporting Tab there are the Manage Reports, Billing and Payments and Payroll Schedule Local Navigation Links.

## myCalPERS Reporting Tab Components

**The following identifies the key components of the myCalPERS reporting Global Navigation Tab.**




| Part | Function |
|---|---|
| 1 | The Reporting Tab is the Global Navigation for all payroll reporting in myCalPERS. |
| 2 | The method drop-down is used to create a new payroll report. |
| 3 | The program selection dropdown is used to review all existing myCalPERS reports or change program report type. |
| 4 | The Earned Period / Adjustment Date link is used to open an individual existing report. |

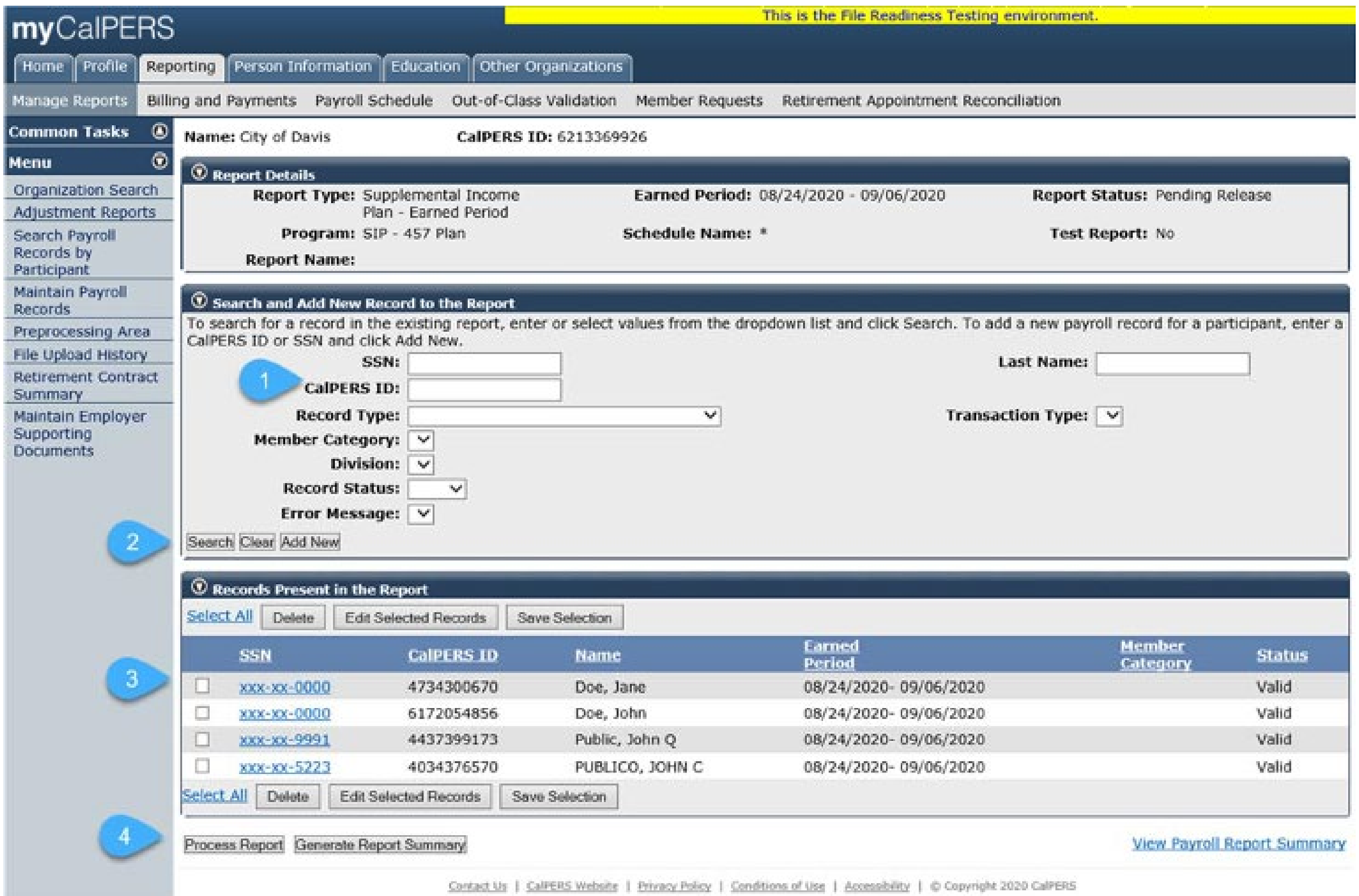
# myCalPERS 457 Plan Report Page

## Overview

The myCalPERS 457 Plan Report Page is used to add new participants, access existing participant records, review report contents and process 457 Plan reports.

## myCalPERS Reporting Tab Components

**The following identifies the key components of the myCalPERS 457 Plan Report Page.**




| Part | Function |
|---|---|
| 1 | The CalPERS ID field is used to add a new participant to a report. |
| 2 | The Add New button loads the Participant Contribution page. |
| 3 | The Records Present in the Report panel displays payroll report records. |
| 4 | The Process Report and Generate Report Summary buttons are used to review and process a report. |

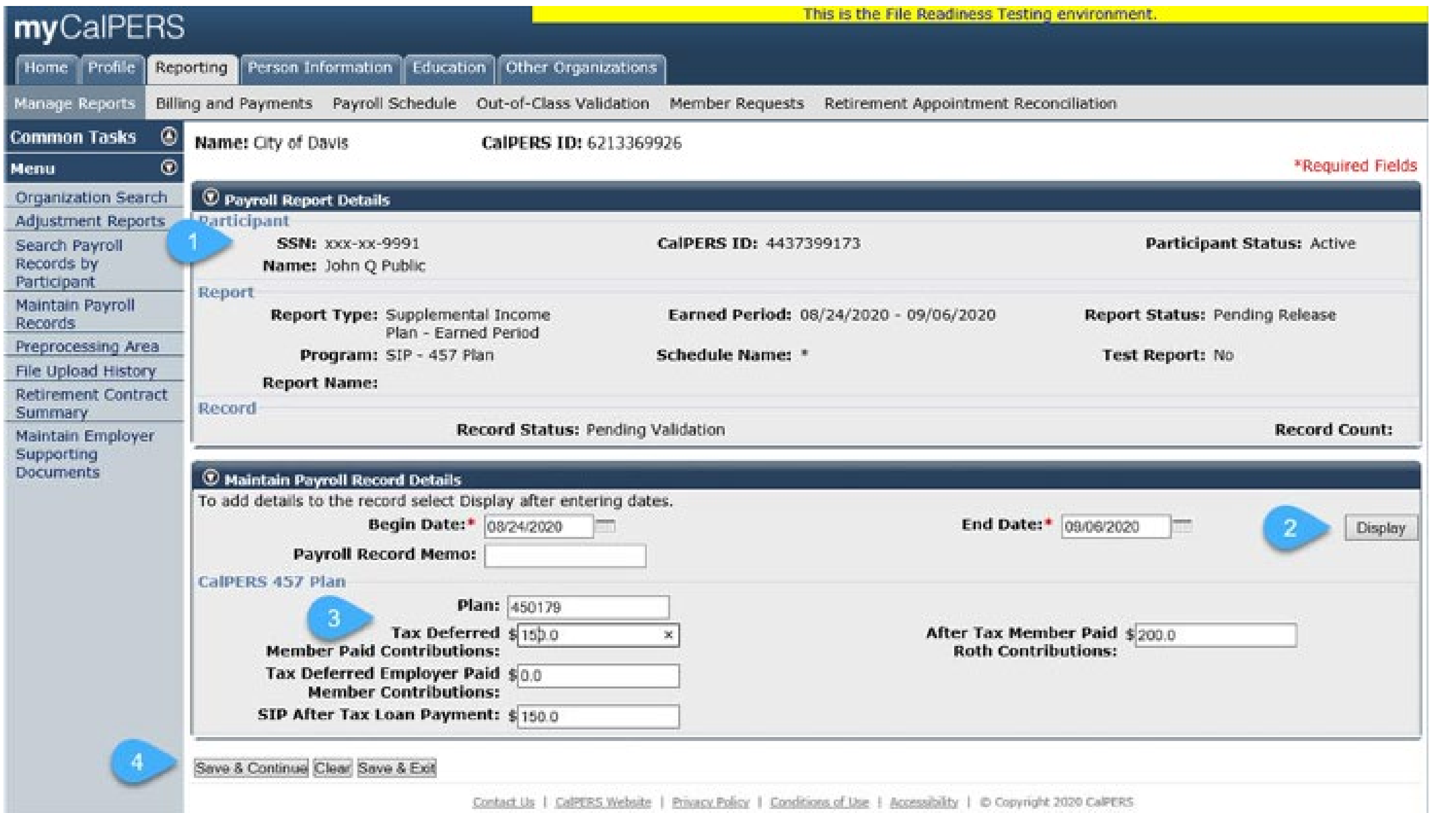
# myCalPERS 457 Plan Participant Contribution Page

## Overview

All myCalPERS 457 Plan Participant Contribution Page is used to enter participant contributions according to the contribution type including Tax Deferred Member Paid Contributions, After Tax Member Paid Roth Contributions, Tax Deferred Employer Paid Contributions or SIP After Tax Loan Payments.

## myCalPERS 457 Plan Participant Contribution Page Components

**The following identifies the key components of the myCalPERS 457 Plan Participant Contribution Page.**




| Part | Function |
|---|---|
| 1 | The Participant Report Details panel displays participant information. |
| 2 | The Display button loads the contribution type and amount fields. |
| 3 | The participant contribution fields allow for contribution amount entries by type. |
| 4 | The Save & Exit button saves the entry and returns to the 457 Plan Payroll Report page. |