

Introduction to myCalPERS for Business Partners

Student Guide

April 27, 2024



Introduction

myCalPERS is an online system business partners use to access information, process transactions, and generate reports. This guide contains information to help new business partner contacts get started with myCalPERS.

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

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Unit 1: Login and Reset Password

To begin using myCalPERS, your agency’s System Access Administrator (SAA) will need to add you as a contact. Contact CalPERS to set up your agency’s access if you work for a new contracting agency.

Security Agreement

Safeguard your agency and employee confidential data by not revealing your username or password to anyone. CalPERS will never ask for your password. It is a violation of the CalPERS Security Agreement to share log-in information. Review CalPERS website’s [Conditions of Use](#) and [Privacy Policy](#) for additional information.

Locked Account

Your account will lock after six unsuccessful password attempts. Use one of the following options to unlock your account:

- Use the **Forgot your Password?** link in myCalPERS (scenario 2)
- Contact your agency’s SAA
- Call CalPERS at **888 CalPERS** (or **888-225-7377**)

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Scenario 1: Log In

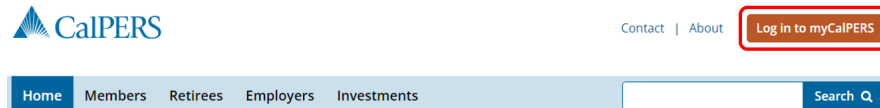
System Logic

The temporary password provided by your system access administrator expires after 30 days.

Step Actions

Step 1 Visit the CalPERS website at www.calpers.ca.gov.

Step 2 Select the **Log in to myCalPERS** button.



Step 3 Enter your username and temporary password.

Step 4 Select the **Log In** button.

Step 5 Enter a new password.

Password Expired - Create Your New Password

Your new password must have:

- 8 characters minimum
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- no spaces

Password (required)

[Show Password](#)

Continue

Step 6 Select the **Continue** button.

Step 7 Read the security agreement.

Step 8 If you agree with this statement, select the **I Accept** button at the bottom left.

Step 9 Read the Conditions of Use for Business Partners (Employers) section.

Step 10

Do you agree to the Conditions of Use for Business Partners (Employers)?

Yes: Select the **Accept** button

No: Select the **Decline** button

Conditions of Use for Business Partners (Employers)

To help you submit and maintain accurate information, as well as ensure compliance, CalPERS provides Retirement Business Rules, Health Business Rules, and myCalPERS system training. For more information, select the Education tab within myCalPERS or visit the Education Center on the CalPERS website.

By accessing this application, you acknowledge that training is available to you. In addition, all information accessible to you will be used only to assist you in conducting official business with CalPERS.

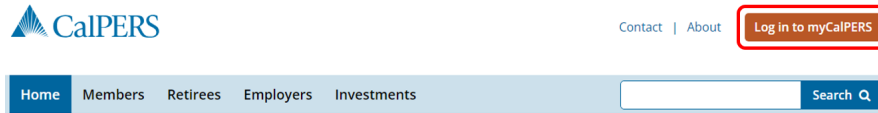
You have completed this scenario.

Scenario 2: Reset Your Password

Step Actions

Step 1 Go to the CalPERS website at www.calpers.ca.gov.

Step 2 Select the **Log in to myCalPERS** button.



Step 3 At the Log In page, select the **Forgot your password?** link.

Step 4 Enter your email and username.

Reset Your Password

Complete the following fields so we can confirm your identity. The information you enter must match our records exactly.

Step 5 Select the **Continue** button.

Step 6 Select a verification method.

Choose a Verification Method

For security purposes, we require this step to log in to your account. If the contact information listed is incorrect, please contact us at **888 CalPERS** (or **888-225-7377**).

How should we verify you? (required)

- Call (XXX) XXX-7777
- Text (XXX) XXX-7777
- Email j*****@calpers.ca.gov

Continue

Step 7 Select the **Continue** button.

Step 8 After you receive your six-digit code, enter it in the Code field.

Enter Your Code

We've sent a six-digit code to j*****@calpers.ca.gov The code expires in 10 minutes.

Code (required)

Continue

Send a New Code

Step 9 Select the **Continue** button.

Create Your New Password

Step 10 Enter a new password.

Create Your New Password

Your new password must have:

- 8 characters minimum
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- no spaces

Password (required)

[Show Password](#)

Continue

Step 11 Select the **Continue** button.

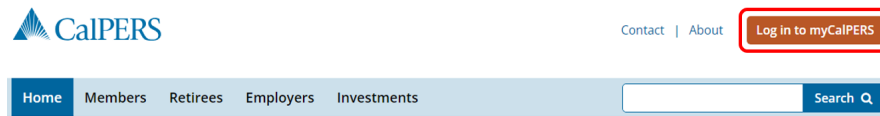
You have completed this scenario.

Scenario 3: Change Your Password, Email, or Phone Number

Step Actions

Step 1 Go to the CalPERS website at www.calpers.ca.gov.

Step 2 Select the **Log in to myCalPERS** button.



Step 3 Enter your username and password.

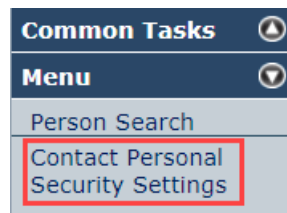
Step 4 Select the **Log In** button.

Step 5 Do you agree to the Conditions of Use for Business Partners (Employers)?

Yes: Select the **Accept** button

No: Select the **Decline** button

Step 6 On the left-side navigation, select **Contact Personal Security Settings**.



Step 7 What would you like to update?

Password: Continue to step 8

Email or Phone Number: Skip to step 12

Password

Step 8 Within the Username and Password section, select the **Edit password** link.

Step 9 Enter a new password.

Create Your New Password

Your new password must have:

- 8 characters minimum
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- no spaces

Password (required)

✖ Enter the required field: Password

[Show Password](#)

Continue

Cancel

Step 10 Select the **Continue** button.

Step 11 Did you need to make additional updates?

Yes: Return to step 7

No: You have completed this scenario

Email or Phone Number

Step 12 Within the Password Recovery Options section, select the **Edit password recovery options** link.

Step 13 Update your email address and/or phone number

Step 14 Select the **Save and Continue** button.

Step 15 Did you need to make additional updates?

Yes: Return to step 7

No: You have completed this scenario

Unit 2: myCalPERS Navigation

myCalPERS has global navigation tabs, local navigation links, and left-side navigation links to access information, process transactions, and run reports. Your system access determines what information you can access and which transactions you can process in myCalPERS. This unit has descriptions of commonly-used tools.

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myCalPERS Homepage

Below shows the myCalPERS homepage followed by descriptions of the main features.

- **Maintain Health Enrollment Requests** section displays if there is a new employee-submitted health transaction or document to review. For more information, refer to the [myCalPERS Health Transaction Verification student guide \(PDF\)](#).
- **My Messages** provides CalPERS issues, events, and updates such as upcoming training classes in your area, new student guides, new services, billing cutoff dates, etc.
- **My Cases** or **View More Actions>>** allows you to open and review the progress and status of your contract(s) with CalPERS.
- **Health Plan Search by ZIP Code** tool can be used to find CalPERS health plans in an area.

The screenshot shows the myCalPERS homepage. At the top, there is a navigation bar with the myCalPERS logo and a date of March 11, 2022. Below the navigation bar, there are tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. The main content area is divided into several sections:

- Common Tasks**: A section with a search icon.
- Menu**: A section with a dropdown arrow, containing links for Person Search, Contact Personal, and Security Settings.
- Welcome**: A section with a heading "Upcoming Scheduled Maintenance" and a message stating that myCalPERS will be unavailable as follows. A bullet point indicates that there is no scheduled maintenance at this time.
- My Messages**: A section with a heading "CalPERS Regional Offices Now Open for Prescheduled Appointments" and a message dated 03/07/2022. It includes a "View Document" link.
- My Cases**: A section with a heading "View More Actions>>".
- Health Plan Search by ZIP Code**: A section with a heading "To find out which CalPERS health plans are available in your area, enter the information below and select Search to display results." It includes a "ZIP Code:" input field, a "Member Category:" section with radio buttons for "State/CSU" (selected) and "Public Agency/School", a "Search Year:" dropdown menu set to "2022", and a "Search" button.
- CalPERS News**: A section with a heading "Go to Newsroom >>". It lists two news items: "Jan 18 CalPERS Board Elects Theresa Taylor as President, Rob Feckner as Vice President - CalPERS" and "Dec 17 CalPERS Announces Candidates for Spring 2022 Special Board Election - CalPERS".

On the right side of the page, there is a "Forms and Publications Center" section with a "QUICK LINKS" section. The quick links include "CalPERS Quick Picks" and "CalPERS website". There is also a "Be the first to know about policy and procedure changes. View the latest CalPERS Circular Letters." section with a "GO" button.

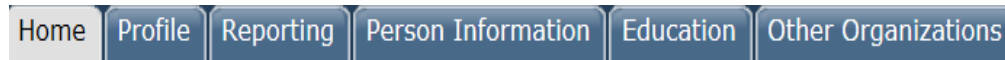
myCalPERS Logo

The myCalPERS logo at the top left will refresh the system and return you to the homepage.

Use it to clear a previous employee/member/retiree query or to reset your navigation status in myCalPERS.

Global Navigation Tabs

The global navigation tabs are the primary way to navigate in myCalPERS.



Home

- Refresh the system and return to the homepage.
- Clear a previous employee/retiree query before another person search.

Profile

- Access your agency's address and communication information, contacts, business partner relationships, and contracts/agreements.
- Clear a previous employee, member, or retiree query before another person search.

Reporting

- Process retirement and health enrollments, employment certifications, and payroll.
- Access billing and payments.
- Request a new payroll schedule or extension.
- Report out-of class appointments.
- Reconcile retirement appointments with unposted payroll.

Person Information

Query employee and retiree retirement and health information.

- Check membership status of a new employee.
- Verify or update an employee's demographics and addresses.
- Access a retiree's retirement date.
- Review member contributions and service credit totals for your CalPERS employees.
- Access a subscriber's health benefit information.
- Review appointment history or add a new appointment for an employee who previously worked with your agency. You may also review or add/correct appointment events, e.g., add/end a leave of absence, permanently separate, change a member category, etc.

Education

Register for employer instructor-led or online classes or Educational Forum (Ed Forum) consultations. Edit or cancel an enrollment. Review your training history.

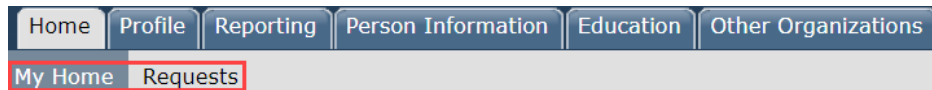
Other Organizations

Access other CalPERS employer contact information (e.g., names, emails, and phone numbers).

Local Navigation Links

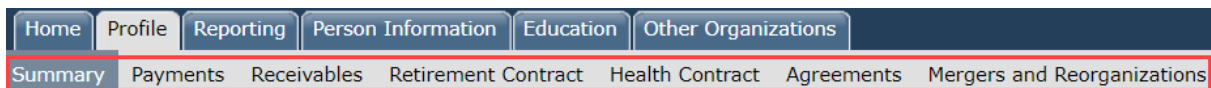
The local navigation links are right below the global navigation tabs and change depending on which global tab is selected. If your agency contracts for both retirement and health benefits, the following links in myCalPERS will display.

Home Global Navigation Tab, Local Navigation Links



- **My Home:** My Messages, My Cases, and Health Plan Search by ZIP Code sections and CalPERS News.
- **Requests:** Order up to three publications with a maximum of 150 copies for each at no cost.

Profile Global Navigation Tab Local Navigation Links



- **Summary:** Access your agency's main address(es) and phone numbers, contacts, business partner relationships, and contracts/agreements. System access administrators can make updates to this page such as adding and maintaining contacts.
State agencies: Select a program link within the Statutory Plan section to review the retirement program event summary, base benefits, special provisions, and member rate summaries.
- **Payments:** Check the status of payments (e.g., Pending, Posted, Cancelled, In Process, etc.). You may also generate an Employer Payment Report.
- **Receivables:** Access open and closed receivables, due dates and amounts, receivable balance, and receivable description. You may also generate an Employer Receivable report.
- **Retirement Contract:** Public agencies and schools can access, add, or modify a resolution, submit a valuation request, or request an amendment to your agency's CalPERS contract.
State agencies: Refer to the first bullet for retirement contract information.
- **Health Contract:** Access your agency's health contract(s) and effective dates.
- **Agreements:** Review your agency's list of agreements with CalPERS.
- **Mergers and Reorganizations:** Access pending and completed agency mergers and school district reorganizations. You may also initiate and add new merger requests.

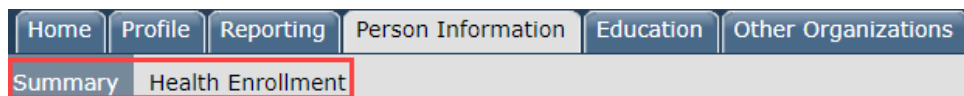
Reporting global navigation tab



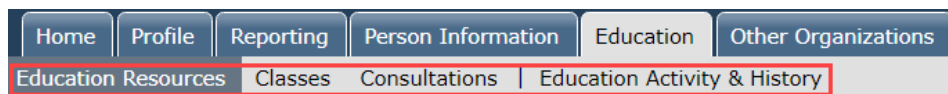
- **Manage Reports:** Upload files, manually process retirement and health enrollments, copy forward a posted payroll report, or maintain health enrollment requests that were submitted by active employees online. File upload reporters that submit service period payroll details for the service credit purchase requests can access a list of their reports and report status. They can also correct errors.
- **Billing and Payments:** Access year-to-date billing and payments, receivable history, and health billing roster.
- **Payroll Schedule:** Add a new schedule or request an extension or exemption. You may also reconcile employees with unposted payroll by earned period.
- **Out-of-Class Validation:** Create, add, or search Out-of-Class records within a report or upload a CSV file. You may select a record to review, update, or delete from the report.
- **Member Requests:** Update the status of an employment certification request, access historical certification information, provide employment certification for a period of service that is not listed, or add a new employment service period.
- **Health Reconciliation:** Health carriers remit enrollment discrepancy reports to CalPERS.
- **Retirement Appointment Reconciliation:** Review and reconcile employees with unposted payroll, confirm earned periods that should not have payroll, and update appointments.

Person Information global navigation tab

Displays after you retrieve your employee's or retiree's profile page.



Education global navigation tab



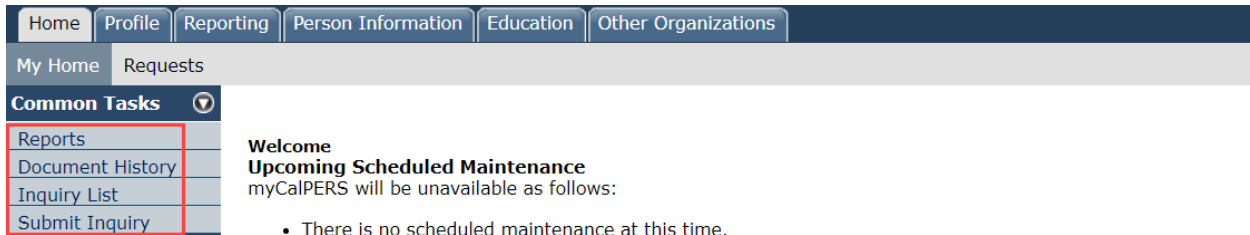
- **Education Resources:** Enroll in a class, request an Educational Forum consultation, review education training activity and history, and access resources.
- **Classes:** Review instructor-led class dates and enroll. You may also start online classes.
- **Consultations:** Request a one-on-one consultation with an employer educator.
- **Education Activity & History:** Access your upcoming, past, enrolled, and canceled classes and consultations. You may reschedule and cancel classes.

Left-Side Navigation Links

The left-side navigation links change depending on which global navigation tab or local navigation link is selected. If your agency contracts for both retirement and health benefits, the following links are available in myCalPERS.

Common Tasks Folder

The Common Tasks folder is available via the **Home**, **Profile**, **Reporting**, or **Education** global navigation tabs. Select Common Tasks to access these static links:



The screenshot shows the myCalPERS navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, there are sub-tabs: My Home and Requests. The 'Common Tasks' folder is expanded, showing a list of links: Reports, Document History, Inquiry List, and Submit Inquiry. To the right of this list, a message reads: 'Welcome Upcoming Scheduled Maintenance myCalPERS will be unavailable as follows: There is no scheduled maintenance at this time.'

- **Reports:** Run reports that query data from myCalPERS via the Cognos application.
- **Document History:** Access documents that you sent or received from CalPERS.
- **Inquiry List:** Review inquiry and response history.
- **Submit Inquiry:** Submit a question/information to CalPERS securely (refer to unit 6).

Home Global Navigation Tab, Left-Side Navigation Links

From the **Home** tab, **My Home** and **Requests** local links, these Menu left-side links display:

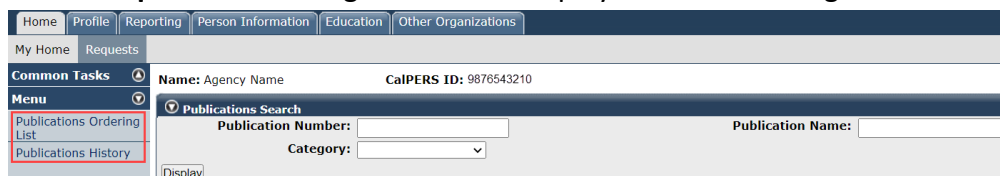
- Select **My Home** local navigation link to display its left-side navigation menu links:



The screenshot shows the myCalPERS navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, there are sub-tabs: My Home and Requests. The 'My Home' sub-tab is selected. The 'Common Tasks' folder is expanded, showing a list of links: Person Search, Contact Personal Security Settings, and My Cases. The 'Menu' folder is also expanded, showing a list of links: Person Search, Contact Personal Security Settings, and My Cases. The 'Person Search' and 'Contact Personal Security Settings' links are highlighted with a red box.

- **Person Search:** Query employee/retiree information.
- **Contact Personal Security Settings:** Change your password, challenge questions, security image and message, phone number, and/or email address.

- Select **Requests** local navigation link to display its left-side navigation links:



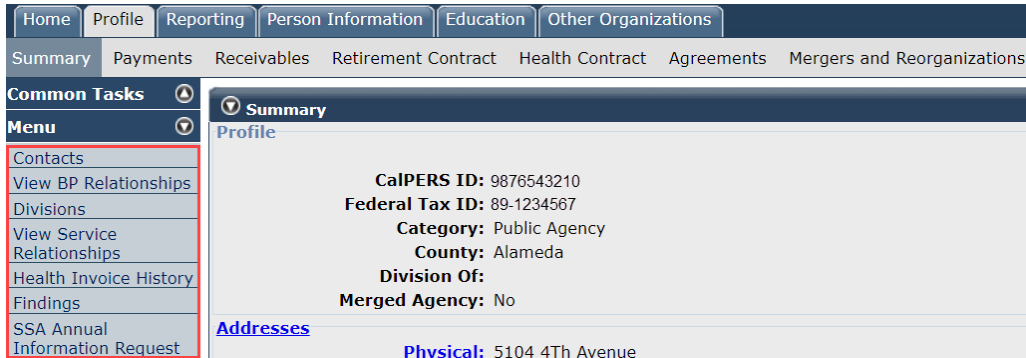
The screenshot shows the myCalPERS navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, there are sub-tabs: My Home and Requests. The 'Requests' sub-tab is selected. The 'Common Tasks' folder is expanded, showing a list of links: Publications Ordering List, Publications History, and My Cases. The 'Menu' folder is also expanded, showing a list of links: Publications Ordering List, Publications History, and My Cases. The 'Publications Ordering List' and 'Publications History' links are highlighted with a red box. The main content area shows a search form for 'Publications Search' with fields for 'Publication Number', 'Category', and 'Publication Name', and a 'Display' button.

- **Publications Ordering List:** Order up to three publications with a maximum of 150 copies for each at no cost.
- **Publications History:** Review your publication order history.

Profile Global Navigation Tab, Left-Side Navigation Links

From the **Profile** tab, **Summary**, **Payments**, **Receivables**, **Retirement Contract**, **Health Contract**, **Agreements**, **Mergers and Reorganizations** local links, these Menu left-side links display:

- Select **Summary** local navigation link to display its left-side navigation links:

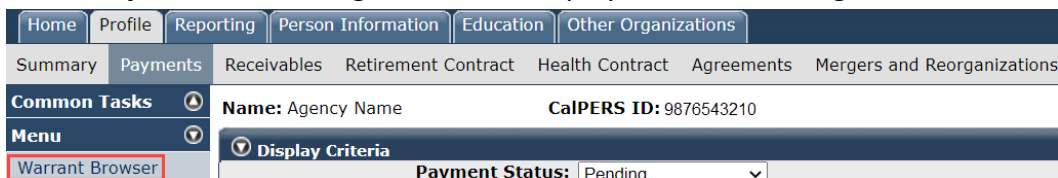


The screenshot shows the 'Profile' tab selected in the top navigation bar. Below it, the 'Summary' sub-tab is active. A left-side navigation menu is open, listing several options: 'Contacts', 'View BP Relationships', 'Divisions', 'View Service Relationships', 'Health Invoice History', 'Findings', and 'SSA Annual Information Request'. The main content area displays the following information:

- CalPERS ID:** 9876543210
- Federal Tax ID:** 89-1234567
- Category:** Public Agency
- County:** Alameda
- Division Of:**
- Merged Agency:** No
- Addresses:** **Physical:** 5104 4Th Avenue

- **Contacts:** Review current and former myCalPERS contacts for your agency.
- **View BP Relationships:** Review business partner relationships that your agency established with a third party to do business on your agency’s behalf.
- **Divisions:** Access a list of agencies under the umbrella of your agency, e.g., a school district is a division of a county office of education.
- **View Service Relationships:** Review a list of agencies for which your agency provides service.
- **Health Invoice History:** Access a list of your health receivables.
- **Findings:** Review the CalPERS auditor’s compliance review findings for your agency.
- **SSA Annual Information Request:** Review a list of the responses to the Annual Information Request (AIR) questionnaire.

- Select **Payments** local navigation link to display its left-side navigation link:

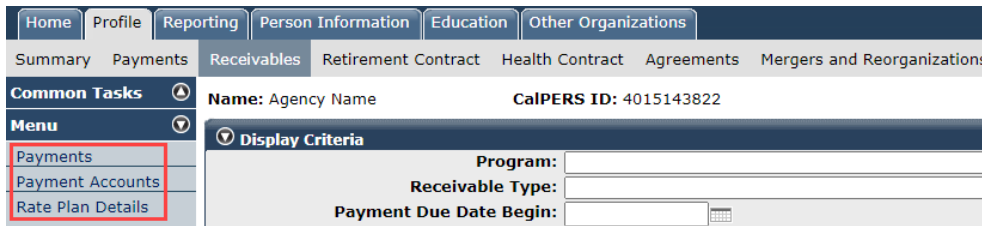


The screenshot shows the 'Profile' tab selected in the top navigation bar. Below it, the 'Payments' sub-tab is active. A left-side navigation menu is open, with 'Warrant Browser' highlighted. The main content area displays the following information:

- Name:** Agency Name
- CalPERS ID:** 9876543210
- Display Criteria:** **Payment Status:** Pending

- **Warrant Browser:** Search for a payment sent to your agency from CalPERS such as Advanced Disability Pension Payments (ADPP) reimbursements.

- Select **Receivables** local navigation link to access its left-side navigation links:



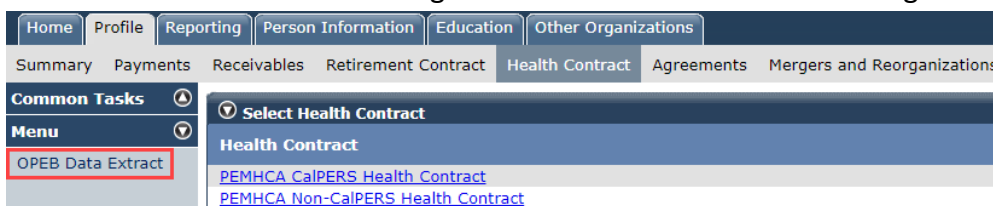
- **Payments:** Check the status of payments (e.g., pending, posted, cancelled etc.).
- **Payment Accounts:** Add or delete bank accounts used for EFT payments.
- **Rate Plan Details:** Review your year-to-date PERS contributions.

- Select **Retirement Contract** local navigation link to access its left-side navigation links. *State agencies:* Select the **Profile** global navigation tab, **Summary** local navigation link for retirement contract information (review page 15).



- **View Benefits:** Review benefit levels and provisions.
- **Maintain Positions:** Add or update codes and names for positions. Each agency determines the codes and position names.
- **View Merger History:** Review business partner merger history and dates.
- **View Special Provisions:** Access summarized information for special provisions.
- **Maintain CBU:** Review a list of collective bargaining units (CBUs) or add a new CBU.
- **GASB Information:** Public agency employers can request, pay for, and download their Governmental Accounting Standards Board (GASB) 68 accounting valuation reports. Agents with multiple-employer plans will also be able to obtain their census data.

- Select **Health Contract** local navigation link to access its left-side navigation links:



- **OPEB Data Extract:** Request and access Other Post-Employment Benefits (OPEB) health census data. Review information on active and retired employees covered and those eligible but not enrolled in a health plan by your agency. This information may be used to support an agency's requirements to report OPEB liability under Governmental Accounting Standards Board (GASB) Statement No. 75 for financial reporting.

- Select a **Health Contract** name link, then access its left-side navigation links:

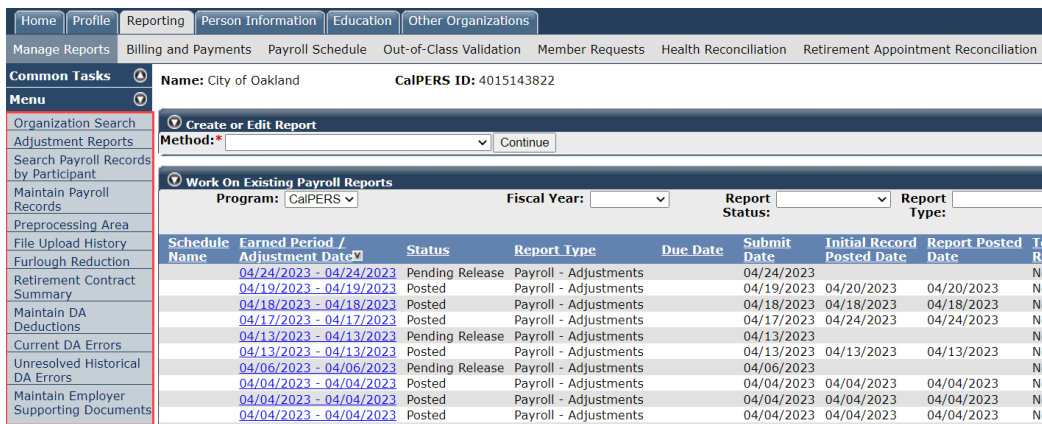


- **Group Summary:** Review medical groups for your agency.
- **Contribution Preview:** Review your agency’s contribution toward enrollees’ health premiums and vesting information.
- **Subscriber List:** Access your agency’s health enrollees and number of covered persons.
- **Contract History:** Check your agency’s health contract’s type and status.

Reporting Global Navigation Tab, Left-Side Navigation Links

From the **Reporting** tab, **Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, Member Requests, Health Reconciliation, Retirement Appointment Reconciliation** local links, these Menu left-side links display:

- Select **Manage Reports** local navigation link to display its left-side navigation links. The following descriptions are the main left-side links used by employers:



- **Adjustment Reports:** Create a payroll adjustment report to adjust posted payroll records.
- **Search Payroll Records by Participant:** Search for posted or unposted payroll records for a specific employee for your agency.
- **Maintain Payroll Records:** Reverse and/or modify posted payroll records.
- **Preprocessing Area:** Review XML reports for retirement or health files that passed level 1 validation but may have data errors that need to be corrected. Files will remain in a pending status until cleared from the preprocessing area.
- **File Upload History:** Check if the uploaded file was accepted or rejected.

- Select **Billing and Payments** local link to display its left-side navigation links:

Billing and Payment Summary (Year-To-Date)		Fiscal Year: 2021/2022	Display
Contributions For Defined Benefit CalPERS: \$10,770,153.62			
Unfunded Accrued Liability: \$0.00			
Health Premium Deduction: \$7,235,193.35			
Arrears Contributions: \$52,062.45			
CERBT Contributions: \$0.00			

- **Billing and Payments:** Access a summary of your financials at the current time. Review contributions reported and paid for each rate plan, arrears, CERBT, and supplemental income plan, billing for health premium deductions, fees, and amount owed to CalPERS.
- **Super Funded Accounts:** Review the details of your super funded rate plans.
- **Rate Plan Details:** Review year-to-date contributions by rate plan.
- **Payment Accounts:** Add, modify, or delete bank accounts for online payments.
- **Make Payment:** Make an online payment to one or more receivables.

- Select **Payroll Schedule** local navigation link to display its left-side navigation link:

- **Fees List:** Review your agency's assessed and waived fees.

- Select **Out-of-Class Validation** local navigation link to display its left-side navigation links:

- **Preprocessing Area:** Access XML reports for retirement or health files that may have errors that need to be corrected. Records will remain in a pending status until cleared from the preprocessing area.
- **File Upload History:** Check if an uploaded file was accepted or rejected.

Person Information Global Navigation Tab

From the **Person Information** tab, search for your employee or retiree. From the **Summary** and **Health Enrollment** local links, several Menu left-side links display.

Refer to the [myCalPERS student guides](#) for retirement, health, and payroll left-side link information for your employees and retirees.

Note: No left-side links display until you access an employee's or retiree's profile page.

Unit 3: myCalPERS & Windows Tips

Zoom

- Press and hold the **Ctrl** key to scroll up and down with your mouse wheel.
- Press and hold the **Ctrl** key and use the **+** or **-** key.

Open Multiple Tabs to Multi-Task

- On any tab or link, press your mouse wheel or right click and select **Open in new tab** (or Open link in new tab) to open item in a new tab.

Open Multiple Windows to Multi-Task

- Right click on any tab or link, then select **Open in new window** (or Open link in new window).
- Use the **Windows** key (between **Ctrl** & **Alt** keys) and select the **left** or **right** arrow keys to evenly split the multiple windows.
- Select the top of the window and drag it to the side of the screen. Let go when window shaded area is in the desired position. Repeat to split the remaining windows.

Keyboard Shortcuts

- Press the **Tab** key to move to the next field on the page, press **Shift+Tab** to go back.
- Enter dates and phone numbers without **/** - or **()**.
- Press the **Enter** key to select the button if the cursor is on a button (button is highlighted).
- Press the **spacebar** to select the radio button if the cursor is on a radio button.
- Enter the first letter or number to populate that item from a drop-down list, e.g., **"f"** for female, **"h"** for hourly, etc.

Refresh myCalPERS

- Select the **myCalPERS** logo or **Home** global navigation tab to refresh the page if you receive an error page or if the global tabs aren't displayed.

Clear a Previous Person Search

- Select the **myCalPERS** logo or **Home** or **Profile** global navigation tabs.
- Select the **Person Search** left-side link if you're on the employee's Profile page.

Return to Previous Page

- Avoid using the browser **back** arrow or **Backspace** key. If there are no return links, use the navigation tabs or links to return to the previous page.

Unit 4: Employer Classes

Our instructor-led and self-paced classes support you in all your CalPERS business.

Instructor-Led Classes

Our [Business Rules & myCalPERS classes](#) will help you understand the importance of your business-related reporting responsibilities, how to use myCalPERS, and how to avoid late fees and administrative costs. Attend an in-person class for a hands-on learning experience where you can complete transactions in a training environment or attend a virtual class and walk through the scenarios in our student guides with an instructor.

Business Rules Classes

Gain a better understanding of the laws and rules associated with your agency's retirement and/or health contract. Our classes are employer-specific and customized to your employer type: school, public agency, or state.

myCalPERS Classes

After attending a Business Rules class, attend myCalPERS classes to learn how to navigate and process transactions in myCalPERS.

Self-Paced Online Classes

You may elect to take our online classes available 24 hours a day. We offer classes to help you understand retirement and health business rules, navigate myCalPERS, and perform transactions.

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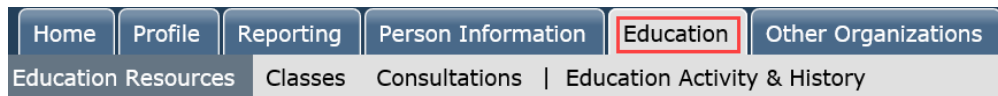
Scenario 1: Register for an Employer Class

System logic

- For virtual classes, select Sacramento as your regional office.
- After registering for a class, the system will email you a confirmation.
- If the class is full, you can select the **Add to Wait List** button. You will receive an email if a seat becomes available.
- To request free training at your agency, email the [employer_educators](mailto:employer_educators@calpers.ca.gov) email at calpers_employer_communications@calpers.ca.gov.

Step Actions

Step 1 Select the **Education** global navigation tab.



Step 2 Select the **Classes** local link or the **Enroll in a Class** hyperlink on the dashboard.

Step 3 Which type of class do you want to enroll in?

Instructor-led (in-person or virtual): Skip to step 7

Online: Continue to step 4

Step 4 Select the **Online** tab.

Sign up for an instructor-led class that's offered virtually or in person at a location near you. Or, take an online class at your own pace.

View your [Education Activity & History](#) to see classes you've enrolled in or completed.



Step 5 Select the **Start** button next to the class you want to take.

Class ^	Duration v	Action
CalPERS 101: More Than Just a Retirement System	1 Hour	Continue
CalPERS Membership Qualifications for California State Universities	1 Hour	Start
CalPERS Membership Qualifications for Public Agencies	1 Hour	Start

Step 6 Select the name of the class topic and the online class will launch.

You have completed enrolling in an online class.

Step 7 Select the **View Class Dates** button for the class you wish to enroll in.

Class ^	Action
Business Rules for Public Agency Employers	<input type="button" value="View Class Dates"/>
Business Rules: Health for Public Agency and School Employers	<input type="button" value="View Class Dates"/>
myCalPERS Employer Reports (Cognos)	<input type="button" value="View Class Dates"/>

Step 8 You may use the Regional Office and Delivery Method drop-down lists to narrow your search.

Step 9 Select the **Enroll** or **Add to Wait List** button next to the class date and location.

Date & Time ^	Location ↕	Action
05/10/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	<input type="button" value="Add to Wait List"/> 0 on wait list
05/17/2023 8:30 AM - 11:00 AM	CalPERS Orange Regional Office 500 N State College Blvd., Suite 750 Orange, CA 92868 Room: Suite 750 Get Directions ↗	<input type="button" value="Enroll"/> 10 seats left
06/14/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	<input type="button" value="Enroll"/> 16 seats left

Step 10 On the Enroll in Class page, verify and update contact information (select the **Needs Special Assistance** check box if necessary).

Step 11 Do you want to enroll other students?

Yes: Continue to step 12

No: Skip to step 15

Step 12 Select the **Add Students** button at the bottom.

Students

[Cancel](#)

Step 13 Update the Add Student page (select **Needs Special Assistance** check box if necessary).

Step 14 Select the **Add** button.

Step 15 Select the **Enroll** button.

You have completed this scenario.

Scenario 2: Modify Enrollment

Step Actions

Step 1 Select the **Education** global navigation tab.

Home	Profile	Reporting	Person Information	Education	Other Organizations
Education Resources		Classes	Consultations	Education Activity & History	

Step 2 Select the **Education Activity & History** local navigation link.

Step 3 What would you like to do?

Reschedule: Continue to step 4

Edit Enrollment: Skip to step 7

Cancel Enrollment: Skip to step 10

Step 4 Select the **Reschedule** link.

Date & Time	Class	Location	Status	Action
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class Meeting ID: 894 3333 7805 Password: 667415	Enrolled	Reschedule Edit Enrollment Cancel Enrollment


Step 5 Adjust the Regional Office and Delivery Method if necessary.

Step 6 Select the **Enroll** or **Add to Wait List** button next to the class date and location.

Date & Time	Location	Action
05/10/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	Add to Wait List 0 on wait list
05/17/2023 8:30 AM - 11:00 AM	CalPERS Orange Regional Office 500 N State College Blvd., Suite 750 Orange, CA 92868 Room: Suite 750 Get Directions	Enroll 10 seats left
06/14/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	Enroll 16 seats left

You have completed this scenario.

Step 7 Select the **Edit Enrollment** link.


Date & Time ▾	Class ⇅	Location ⇅	Status ⇅	Action
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class  Meeting ID: 894 3333 7805 Password: 667415	Enrolled	Reschedule Edit Enrollment Cancel Enrollment

Step 8 Modify your enrollment information.

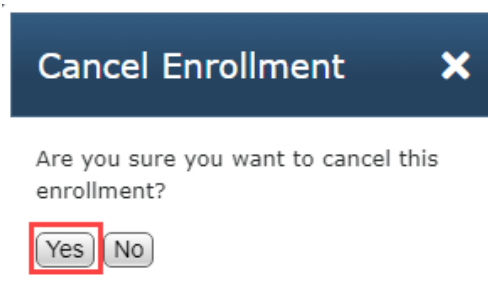
Step 9 Select the **Save Change** button.

You have completed this scenario.

Step 10 Select the **Cancel Enrollment** link.

Date & Time ▾	Class ⇅	Location ⇅	Status ⇅	Action
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class  Meeting ID: 894 3333 7805 Password: 667415	Enrolled	Reschedule Edit Enrollment Cancel Enrollment

Step 11 Select the **Yes** button to confirm your enrollment cancellation.

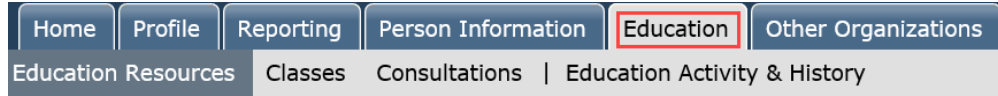


You have completed this scenario.

Scenario 3: Review Education Activity & History

Step Actions

Step 1 Select the **Education** global navigation tab.



Step 2 Select the **Education Activity & History** local navigation link.

Step 3 Select either the **Instructor-Led Classes**, **Online Classes**, or **Consultations** tab.

The screenshot shows the 'Education Activity & History' page. At the top, there are three tabs: 'Instructor-Led Classes' (highlighted with a red box), 'Online Classes', and 'Consultations'. Below the tabs, there is a link for 'Employer Enrollments'. The main content is a table with the following data:

Date & Time	Class	Location	Status	Action
06/14/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO)	Cancelled	
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class Meeting ID: 894 3333 7805 Password: 667415	Enrolled	Reschedule Edit Enrollment Cancel Enrollment

Step 4 Review your activity.

The screenshot shows the 'Education Activity & History' page, similar to the previous one, but with the 'Instructor-Led Classes' tab selected. The status of the class on 04/12/2023 has changed from 'Enrolled' to 'Attended'.

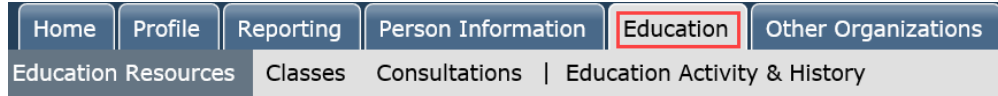
Date & Time	Class	Location	Status	Action
06/14/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO)	Cancelled	
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class Meeting ID: 894 3333 7805 Password: 667415	Attended	

You have completed this scenario.

Scenario 4: Print Class Completion Certificate

Step Actions

Step 1 Select the **Education** global navigation tab.



Step 2 Select the **Education Activity & History** local navigation link.

Step 3 Select either the **Instructor-Led Classes** or **Online Classes** tab.

The screenshot shows the 'Instructor-Led Classes' tab selected. Below the tabs, there is a table with the following data:

Date & Time	Class	Location	Status	Action
06/14/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO)	Canceled	
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class Meeting ID: 894 3333 7805 Password: 667415	Attended	

Step 4 Select the **Print Certificate (PDF)** link.

The screenshot shows the 'Online Classes' tab selected. Below the tabs, there is a table with the following data:

Class	Duration	Status
Business Rules: Health Benefits: Health Benefits: Health Eligibility Requirements	1 Hour	Completed 04/05/2024 Print Certificate (PDF)
myCalPERS Retirement Enrollment: Add Appointment Events	30 Minutes	Completed 04/05/2024 Print Certificate (PDF)

Showing records 1 - 2

You have completed this scenario.

Unit 5: Submit Inquiry & Inquiry List

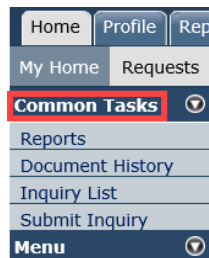
Submit Inquiry

This feature allows you to send a question or information online to CalPERS in a secured environment. When submitting an inquiry, follow the guidelines below.

- For privacy and security, do not include any Social Security numbers or HIPAA information.
- If you need to reference an individual employee, be sure to include their full name, date of birth, and CalPERS ID.
- If you are requesting demographic changes, include which type of documented proof you have, e.g., driver license, birth certificate, Social Security card, etc.

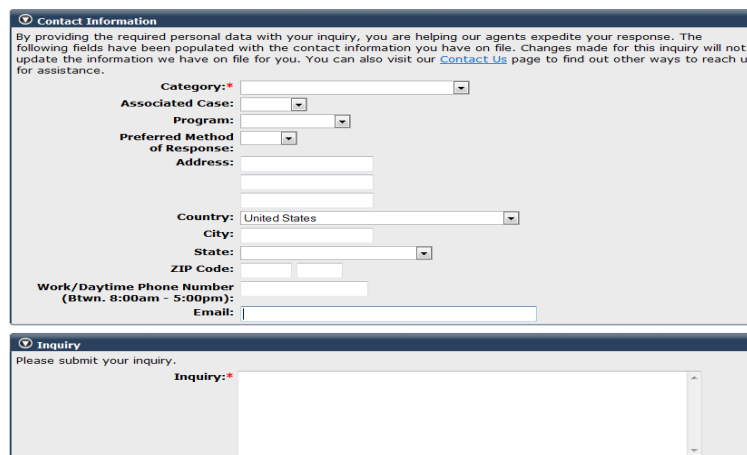
Step Actions

Step 1 From the homepage, select the **Common Tasks** left-side navigation folder.



Step 2 Select the **Submit Inquiry** link from the left-side navigation menu.

Step 3 Complete the Contact Information section.

A screenshot of a web form titled 'Contact Information'. The form contains several fields: 'Category' (dropdown), 'Associated Case' (dropdown), 'Program' (dropdown), 'Preferred Method of Response' (dropdown), 'Address' (text input), 'Country' (dropdown, set to 'United States'), 'City' (text input), 'State' (dropdown), 'ZIP Code' (text input), 'Work/Daytime Phone Number (Btwn. 8:00am - 5:00pm):' (text input), and 'Email' (text input). Below this is an 'Inquiry' section with a text area for the user to enter their question or information. The text area is currently empty.

Step 4 Enter your question or information in the Inquiry field.

Step 5 Select the **Submit** button.

You have completed this scenario.

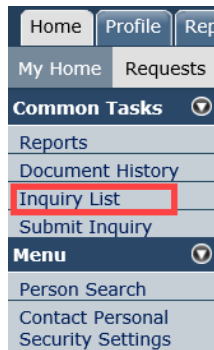
Inquiry List

Within five business days, you will receive an email that indicates a response to your inquiry is available. The Inquiry List displays all inquiries submitted by your agency's contacts. Your list of inquiries and responses are retained for future reference.

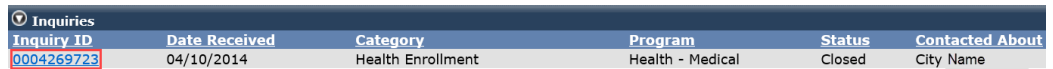
Step Actions

Step 1 From the homepage, select the **Common Tasks** left-side navigation folder.

Step 2 Select the **Inquiry List** link from the left-side navigation menu.

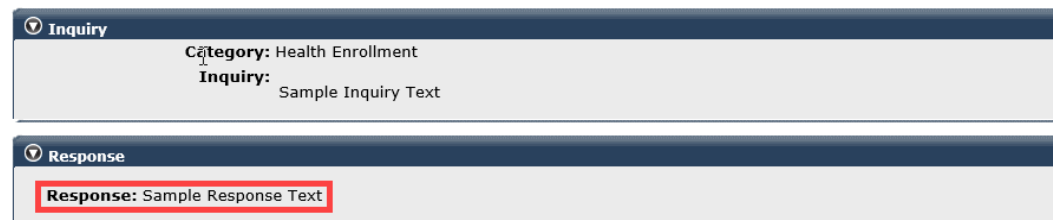


Step 3 Select the **Inquiry ID** number for your inquiry. You may sort by column headers to find submitted inquiries.



Inquiry ID	Date Received	Category	Program	Status	Contacted About
0004269723	04/10/2014	Health Enrollment	Health - Medical	Closed	City Name

Step 4 Within the Response section, review the response from a CalPERS team member.



You have completed this scenario.

Unit 6: Resources

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myCalPERS Student Guides & Resources

The [myCalPERS Student Guides & Resources](#) page contains resources to will help you navigate and process transactions through myCalPERS. The student guides will assist you with system functionality related to job functions and correspond with the myCalPERS employer training classes. Check back often for the most updated versions.

Retirement Reference & Health Benefits Guides

The [Reference & Health Guides](#) will help you understand the retirement and health rules, policies, laws, requirements, deadlines, etc. All contacts who process enrollments or convey retirement and/or health benefits information to employees should reference these resources.

Forms & Publications

The [Forms & Publications](#) page allows you to browse, download, or print any form, publication, and other documents you may need.

Forms & Publications

Browse, download, or print any form, publication, or other documents you may need. Forms are subject to our [Privacy Notice](#).

To order a publication:

- **Members:** [contact us](#) by phone.
- **Employers:** log in to [myCalPERS](#) and select **Requests** to access the Publication Ordering List.

Filter Documents

[Clear All](#)

Document Year

Filter by Year

Active Members

- All Active Members Documents (241)
 - Beneficiaries (6)
 - Community Property (4)
 - Deferred Compensation (1)
 - Health Benefits (134)
 - Judges' Retirement Systems (12)
 - Refunds & Reciprocity (10)
 - Retirement Benefits (71)
 - Service Credit (13)
 - Trusts & Power of Attorney (3)

Show entries

Search:

Title
2023 Anthem Blue Cross Del Norte County (EPO) Evidence of Coverage (PDF)
2023 Anthem Blue Cross Del Norte County EPO Summary of Benefits and Coverage (PDF)
2023 Anthem Blue Cross Medicare Preferred Evidence of Coverage (PDF)
2023 Anthem Blue Cross Medicare Preferred Summary of Benefits and Coverage (PDF)
2023 Anthem Blue Cross Select Basic (HMO) Evidence of Coverage (PDF)
2023 Anthem Blue Cross Select Basic (HMO) Summary of Benefits and Coverage (PDF)
2023 Anthem Blue Cross Traditional Basic (HMO) Evidence of Coverage (PDF)
2023 Anthem Blue Cross Traditional Basic (HMO) Summary of Benefits and Coverage (PDF)
2023 Anthem Medicare Preferred Medicare Part D Prescription Drug Plan Evidence of Coverage (PDF)
2023 Blue Shield of California: Access + HMO Evidence of Coverage and Disclosure Form (PDF)
2023 Blue Shield of California: Access+ EPO Evidence of Coverage and Disclosure Form (PDF)
2023 Blue Shield of California: Blue Shield Medicare PPO Evidence of Coverage and Disclosure Form (PDF)

Email Subscriptions & Circular Letters

Email Subscriptions

Subscribe to receive the latest information about board meetings, legislative news, CalPERS Long-Term Care program, CalPERS news, employer bulletins, member education bulletins, Circular Letters, and State Social Security Administrator program newsletters.

Visit the [Email Subscriptions](#) page to subscribe.

Subscribe

By Email for Newsletters and Alerts

Circular Letters

Circular Letters notify employers of changes in laws, procedures, Employer News, health billing cutoff dates, etc. To subscribe, see the Email Subscriptions information in the previous section.

Browser or search [Circular Letters](#) from 1996 to present.

Circular Letters

Browse or search Circular Letters from 1996 to present. You can also subscribe to [Employer Bulletins](#) to receive email notifications when new Circular Letters are posted.

Show entries

Search

Letter No.	Subject	Audience	Date
200-021-22 (PDF)	Pre-Retirement Survivor Benefits Webinar for State Employers	<ul style="list-style-type: none"> All CalPERS State Employers 	2/16/2022
200-020-22 (PDF)	Addendum to the 2020 Schools Actuarial Valuation Report	<ul style="list-style-type: none"> All School Employers 	2/4/2022
200-019-22 (PDF)	Addendum to the 2020 State Actuarial Valuation Report	<ul style="list-style-type: none"> All State Employers 	2/4/2022
200-017-22 (PDF)	Governor's Executive Order N-3-22	<ul style="list-style-type: none"> All School Employers 	1/31/2022
200-015-22 (PDF)	New Service Prior to Membership Automation and Certification Features	<ul style="list-style-type: none"> All CalPERS Employers 	1/26/2022
200-012-22 (PDF)	Governmental Accounting Standards Board (GASB) Statement 75 Agent Report Availability for Public Agencies and Schools	<ul style="list-style-type: none"> Public Agency Employers School Employers 	1/20/2022
200-011-22 (PDF)	Governmental Accounting Standards Board (GASB) Statement 68 Cost-Sharing Reports for Measurement Date June 30, 2021	<ul style="list-style-type: none"> Public Agency Employers 	1/20/2022
200-010-22 (PDF)	Governmental Accounting Standards Board (GASB) Statement 68 Cost-Sharing Reports for Measurement Date June 30, 2021	<ul style="list-style-type: none"> State Colleges and Universities County Superintendent of Schools Individual School Districts 	1/20/2022
200-009-22 (PDF)	Governmental Accounting Standards Board (GASB) Statement 68 Agent Reports Availability Form	<ul style="list-style-type: none"> Public Agency Employers 	1/20/2022
200-013-22 (PDF)	California Public Employees' Retirement Law (PERL) 2022	<ul style="list-style-type: none"> All CalPERS Employers 	1/18/2022

myCalPERS Technical Requirements

From this page, these five business partner page links display on the left:

- [myCalPERS Employer Reports \(Cognos\) Catalog](#)
- [Special Compensation Reportability Table](#)
- [System Access Administrators](#)
- [System Enhancements](#)
- [Technical Resources](#)

You may also log in to a [file readiness test environment](#) at the bottom of the page. Transactions processed in this environment will not update your agency's actual myCalPERS data.

myCalPERS Employer Reports (Cognos) Catalog Page

- myCalPERS Employer Reports (Cognos) student guide
- List of employer reports and descriptions
- Type of reports (Benefits, Contributions, Enrollments, Financials, Health, Retirement Enrollment, Retirement Contracts, System Access Administration)
- User role needed to run each report

Special Compensation Reportability Table Page

This includes a table of reportability details for each member category within the identified special compensation category and type.

System Access Administrator page

- myCalPERS System Access Administration student guide
- myCalPERS System Privileges for Business Partner Roles supplemental guide
- New Contact Checklist, User Access Role Change and Exit Checklist

System Enhancements Page

Access this link for myCalPERS system enhancements implemented to improve functionalities and efficiencies when conducting business with CalPERS.

Technical Resources Page

- **Employers:**
 - Information for file uploading transactions in myCalPERS
 - Reporting Out-of-Class Hours Worked section (Data element definitions, sample CSV file, student guide, frequently asked questions, and Circular Letter)
- **Direct Authorization Vendors:** Information for organizations authorized to receive monthly deductions from a retirement warrant to pay a sponsored company
- **Making Payments:** Electronic Funds Transfer (EFT) and the CalPERS ACH ID number

CalPERS Contacts

Email

- To contact the [employer educators](#) for training questions and requests, email calpers_employer_communications@calpers.ca.gov.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email ert@calpers.ca.gov.
- To contact [CalPERS Membership Unit](#) for questions regarding membership eligibility and/or enrolling an employee, email membership_reporting@calpers.ca.gov.
- To contact the [Audit Compliance and Resolution Unit](#) for questions regarding Publicly Available Pay Schedules, reportable payrates and special compensation, labor policies or agreements, Out-of-Class reporting, and compensation reportability related to settlement agreements, email mou_review@calpers.ca.gov.
- To contact the [Cashiers Unit](#) for questions about your agency's online payments, email fcsd_cashiers@calpers.ca.gov.
- To contact the [myCalPERS System Support](#) team for questions regarding the Retirement Appointment Reconciliation tool, email employer_technical_support@calpers.ca.gov.
- To order large quantities of [health publications](#), email ossd_public_agency_requests_publication_fulfillment@calpers.ca.gov.

Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays. Save time by having your employer myCalPERS account open before calling in.

- TTY: (877) 249-7442 (This number does not accept voice calls.)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

Submit Inquiry

Send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation folder, then select the **Submit Inquiry** link to submit a question or request. Review unit 7 for full instructions.