myCalPERS Health Enrollment

Student Guide

March 2, 2024

CalPERS

Introduction

This guide is a resource to assist with processing common health enrollment transactions in myCalPERS. You will also learn how to review updated and rescinded transactions and use reports. Refer to the myCalPERS Health Enrollment Supplement (PDF) student guide for additional transactions.

For confirming employee-submitted transactions in myCalPERS, refer to the myCalPERS Health Transaction Verification (PDF) student guide.

Disclaimer

Business partner and participant information has been masked in this procedure guide.

System Access

If you are unable to process these scenarios, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

Prior to taking a myCalPERS training, new users should review the Introduction to myCalPERS for Business Partners (PDF) student guide and take a health Business Rules class. Business rules summarize the laws defined by the California Public Employees' Retirement Law (PERL).

Contents

Unit 1: Health Benefits Plan Enrollment for Active Employees (HBD-12)

In this unit, you will learn how to process the Health Benefits Plan Enrollment for Active Employees (HBD-12) form using myCalPERS. Keep a copy of the HBD-12 in the employee personnel file. Do not mail the form to CalPERS unless it's necessary.

myCalPERS Health Aid-Health Event Types and Reasons for Employers

The [myCalPERS Health Aid: Health Event Types and Reasons for Employers (PDF)](#) will help you determine the health event type, reason, and event date to use when entering transactions.

System Logic

When starting a transaction, on step 2 when searching for the employee, you may use the last four digits of an SSN.

Decline Coverage

If an eligible employee declines to enroll, you do not need to process anything. Your employee must decline and sign the HBD-12 form which you keep on file.

Notifications After a Transaction is Updated

- The next business day, a confirmation is sent to the employee.
- The next business day, a confirmation with the COBRA HBD-85 form and information is sent to cancelled employees and deleted dependents.
- Overnight, health carriers receive health enrollment/changes and demographic/address changes.

Contents

Scenario 1: New Enrollment-Enroll in Health Benefits

System Logic

PERS Employees

- The appointment must be updated in myCalPERS prior to processing a health enrollment.
- For central-state agencies, it takes 1-2 days to update myCalPERS from the Personnel Information Management System (PIMS).

Non-PERS and CalSTRS Employees

- If the employee previously had health benefits with your agency then separated (prior appointment is in myCalPERS), before processing a new health enrollment, you will add a new appointment for them by following steps 1-6.
- If the employee has a concurrent active CalPERS appointment with your agency, contact CalPERS to add the non-PERS or CalSTRS appointment prior the health enrollment.
- For employees enrolling due to Affordable Care Act (ACA), the process is like a non-PERS/CalSTRS health enrollment. Refer to step 22 for the retirement program.

New Contracting Health Agency or New Contracting Group

Your PEMHCA resolution must be active in myCalPERS before you can process enrollments.

Social Security Numbers (SSN) for Dependents

- Contact CalPERS if adding a spouse or domestic partner who does not have an SSN.
- You can enroll a dependent child without an SSN by bypassing the warning message. Follow up within 90 days to add their SSN (refer to unit 4).

Disabled Dependent Child

Process the health enrollment without the disabled dependent child who is 26 years or older. Provide the employee with two forms to be completed within 60 days of the newly eligible employee's initial enrollment in the CalPERS health program.

- The employee completes part A of the Disabled Dependent Member Questionnaire and Medical Report (HBD-34) (PDF), then submits it to the child's physician. The physician completes the rest of the form then submits it to CalPERS.
- The employee submits the Authorization to Disclose Protected Health Information (PERS-BSD-35) (PDF) to the child's physician, and the physician retains the form.

After CalPERS reviews the HBD-34, if the overage dependent is eligible, CalPERS will add the disabled dependent to the subscriber's health benefits. A notification will be sent to your agency and the employee after the dependent is added or if they are not approved.
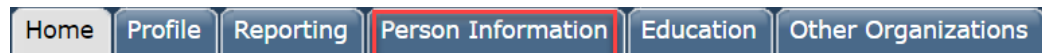
ZIP Code for Eligibility

A physical address is required unless the employee is using an employer ZIP code for health eligibility. If the PO Box displays, you may add the physical address at step 17.
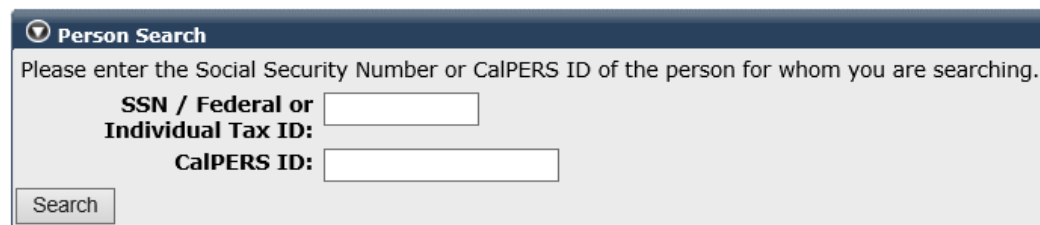
Step Actions

Is This a CalPERS Employee or a New (No Prior Appointment With Your Agency) Non-PERS or CalSTRS Employee?

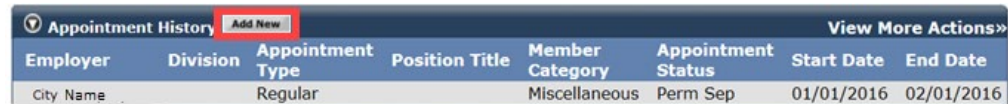|	
Step 1	**Yes:** Skip to step 7. **No:** For your returning CalSTRS or non-PERS employee (prior appointment in myCalPERS with your agency), add their appointment. From the homepage, select the **Person Information** global navigation tab.
Step 2	Complete the Person Search section.
Step 3	Select the **Search** button.
Step 4	Within the Appointment History section, select the **Add New** button to create a new non-PERS or CalSTRS appointment. **Note:** If the button does not display, contact the person at your agency who adds appointments to assist you before processing the new health enrollment.
Step 5	Change the Program field to *Health*, and then complete the following: • **Enrollment Eligibility Date:** Hire date for this health-only appointment • **Retirement System:** Employee's retirement system (do not select CalPERS) • **Division:** Select if the employee works for an agency under the parent agency • **Original Hire Date:** Employee's first hire date with your agency • **CBU** (Collective Bargaining Unit drop-down list displays after selecting the retirement system)**:** Select the employee's medical group.
Step 6	Select the **Save** button.

Add New Health Enrollment Transaction

Step 7	Select the **Reporting** global navigation tab.

Step 8	Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

Step 9	Select the **Continue** button.

Search for the Subscriber

Step 10	Complete the Person Search section.

Step 11	Select the **Search** button.

Step 12	Does the Health Event Information section display? **Yes:** Skip to step 14. **No:** Select the **Add New** button to continue for the non-PERS or CalSTRS employee.

Step 13	Complete the Demographics Information section.

Input Health Event Information

Step 14	Complete the Health Event Information section.

Step 15	Select the **View Effective Date** button at bottom right.
Step 16	Select the **Save & Continue** button.

Update Subscriber Details

Step 17   Complete the Maintain Address Details section if you need to update the employee's address or to choose the employer's ZIP code for health eligibility.

Note: If a P.O. Box is used for the mailing address, the employee must have a physical address or use the employer ZIP code for health eligibility.

Step 18   **Optional:** If you populate the Maintain Communication Details section, select the **Primary** radio button so the phone number and/or email address displays on the employee's Profile page.

Select Appointment

Step 19   Does the employee have more than one active appointment with your agency?

Yes: Choose the **Select Appointment** link.

No: Skip to step 22.

Step 20   Select the applicable **appointment** radio button.

Step 21   Choose the **Select** button.

Step 22   Complete the Appointment Details section:

- **Division:** An agency under a parent agency, e.g., a school district.
- **Original Hire Date:** Non-PERS or CalSTRS employee's first hire date.
- **Retirement Program:** Affordable Care Act/None (For a part-time employee who is eligible due to ACA), Other (non-PERS), or STRS (California State Teachers' Retirement System). Do not select PERS.
- **Affiliated Association:** For a dues-paying member of one of these associations.
- **Medical Group:** For public agencies and schools, choose the employee's medical group based on your agency's health contract.

Step 23   Select the **Save & Continue** button.

Step 24   Did you update the address?

Yes: Select the correct **Entered Address** or **U.S. Postal Service Matches** radio button.

No: Skip to step 27.

Step 25   Select the **Confirm** button.

Step 26   Select the **Save & Continue** button.

Add Dependents

Step 27   Is your employee enrolling dependents?

Yes: Select the **Add New** button.

No: Skip to step 44.

Step 28   Is the dependent listed in the Existing Relationships Eligible for Health section?

Yes: Select the dependent's radio button.

No: Skip to step 31.

Step 29   Select the **Continue** button.

Step 30   Skip to step 32.

Step 31   Select the **Add New** button.

Step 32   Complete or update the Person Details section if necessary. You may update if the dependent is not an active employee at a PERS-contracting agency.

Step 33   Does the dependent have the same address as your employee?

Yes: Skip to step 37.

No: Deselect the Address is the same as Primary Subscriber check box.

Step 34   Complete the Address Details section.

Step 35   Select the **Save & Continue** button.

Step 36   Select the **Confirm** button.

Step 37   Select the **Save & Continue** button.

Step 38	Is this dependent in a parent-child relationship?

Yes: Select the **Maintain Certification** link.

No: Skip to step 43.

Step 39	Select the **Certify Dependent** check box.

Step 40	Select the **disclaimer** check box.

Step 41	Select the **Save & Continue** button.
Step 42	Below the Dependent Information section, select the **Save & Continue** button.
Step 43	Do they have additional dependents?
	Yes: Return to step 27.
	No: Continue to step 44.
Step 44	Select the **Save & Continue** button.

Select Health Plan

Step 45	Select the **medical plan** radio button.

Step 46	Enter a medical provider(s) if the employee indicated a primary care physician.

Step 47	Select the **Save & Continue** button.

Step 48   Select one of the four option links in the health transaction confirmation.

Health Transaction Confirmation

The transaction successfully processed.

Print the health transaction confirmation.

Add another transaction for this subscriber.

Process a new transaction for a different subscriber.

Return to home page.

Tip: The print option provides details in a PDF format in a separate browser window. Confirm that the transaction completed accurately. To correct a dependent's demographics for a transaction with:

- **Future effective date:** Rescind the transaction and re-process the new health enrollment. You will be able to make most corrections.

- **No SSN:** If a dependent was added without an SSN, contact CalPERS to correct the dependent's name, gender, birth date, or dependent type.

- **Retroactive effective date:** Contact CalPERS.

Health Transaction Confirmation

The following transaction successfully processed on 05/09/2019.

CalPERS ID: 0123456789
Subscriber Name: Jane Jones

Health Event Type: New Enrollment
Health Event Reason: Late or Loss of Coverage (Emp)

Effective Date: 06/01/2019
Event Date: 05/30/2019
Received Date: 05/09/2019

Health Plan Name: Anthem Blue Cross Select

Covered Persons:

Covered Person	Relationship
Jane Jones	Self
Jill Jones	Child

You have completed this scenario.

Scenario 2: Add Dependent

System Logic

- Social Security number (SSN) fields are required when adding a spouse or domestic partner. If they do not have an SSN, contact CalPERS to add the dependent.
- You can enroll a dependent child without an SSN by bypassing the warning message. Follow up within 90 days to add their SSN (refer to unit 4).
- When adding multiple dependents within one transaction, the health event reason must be the same. If not, process a separate health transaction for each unique health event reason.

Step Actions

Add Health Enrollment Transaction

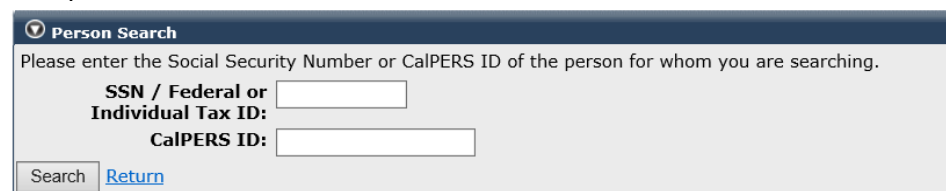| Step 1	Select the **Reporting** global navigation tab.
Step 2	Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.
Step 3	Select the **Continue** button.

Search for the Subscriber
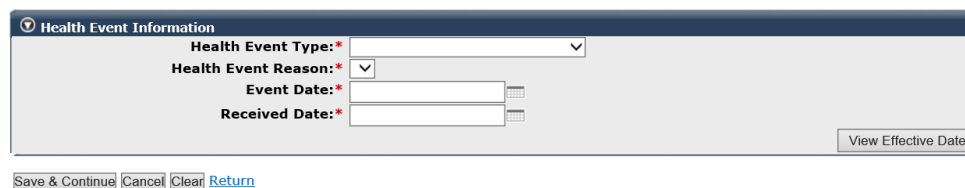
Step 4	Complete the Person Search section.
Step 5	Select the **Search** button.

Input Health Event Information

Step 6	Complete the Health Event Information section.
Step 7	Select the **View Effective Date** button at bottom right.
Step 8	Select the **Save & Continue** button.

Adding Dependents

Step 9	Is the dependent listed in the Existing Relationships Eligible for Health section?
	Yes: Select the dependent's check box.
	No: Skip to step 12.
Step 10	Do you need to update the dependent's demographics or address?
	Yes: Select the **Update Demographics** link.
	No: Select the **Continue** button, then skip to step 24.
Step 11	Skip to step 13.
Step 12	Within the Existing Relationships Eligible for Health section, select the **Add New** button.
Step 13	Complete or update the Person Details section.
Step 14	Is the dependent's address the same as your employee's?
	Yes: Skip to step 18.
	No: Deselect the Address is the same as Primary Subscriber check box.
Step 15	Complete the Address Details section.
Step 16	Select the **Save & Continue** button.
Step 17	Select the **Confirm** button.
Step 18	Select the **Save & Continue** button.
Step 19	Is the dependent in a parent-child relationship?
	Yes: Select the **Provide Certification** link.
	No: Skip to step 24.

Step 20	Select the **Certify Dependent** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kitty Kooper	01/31/2024	☐ Certify Dependent

Step 21	Select the **disclaimer** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kitty Kooper	03/31/2025	☑ Certify Dependent

☑ * I am a duly appointed and qualified representative of the agency/department.

I have reviewed the above affidavit, supporting documentation, and verified the identity of the subscriber submitting this affidavit.

I retained copies of the subscriber's health and dental enrollment form(s) and all supporting documents to enroll/recertify the eligibility of the employee's dependent in a PCR.

Based on the review of the documentation and information provided I recommend enrolling/recertifying this dependent in a PCR based on the information provided and documentation attached [per CCR §599.500(o)].

Step 22	Select the **Save & Continue** button.
Step 23	If the employee provided a physician name for the dependent, enter the physician's name in the **Provider** field.
Step 24	Do they have additional dependents to add for this health event reason?
	Yes: Return to step 9.
	No: Continue to step 25.
Step 25	Under the Existing Relationships Eligible for Health section, select the **Continue** button.

⊙ **Existing Relationships Eligible for Health**   Add New

Select a dependent below. If a dependent is not listed, select the **Add New** button.

Name	Date of Birth	Relationship	Medical	Parent-Child Relationship	Provider
☐ Liinamo, Pip X	10/02/1986	Child	No		
☐ Liinamo, Liber Richelle	12/13/1984	Child	No		
☑ Kooper, Kitty	09/15/2012	Niece	Yes	Update Certification	

Continue Cancel Return

Step 26	Select one of the four option links in the health transaction confirmation.

Health Transaction Confirmation

The transaction successfully processed.

Print the health transaction confirmation.

Add another transaction for this subscriber.

Process a new transaction for a different subscriber.

Return to home page.

You have completed this scenario.

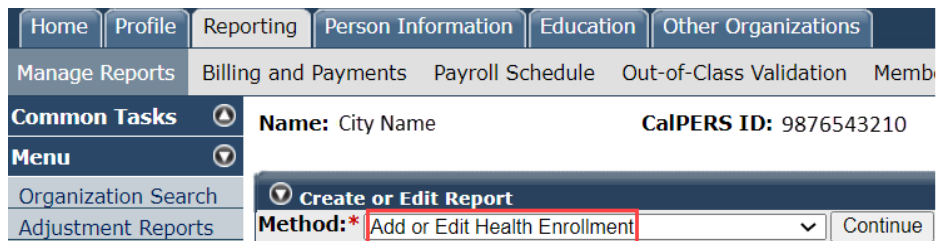## Scenario 3: Delete Dependent

System Logic

- When deleting multiple dependents within one health transaction, the health event reason must be the same. If not, process a separate health transaction for each health event reason.
- When deleting a former spouse due to divorce or domestic partner due to termination of relationship with the Secretary of State, allow myCalPERS to automatically delete dependents with the relationship of Step Child or Domestic Partner Child.

Step Actions

Add Health Enrollment Transaction

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

Step 2   Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

Step 3   Select the **Continue** button.

Search for the Subscriber

Step 4   Complete the Person Search section.

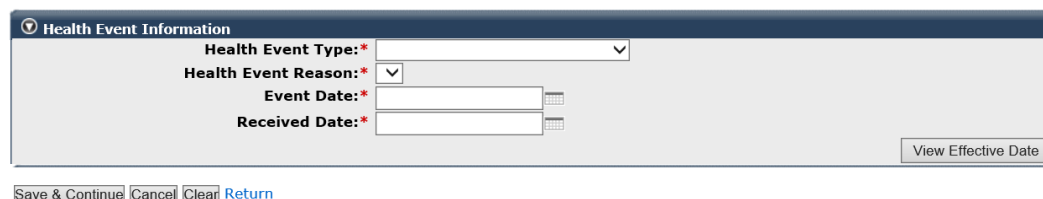Step 5   Select the **Search** button.

Input Health Event Information

Step 6   Complete the Health Event Information section.

Step 7   Select the **View Effective Date** button at bottom right.

Step 8   Select the **Save & Continue** button.

Delete Dependent(s)

Step 9   Select the check box(es) next to the dependent(s) being deleted.

Existing Relationships Eligible for Health			
Name	Date of Birth	Relationship	Medical
☐ Wilson, Willy	06/14/2001	Child	Yes
☐ Wilson, Wanda	05/04/1979	Spouse	Yes
☐ Wilson, Wally	03/18/2013	Child	Yes
☐ Smith, Sam	06/02/2004	Step Child	Yes

Continue Cancel Return

Step 10   Select the **Continue** button.

Step 11   Select one of the four option links in the health transaction confirmation.

Health Transaction Confirmation

The transaction successfully processed.

Print the health transaction confirmation.

Add another transaction for this subscriber.

Process a new transaction for a different subscriber.

Return to home page.

You have completed this scenario.

Scenario 4: Change Health Plan

System Logic

Move Health Event Reason

- Prior to processing a plan change, the new address should be reflected in myCalPERS.
- For central-state agencies, an address change in Personnel Information Management System (PIMS) will reflect in myCalPERS in 1-2 business days.

Work ZIP Code

To start or stop using the work ZIP code for health eligibility, process an **Update Enrollment** health event type prior to the plan change with the following health event reasons:

- **Change Eligibility ZIP** to add the work ZIP code
- **Cancel Eligibility ZIP** to cancel a work ZIP code

Step Actions

Add Health Enrollment Transaction

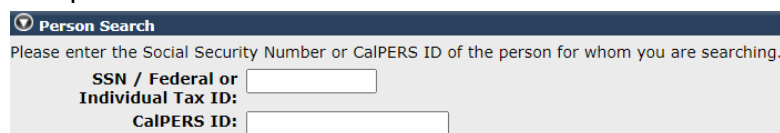| Step 1	Select the **Reporting** global navigation tab.
Step 2	Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

Step 3	Select the **Continue** button.

Search for the Subscriber

Step 4	Complete the Person Search section.

Step 5	Select the **Search** button.

Input Health Event Information
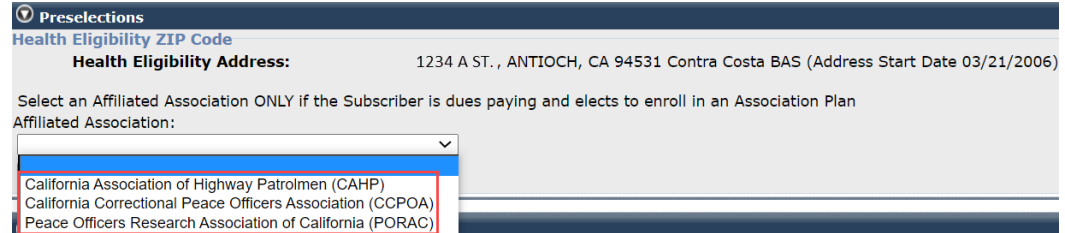
Step 6	Complete the Health Event Information section.

Step 7	Select the **View Effective Date** button. at bottom right.

Step 8	Select the **Save & Continue** button.
Step 9	Is this a dues-paying member of an affiliated association who is electing to enroll in an association plan?

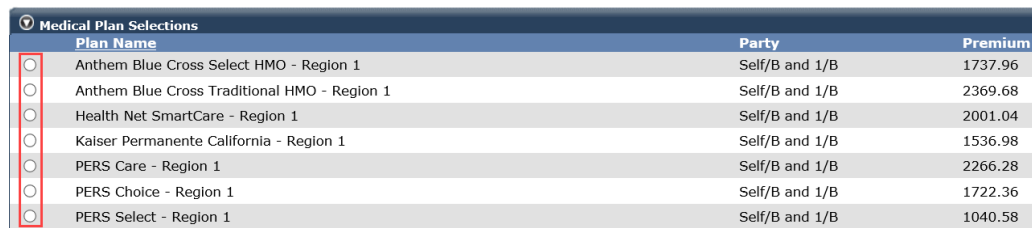**Yes:** Select the member's association from the drop-down list.

No: Skip to step 11.

Step 10	Select the **Display Plans** button.

Change Health Plan

Step 11	Select the **health plan** radio button chosen by the subscriber.

Step 12	Enter a medical provider(s) if the employee indicated primary care physician(s).
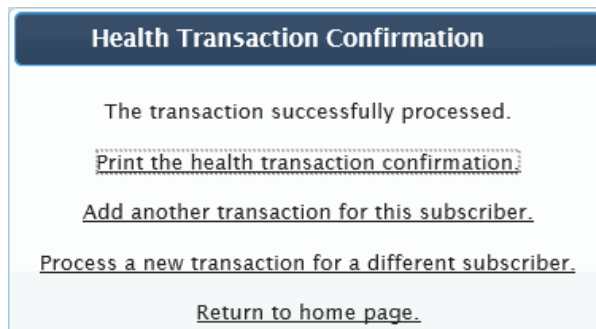
Step 13	Select the **Save & Continue** button.
Step 14	Select one of the four option links in the health transaction confirmation.

You have completed this scenario.

Scenario 5: Cancel Coverage

System Logic

Leave of Absence (Not Family Medical Leave or Maternity/Paternity Leave)

- For public agencies and schools, add the leave to the employee's appointment, and the health benefits will automatically cancel.
- For steps on updating nonPERS and CalSTRS employee appointments, refer to the myCalPERS Health Enrollment Supplement student guide.

Permanent Separation

- Do not process a Cancel Coverage transaction for a permanently separating employee. Add the separation event to their appointment, and myCalPERS will cancel the health benefits.
- After the permanent separation is reflected in myCalPERS, verify the health benefits is cancelled to ensure there won't be any billing issues.

Voluntary Cancellation

If an employee is requesting to cancel with an effective date more than a month in the future, adjust the received date to the month prior to the effective date.

- **Event Date:** Day of the employee request
- **Received Date:** Month prior to the effective date/01/year

Step Actions

Add Health Enrollment Transaction

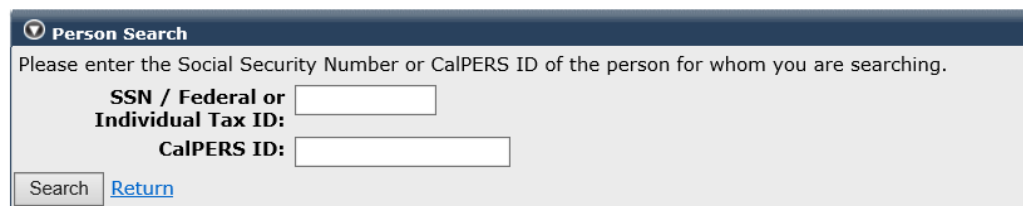| Step 1	Select the **Reporting** global navigation tab.
Step 2	Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.
Step 3	Select the **Continue** button.

Search for the Subscriber

Step 4	Complete the Person Search section.
Step 5	Select the **Search** button.

Input Health Event Information

Step 6	Complete the Health Event Information section.

Step 7	Select the **View Effective Date** button at bottom right.
Step 8	Select the **Save & Continue** button.
Step 9	Select one of the four option links in the health transaction confirmation.

You have completed this scenario.

Unit 2: Rescission

A rescission is reversing a transaction to make a correction or due to a subscriber request. In this unit, you will learn how to rescind a permissive transaction with a *future effective date*.

System Logic

- You may not process a rescission for a mandatory event or if it is after the effective date. Contact CalPERS for assistance.
- To correct a dependent's demographics on a new health enrollment or add dependent transaction, rescind the *entire* transaction, and then reprocess it.
  Note: Only change a dependent's demographics if they were *originally added with an SSN*. Otherwise, contact CalPERS to update the dependent's name, birth date, gender, etc.

Step Actions

Step 1	Select the **Reporting** global navigation tab.
Step 2	Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

Step 3	Select the **Continue** button.

Search for the Subscriber
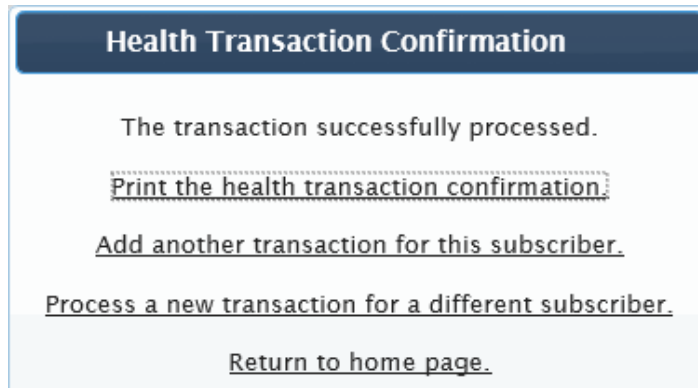
Step 4	Complete the Person Search section.

Step 5	Select the **Search** button.

Rescind the Transaction

Step 6   Within the Demographics Information section, select the **Rescind an Existing Transaction** link.

Step 7   Within the Health Enrollment History section, select the radio button associated to the future health event to be rescinded.
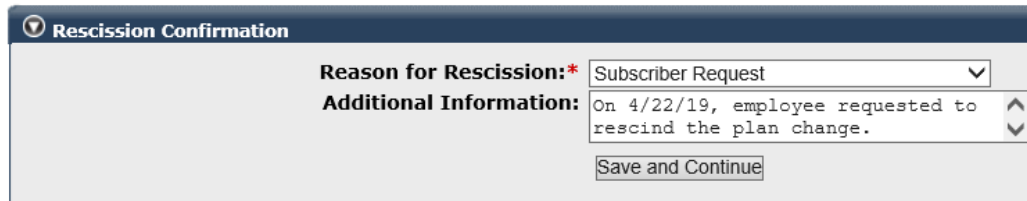
Step 8   Select the **Rescind** button.

Step 9   Complete the Rescission Confirmation section.
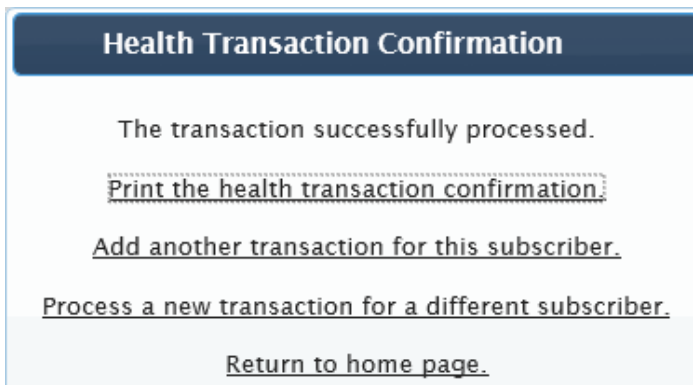
Step 10   Select the **Save and Continue** button.

Step 11   From the Health Event Information section, select the **Save & Continue** button.

Step 12   Select one of the four option links in the health transaction confirmation.

You have completed this scenario.

Unit 3: Person Search Tool-Health Enrollment Details

In this unit, you will learn how to review health enrollment details by using the five left-side links (refer to scenarios below) for one of your employees enrolled in health benefits.

System Logic

- Use the last four digits of an SSN, full SSN, employee CalPERS ID, or federal or individual tax ID for a person search.
- You may access health details only for employees and retirees with your agency.
- myCalPERS automatically displays information as of the current date. A warning message displays when you're accessing a future new health enrollment or a retroactive cancelled enrollee. To review their Health Enrollment Summary page, use the **Summary As-Of Date** left-side link and enter a date of when they had/will have health benefits with your agency.

- In most cases, a permanent separation will cancel health benefits; however, verify the cancellation of a separated employee to ensure the correct billing of premiums.
- To clear the previous subscriber's health benefits information, select the **myCalPERS** logo.

Contents

Scenario 1: Enrollment Summary

You will review subscriber health enrollment information including current and formerly covered dependents, health plan, total premium, and future health events.

System Logic

When the **Enrollment Summary** page is unavailable due to future-dated enrollments or a former subscriber, use the other four left-side menu links to verify enrollment information and deductions.

Step Actions

Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Complete the Person Search section.

Step 3	Select the **Search** button.
Step 4	Select the **Health Enrollment** local navigation link.

Step 5	Select the first link under the **Health Account** column.

Step 6	Review the Health Enrollment Information section.

Step 7	Review the Covered Persons Summary section for a list of current and former dependents.

Note: Each name is a link to their Covered Persons Health Information page.

Step 8	Is there a **View More Actions** link in the Covered Persons Summery section? **Yes:** Select the **View More Actions** link for the full list of covered and formerly covered dependents.

Covered Persons Summary						View More Actions»
Below are your covered persons for health. Select the name of a covered person to view detailed health information.						
Name	**Date of Birth**	**Dependent Type**	**Certified**	**Medical**	**Dental**	**Vision**
TADHIG LIEBAN	05/02/1958	Self	NA	Basic	No	No
ARUTYUN LIEBAN	10/18/1965	Spouse	NA	Basic	No	No
SIULING LIEBAN	07/01/1994	Natural Born Child	NA	Basic	No	No
DOMINNETTA DUBOSKI	12/06/1995	Natural Born Child	NA	Basic	No	No

No: Skip to step 10.

Step 9	If you selected the **View More Actions** link, select the **Enrollment Summary** left-side link to return to the previous Health Enrollment Summary page.

Common Tasks		Health Enrollment Information
Menu		Your health enrollment is based on the following information:
Enrollment Summary		**Health Eligibility Information**
Enrollment History		**Appointment ID:** 2233440
Deduction History		
Premium Search Tool		**Employer CalPERS ID:** 9876543210
Summary As-Of Date		**Employer:** City Name

Step 10	Review the Health Plan Summary section.

Health Plan Summary				
Below is your plan and premium information.				
Health Benefit Type	**Health Plan Name**	**Party Type**	**Health Enrollment Status**	**Total Premium**
Medical	Kaiser Permanente California Bay Area (1043)	Self/B and 2+/B	01/01/2016	$1,906.81

Step 11	Review the Future Health Events section for transactions with future effective dates.

Future Health Events			
Below are your health events that are effective at a future date.			
Future Health Event Type	**Future Health Event Reason**	**Future Effective Date**	**Health Notification**
New Enrollment	Late or Loss of Coverage (Emp)	02/01/2023	
Update Enrollment	Establish Medical Group	02/01/2023	

Step 12	**For state agencies:** Review the Pending Health Events section to verify a pending dental enrollment into retirement transaction.

Pending Health Events					
Below are requests that require CalPERS review.					
Name	**CalPERS ID**	**Pending Health Event Type**	**Pending Health Event Reason**	**Received Date**	**Status**
ZANOTELLI CASTRO-AYALA	0123456789	New Enrollment	State Retiree - Dental Enrollment	01/01/2018	Pending Analyst Review

You have completed this scenario.

Scenario 2: Enrollment History

You will review all health enrollment transactions in chronological order including rescissions, effective dates, health event types, and future enrollment changes.

Step Actions

Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Complete the Person Search section.

Step 3	Select the **Search** button.
Step 4	Select the **Health Enrollment** local navigation link.

Step 5	Select the top link under the **Health Account** column.

Step 6	Select the **Enrollment History** link under the **Menu** left-side navigation.

Step 7	Do you want to filter your search to review specific transactions like a rescission? **Yes:** Use the Search Criteria for Health Enrollment History section.

No: Skip to step 9.

Step 8	Select the **Search** button.

Step 9   Under the Status column, select the link for transaction details to review the dates used to enter the transaction, created date, if employer or CalPERS processed, and rescission notes.

Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status
03/01/2023	Change Health Plan	Move	Roelie Lee Sundotlen	Medical	Rescinded
01/01/2020	Change Health Plan	Plan Code change transfer - Batch	Roelie Lee Sundotlen	Medical	Confirmed
12/01/2018	Delete Dependent	Delete Dependent- Did not certify for Parent-Child Relationship	Elizabeth Lamberto Liinamo	Medical	Rescinded
12/01/2016	Add Dependent	Parent-Child Relationship	Elizabeth Lamberto Liinamo	Medical	Confirmed
12/01/2016	Delete Dependent	Delete Dependent- Did not certify for Parent-Child Relationship	Elizabeth Lamberto Liinamo	Medical	Confirmed

Health Enrollment History

Step 10   Select the **View Health Enrollment Summary** link for the health enrollment summary as of the effective date of the transaction.

Transaction Details

Name: Elizabeth Lamberto Liinamo
Health Event Type: Add Dependent
Health Event Reason: Parent-Child Relationship
Health Benefit Type: Medical
Effective Date: 12/01/2016
Event Date: 11/01/2016
Received Date: 11/30/2016
Status:

Created Date: 12/07/2016 10:07:56 AM
Change Date: 12/07/2016 10:07:56 AM
Created by User: Employer
Updated by User: Employer
Reason for Rescission:
Additional Information:

View Health Enrollment Summary

Step 11   Review the health information based on the effective date of the transaction.

Health Enrollment Information

Your health enrollment is based on the following information: Health Enrollment Summary As Of: 12/01/2016

Health Eligibility Information

Appointment ID: 27791120
Employer CalPERS ID: 1262943822
Employer: Agency Name
Division CalPERS ID: 1262943822
Division: Agency Name
Agency Type: Public Agency

Qualifying CalPERS ID: 0123456789

Medical Group: 004 UPE, LOCAL 790 UNIT B C D
Permanent Separation Date:
Retirement Date:

Health Benefit Appointment Yes
Same As Health Eligibility:

Enrollment Information

Affiliated Retirement System: PERS
Financially Responsible CalPERS ID: 0123456789
Payroll Office Code: 5
Affiliated Association:
Health Account Status: Active Employment

Health Eligibility Zip Code: 94531
Zip Code Override Indicator: No
Override Zip Code Type:
Region: BAR
County: Contra Costa

Covered Persons Summary   View More Actions»

Below are your covered persons for health.
Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
Roelie Sundotlen	11/11/1961	Self	NA	Basic	No	No
Jorge Beuningen	03/06/1961	Spouse	No	Basic	No	No
Elizabeth Liinamo	10/02/2005	Parent-Child	Yes	Basic	No	No

You have completed this scenario.

Scenario 3: Deduction History

You will review your employee's history of premium payments and credits. The information includes the coverage month, plan name, party type, and participant/employer share.

You also have access to the deduction history for your retirees and former employees.

Step Actions

Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Complete the Person Search section.

Step 3	Select the **Search** button.
Step 4	Select the **Health Enrollment** local navigation link.

Step 5	Select the top link under the **Health Account** column.

Step 6	Select the **Deduction History** link under the **Menu** left-side navigation.
Step 7	Select from the **Deduction Source** drop-down list in the Search Criteria section.

Deduction Source	Active/Retired and Retirement System Use each deduction source to verify:
Benefit Roll	*Retired CalPERS participant* deductions only, even though the employer share displays
PA Billing	What has been billed to your agency for your active and retired CalPERS, CalSTRS, and non-PERS participants. Use this to verify your *employer share* for your retired CalPERS and CalSTRS participants.
SCO	Active central state deductions
Non-Central	Active non-central state deductions

Step 8 Select the **Search** button to review deduction history.

Step 9 Review the Deduction History section.

Coverage Month	Status	Employer CalPERS ID	Plan Name	Party Type	Plan Code	Participant Share	Employer Share	Medicare Reimbursement
October 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
September 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
August 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
July 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
June 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
May 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
April 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
March 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
February 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
January 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,228.36	$0.00
December 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
November 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
October 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
September 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
August 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
July 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
June 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
May 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
April 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
March 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
February 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
January 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$2,115.46	$0.00
December 2020	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$1,998.07	$0.00
November 2020	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$1,998.07	$0.00
October 2020	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	$0.00	$1,998.07	$0.00

Showing records 1 - 25 | First << Previous   1 2 3 4 5 6 7 8 9   Next >>   Last | View Max

You have completed this scenario.

Scenario 4: Premium Search Tool

You will assist your employee with searching for available health plans by eligibility ZIP code and those associated with a specific provider or medical group.

You can also compare benefits and premiums for the available plans.

Step Actions

Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Complete the Person Search section.

Step 3	Select the **Search** button.
Step 4	Select the **Health Enrollment** local navigation link.

Step 5	Select the **Premium Search Tool** link under the **Menu** left-side navigation.

Step 6	**Optional:** Use the filter(s) in the Health Premium Search Tool section.

Step 7	Do you want to search for plans affiliated with a physician or medical group?
	Yes: Continue to step 8.
	No: Skip to step 10.

Step 8   Enter a provider's (primary care or specialist) first or last name or medical group, and the health plans with which they are associated will display. **Subscribers should contact the health plan to verify if the provider is available.**

1. Select the **Advanced Options** button.
2. Select the **Provider Type** radio button.
3. If you want to search for plans associated with a physician medical group, select the **Medical Group** radio button.
4. Change the mile radius from the drop-down list if necessary.
5. Enter a provider's first and/or last name or medical group name. *Do not press the Enter key.*
6. Select the doctor, specialist, or medical group from the list below.
7. Select the **Search** button at bottom left of the section.
8. Review the Provider Available? column to confirm if the provider is affiliated with the health plan.

Note: The health plan name is a link their toll-free telephone number.

Step 9   Select at least one health plan check box or the **Select All** link.

Step 10   Within the Provider Directory Alert section, review any alert information.

Step 11   Select the **Compare Health Plans** button at the bottom left of the page.

Step 12   Within the Health Plan Comparison Filters section, select the benefits you want to review or compare.

Step 13   Each plan that you selected in step 9 will be displayed in columns side by side with the selected benefits expanded.

Step 14   Select the **Back to Health Plan Search Results** button in the top Health Plan Search Criteria section to do another health plan comparison.

You have completed this scenario.
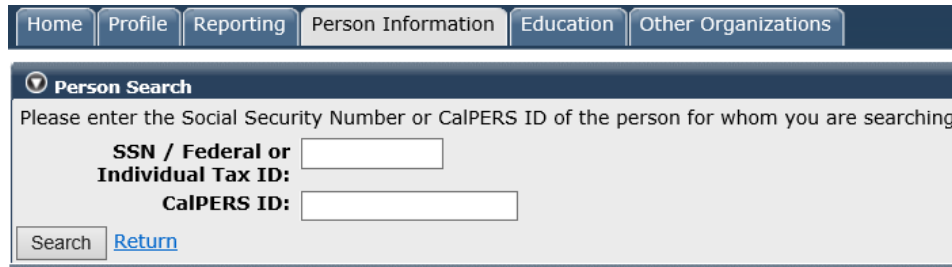
Scenario 5: Summary As-Of Date

You will verify health enrollment details on a new health enrollment with a future effective date. You can also use this to review retroactively cancelled enrollees.

Step Actions
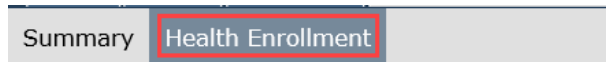
Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Complete the Person Search section.

Step 3	Select the **Search** button.
Step 4	Select the **Health Enrollment** local navigation link.

Step 5	Select the top link under the **Health Account** column.

Step 6	Select the **Summary As-Of Date** link under the left-side **Menu** folder.

Step 7	Enter the date of when the enrollee is covered or the transaction effective date.

Step 8	Select the **Search** button.

Step 9   Review the enrollment summary information based on the as-of date entered. Refer to scenario 1 for details.

Health Account Summary
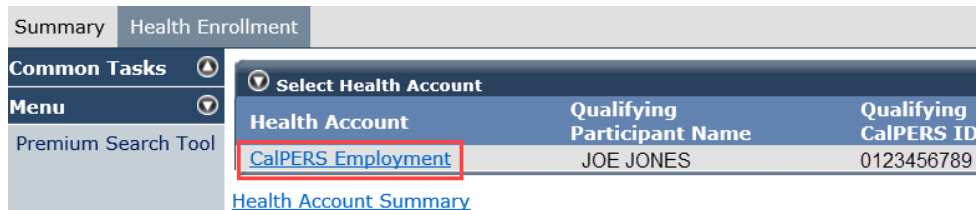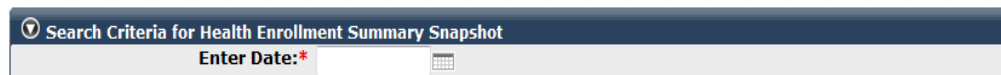
Health Account: CalPERS Employment	**Qualifying Participant Name:** Roelie Lee Sundotlen
Qualifying CalPERS ID: 0123456789	**Health Account Status:** Active Employment

Health Enrollment Information

Your health enrollment is based on the following information: **Health Enrollment Summary As Of:** 01/27/2023

Health Eligibility Information

Appointment ID: 27791120	**Medical Group:** 004 UPE, LOCAL 790 UNIT B C D
Employer CalPERS ID: 1262943822	**Permanent Separation Date:**
Employer: Agency Name	**Retirement Date:**
Division CalPERS ID: 1262943822	
Division: Agency Name	
Agency Type: Public Agency	**Health Benefit Appointment** Yes
	Same As Health Eligibility:
Qualifying CalPERS ID: 0123456789	

Enrollment Information

Affiliated Retirement System: PERS	**Health Eligibility Zip Code:** 94531
Financially Responsible CalPERS ID: 0123456789	**Zip Code Override Indicator:** No
Payroll Office Code: 5	**Override Zip Code Type:**
Affiliated Association:	**Region:** RG1
Health Account Status: Active Employment	**County:** Contra Costa

Covered Persons Summary   View More Actions»

Below are your covered persons for health.
Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
Roelie Sundotlen	11/11/1961	Self	NA	Basic	No	No
Jorge Beuningen	03/06/1961	Spouse	No	Basic	No	No
Elizabeth Liinamo	10/02/2005	Parent-Child	No	Basic	No	No
Liber Liinamo	12/13/1984	Natural Born Child	No	No	No	No

Health Plan Summary

Below is your plan and premium information.

Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	Kaiser Permanente California - Region 1 (5333)	Self/B and 2+/B	01/01/2020	$2,228.36

Future Health Events

Below are your health events that are effective at a future date.

Future Health Event Type	Future Health Event Reason	Future Effective Date	Health Notification
Add Dependent	Loss of Coverage	02/01/2023	
Dependent Address Change	Address Update	02/01/2023	

Pending Health Events

Below are requests that require CalPERS review.

Name	CalPERS ID	Pending Health Event Type	Pending Health Event Reason	Received Date	Status
No results found.					

You have completed this scenario.

Unit 4: Add Dependent Social Security Number

In this unit, you will learn how to add a dependent's Social Security number (SSN). You are required to add an SSN to a dependent within 90 days from their enrollment date.
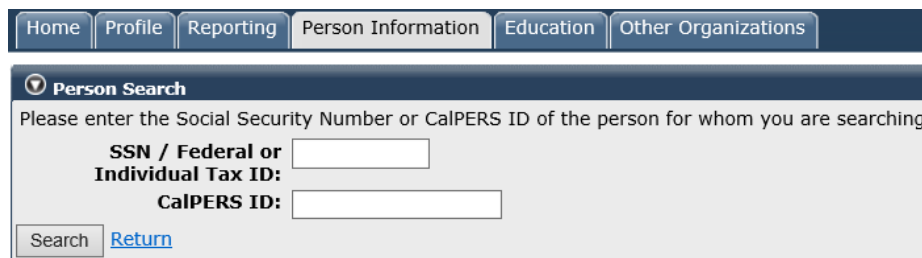
System Logic

Adding or correcting a dependent's SSN is the only demographic change you can make to an enrolled dependent. To correct their name, birth date, or gender, contact CalPERS.

Step Actions

Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Complete the Person Search section.

Step 3	Select the **Search** button.
Step 4	Select the **Health Enrollment** local navigation link.
Step 5	Select the first link (may display CalPERS or CalPERS Employment) under the Health Account column.
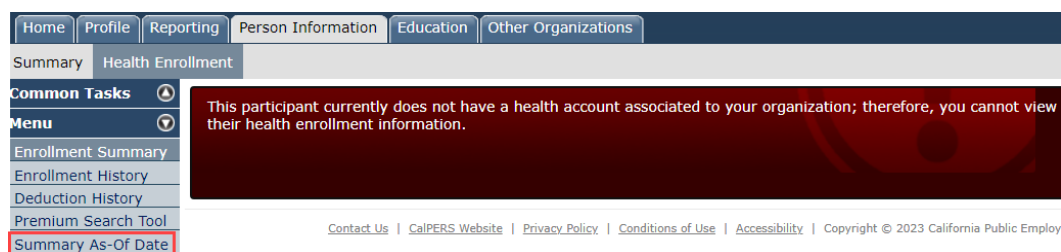
Step 6	Does the employee's profile page display?
	Yes: Skip to step 9.
	No: Select the **Summary As-Of Date** left-side link.

Step 7	Complete the Enter Date field with the date the employee is enrolled.
Step 8	Select the **Search** button.

Step 9	Within the Covered Persons Summary section, is the dependent listed? **Yes:** Skip to step 10. **No:** Within the Covered Persons Summary section, select the **View More Actions** link to display the full list of covered and formerly covered dependents.
Step 10	Select the **name** link for the dependent you want to update.
Step 11	Select the **edit** link next to the SSN/ITIN field.
Step 12	Add the SSN.
Step 13	Choose a verification document type.
Step 14	Select the **Save** button at the bottom right of the section. **You have completed this scenario.**
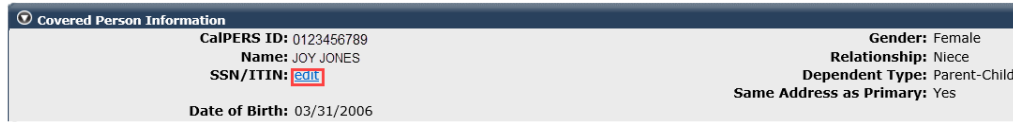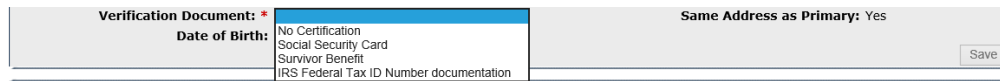
Unit 5: Health Reports

In this unit, you will learn how to run health reports to review new transactions, batch transactions (those that are automatically updated in myCalPERS), and other data.

For a full list of employer reports, refer to the [myCalPERS Employer Reports (Cognos) Catalog](#) page.

To learn more about Cognos (IBM software that retrieves data from myCalPERS and creates reports) functionality, refer to the [myCalPERS Employer Reports (Cognos) PDF](#) student guide.

Contents

Scenario 1: Employer Health Event Transaction Report

You will run the Employer Health Event Transaction Report to review transactions that are effective next month for your agency. It's recommended to run this report monthly.

Some reasons to run this report:

- Identify deleted 26-year-old children. Some state agencies use this information to delete the dependents from the employees' dental and vision benefits.
- Review transactions that were submitted online by your employees.
- Verify the enrollment information that you entered is correct.
- Public agencies and schools review the new transactions for their active and retired employees to reconcile their health statement.

System Logic

Wait to run this report until after the first three business days of the current month (26-year-old deletion batch completion time) if retrieving data for the following month.

Step Actions

Run Report

Step 1	From the homepage, select the Common Tasks folder from the left-side navigation.
Step 2	Select the **Reports** left-side link.
Step 3	From the left-side menu, select the Team content folder.
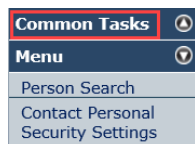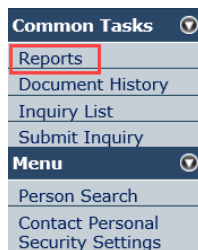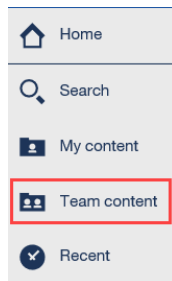
Step 4	Select the **PSR_REPORTS_ENV98** link.
Step 5	Select the **Employer Health Event Transaction Report** link.
Step 6	To review the transactions that will be effective next month, use the Effective Date Range criterion. For example, if the current month is December, enter 1/1/24 for the from and to dates.

Select Effective Date Range

The effective date is the date on which the transaction takes effect.

Effective From Date :

Effective To Date :

To retrieve other transaction data, you may use these options to run the report:

- For public agency or school billing reconciliation, use the Select Event Create Date Range From Date (day after the previous month's billing cutoff date) and To Date (statement billing cutoff date) fields.
- To display specific transactions by who/what made the updates, choose from the Created by User Type drop-down list:

  – **External Business Partner**: Employer (Employer processed the enrollment or confirmed an employee-submitted myCalPERS transaction)
  – **External Participant**: Employee or retiree
  – **Internal User**: CalPERS team member
  – **Service**: Automatically updated by the system, e.g., 26-year-old delete – Batch, Continued Elig: Retirement – Batch, etc.
  – **Blank**: No user (transaction was due to a data fix)

Step 7	Select the **Finish** button at bottom left.

Change Report Format

Step 8	Select the **Run as** icon in the top left corner of the page.
Step 9	Select a format. Run Excel data and Run CSV are recommended for filtering.

Run HTML

Run PDF

Run Excel

Run Excel data

Run CSV

Step 10	Select the spreadsheet at the bottom to open it.

Filter the Report

Step 11   Select the cell in the top left corner to highlight the entire spreadsheet.

	A	B	C	D	E	F	G	H	I
1	Subscriber	Subscriber	Subscriber	Enrollee N	Enrollee D	Subscriber	Subscriber	External P	Retiremen	Dep
2	1.3E+09	Javaloyes,	Active		Utrilla, Knu	########	PSR_TEST	xxx-xx-5995	PERS	Dor
3	1.86E+09	Cheun, Fid	Retired		Cheun, Fid	########	PSR_TEST	xxx-xx-4524	PERS	Self

Step 12   To widen all the cells, double click on the line between any two columns.

	A	B	C
1	Subscriber	Subscriber	Subscriber E
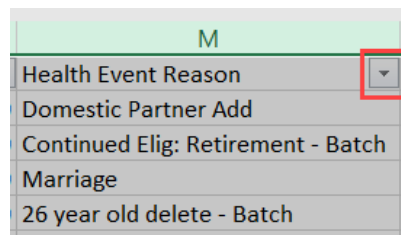
Step 13   From the ribbon, select Sort & Filter.

Σ AutoSum
Fill ˅
Clear ˅
Sort & Filter ˅
Find & Select ˅
Sensitivity ˅
Comments
Editing
Sensitivity

Step 14   Select Filter option.

▽ Filter
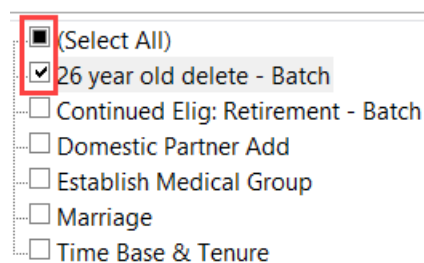
Step 15   Select the drop-down arrow in the Health Event Reason column.

M
Health Event Reason ▾
Domestic Partner Add
Continued Elig: Retirement - Batch
Marriage
26 year old delete - Batch

Step 16   Deselect the Select All check box, and then select the check box(es) for the specific transactions you want displayed like the 26-year-old deletions.

☑ (Select All)
☑ 26 year old delete - Batch
☐ Continued Elig: Retirement - Batch
☐ Domestic Partner Add
☐ Establish Medical Group
☐ Marriage
☐ Time Base & Tenure

Step 17   Select the **OK** button.

You have completed this scenario.

Scenario 2: Employer Health Enrollee Report

You will run the Employer Health Enrollee Report to display everyone who is enrolled as of a certain date. This includes all dependents and those enrolled on direct pay and COBRA.

Some other benefits to this report:

- Review the Age 26 Cancel Date, Medically Disabled Dependent Certification End Date, and Parent-Child Relationship Certification End Date columns to identify the children that will be deleted or who may need to be recertified.
- If the Enrollee SSN column is blank, add the dependent's SSN in myCalPERS (refer to unit 4).
- If the Mailing Undeliverable Address Indicator column has a Y, it means CalPERS correspondence to the employee got returned. You may need to update an employee's address, so the correct one is reflected in myCalPERS.

Step Actions

Run Report

Step 1	From the homepage, select **Common Tasks** from the left-side navigation.
Step 2	Select **Reports**.
Step 3	From the left-side navigation, select **Team content**.
Step 4	Select the **PSR_REPORTS_ENV98** link.
Step 5	Select the **Employer Health Enrollee Report-Ext** link.
Step 6	To review everyone who is currently enrolled, don't change the As Of Date field.
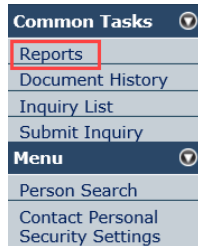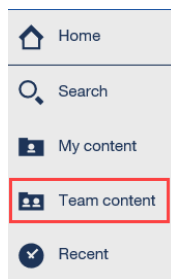
Step 7	Select the **Finish** button.

Change Report Format

Step 8	Select the **Run as** icon in the top left corner of the page.

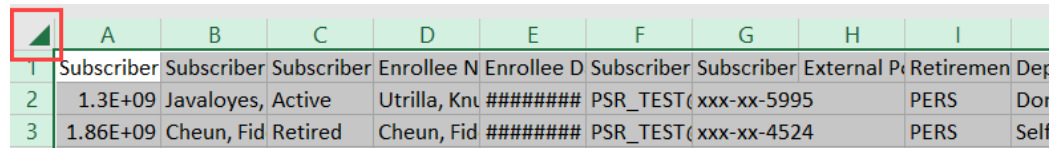| Step 9	Select a format. Run Excel data and Run CSV are recommended for filtering.

Step 10	Select the spreadsheet at the bottom to open it.

Filter the Report

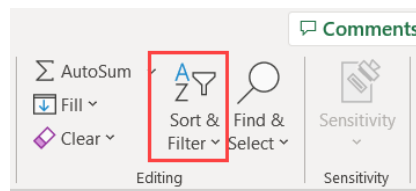| Step 11	Select the cell in the top left corner to highlight the entire spreadsheet.

Step 12	To widen the cells for the entire sheet, double click on the line in between any two columns.
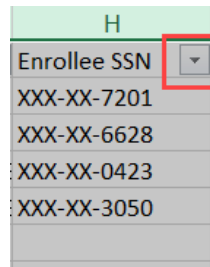
Step 13	From the ribbon, select the Sort & Filter option.
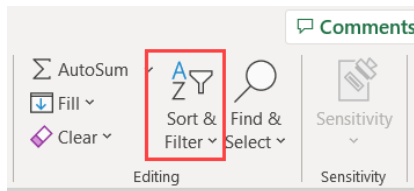
Step 14	Select Filter option.

Step 15   Select the drop-down arrow in one or more column(s).

H	
Enrollee SSN	▾
XXX-XX-7201	
XXX-XX-6628	
XXX-XX-0423	
XXX-XX-3050	

Step 16   Deselect the Select All check box, and then select the check box if you only want to certain information like all dependents with missing SSNs.

Text Filters

Search

- ☐ XXX-XX-9592
- ☐ XXX-XX-9669
- ☐ XXX-XX-9819
- ☐ XXX-XX-9835
- ☐ XXX-XX-9846
- ☐ XXX-XX-9934
- ☐ XXX-XX-9959
- ☐ XXX-XX-9995
- ☑ (Blanks)

Step 17   Select the **OK** button.

You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](#) at www.calpers.ca.gov.

- [Business Rules & myCalPERS Classes](#)
  Pathway: CalPERS website > Employers > I Want To…: Attend Training & Events > Business Rules & myCalPERS Classes
- [myCalPERS Student Guides & Resources](#)
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides
- [myCalPERS Health Billing Reconciliation (PDF)](#)
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides > Health > myCalPERS Health Billing Reconciliation (PDF)
- [myCalPERS Health Aid: Health Event Types and Reasons for Employers (PDF)](#)
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides > **Health** > myCalPERS Health Aid: Health Event Types and Reasons for Employers (PDF)
- [Frequently Asked Questions (FAQ)](#)
  Pathway: CalPERS website > About > Resources: Questions, Comments, & Complaints > Frequently Asked Questions
- [Policies & Procedures](#)
  Pathway: CalPERS website > Employers > Policies & Procedures
- [myCalPERS Technical Requirements](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [Public Agency & Schools Health Benefits Guide (PDF)](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Health Benefits Guide (PDF)
- [State Health Benefits Guide (PDF)](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Health Benefits Guide (PDF)
- [Health Program Guide (HBD-120) (PDF)](#)
  Pathway: CalPERS website > In the search box at top right, enter HBD-120 > **CalPERS Health Program Guide** link
- [Circular Letters](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law (PERL)](#)
  Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)

- [myCalPERS Employer Reports (Cognos) Catalog](#)

  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

  – CalPERS Health Subscriber Out of Service Population – Employer

  – Chancellor's Office Parent-Child Recertification Report CSU Campuses

  – Dental Retirees OE Report – CalHR

  – Dental Retirees OE Report – CSU

  – Dependent Enrollment Report

  – Employer Health Enrollee Report - Ext

  – Employer Health Event Notification Report

  – Employer Health Event Transaction Report

  Note: The 26-year-old deletion batch runs the first three business days of the month.

  – Health Plan Statement Employer Report

  – Health Subscriber PA Billing Report

  – Health ZIP Code Yes-No Report - HMO for Public Agency/School

  – Health ZIP Code Yes-No Report - PPO for Public Agency/School

  – Health ZIP Code Yes-No Report - State/CSU

  – Non-PERS Health Eligibility and Appointment Data Submission Report

  – Open Enrollment Health Plan Changes Report

  – Parent-Child Relationship Dependent with Expiring Certification Report

  – PERS Retiree List Report

  – State Active Health Enrollment and SCO Health Deduction Discrepancy Report

  Reports run via the myCalPERS pages (not the **Reports** left-side link):

  For state agencies:

  – Dependent Verification End Date Employer Report

  – Dependent Verification Health Event Employer Report

  – Dependent Verification with Past Due or No End Dates Active Health Report

  For public agencies, schools, and non-central state agencies:

  – Monthly Employer Billing Roster Report

  Note: This report includes subscriber addresses and death dates.

CalPERS Contacts

Email

- To contact [employer educators](#) for 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 [order health publications](#), email **ossd_public_agency_requests_publication_fulfillment@calpers.ca.gov**.
- To [request a custom Cognos health report](#), email **hamd_data_services@calpers.ca.gov**. It can take 6-10 weeks to fulfill each request. Additional information and approval may be required.

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.

- 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

You can 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. Refer to the [Introduction to myCalPERS for Business Partners (PDF)](#) student guide for details.