my|CalPERS
Readiness Guide

for

Employers

August 2011

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INTRODUCTION

The new Web-based my|CalPERS system is scheduled to launch in September 2011. The Public Employer Readiness Team (PERT) has prepared this *my|CalPERS Readiness Guide* as a tool to help your organization assess its readiness to conduct business utilizing the new my|CalPERS system. This document is one of several tools, which will help you prepare your systems, business processes, and staff to successfully transition to the new system.

This guide includes the educational and technical steps for both online reporters and file reporters. PERT recognizes that some employers, depending on their business needs, may be both a file reporter and an online reporter. Therefore, this guide includes the readiness steps for both reporting types.

For employers who are also Direct Authorization Vendors an additional guide is available that outlines the readiness steps specific to Direct Authorization Vendors.

2. ONLINE REPORTERS

The following information pertains specifically to employers who will provide their business data to my|CalPERS using the online reporting method.

2.1 Educational Readiness

PERT continues to provide readiness support for all of its employers. Significant previous educational efforts to ensure employers are ready have included: assisting employers select the reporting method that best suits their organization (August – October 2008) and providing information regarding changes in business policies and procedures (June – September 2009). Please review the *Get Ready Overview* document, which can be found in the PERT area of CalPERS On-Line at http://www.calpers.ca.gov/pert, for a refresher on what you need to know to get ready for my|CalPERS.

The following table summarizes the current and upcoming educational readiness steps for online reporters:

√	my|CalPERS EDUCATION STEPS	APPROXIMATE TIMEFRAME
☐	**Identify System Access Administrator(s) and understand their role and responsibilities in my|CalPERS**	**March – August 2011**
☐	**Review the *my|CalPERS System Conversion Impacts for Employers* document**	**April – August 2011**
☐	**Register to attend my|CalPERS user training**	**May – November 2011**
☐	**Attend my|CalPERS user training**	**June – November 2011**

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2.2   Technical Readiness

Online reporters do not need to submit FTP files or upload files directly into my|CalPERS; therefore, there are few technical readiness steps. The key technical steps involve ensuring system users are able to log in to the new my|CalPERS system upon launch to enter or retrieve information.

The following table outlines the key technical steps required to be ready to use the new my|CalPERS system upon launch:

√	my|CalPERS TECHNICAL STEPS	APPROXIMATE TIMEFRAME
☐	**Successfully log in to my|CalPERS**	**May – July 2011, and September 2011 - ongoing**
☐	**Successfully set up system users and assign user roles**	**May – July 2011, and September 2011 - ongoing**
☐	**Review and prepare for System Conversion (Cutover) activity freeze dates**	**August - September 2011**

3. FILE REPORTERS

The following information pertains specifically to employers who will provide their business data to my|CalPERS using an electronic method (File Upload or FTP).

3.1 Educational Readiness

Significant previous educational efforts to ensure employers are ready have included: assisting employers select the reporting method that best suits their organization (August – October 2008), providing a technical overview of the payroll file (March – May 2009), and delivering information regarding changes in business policies and procedures (June – September 2009). Please review the *Get Ready Overview* document, which can be found in the PERT area of CalPERS On-Line at http://www.calpers.ca.gov/pert, for a refresher on what you need to know to get ready for my|CalPERS.

The following table summarizes the current and upcoming educational readiness steps for online reporters:

√	my|CalPERS EDUCATION STEPS	APPROXIMATE TIMEFRAME
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☐	**Review the *my|CalPERS System Conversion Impacts for Employers* document**	**April – August 2011**
☐	**Register to attend my|CalPERS user training**	**May – November 2011**
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3.2 Technical Readiness

Technical Readiness refers to the technical steps that are required to ensure that an employer is able to connect to my|CalPERS and submit correctly formatted files.

PERT has many resources available at http://www.calpers.ca.gov/pert to help you with technical readiness. The online Technical Toolkit outlines the required technical elements and specifications for file submission to the new my|CalPERS system. In addition to this guide, CalPERS has produced a *my|CalPERS File Testing Overview for Employers* document, which provides in-depth technical detail about the requirements to successfully submit data files to CalPERS. You can also access the *File Readiness Alerts Page*, which provides the latest information regarding file testing.

The following table outlines the key technical steps required to use the new my|CalPERS system upon launch.

√	my|CalPERS TECHNICAL STEPS	APPROXIMATE TIMEFRAME
☐	**Assess impact on internal systems**	**Ongoing**
☐	**Make necessary changes to internal system**	**Ongoing**
☐	**Complete System Access Administrator activities for testing**	**May – August 2011**
☐	**Successfully test connectivity with CalPERS (if FTP reporter)**	**May – September 2011**
☐	**Successfully transfer and validate test file**	**May – September 2011**
☐	**Receive notification of errors in test file (exception handling)**	**May – September 2011**
☐	**Resolve and correct data errors in test environment**	**May – September 2011**
☐	**Load and verify Seed Data (test and production)**	**August – September 2011**
☐	**Successfully set up system users and assign user roles**	**May – July 2011, and September - ongoing**
☐	**Review and prepare for System Conversion (Cutover) activity freeze dates**	**September 2011**

4.   ADDITIONAL ASSISTANCE

PERT is dedicated to working with employers throughout this process and looks forward to addressing your questions and concerns about the transition.

For additional information, please see the PERT area of CalPERS On-Line at www.calpers.ca.gov/pert. If you have questions, please contact the CalPERS Customer Contact Center by calling our toll free number **888 CalPERS** (or **888**-225-7377).