myCalPERS System Access Administration

Student Guide

December 2, 2023

CalPERS

Introduction

This guide will assist system access administrators (SAA) with their responsibility of managing their agency's contacts, myCalPERS system access, and agency contact information.

Business With CalPERS

To conduct business using myCalPERS, your organization must designate at least one SAA to manage system access for your agency. If the SAA is unavailable (e.g., left your agency, on vacation, etc.), call CalPERS at **888 CalPERS** (or **888**-225-7377) for assistance.

Disclaimer

As a security safeguard, 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.

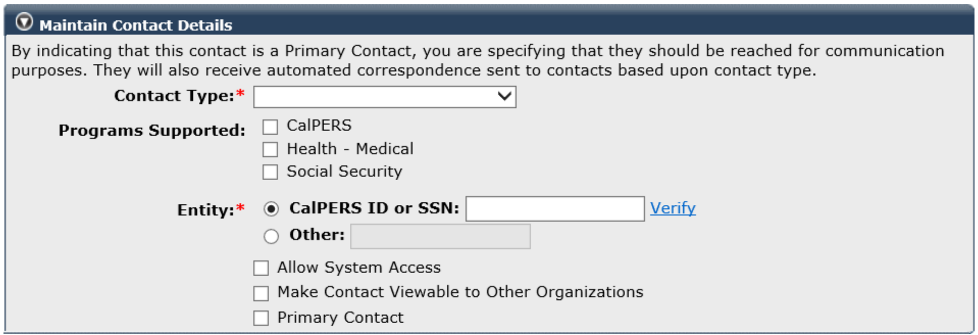
Training Opportunities

Prior to taking a myCalPERS training, new users should review the Introduction to myCalPERS for Business Partners (PDF) student guide.

Contents

Terms and Definitions

The terms and definitions outlined in this section are used within this guide. Review each term along with the definition to properly add contacts in myCalPERS.



Contact Type

This identifies the duties, position titles, and/or program areas relating to a contact. If a contact serves multiple functions, add the contact for each contact type. This does not determine the access the contact has within myCalPERS. We may use the contact type to communicate with a specific area of your agency regarding CalPERS business.

Programs Supported

This identifies the programs the individual supports. Selecting these do not grant system access.

Allow System Access

A contact may be granted system access allowing them to log in to myCalPERS to conduct business for your agency and contact CalPERS regarding agency or member-specific information.

Make Contact Viewable to Other Organizations

This feature allows you to share your agency's contact information with other agencies via the **Other Organizations** global navigation tab.

Primary Contact

This person is designated to receive direct communication from CalPERS related to their contact type. When a primary contact isn't designated, CalPERS will send the communication to the General primary contact. If there is no General primary contact designated, CalPERS will send the communication to the agency's address on file.

It is strongly recommended that a primary contact be selected for each contact type applicable to the agency to ensure that communications are received in a timely manner. Only one person can be identified as the primary contact for each contact type.

Preferred Communication

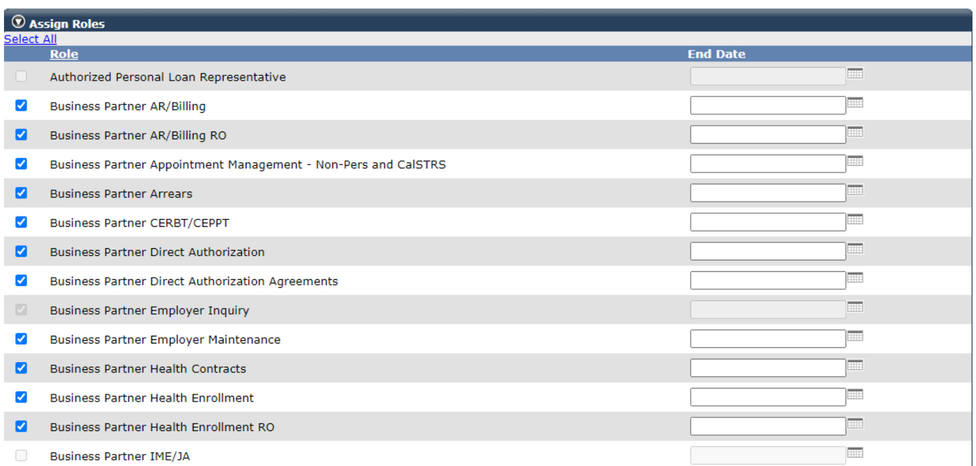
The primary contact will receive notifications from CalPERS based on their preferred communication method in myCalPERS:

- **Email:** A notification will be sent advising the contact that there is a new document in myCalPERS to review. The document can be located by logging in to myCalPERS and selecting Document History from the left-side navigation under Common Tasks.
- **Mail:** A notification will be sent via USPS to the address listed for the contact. A copy will also be saved in your agency's myCalPERS document history.

Roles

Access to information and the ability to process transactions are based on the user roles assigned to the contact. Roles should be assigned based on the duties the contact will be performing for your agency. Only user roles specific to your agency's contracts are available.

A complete list of roles can be found in the myCalPERS System Privileges for Business Partner Roles (PDF) supplemental guide.



End Dates

The optional End Date field allows you to grant a user a role for a known length of time. If an end date is entered, the role will be granted until the end date. If the End Date field is left blank, the role is granted until an end date is entered, the user role is unchecked, or their account is deactivated or locked.

Unit 1: Add New Contacts

Scenario: Add a Contact

You have a new team member who needs to access myCalPERS for their job duties. You will add them as a contact with system access.

Security Agreement

Safeguard your agency and employees' confidential data by creating a unique login for each employee needing myCalPERS access. It is a violation of the CalPERS Security Agreement to share log-in information between individuals. Review CalPERS website's Conditions of Use and Privacy Policy for additional information.

System Logic

- For a contact to have system access, their Social Security number or CalPERS ID must be entered.
- For mailing addresses:

  – Select from the Existing Business Partner Address drop-down list.

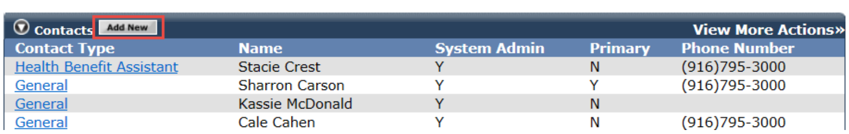
  – Select Mailing or Physical to ensure the contact's address is updated if your agency's address is updated.

  – Select None to manually enter an address. These addresses must be manually maintained to ensure CalPERS communications are received timely when the preferred method of communication is mail.

Step Actions

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

Step 2 In the Contacts section, select the **Add New** button.



Step 3 In the Maintain Contact Details section, select from the **Contact Type** drop-down list.

Step 4 Select the **Programs Supported** check box(es).

Step 5 Enter the new contact’s CalPERS ID or Social Security number.

Step 6 Select the **Verify** link.

Step 7 Was the contact found in myCalPERS?

Yes: Skip to step 11.

No: Continue to step 8.

Step 8 Select the **Add Person** link.

Step 9 Complete the Person Details section.

Step 10 Select the **Save** button.

Step 11 Is the contact being granted system access?

Yes: Continue to step 12.

No: Skip to step 13.

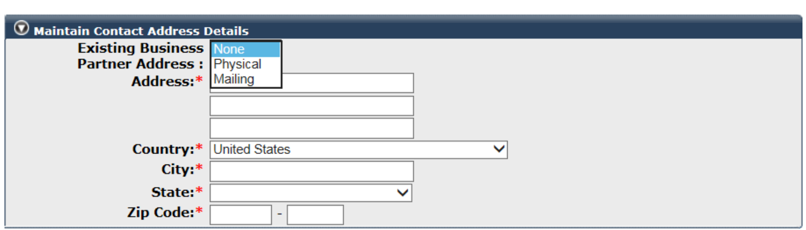
Step 12 Select the **Allow System Access** check box.

Step 13 If applicable, select the **Make Contact Viewable to Other Organizations** check box.

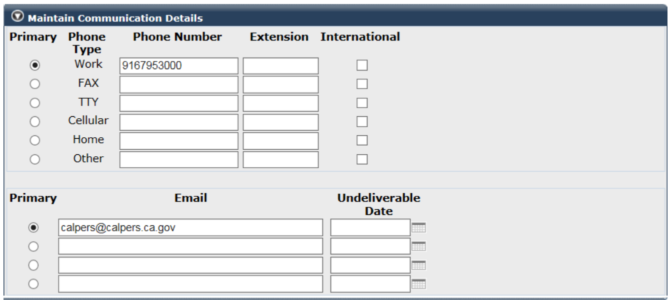
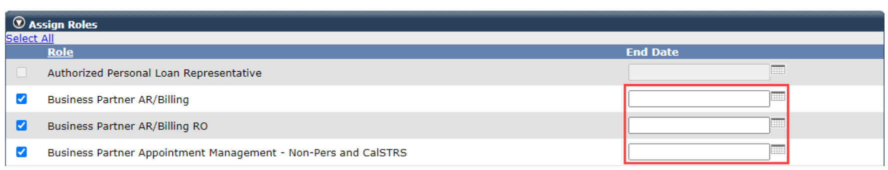
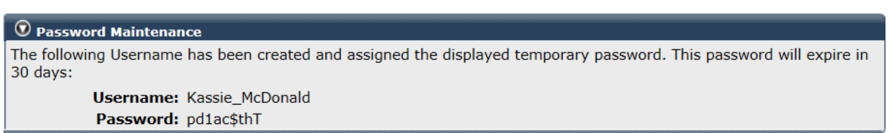
Step 14 If applicable, select the **Primary Contact** check box.

Step 15 In the Maintain Preferred Communication Details section, select the **Preferred Communication** method from the drop-down list.

Step 16 In the Maintain Contact Address Details section, select from the **Existing Business Partner Address** drop-down list.



Step 17 Enter the contact’s phone number(s) and email address(es).

Step 18	Select the **Primary** radio button for one phone number and email address. 
Step 19	Select the **Save** button.
Step 20	Did you check the **Allow System Access** check box in step 12? **Yes**: Continue to step 21. **No**: **You've completed this scenario.**
Step 21	In the Assigned Username section, enter a username for this contact.
Step 22	In the Assign Roles section, select the check box(es) for the roles that apply to the contact.
Step 23	Do any of the selected user roles need to have an assigned end date? **Yes**: Continue to step 24. **No**: Skip to step 25.
Step 24	Complete the End Date field(s). 
Step 25	Select the **Save** button.
Step 26	Provide the username and temporary password to the contact. 
Step 27	Select the **Continue** button. **You have completed this scenario.**

Unit 2: Maintain Existing Contacts

It is important to maintain your contacts to ensure the accuracy and security of information delivered to and from CalPERS. When your agency contacts are kept up to date, it prevents unauthorized access to agency and employee information in myCalPERS and assures your agency is receiving proper communication from CalPERS.

Contents

Scenario 1: Grant System Access

You will grant system access to an existing contact.

Step Actions

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

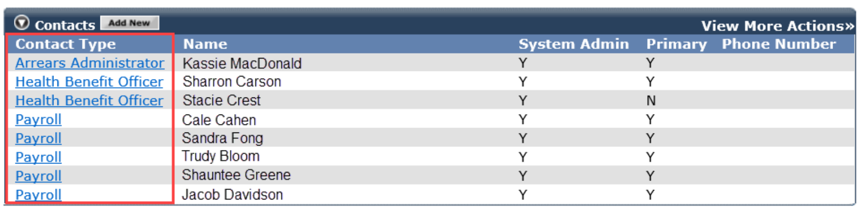
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

Step 3 Select the **View More Actions** link.

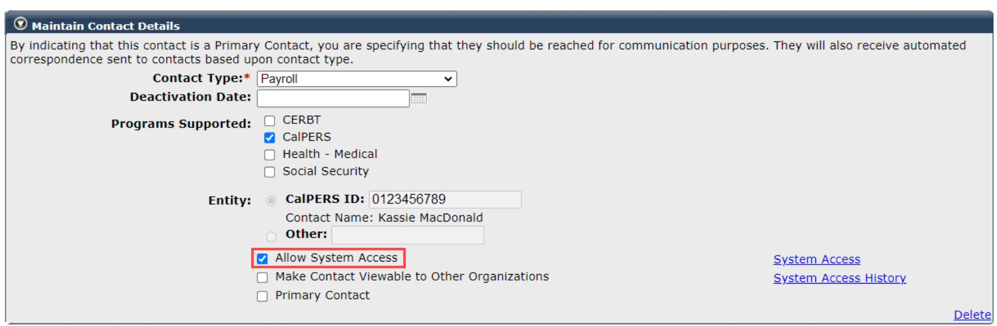
Step 4 Select the **Contact Type** link of the contact.



Contacts Add New View More Actions»

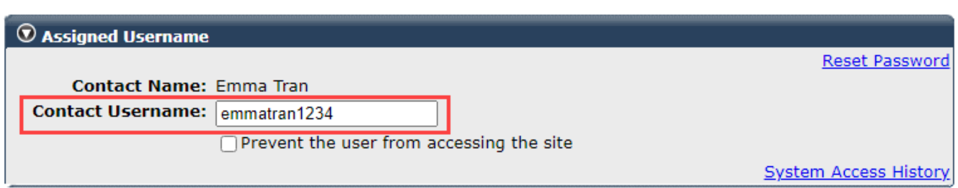
Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 In the Maintain Contact Details section, select the **Allow System Access** check box.

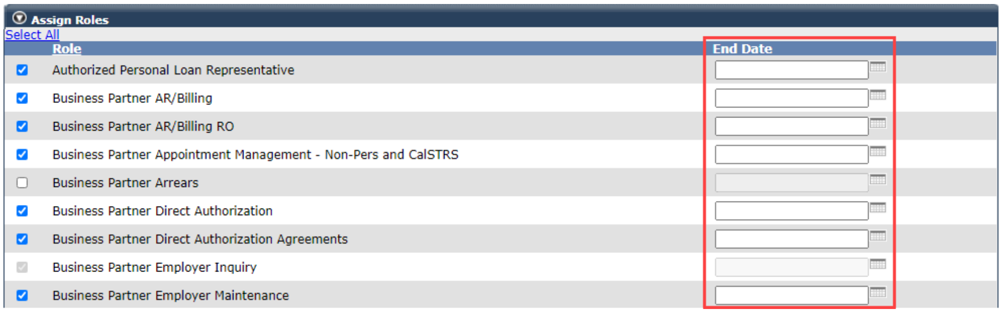


Step 6 In the Maintain Contact Details section, select the **System Access** link.

Step 7 In the Assigned Username section, enter a username for this contact.



Step 8 In the Assign Roles section, select the appropriate check box(es) to assign access roles to the contact.

Step 9	Do any of the selected user roles need to have an assigned end date? **Yes**: Continue to step 10. **No**: Skip to step 11.
Step 10	Complete the End Date field(s). 
Step 11	Select the **Save** button.
Step 12	Provide the username and temporary password to the contact.
Step 13	Select the **Continue** button. **You have completed this scenario.**

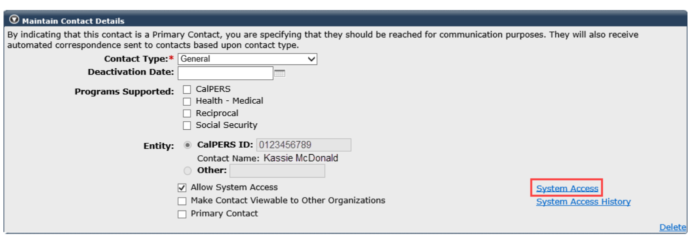
Scenario 2: Update System Access

A contact has had a change in duties and needs additional myCalPERS access. You will update their system access.

System Logic

If the contact is logged in at the time their system access is updated, they will need to log out and log in again to use the additional access.

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Skip to step 4. **No**: Continue to step 3.
Step 3	Select the **View More Actions** link.
Step 4	Select the **Contact Type** link of the contact.
Step 5	In the Maintain Contact Details section, select the **System Access** link. 
Step 6	In the Assign Roles section, select and/or deselect the appropriate check box(es).
Step 7	Do the user role(s) need to have end date(s) updated? **Yes**: Continue to step 8. **No**: Skip to step 9.
Step 8	Complete the End Date field(s).
Step 9	Select the **Save** button.
Step 10	Scroll to the bottom of the page and select the **Save** button again. **You have completed this scenario.**

Scenario 3: Add Additional System Access Administrator

Your agency only has one SAA. You will designate an additional SAA for your agency.

Step Actions

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

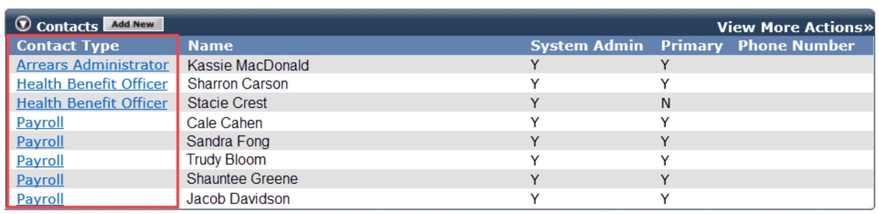
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

Step 3 Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.



Step 5 In the Maintain Contact Details section, select the **System Access** link.

Step 6 In the Assign Roles section, select the **System Access Administrator** check box.

Step 7 Does the SAA user role need an end date?

Yes: Continue to step 8.

No: Skip to step 9.

Step 8 Complete the End Date field(s).

Step 9 Select the **Save** button.

Step 10 Scroll to the bottom of the page and select the **Save** button again.

You have completed this scenario.

Scenario 4: Designate a New Primary Contact

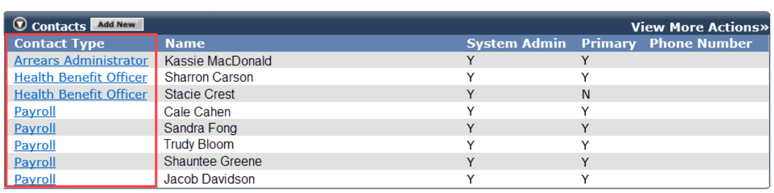
A primary contact has left your agency. You will designate an existing contact as the new primary contact.

System Logic

- Only one contact can be assigned as the primary contact for each contact type.
- Each contact type in use should have a primary contact designated.
- Once a new primary contact is designated, the system will remove the primary contact status from the previous primary contact.
- Primary contacts are not required to have system access. If they do not have system access, their preferred communication should be *mail* (see unit 2, scenario 7).

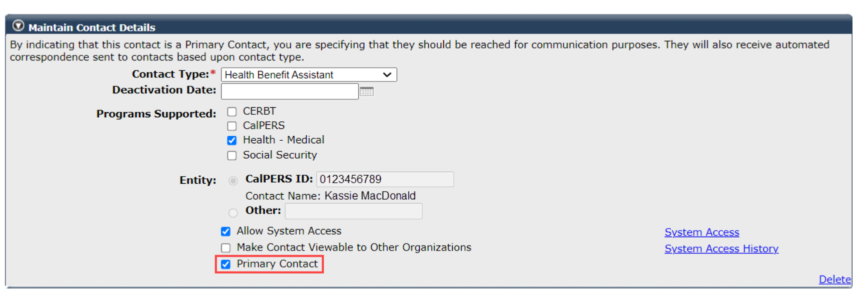
Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Skip to step 4. **No**: Continue to step 3.
Step 3	Select the **View More Actions** link.
Step 4	Select the **Contact Type** link of the contact.



Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5	In the Maintain Contact Details section, check the **Primary Contact** check box.



Step 6	Select the **Save** button. **You have completed this scenario.**

Scenario 5: Update Contact Type

Due to a change in duties, you will update the contact type of an existing contact.

Step Actions

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

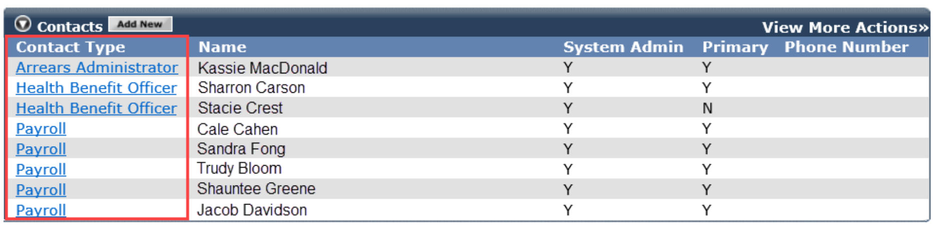
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

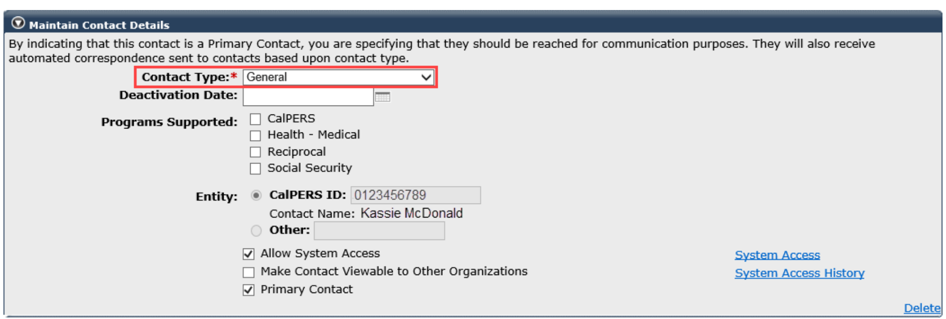
Step 3 Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.


Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 In the Maintain Contact Details section, select from the **Contact Type** drop-down list.



Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 6: Update Preferred Communication Method

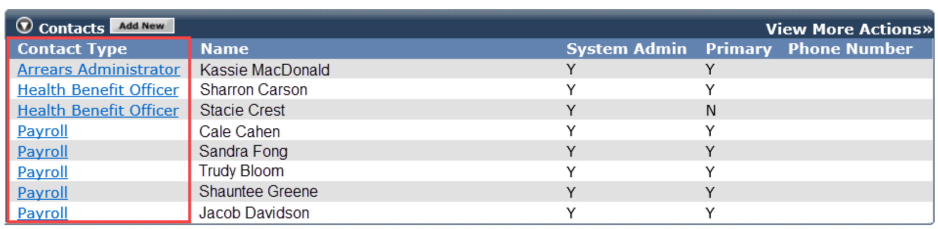
You will update the method that CalPERS communicates with the contact.

System Logic

The preferred method of communication is used when CalPERS sends notifications to primary contacts for your agency. Review the Terms & Definitions section at the beginning of this student guide for additional information.

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Skip to step 4. **No**: Continue to step 3.
Step 3	Select the **View More Actions** link.
Step 4	Select the **Contact Type** link of the contact.



Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5	In the Maintain Preferred Communication Details section, select from the **Preferred Communication** drop-down list.

Step 6	Select the **Save** button. **You have completed this scenario.**

Scenario 7: Reset Password

A contact has forgotten their password. You will reset their password.

System Logic

Passwords expire every 90 calendar days.

Step Actions

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

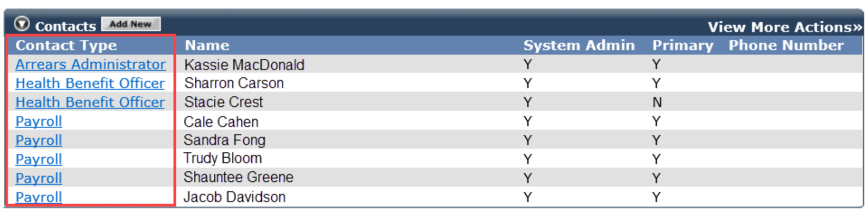
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

Step 3 Select the **View More Actions** link.

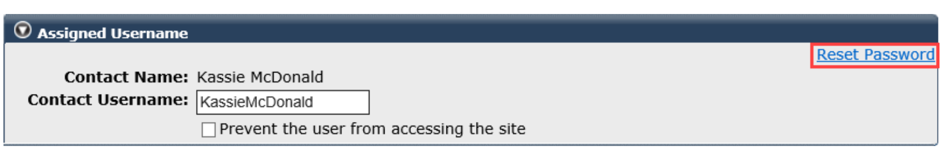
Step 4 Select the **Contact Type** link of the contact.



Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 In the Maintain Contact Details section, select the **System Access** link.

Step 6 In the Assigned Username section, select the **Reset Password** link.



Step 7 Provide the contact with their temporary password.

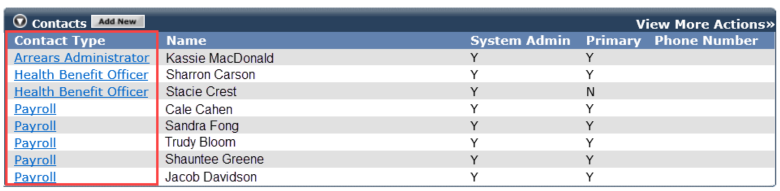
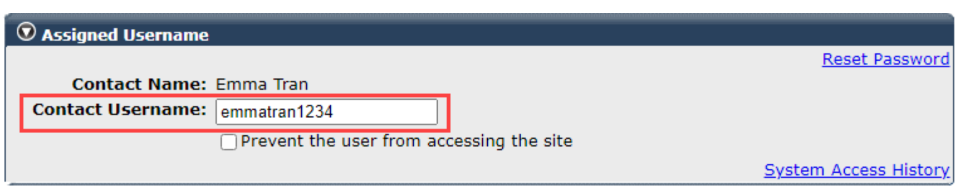
Step 8 Select the **Continue** button.

You have completed this scenario.

Scenario 8: Update Username

A contact recently changed their name. Per their request, you will update their username.

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Skip to step 4. **No**: Continue to step 3.
Step 3	Select the **View More Actions** link.
Step 4	Select the **Contact Type** link of the contact. 
Step 5	In the Maintain Contact Details section, select the **System Access** link. 
Step 6	In the Assigned Username section, enter a new username in the Contact Username field. 
Step 7	Select the **Save** button.
Step 8	Scroll to the bottom of the page and select the **Save** button again. **You have completed this scenario.**

Scenario 9: Deactivate Contact

One of your agency contacts permanently separated. You will deactivate the account.

You must deactivate contacts once they leave your agency, go on a leave of absence, or when they should no longer be a contact for your agency. By deactivating a contact, they will no longer have access to myCalPERS or be able to contact CalPERS for member and employer-specific information.

System Logic

- If the contact is listed under multiple contact types, you must deactivate them separately under all contact types.
- If the contact is a primary contact, you must designate a new primary contact (see unit 2, scenario 5).
- If the current date is used as the deactivation date, the contact's access will deactivate at midnight. If a future date is used, their access will deactivate at midnight on the morning of the date entered.

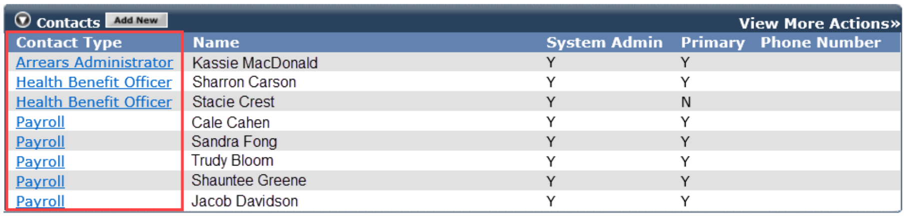
Automatic Deactivation

- Contacts will be deactivated via a batch process upon permanent separation, retirement, or agency transfer (state agencies only) effective on either the effective date of the change in appointment or the date the change was entered, whichever is later.
- Once a contact has been automatically deactivated, access will not reactivate upon retroactive changes to appointment status. If appointment changes are completed prior to the effective date of the automatic deactivation, access will not be deactivated.
- Contacts without a retirement appointment under your agency must be deactivated manually. This includes health-only appointments, non-contributory appointments, and third-party contacts.

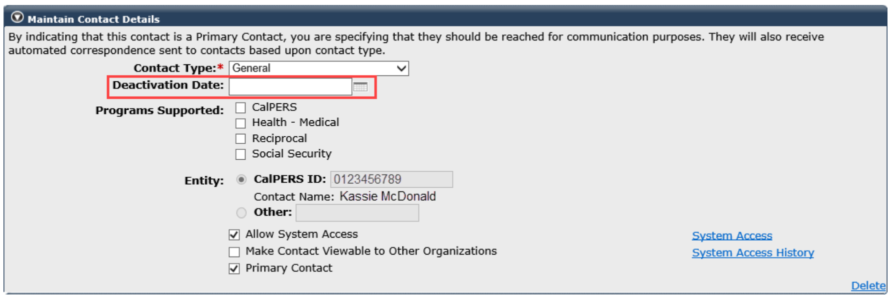
Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Skip to step 4. **No**: Continue to step 3.
Step 3	Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.



Step 5 In the Maintain Contact Details section, complete the Deactivation Date field.



Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 10: Reactivate Contact

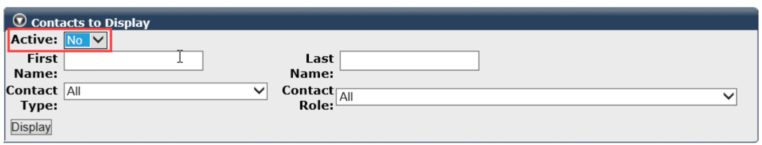
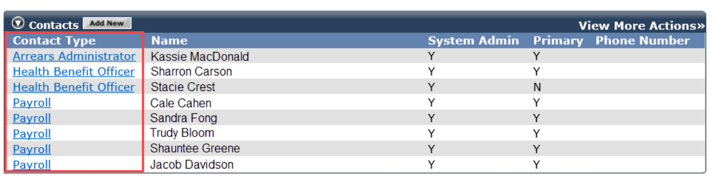
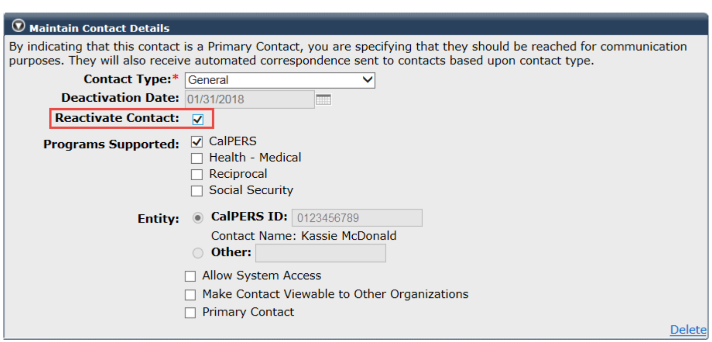
A contact returned from a leave of absence. You will reactivate the contact.

System Logic

If system access is being granted upon reactivation, the same user roles and username will be assigned to the contact. Upon reactivating the account:

1. Review and update user roles
2. Reset the contact's password (see unit 2, scenario 13)
3. Provide the contact with their username and temporary password

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, select the **View More Actions** link.
Step 3	In the Contacts to Display section, select **No** from the Active drop-down list. 
Step 4	Select the **Display** button.
Step 5	In the Contacts section, select the **Contact Type** link for the contact. 
Step 6	Select the **Reactivate Contact** check box. 

Step 7	Does the contact need system access? **Yes**: Continue to step 8. **No**: Skip to step 18.
Step 8	Select the **Allow System Access** check box.
Step 9	Select the **System Access** link.
Step 10	Did the contact have system access prior to being deactivated? **Yes**: Skip to step 12. **No**: Continue to step 11.
Step 11	In the Assigned Username section, enter a username for this contact. 
Step 12	In the Assign Roles section, review the assigned roles.
Step 13	Does the contact need their access updated? **Yes**: Continue to step 14. **No**: Skip to step 18.
Step 14	In the Assign Roles section, select and/or deselect the appropriate check box(es).
Step 15	Do any of the user roles need to have an end date updated? **Yes**: Continue to step 16. **No**: Skip to step 17.
Step 16	Complete the End Date field(s).
Step 17	Select the **Save** button.
Step 18	In the Maintain Contact Details section, update the appropriate check box(es).
Step 19	Select the **Save** button.
Step 20	Do you need to reset the contact's password? **Yes**: See unit 2, scenario 9. **No**: **You have completed this scenario.**

Scenario 11: Delete Contact

You added a contact to the wrong person as a myCalPERS contact. You will delete the contact.

System Logic

- Deleting contacts should only be used when a contact should not have been added.
- Deactivation should be used when a contact permanently separated from your agency or goes on a leave of absence (see unit 2, scenario 11).
- Once a contact's account is deleted, all history of their access is removed from myCalPERS.

Step Actions

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

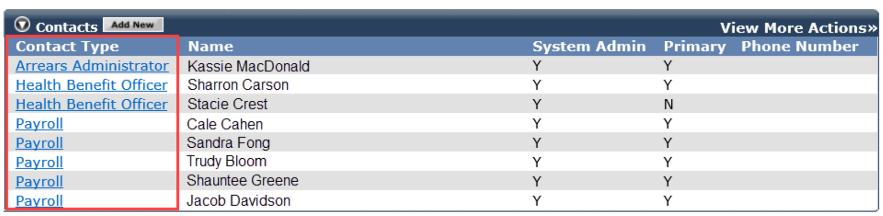
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

Step 3 Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.



Step 5 In the Maintain Contact Details section, select the **Delete** link.

Step 6 In the Confirm Deletion dialogue box, select the **OK** button.

You have completed this scenario.

Scenario 12: Review System Access History

You will review a contact’s system access and assigned role history.

The System Access History section displays the history of the contact’s system access, including creation, deactivation, and reactivation.

The Assigned Role History section displays the history of the contact’s user roles.

Step Actions

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

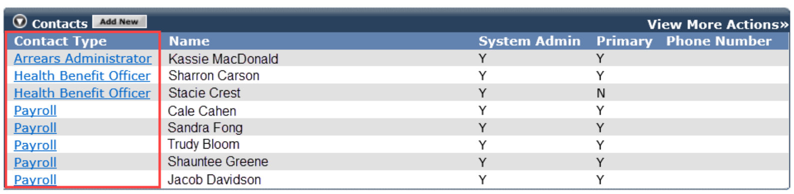
Step 2 Within the Contacts section, is the contact listed?

Yes: Skip to step 4.

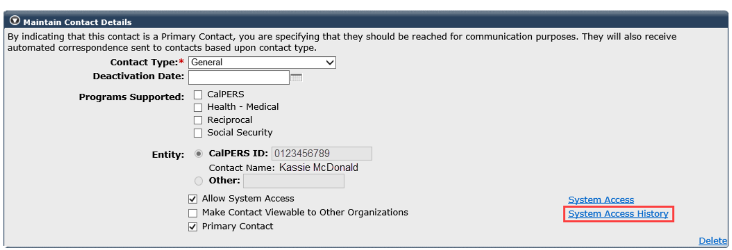
No: Continue to step 3

Step 3 Select the **View More Actions** link.

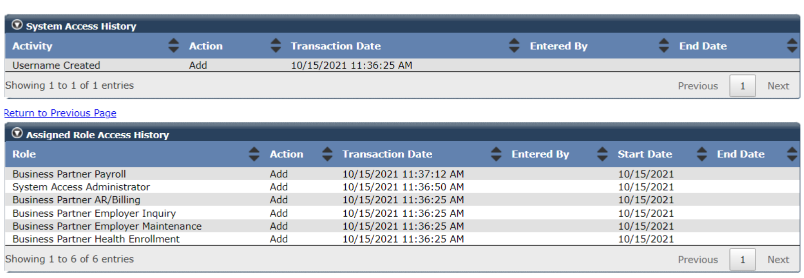
Step 4 Select the **Contact Type** link of the contact.



Step 5 In the Maintain Contact Details section, select the **System Access History** link.



Step 6 Review the System Access History and Assigned Role Access History sections.



You have completed this scenario.

Unit 3: Maintain Agency Information

To receive communications from CalPERS, ensure your agency's contact information in myCalPERS is kept current. This includes agency address(es), contact number(s), and email address(es).

Contents

Scenario 1: Update Agency Address

Your agency has moved. You will update the address in myCalPERS.

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Summary section, select either the **Physical** or **Mailing** link. 
Step 3	Update or correct the information contained in the Maintain Address Details section.
Step 4	Select the **Save** button.
Step 5	Is the U.S. Postal Service Match correct? **Yes**: Skip to step 7. **No**: Continue to step 6.
Step 6	Select the **Entered Address** radio button.
Step 7	Select the **Confirm** button.
Step 8	Select the **Save** button. **You have completed this scenario.**

Scenario 2: Update Agency Phone Number and Email Address

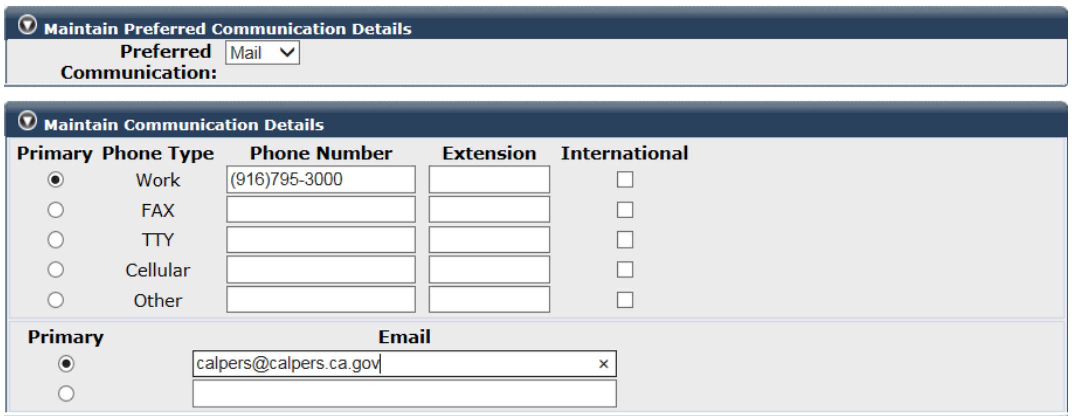
You will update the primary phone number and email address that displays on your agency's profile page in myCalPERS.

Step Actions

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

Step 2 In the Summary section, select the **Communication Information** link.

Step 3 In the Maintain Preferred Communication Details and Maintain Communication Details sections, update your agency's communication information.



Step 4 Select the **Primary** radio button for one phone number and email address.

Step 5 Select the **Save** button.

You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the CalPERS website at www.calpers.ca.gov.

- myCalPERS Student Guides & Resources
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides
- System Access Administrators
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators
- myCalPERS System Privileges for Business Partner Roles (PDF)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators > Assign System Access and System Role Privileges: myCalPERS System Privileges for Business Partner Roles (PDF)
- myCalPERS Employer Reports (Cognos) Catalog
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > Employer Reports (Cognos) Catalog
  – Business Partner myCalPERS User Access Report

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**.

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 and select the **Submit Inquiry** link to submit a question or request.