myCalPERS Business Partner Relationships

Student Guide

December 2, 2023

CalPERS

Business Partner Relationships

This guide will assist your agency with the process of establishing, modifying, and ending business partner relationships.

Disclaimer

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

System Access

To process the steps detailed in the scenarios, your assigned user roles must include one of the following:

- Business Partner Employer Maintenance
- Business Partner Direct Authorization
- Business Partner Authorized Personal Loan Representative
- Business Partner Reciprocal
- Carrier
- System Access Administrator

If you are unable to process these scenarios, contact your agency's system access administrator to update your myCalPERS access. Your agency's myCalPERS System Access Administrator(s), can be identified from the Profile global navigation tab > Contacts section > System Admin column displays Y. If your agency does not have a system access administrator, call the CalPERS customer contact center at **888 CalPERS** (or **888**-225-7377).

Contents

Introduction

A business partner relationship is an agreement between two agencies or between an agency and a company authorizing services to be performed on your agency's behalf. When a business partner relationship is established, the agency or company acting on behalf of your agency can perform services such as submit payroll, process retirement and health enrollments, or process payments.

Services Provided

Business partner relationships can be established for each CalPERS contract or agreement type to perform the following services:

- Enrollment
- Billing
- Payroll

Notifications

CalPERS will send a letter to your agency and the agency you have a business partner relationship with when the business partner relationship:

- Has been approved or rejected by CalPERS
- Has had their begin or end dates modified
- Has ended

Scenario 1: Establish a Business Partner Relationship

You will establish a business partner relationship within myCalPERS.

System Logic

- If you add the business partner to myCalPERS, advise the contact entered in step 4 to call CalPERS to activate their account and establish their agency's myCalPERS access.
- The relationship start date can be backdated up to 60 days.
- Your agency can establish multiple relationships for the same services.
- If the relationship is between two state agencies, prior to submitting the request in myCalPERS, please email the State Controller's Office (SCO) at **ppsdsacs@sco.ca.gov** with the following information indicating that your agency is transferring personnel and payroll services SCO will provide confirmation to CalPERS upon approval of your request.

  – Name of agency that will perform services
  – Agency code of agency that will perform services
  – Name of agency that will no longer perform services
  – Agency code of agency that will no longer perform services
  – Effective date of change
  – Address of agency that will perform services
  – Contact information for agency that will perform services

Step Actions

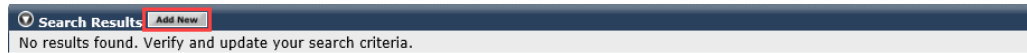|	
Step 1	Select the **Profile** global navigation tab.
Step 2	Select the **View BP Relationships** left-side navigation link.
Step 3	Within the Business Relationships section, select the **Add New** button.
Step 4	Within the Maintain Business Relationship Details section, choose the **Select** link.
Step 5	Within the Organization Search section, enter the business partner name, Federal Tax ID, or CalPERS ID.

Step 6	Select the **Search** button.
Step 7	Is the business partner displayed in the Search Results section? **Yes:** Skip to step 16 **No:** Continue to step 8
Step 8	Within the Search Results section, select the **Add New** button. Ⓥ **Search Results** [Add New] No results found. Verify and update your search criteria.
Step 9	Complete the Organization Details section. Ⓥ **Organization Details** Business Partner Category:* [Service Provider ▾] Business Partner Type:* [▾] Business Partner Name:* [ ] Federal Tax ID: [ ]
Step 10	Complete the Address & Communication Details section.
Step 11	Complete the General Contact Information section.
Step 12	Select the **Submit** button.
Step 13	Verify the U.S. Postal Service Match is correct.
Step 14	Select the **Confirm** button.
Step 15	Select the **Submit** button.
Step 16	Within the Search Results section, select the radio button for the appropriate business partner.
Step 17	Select the **Select** button.
Step 18	Within the Maintain Business Relationship Details section, enter the **Contact Name** and **Phone Number** for the business partner selected in step 4. Ⓥ **Maintain Business Relationship Details** Business Partner Name:* Company Payroll Services PO Box 123 Address: Sacramento, CA 95616 Contact Name:* [ ] Phone Number:* [ ] **Programs Supported** ☐ California Public Employees' Retirement System -30366 ☐ PEMHCA CalPERS Health Contract -33932 ☐ PEMHCA Non-CalPERS Health Contract -34432 ☐ * I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.

Step 19   Within the Programs Supported area, select the specific contract(s) or agreement(s) for which the business partner will be responsible for providing services.

Step 20   Under each contract, select the check box for the service the business partner will provide.

Step 21   For each service, complete the Relationship Start Date field.

Step 22   If applicable, complete the **Relationship End Date** field for each service.

Step 23   Select the certification check box at the bottom.

Step 24   Select the **Establish Relationship** button.

            You have completed this scenario.

Scenario 2: Modify or End a Business Partner Relationship

You will modify a business partner relationship in myCalPERS.
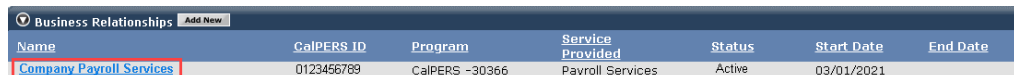
System Logic

- End dates can only be entered or updated by the CalPERS contracting agency.
- If the current date is used as the end date, allow 24 hours for myCalPERS to terminate the relationship.

Step Actions

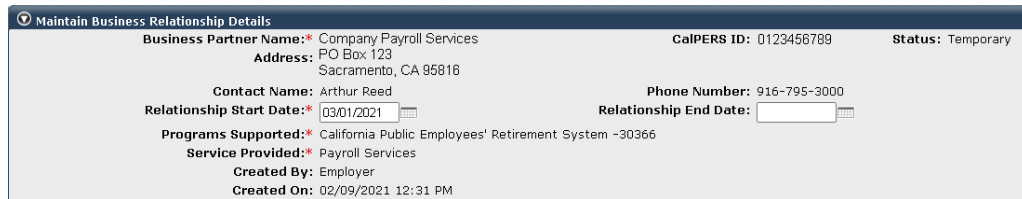| Step 1	Select the **Profile** global navigation tab.
Step 2	Select the **View BP Relationships** left-side navigation link.
Step 3	Within the Business Relationships section, select the name of the business partner name associated with the service you want to terminate.
Step 4	Within the Maintain Business Relationship Details section, modify the relationship as necessary.
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
- [Business Rules & myCalPERS Classes](#)
  Pathway: CalPERS website > Employers > I Want To… : Attend Training & Events > Business Rules & myCalPERS Classes

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.