myCalPERS System Privileges for Business Partner Roles

Supplemental Guide

April 22, 2023

System Privileges for Business Partner Roles

Introduction

This document provides System Access Administrators (SAA) a list of privileges for each user role. Based on your organizational needs, security, and confidentiality practices, each user should only be assigned the roles necessary to perform the functions of their position. Not all user roles are applicable to all business partners.

Contents

General

Business Partner Employer Inquiry

Assigned to all contacts under a public agency, school, state, or service provider

- View business partner contact list, document history, business partner relationships, and other organization contact information
- View and submit inquiries
- Access the Education global navigation tab
- Upload files

Business Partner Employer Maintenance

- Order publications and submit inquiries
- Maintain agency address(es), business partner relationship(s), and add organizations
- View document history, cost share details, rate summary, division, agency mergers, agreements, Supplemental Income Plan (SIP), other organization contact information, cases, statutory event information, member rate summary, retirement program history, and file upload history
- View and maintain contacts and business partner relationships
- View and submit inquiries and maintain employer supporting documentation
- Access the Education global navigation tab
- Upload files

Business Partner Limited

- View home and agency profile pages

Contracts & Agreements

Business Partner Direct Authorization Agreements

For agencies with Direct Authorization (DA) agreements

- View business partner contact list, document history, business partner relationships, and other organization contact information
- Establish and view direct authorization agreements
- Access the Education global navigation tab
- Upload files

Business Partner Health Contracts

For agencies with a PERS and/or non-PERS health contract

- View health contract details: Medical group summary and history, optional provisions like vesting, subscriber list, employer contribution, contract history, and contract notes
- View business partner contact list, document history, business partner relationships, other organization, contact information, and mergers and reorganizations
- Access the Education global navigation tab
- Upload files and submit documentation
- Request and view Other Post-Employment Benefits (OPEB) census data (must also have the Business Partner AR/Billing role)

Business Partner Retirement Contracts

For agencies with a CalPERS retirement contract

- View business partner contact list, document history, business partner relationships, and other organization contact information, contract history, rate summary, benefit levels and provisions, employee and employer rates (current and historical), merger history, contract exclusions, census data, participant summary via the person information search, file upload history, and reorganizations
- Submit/view valuation report requests and inquiries
- View and maintain retirement contact, system transfer out, amendments, cost share, finalize contract, terminate contract, resolutions, written labor agreements, reclassification provisions, school districts (dissolve or add new), Employer Paid Member Contributions (EPMC), and 2-years additional service credit (Golden Handshake)
- Initiate and maintain retirement contract, Social Security 218 agreement, appointments, direct authorization agreements, and reciprocal agreements
- View/maintain position titles and collective bargaining units (CBU)
- Request, view, and maintain GASB 68 census data (must also have the Business Partner Retirement GASB Contact role)
- Access the Education global navigation tab
- Upload files and submit documentation

Business Partner Social Security

For agencies with a Social Security 218 agreement

- View business partner summary, contracts and agreements, Social Security Administration (SSA) invoices, and receivables
- View and maintain SSA 218 agreement
- Submit and view SSA 218 Annual Information Requests (AIR)
- Access the Education global navigation tab
- View and upload documents

Business Partner Supplemental Income Plan

For agencies with a CalPERS SIP-457 agreement

- View and maintain participant summary via the person information search
- View, initiate, and maintain Supplemental Income Plan (SIP) agreements and enrollment information
- Access the Education global navigation tab
- Upload files

Financials/Payments

Business Partner AR/Billing

- View business partner contact list, document history, business partner relationships, other organization contact information, receivables, invoices, billing and payment summary, arrears invoices, fees, and payment history
- Process, view, and cancel payments
- Establish, maintain, and view banking accounts
- View/maintain appointment and payroll information within the Receivables page
- View/maintain out-of-class appointments, documents, and penalties
- Request and view Other Post-Employment Benefits (OPEB) census data (must also have the Business Partner Health Contracts role)
- Access the Education global navigation tab
- Upload files

Business Partner AR/Billing RO

- View business partner contact list, document history, business partner relationships, other organization contact information, receivables, invoices, billing and payment summary, payments, arrears invoices, fees, and payment history
- Process, view, and cancel payments
- View/maintain appointment and payroll information within the Billing and Payments page
- View/maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

Business Partner CERPT/CEPPT

For agencies participating in the California Employers' Retiree Benefit Trust (CERBT) and California Employers' Pension Prefunding Trust (CEPPT) Funds

- View CERPT and CEPPT agreement details
- View payment, transaction, and disbursement details and history
- Upload files

Business Partner Direct Authorization

For agencies with Direct Authorization (DA) agreements

- View direct authorization agreements and hold harmless agreements
- View direct authorization deductions and errors
- View document history, other organization contact information, cases, file upload history, receivables, invoices, payments, and payment history
- View and maintain agency address(es), contacts, agency contacts and business partner relationships
- View and submit inquiries
- Access the Education global navigation tab
- Upload files

Business Partner PA Billing

- View business partner contact list, document history, business partner relationships, other organization contact information, receivables, invoices, billing and payment summary, and monthly billing roster
- View appointment and payroll information within the Billing and Payments page
- Access the Education global navigation tab
- Upload files

GASB Contact

- View business partner contact list, document history, business partner relationships, other organization contact information
- View and maintain appointment and payroll information within the Retirement Appointment Reconciliation page
- Request, view, and maintain GASB 68 census data (must also have the Business Partner Retirement Contracts role)
- Access the Education global navigation tab
- Upload files

Health Enrollment

For agencies with PERS and/or non-PERS health contracts

Business Partner Appointment Management – Non-PERS and CalSTRS

For agencies with a non-PERS health contract

- View participant summary via the person information search
- View, maintain, and initiate appointments
- Access the Education global navigation tab
- Upload files

Business Partner Health Enrollment

- View participant summary via the person information search
- View business partner contact list, document history, business partner relationships, and other organization contact information
- Enroll, maintain, and view health enrollments
- View, confirm, and reject health transaction verifications submitted online by members
- Complete Dependent Eligibility Verification (DEV) – *for state agencies only*
- Access the Education global navigation tab
- Upload files

Business Partner Health Enrollment RO

- View participant summary and health enrollment details via the person information search
- View business partner contact list, document history, business partner relationships, and other organization contact information
- Access the Education global navigation tab
- Upload files

Payroll

For agencies with a CalPERS retirement contract

Business Partner Payroll

- View business partner contact list, document history, business partner relationships, other organization contact information, retirement contract information, rate summary, amendments and resolutions, written labor agreements, exclusions, cost share details, rate summary, member and employer rates, benefit provisions, retirement program history, arrears invoice details, rate plan receivable details, fee details, billing and payment summary, and invoice history pages
- View participant summary via the person information search
- View and process earned period and adjustment payroll reports
- View participant posted and unposted payroll and contributory appointment history via the View Service History and View Transaction History links
- View and maintain payroll schedules
- Reverse and modify posted payroll records via the Maintain Record Details page
- Maintain unposted payroll within the Retirement Appointment Reconciliation, Payroll Schedules, and Receivables pages
- View and maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

Business Partner Payroll RO

- View business partner contact list, document history, business partner relationships, and other organization contact information
- View participant summary via the person information search
- View participant posted payroll via the View Service History and View Transaction History links
- View payroll schedules
- Maintain unposted payroll within the Retirement Appointment Reconciliation, Payroll Schedules, and Receivables pages
- View and maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

Business Partner SCP Certification

- View business partner contact list, document history, business partner relationships, and other organization contact information
- View participant summary via the person information search, employee rate summary, service credit purchase list, cost share details, employment certification requests, service credit purchase determination information, reciprocal eligibility determination information, contribution adjustment cost information, and member election details
- View and maintain appointments
- Initiate and maintain service period records and special compensation details
- Access the Education global navigation tab
- Upload files and submit documentation

Retirement Enrollment

For agencies with a CalPERS retirement contract

Business Partner Arrears

To access the following pages the user must also have one of the following roles: Business Partner Payroll, Business Partner Payroll RO, Business Partner Retirement Enrollment, and/or Business Partner Retirement Enrollment RO.

- Submit service credit purchase requests, including appointment and payroll information
- Submit employment certifications and CalPERS Review Reports to request a membership review

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Business Partner Retirement Enrollment

- View and maintain participant summary via the person information search
- View business partner contact list, document history, business partner relationships, other organization contact information, retirement contract, contributory appointment history, employee rate summary, cost share, member and employer rates, and findings
- View, maintain, and add appointments and positions
- Maintain participant contact and demographic information
- View/maintain appointment and payroll information within the Retirement Appointment Reconciliation page
- View and maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

Business Partner Retirement Enrollment RO

- View participant summary via the person information search
- View business partner contact list, document history, business partner relationships, other organization contact information
- View appointment details
- Confirm unposted payroll within the Retirement Appointment Reconciliation page
- View and maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

System Access Administration

System Access Administrator

- View and maintain agency address(es), contact list, system access, business partner relationship(s), out-of-class appointments, documents, and penalties
- View document history, other organization contact information, contact system access history
- Reset user passwords
- Access the Education global navigation tab
- Upload files

Other

Authorized Personal Loan Representative

- View and maintain business partner address(es), contact list, and business partner relationships
- View agreements, and loan eligibility
- Access the Education global navigation tab
- Upload files

Business Partner IME/JA

For Independent Medical Examiners (IME) and Job Assessors (JA)

- View and maintain IME fees, administrative hearing fees, cancellation fees, JA summary and fee schedules
- Submit documentation
- View documents and other organization contact information
- View file upload history
- View/maintain business partner summary, participant address, and communication details

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Business Partner Reciprocal

For reciprocal retirement systems

- View and maintain business partner summary, contact information, and business partner relationships
- View reciprocal agreement, participant appointment and service credit information, service verification requests, and document history
- Submit reciprocal employment information and Inter-System Membership Advice (ISMA) forms
- Access the Education global navigation tab
- Upload files and submit inquiries

Carrier

Assigned to all health carrier contacts

- View carrier address(es), health plan list, document history, participant summary and health enrollment information, and other organization contact information
- View and maintain business partner relationship(s), agency contacts, other organizations, health carrier ZIP code information, and health reconciliation
- View current and former plans, restrictions, rates, service area, and contact information

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Business Partner CalHR

For the California Department of Human Resources

- View business partner summery, contact information, and business partner relationships
- Access the Education global navigation tab
- Upload files