pert | PUBLIC EMPLOYER READINESS TEAM

Getting Started with my|CalPERS

October 2011

Getting Started with my|CalPERS

Introduction

Welcome to my|CalPERS!

The Public Employer Readiness Team (PERT) has prepared this document, ***Getting Started with my|CalPERS***, to highlight things our employer business partners need to do or be aware of once they begin using the new my|CalPERS system. This document contains a checklist of activities, references to related resource materials, reminders, important dates to consider, and a Forms Transition Guide, which specifies what will happen to forms currently used by employers after the launch of my|CalPERS.

Easy Does It!

Using a new system can be a bit overwhelming at first, and we understand that you will have questions, may encounter errors, and may see things in the system that do not make sense. Rest assured that CalPERS staff will be available to support you and will continue to provide readiness assistance and training opportunities over the next few months.

Once my|CalPERS launches on September 19, 2011, CalPERS staff will need to get accustomed to the new system, as well as process a backlog of data. We ask that you take this into consideration and have patience during the first few weeks after my|CalPERS launches. Our CalPERS Customer Contact Center anticipates a high volume of calls and you may experience longer than usual wait times. It is recommended that you prioritize your requests for assistance. If your question or issue is not time-critical, you may want to wait for the initial call volume to subside. We are providing a grace period for submitting payroll contribution reporting, so we encourage you to take advantage of the extra time and ease into processing your data (grace period does not apply to other transactions, such as payroll contribution payments and retirement enrollments). **The new deadline for processing payroll contribution reporting for July, August and September reporting periods is November 30, 2011.**

During the first month after my|CalPERS launches, there will be a significantly greater than normal amount of data being processed that had been temporarily suspended during the system conversion period. Processing this data could affect the response time for processing Payroll, Retirement Enrollment and Health Enrollment files.

We have established some guidelines for our employers who will be submitting electronic files and/or processing online transactions, so that you will know what to expect during the first month after launch:

- ***All employers*** – Expect at most a 48-hour turnaround for processing of Payroll, Retirement Enrollment and Health Enrollment files and online transactions. This timeline will fluctuate based on the volume and priority of concurrent transactions being processed through my|CalPERS.
- ***FTP employers*** – Expect an email notification after successfully submitting a file, but status may not be available on the File Upload History page for up to 48 hours.
- ***All File Reporter employers*** - If processing time is expected to exceed 48 hours, expect to receive notification from CalPERS. If you don't see your file process right away, please do not submit the file again. Wait for the file to process or to receive notification from CalPERS regarding a delay.

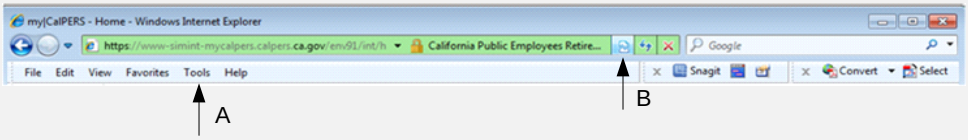
The checklists on the following pages highlight things that employers need to do and/or be aware of once they begin using my|CalPERS.

<table>
<tr><th colspan="3">PREPARING TO USE MY|CALPERS</th></tr>
<tr><td>Navigating to my|CalPERS</td><td>Are you able to navigate to my|CalPERS?

<table><tr><td>YES</td><td>Welcome to my|CalPERS!</td></tr><tr><td>NO</td><td>https://my.calpers.ca.gov is the link that will take you to my|CalPERS, where you will first indicate whether you are a business partner or a participant and then be taken to the Business Partner Login page, where you will proceed with logging in to my|CalPERS.

Note: This link will not be activated for access to the business partner landing page until my|CalPERS is launched on September 19, 2011. Prior to September 19, the link takes you to my|CalPERS for participants.

Resource(s):
• See Appendix A at the end of this document for detailed instructions on how to log in to my|CalPERS for the first time.</td></tr></table></td><td>☐</td></tr>
<tr><td>Browser Compatibility</td><td>When you are logged into my|CalPERS, are all features (buttons, tabs, text, etc.) displayed properly on your screen?

<table><tr><td>YES</td><td>No action required.</td></tr><tr><td>NO</td><td>There may be issues with the version and/or settings for the browser that you are currently using to access my|CalPERS. Internet Explorer v8 and Firefox v3.6 or above should be compatible.
For example, if the “Home” tab is partially cut-off on the left side and you are:
• Using Internet Explorer v8 - navigate to the “Tools” menu in your Internet Explorer v8 window and select “Compatibility View” (arrow A). You will then be able to turn this view off by selecting the icon in the address window (arrow B) in order to see the entire “Home” tab.
 

• Using an older version of Internet Explorer – download the free upgrade to Internet Explorer v8 by selecting this link:
○ http://windows.microsoft.com/en-US/internet-explorer/downloads/ie-8. Do not upgrade to Internet Explorer v9.

If you are still having problems with Internet Explorer, or if your organization requires that you use a different browser, you can download Mozilla Firefox for free by selecting this link:
○ http://www.mozilla.com/en-US/firefox/new/.</td></tr></table></td><td>☐</td></tr>
</table>

<table>
<tr>
<td>System Access Administrator (SAA)</td>
<td>Did your agency register a System Access Administrator (SAA), or have one set up by PERT or the CalPERS Customer Contact Center, prior to July 15? The SAA refers to the individual who has responsibility for the management of user access to my|CalPERS for your organization.
<table>
<tr><td>YES</td><td>Your SAA needs to change their password the first time they log in to my|CalPERS.</td></tr>
<tr><td>NO</td><td>Have the person you designated to be your SAA contact the CalPERS Customer Contact Center at 888-CalPERS (or 888-225-7377) to get set up in my|CalPERS.</td></tr>
</table>
Note: If your SAA information did not get converted into the new system, contact the CalPERS Customer Contact Center at 888-CalPERS (or 888-225-7377) to get set up.</td>
<td>☐</td>
</tr>
<tr>
<td>Setting up Business Contacts & Granting System Access</td>
<td>Did your agency's SAA set up business contacts for your agency, create user IDs and grant them system access, prior to July 15?
<table>
<tr><td>YES</td><td>Instruct your business contacts that they will need to change their passwords the first time they log in to my|CalPERS.</td></tr>
<tr><td>NO</td><td>Once your agency's SAA has been established in my|CalPERS, the SAA can set up business contacts and grant them system access.
Resource(s):
• my|CalPERS Guide to Adding New Contacts in the PERT area of CalPERS On-Line</td></tr>
</table>
Note: If your business contacts did not get converted, your agency's SAA will need to recreate the contacts in my|CalPERS.</td>
<td>☐</td>
</tr>
<tr>
<td>Setting up Health Benefits Officer with System Access for Open Enrollment</td>
<td>Will your agency be processing health enrollment transactions during CalPERS Open Enrollment period from October 10 – November 4, 2011?
<table>
<tr><td>YES</td><td>Have your agency's SAA set up your Health Benefits Officer(s) as a business contact and grant the appropriate system access to process health enrollment transactions in my|CalPERS.</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table></td>
<td>☐</td>
</tr>
<tr>
<td>CalPERS IDs and Appointment IDs</td>
<td>Do you need to obtain a listing of your Participant CalPERS IDs and/or Appointment IDs for your agency's employees?
<table>
<tr><td>YES</td><td>Access the Reports link under Common Tasks in the Left-Side Navigation area of my|CalPERS to generate the CalPERS ID and Appointment ID Report.
Resource(s):
• Generating Reports my|CalPERS in the PERT area of CalPERS On-Line</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table></td>
<td>☐</td>
</tr>
</table>

<table>
<tr>
<td>Trusted Site Setup for my|CalPERS Reports</td>
<td>Will you be generating reports in my|CalPERS?
<table>
<tr><td>YES</td><td>Add Cognos ®, a system reporting tool in my|CalPERS, as a trusted site to your web browser.
Resource(s):
• See Appendix B at the end of this document for detailed instructions on how to add Cognos ® as a trusted site to your browser.</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
</td>
<td>☐</td>
</tr>
<tr>
<td>File Transfer Protocol (FTP) Connectivity Setup</td>
<td>If you are planning on using File Transfer Protocol (FTP) to submit electronic files (Payroll Contribution, Retirement Enrollment or Health Enrollment files) in my|CalPERS, has your FTP connectivity been established?
<table>
<tr><td>YES</td><td>No action required.</td></tr>
<tr><td>NO</td><td>Contact CalPERS Customer Contact Center at 888 CalPERS (or 888-225-7377) to initiate the setup process for FTP. Please be aware that this process can take up to six weeks.</td></tr>
</table>
Note: You can submit files via the file upload process in my|CalPERS in the interim while your FTP connectivity is being established.
</td>
<td>☐</td>
</tr>
<tr>
<td>Email Notifications for FTP File Reporters</td>
<td>Will you be using File Transfer Protocol (FTP) to submit electronic files (Payroll Contribution, Retirement Enrollment, or Health Enrollment files) in my|CalPERS and receiving electronic response files via FTP from my|CalPERS?
<table>
<tr><td>YES</td><td>Set up a “System Support” contact type in my|CalPERS to receive email notifications regarding FTP response file availability.
Resource(s):
• my|CalPERS Guide to Adding New Contacts in the PERT area of CalPERS On-Line</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
</td>
<td>☐</td>
</tr>
</table>

<table>
<tr><th colspan="3">UPDATING AND VERIFYING YOUR AGENCY'S DATA</th></tr>
<tr><td>Retirement Enrollment</td><td>Did you hold any membership enrollments and/or enrollment changes during the system conversion period?

<table><tr><td>YES</td><td>Begin processing membership enrollments and/or enrollment changes before processing payroll contribution reporting in my|CalPERS.</td></tr><tr><td>NO</td><td>No action required.</td></tr></table>
Note: When you process the membership enrollments (that you have been holding) in my|CalPERS at launch, you will be able to use a retroactive eligibility and hire date of when the employee qualified for CalPERS membership.

Note: Coverage groups are no longer being used when processing membership enrollments. This information is collected as a Member Category: Miscellaneous, Safety-Fire, Safety-Police.</td><td>☐</td></tr>
<tr><td>Registering Retired Annuitants</td><td>Registering your working retired annuitants is a new requirement with the launch of my|CalPERS. Do you have any retired annuitants that you need to create appointments for?

<table><tr><td>YES</td><td>Begin processing a membership enrollment transaction for each retired annuitant in my|CalPERS prior to reporting retired annuitant information in payroll reporting.</td></tr><tr><td>NO</td><td>No action required.</td></tr></table>
Note: Important - When entering data into the Appointment Details page, you should select the “Yes” radio button next to “Is the member subject to Social Security?” Although we are aware that retired annuitants are not subject to Social Security, this is a workaround that will allow the payroll record to update.</td><td>☐</td></tr>
<tr><td>Participant Demographic Data</td><td>Did you hold any participant demographic information and updates during the system conversion period?

<table><tr><td>YES</td><td>Begin processing participant demographic data submissions and updates in my|CalPERS.</td></tr><tr><td>NO</td><td>No action required.</td></tr></table></td><td>☐</td></tr>
</table>

<table>
<tr>
<td>Health Enrollment</td>
<td>
Did you hold any Health Benefits enrollments and/or enrollment changes during the system conversion period?
<table>
<tr><td>YES</td><td>Begin processing Health Benefits enrollment transactions in my|CalPERS.</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
Did you have any Health Benefits enrollment transactions with errors left uncorrected in ACES prior to the system conversion period?
<table>
<tr><td>YES</td><td>Health Benefits enrollment transactions with errors left uncorrected in ACES will not transition into my|CalPERS and must be re-processed in my|CalPERS.</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
Note: Although ACES will be available in a view-only capacity through October 31, 2011, the data in ACES has been frozen as of September 2, 2011.
</td>
<td>☐</td>
</tr>
<tr>
<td>Health Event Reasons</td>
<td>
For Online Reporters: Did you know that the Health Event Reason Codes that you use in ACES have been replaced with simple terms in my|CalPERS?
<table>
<tr><td>YES</td><td>Begin using the Health Event Reasons in my|CalPERS.</td></tr>
<tr><td>NO</td><td>Review the listing of Health Event Reasons being used in health transactions.
Resource(s):
• my|CalPERS Health Event Reasons page in the PERT area of CalPERS On-Line</td></tr>
</table>
Note: New health event reasons have been added to my|CalPERS.
</td>
<td>☐</td>
</tr>
<tr>
<td>Health Employer Contributions Resolutions</td>
<td>
For Public Agency and School employers who contract for health benefits: Did your agency adopt a resolution changing your employer health contribution during the system conversion period?
<table>
<tr><td>YES</td><td>Submit your resolution to CalPERS for processing of those health contribution changes adopted during the system conversion period. If you do not have a resolution template that contains language clarifying compliance with Government Code 7505, please contact CalPERS for a current template.</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
Note: Online functionality for processing health resolutions will not be available in my|CalPERS at launch. Continue to mail or fax resolutions to CalPERS Headquarters:

California Public Employees' Retirement System
P.O. Box 942715
Sacramento, CA 94229-2715
Fax: 800-959-6545
</td>
<td>☐</td>
</tr>
</table>

<table>
<tr>
<td>Dental Enrollment</td>
<td>
For State Agencies and CSU Employers: Did you hold any retiree dental enrollments during the system conversion period?
<table>
<tr><td>YES</td><td>Submit form STD-692, Dental Plan Enrollment Authorization, to CalPERS for processing retiree dental enrollments that were held during the system conversion period.</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
Note: Online functionality for processing retiree dental enrollment transactions will not be available in my|CalPERS at launch. Continue using the STD-692 form for retiree dental enrollments. Mail or fax the retiree dental enrollment forms to CalPERS Headquarters:

California Public Employees’ Retirement System
P.O. Box 942715
Sacramento, CA 94229-2715
Fax: 800-959-6545
</td>
<td>☐</td>
</tr>
<tr>
<td>Relationships with Other Agencies or Third-Party Service Providers</td>
<td>
Does another agency or third-party service provider report data to CalPERS on your behalf, or do you report data on behalf of other agencies?
<table>
<tr><td>YES</td><td>Within my|CalPERS, verify that the appropriate reporting organization(s) are listed in the “Business Relationships” panel on the “Profile” tab <u>and/or</u> verify that all the organizations you report for are listed on the “Division” panel, which is one of the Menu items on the left side of the “Profile” tab. If there are any discrepancies, please contact the CalPERS Customer Contact Center at 888 CalPERS (or 888-225-7377).</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
</td>
<td>☐</td>
</tr>
</table>

<table>
<tr><th colspan="3">PROCESSING PAYROLL CONTRIBUTION REPORTING AND PAYMENTS</th></tr>
<tr><td>Payroll Contribution Reporting – Special Compensation</td><td>Do you report special compensation for your agency's employees?

<table><tr><td>YES</td><td>It is recommended that you identify each specific category and type of special compensation that your agency is required to report.</td></tr><tr><td>NO</td><td>No action required.</td></tr></table>
Note: For online reporters: The first time you report payroll contribution information in my|CalPERS using copy forward, the special compensation categories and types will default to "Unknown." It is important that you go into each payroll record and assign the special compensation category and type, which will help prevent having to justify the reportable earnings at a later time.
For file reporters: You should plan to add the special compensation type and category to your July, August, and September held files When submitting future payroll reports, you should include the special compensation category and type within each payroll record. If you report only the special compensation amount, the system will default the category and type to "Unknown." It is important that you properly report the special compensation category and type. Reporting the category and type within my|CalPERS will help prevent having to justify the reportable earnings at a later time.</td><td>☐</td></tr>
<tr><td>Payroll Contribution Reporting – Tax Deferred Member Paid Contributions and Resolutions</td><td>For online reporters: Do you have the IRC 414(h)(2) resolution on file with CalPERS, which allows you to report member paid tax deferred contributions?

<table><tr><td>YES</td><td>my|CalPERS pre-populates the entire tax deferred member contribution amount within the Taxed Deferred Employer Paid Member Contribution field. If you do not pay the entire tax deferred contribution amount, you will need to adjust each record within your payroll report and properly allocate the correct amount as either tax deferred member paid contributions or tax deferred employer paid member contributions.</td></tr><tr><td>NO</td><td>If no, but you do report tax deferred contributions, you must file a copy of the IRC 414(h)(2) resolution with CalPERS.
If no, but you do not report tax deferred contributions, no action required.

Resource(s):
• To obtain a sample of the IRC 414(h)(2) resolution, access the CalPERS Public Agencies and Schools Procedure Manual, Compensation Review Section</td></tr></table>
For file reporters: Starting with your first XML file submission, you should begin reporting the tax deferred member contribution amounts within the correct data elements per your labor agreement.</td><td>☐</td></tr>
</table>

<table>
<tr>
<td>Payroll Contribution Reporting – Retired Annuitants</td>
<td>Will you be reporting payroll information for retired annuitants in my|CalPERS?
<table>
<tr><td>YES</td><td>Your payroll report should include the information required for retired annuitants, which includes payroll period begin and end dates, pay rate type, pay rate, reportable earnings, scheduled full time hours or days per week and total hours worked. No contributions get reported, since service credit is not generated for retired annuitants.</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
</td>
<td>☐</td>
</tr>
<tr>
<td>Remittance Advice for Payroll Contribution Payments</td>
<td>Do you submit payments by check for your payroll contributions?
<table>
<tr><td>YES</td><td>Begin using the new Remittance Advice Report that is available in my|CalPERS. Access the Reports link under Common Tasks in the Left-Side Navigation area of my|CalPERS to generate the Remittance Advice Report. Discontinue use of the interim Remittance Advice Form (via the spreadsheet) that was required during the system conversion period.

Resource(s):
• Generating Reports my|CalPERS in the PERT area of CalPERS On-Line</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
</td>
<td>☐</td>
</tr>
<tr>
<td>Establish Electronic Funds Transfer (EFT) Account in my|CalPERS</td>
<td>Do you use, or wish to use, the EFT Debit method to make payments in my|CalPERS?
<table>
<tr><td>YES</td><td>Discontinue using paycalifornia.com. The CalPERS link on paycalifornia.com will be unavailable after September 16, 2011, and future dated payments will be deleted. You will need to establish your EFT account and routing number in my|CalPERS prior to making your first payment.
Also, the CalPERS Automated Clearing House (ACH) identification number has changed. The new CalPERS ACH ID number is: 1946207465. If you pay by EFT, you must notify your bank that this CalPERS ACH ID number is assigned to an approved payee. Without this pre-approval, your EFT payment will not be processed by your bank.</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
Do you wish to use the EFT Credit method to make payments in my|CalPERS?
<table>
<tr><td>YES</td><td>You will need to submit a user agreement for the EFT credit method. Upon receipt of the agreement, CalPERS will provide you with file specifications for your financial institution to initiate payment.

Resource(s):
• New Electronic Fund Transfer (EFT) Authorization Agreement – Credit Method will be available at launch on CalPERS On-Line.</td></tr>
<tr><td>NO</td><td>No action required.</td></tr>
</table>
</td>
<td>☐</td>
</tr>
</table>

REMINDERS		
my|CalPERS Training	If you haven't already done so, please make sure you register and take our my|CalPERS training, so that you receive the instructions you need to continue conducting business with CalPERS and help ensure a smooth transition and continuity in services. ***Resource(s):*** • Types of Training • Course Decision Matrix • my|CalPERS Training Registration (These resources are located in the PERT area of CalPERS On-Line)	☐
Submitting Payroll Contribution Reporting (CalPERS Retirement)	Begin reporting the next payroll contribution report that is due for your agency. This will be for the pay period ***after*** your last successfully reported payroll. ***Example:*** If the reporting period for your last payroll that you successfully reported ended June 30, then begin your payroll reporting in my|CalPERS with the reporting period that starts July 1. If the reporting period for your last payroll that you successfully reported ended May 31, then begin your payroll reporting in my|CalPERS with the reporting period that starts June 1.	☐
Supplemental Income 457 Plan - Submitting Payroll Contribution Reporting and Payments	***For pay periods that end on or before November 30, 2011 –*** Continue to submit payroll contribution reporting and payments to ING. ***For pay periods that begin on or after December 1, 2011 –*** Submit payroll contribution reporting and payments in my|CalPERS. ***Note:*** If your pay period starts in November, but ends on or after December 1, 2011, you will begin submitting payroll contribution reporting and payments in my|CalPERS.	☐

DATES TO REMEMBER		
October 10 – November 4, 2011	CalPERS Health Benefits 2011 Open Enrollment period	☐
November 1, 2011	Employers interested in adopting the CalPERS 457 Plan, optional Loan Provision and/or the Self-Managed Account provision can begin submitting requests through the my|CalPERS self-service portal. Employers can call the CalPERS 457 Plan 1-800-696-3907 and an account manager will assist with the adoption process.	☐
November 30, 2011	Deadline for processing payroll contribution reporting for July, August and September reporting periods ***Note:*** Once the grace period is over for submission of July, August, and September payroll contribution reporting, it becomes business as usual, and you will report on the normal deadline that corresponds with the ending date of your respective payroll schedule.	☐
MISCELLANEOUS INFORMATION		
Sending Documents to CalPERS	Mailing address for sending documents to CalPERS Headquarters: California Public Employees' Retirement System P.O. Box 942715 Sacramento, CA 94229-2715 Fax number for faxing documents to CalPERS Headquarters: 800-959-6545 ***Note:*** Some CalPERS program areas may still provide their own PO box and fax number for a more direct routing of correspondence.	☐
Service Credit Purchase Balance Information	Online functionality for displaying Service Credit Purchase Balance Information, which would typically be viewed when performing a Person Information query, will not be available at launch and is planned for a future release. This information includes the service credit purchase deduction amount and the expected end of payment date.	☐

Forms Transition Guide

The purpose of the Forms Transition Guide is to outline changes affecting forms used by employers as a result of the my|CalPERS implementation. There are three possible scenarios for what happens to each form:

- ***Use Existing Form*** – use the existing form just like you have in the past
- ***Online Functionality*** – the form is being replaced by an online transaction that you will use in my|CalPERS instead of using a paper form
- ***New Form in my|CalPERS*** – the old form is being replaced by a new online form available within my|CalPERS.

NAME OF FORM BEFORE MY|CALPERS	FORM ID	WHAT HAPPENS POST LAUNCH			COMMENTS AND / OR NAME OF FORM AFTER MY|CALPERS
		Use Existing Form	Online Functionality	New Form in my|CalPERS	
Member Action Request	AESD-1	☐	☒	☐	
Election of Optional Membership - Legislative Employee	AESD-3	☐	☐	☒	*New Form* - Election of Optional Membership – Legislative Employee
Delete ACES User Form	AESD-42	☐	☒	☐	User access is managed online by employer's System Access Administrator.
Employer User Security Agreement	AESD-43	☐	☒	☐	Online security agreement replaces form.
Election of Optional Membership - Elective Officer	AESD-59	☐	☐	☒	*New Form* - Election of Optional Membership – Elective Officer
Election of Optional Membership - State Appointee	AESD-83	☐	☐	☒	*New Form* - Election of Optional Membership – State Appointee
Notice of Exclusion From CalPERS Membership	AESD-139	☒	☐	☐	Continue to use current form, which is kept on file by employer.
Notice of Exclusion From CalPERS Membership for State Agencies	AESD-139S	☒	☐	☐	Continue to use current form, which is kept on file by employer.
Election of Optional Membership - Part-Time Employee	AESD-229	☐	☐	☒	*New Form* - Election of Optional Membership – Part-Time Employee
Reply Change of Address Card	AESD-239	☐	☐	☒	System will generate notice to member.

NAME OF FORM BEFORE MY|CALPERS	FORM ID	WHAT HAPPENS POST LAUNCH			COMMENTS AND / OR NAME OF FORM AFTER MY|CALPERS
		Use Existing Form	Online Functionality	New Form in my|CalPERS	
Supplemental Payroll Reporting Form	AESD-624	☐	☒	☐	
Payroll Listing Form	AESD-625A	☐	☒	☐	
Summary Report, Member & Employer Contributions	AESD-626	☐	☒	☐	
Account Detail Information Sheet	BSD-11A	☐	☐	☒	*New Form* - First Payment Acknowledgement Letter for Members
Notice of Benefit Approval	BSD-11-W	☐	☐	☒	*New Form* - First Payment Acknowledgement Letter for Employers
Report of Separation & Advance Payroll Information	BSD-194	☐	☐	☒	*New Form* - Report of Separation & Advance Payroll Information
Employer Acknowledgement Letter	BSD-197-W	☐	☐	☒	*New Form* - Retirement Acknowledgement Letter to Employer for CalPERS* ***Note:** The information in the Employer Acknowledgement Letter pertaining to State Agencies and dental enrollment is incorrect. If you are a State Agency, please refer to the Dental Enrollment section on page 7 of this document for the correct address for dental enrollment forms.
Requested Employer Certification	BSD-200	☒	☒	☐	This information can now be entered online; however, the form will still be available on request.
Amended Employer Certification	BSD-200A	☒	☒	☐	This information can now be entered online; however, the form will still be available on request.
Beneficiary Designation	BSD-241	☐	☐	☒	*New Form* - Pre-Retirement Beneficiary Designation
Report of Separation for Death - Request for Payroll Information	BSD-738	☐	☐	☒	*New Form* - Report of Separation for Death – Request for Payroll Information
Health Benefit Plan Enrollment	HBD-12	☒	☒	☐	Use online functionality to process health benefit plan enrollments; existing HBD-12 form will be available for employers to keep on file.

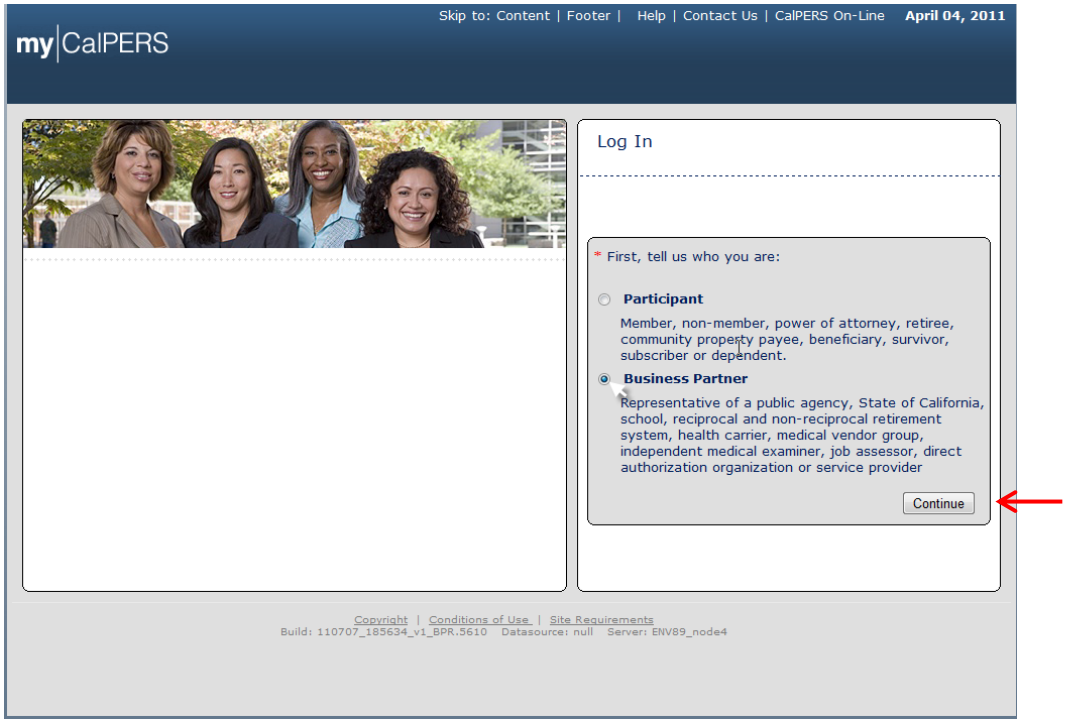
NAME OF FORM BEFORE MY|CALPERS	FORM ID	WHAT HAPPENS POST LAUNCH			COMMENTS AND / OR NAME OF FORM AFTER MY|CALPERS
		Use Existing Form	Online Functionality	New Form in my|CalPERS	
Declaration of Health Coverage Form	HBD-12A	☒	☐	☐	Continue to use current form, which is kept on file by employer.
Direct Payment Authorization	HBD-21	☐	☒	☒	*New Form* - Health Direct Pay Election Form. Generated by my|CalPERS to the member when a temporary separation is processed. There is no longer a requirement to submit the HBD-21 form to CalPERS because the information can be entered online. However, the employer can still use the form to capture the information.
COBRA Group Continuation Coverage	HBD-85	☒	☒	☐	Use online functionality to process COBRA group continuation coverage; existing HBD-85 form will be available for employers to keep on file.
Health Plan Enrollee Information or Employment Status Changes	HBD-86	☐	☒	☐	Existing form will no longer be used because information can be entered online.
Arrears Payroll Information Form	MEM-1344	☐	☐	☒	*New Form* - Notification of Reported Late Appointment When an employer submits membership enrollments over 90 days late, this form will be generated and sent to the employer to provide the missing payroll details for the late appointment.
Disability Estimate Request	MSD-1	☒	☐	☐	
Request for Time Extension and Delinquency Waiver	PERS01E0001	☐	☒	☐	
Separation/Disposition of CalPERS Contributions	STD-687	☐	☐	☐	As a result of process changes associated with Separation/Disposition of CalPERS Contributions, there is no longer a requirement to submit this form to CalPERS.
Dental Plan Enrollment Authorization (State Agencies and CSU employers)	STD-692	☒	☐	☐	State Agencies and CSU employers will continue to send form STD-692 to CalPERS for processing retiree dental enrollments.

NAME OF FORM BEFORE MY|CALPERS	FORM ID	WHAT HAPPENS POST LAUNCH			COMMENTS AND / OR NAME OF FORM AFTER MY|CALPERS
		Use Existing Form	Online Functionality	New Form in my|CalPERS	
Electronic Fund Transfer (EFT) Authorization Agreement		☐	☒	☐	Will be discontinued for EFT Debit transactions. Users will provide authorization by clicking on Terms & Conditions in Payment Setup Summary. A new Electronic Fund Transfer (EFT) Authorization Agreement form will be available on CalPERS On-Line for EFT Credit transactions.

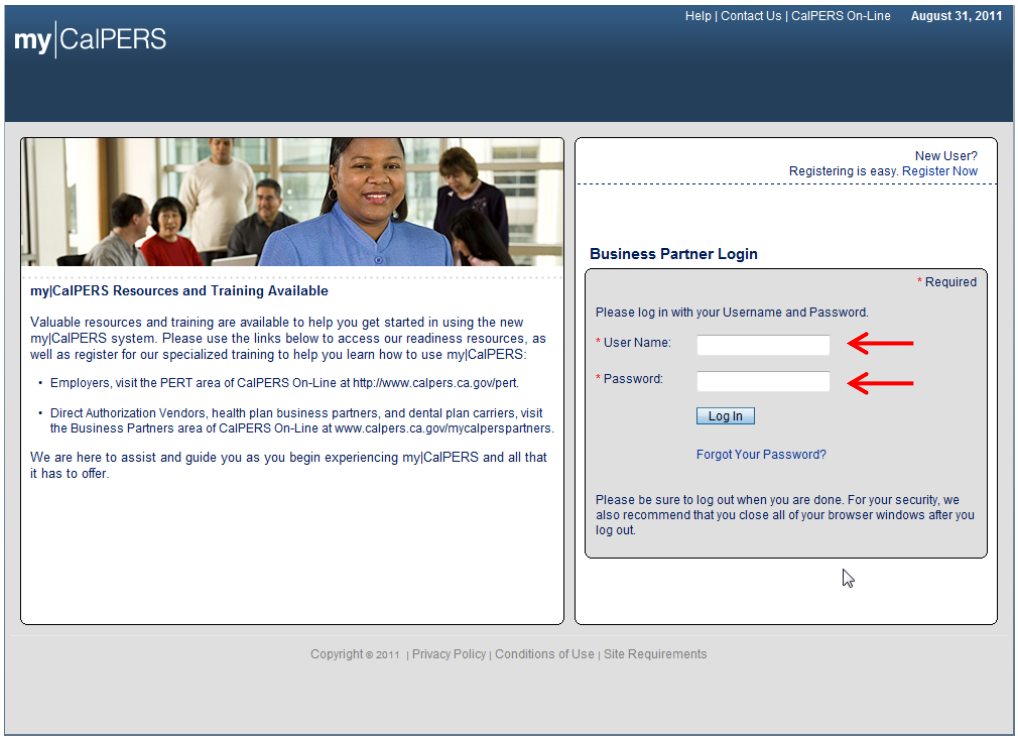
Appendix A

INSTRUCTIONS
Logging into my|CalPERS

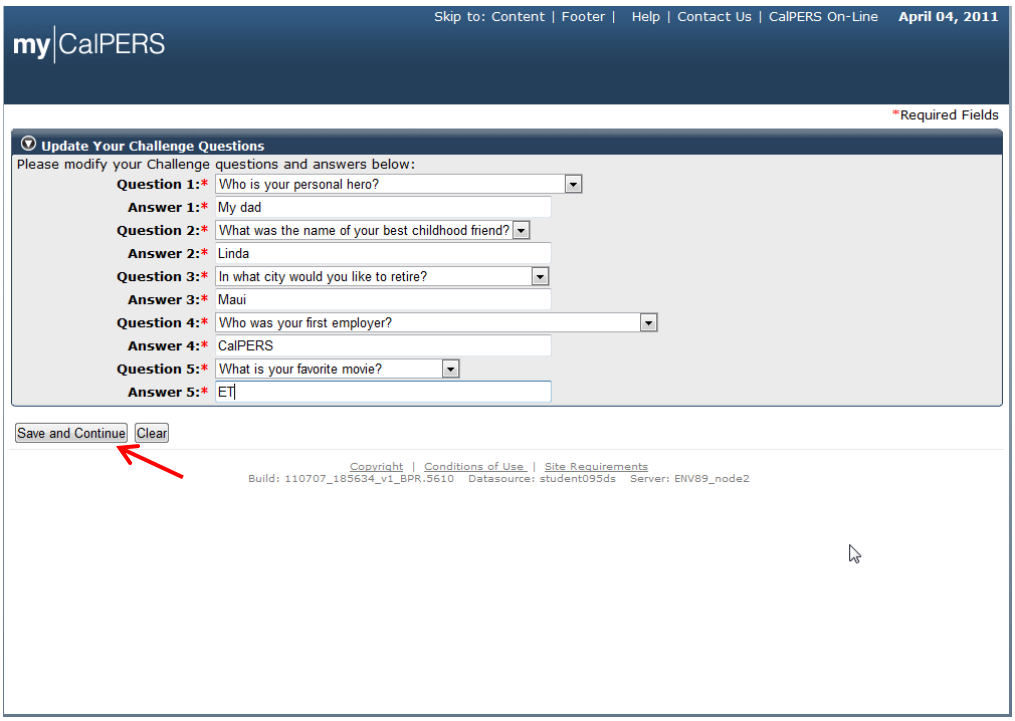
- Open Internet Explorer.
- Navigate to my|CalPERS using this link: https://my.calpers.ca.gov
- Follow the instructions below to log in to my|CalPERS for the first time.



From the my|CalPERS *Log In* page, select the **Business Partner** radio button, then select the **Continue** button.

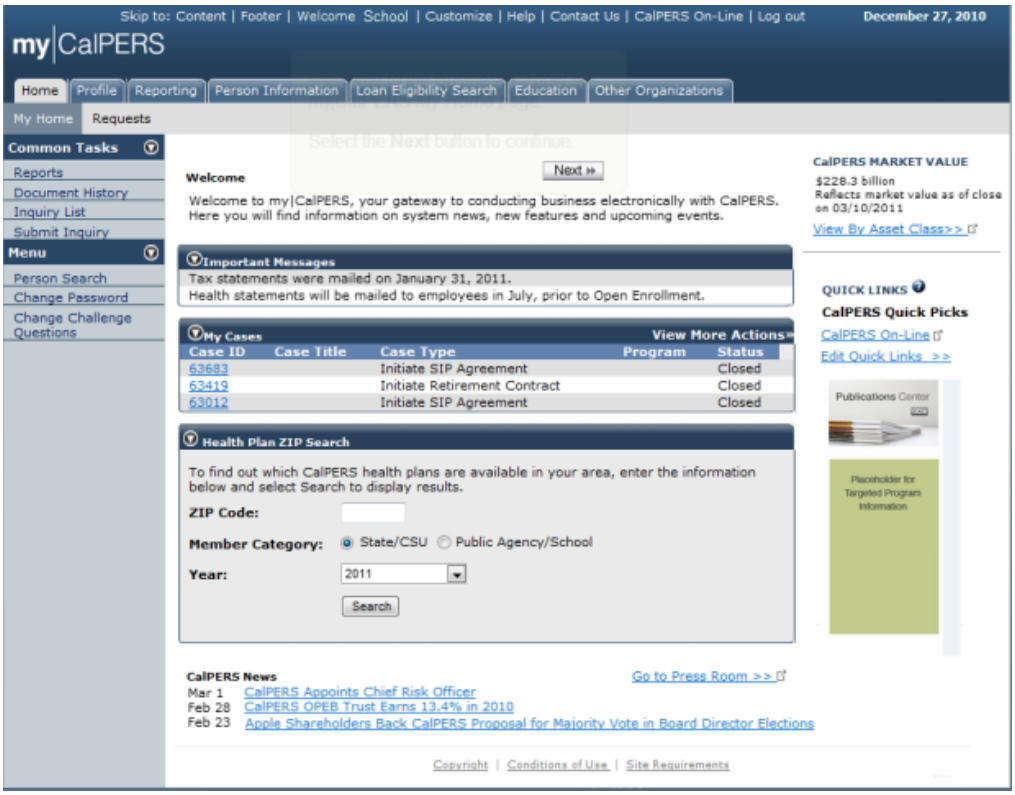


Enter your **User Name** and **Password**.



For security, select your five challenge questions and answers. Then select the **Save and Continue** button.

Select the **Accept** button.



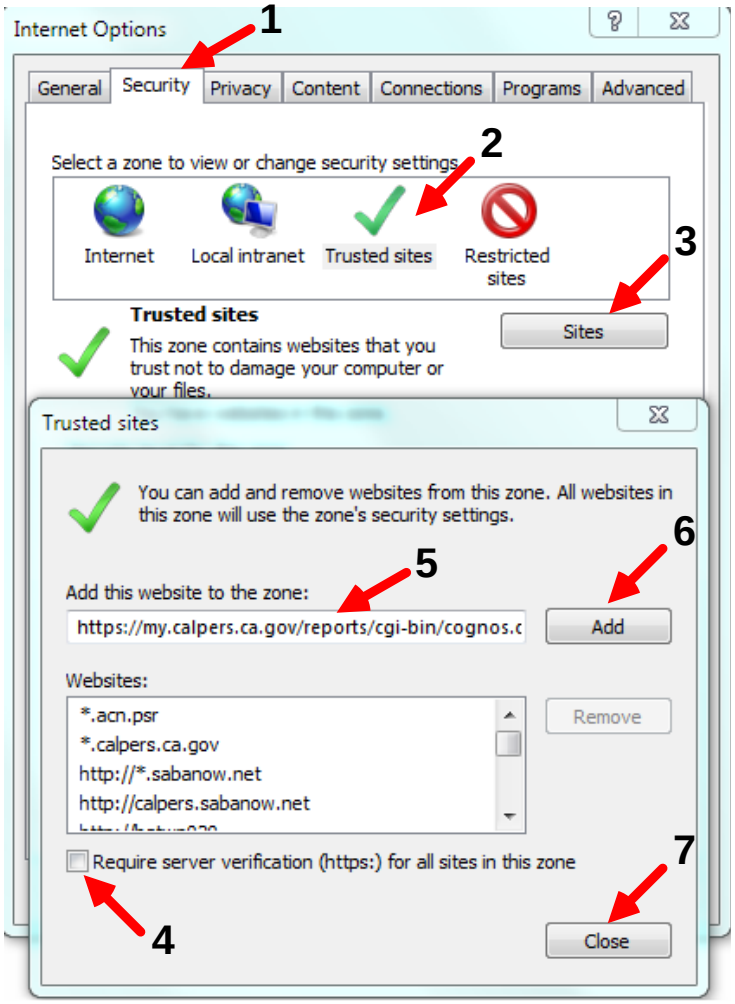
Welcome to the Business Partners my|CalPERS *Home* Page!

Appendix B

INSTRUCTIONS

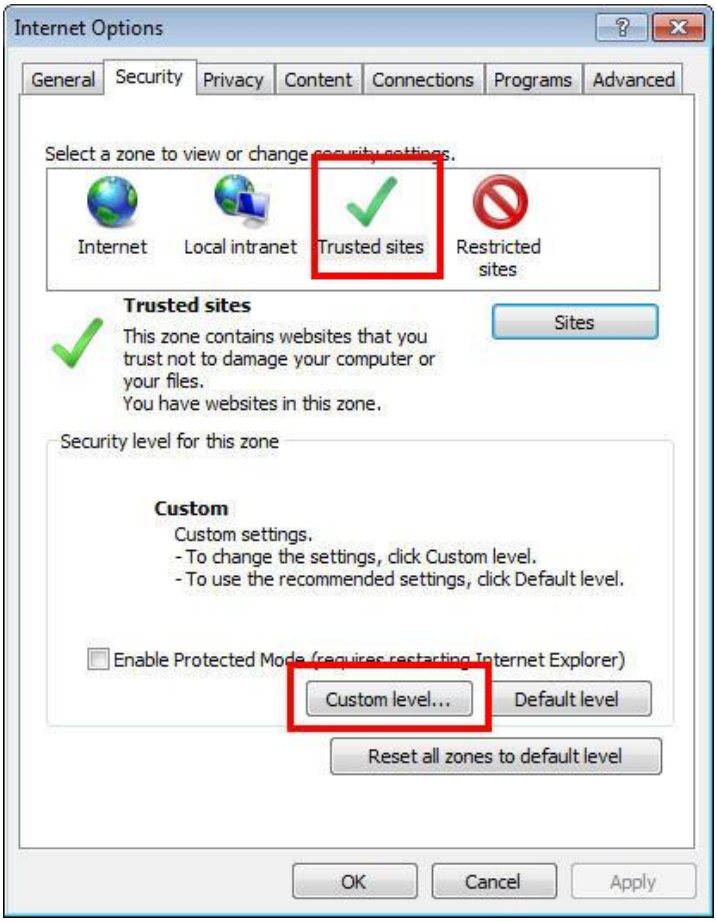
Add *Cognos ®,* a system reporting tool in my|CalPERS, as a trusted site to your web browser.

- Open Internet Explorer.
- On the Menu Bar, select **Tools** and then select **Internet Options**.
- Follow the instructions below to add *Cognos* ® as a trusted site.



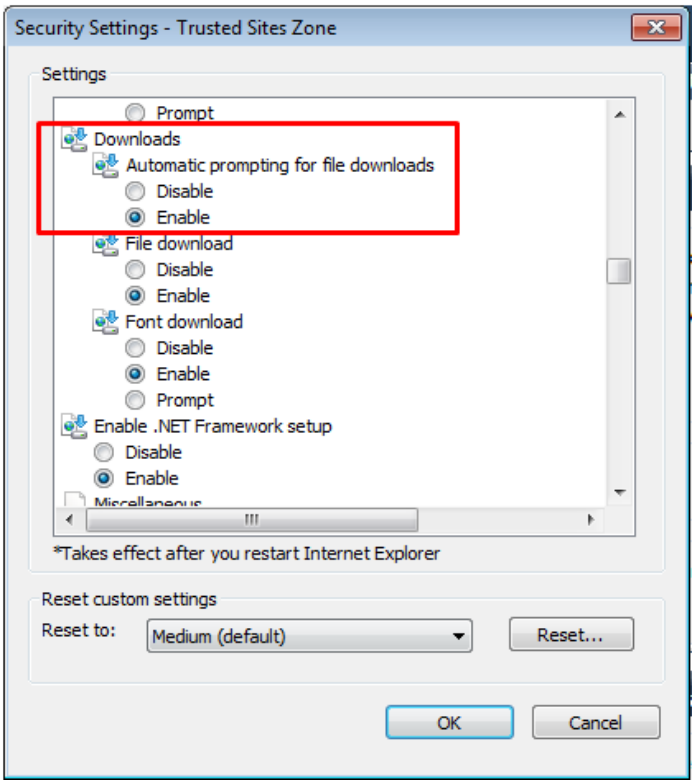
1. Select **Security** Tab.
2. Select **Trusted Sites.**
3. Select **Sites.**
4. Make sure the box is ***not checked.***
5. Enter **https://my.calpers.ca.gov/reports/cgi-bin/cognos.cgi** to add this website to the zone.
6. Select **Add.**
7. Select **Close**.

Follow the instructions below to modify the options of the Trusted Sites zone and set the "Enable XSS Filter" property to "Disable."

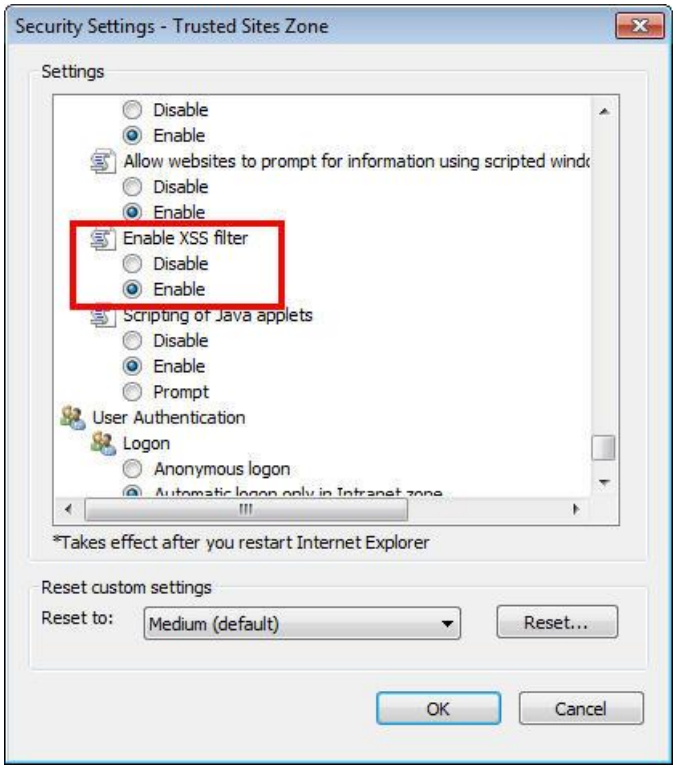


Back on the 'Internet Options' dialog, with 'Trusted Sites' still selected, select the **Custom Level** button.

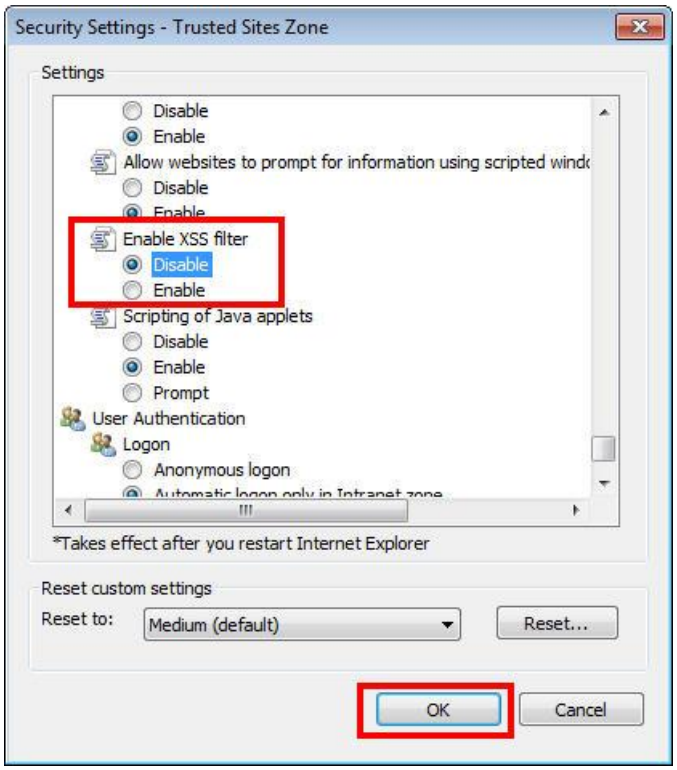
In the 'Security Settings' dialog, scroll down to find the ‘Downloads’ setting.



Change the setting for ‘Automatic prompting for file downloads' from 'Disable' to Enable.’

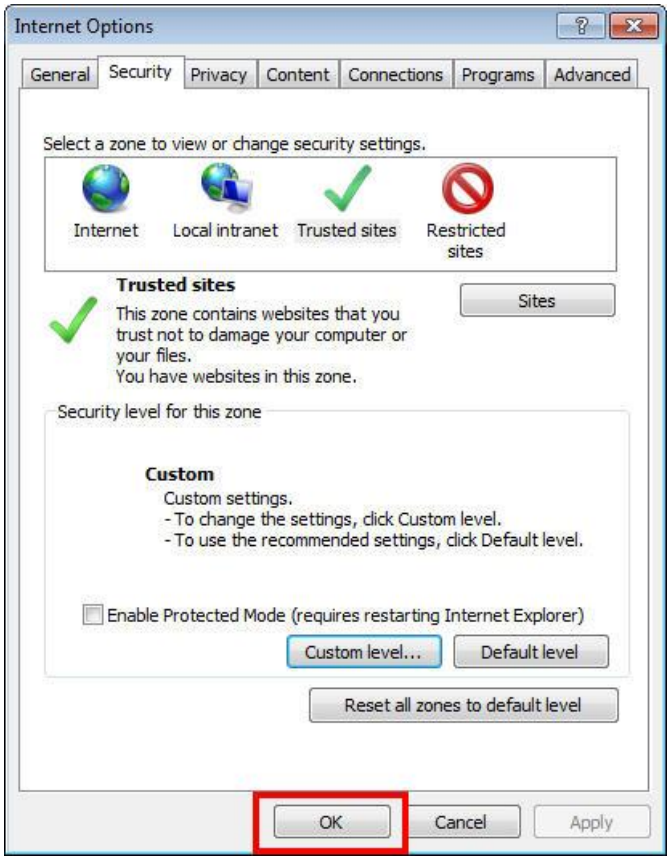


Continue scrolling down to find the 'Enable XSS filter' setting.



Change the setting for 'Enable XSS filter' from 'Enable' to 'Disable', then select **OK**.

When prompted to change settings for this zone, select **Yes**.



Back on the 'Internet Options' dialog, select **OK**.