



California Public Employees' Retirement System
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Membership

Circular Letter

September 25, 2019

Circular Letter: 200-042-19

Distribution: Special

To: Reciprocal Retirement Systems
Subject: New enhancements being added to my|CalPERS

Purpose

The purpose of this Circular Letter is to inform you of new enhancements being implemented in my|CalPERS, the online system used to store CalPERS' membership information. CalPERS has enhanced access to necessary membership information for reciprocal retirement systems. These enhancements will also allow the submission of online requests for service verifications and reciprocity.

Enhanced Functionality of my|CalPERS

Based on feedback received from reciprocal retirement systems, CalPERS has increased the information provided in my|CalPERS to ensure the CalPERS membership information available is useful and adequate for reciprocal retirement systems to validate CalPERS membership data and enroll their members into membership. Currently, reciprocal retirement systems have access to designate team members to sign up for my|CalPERS access to obtain basic membership status information. Effective September 23, 2019, reciprocal retirement systems will have the ability to log in to my|CalPERS to obtain more detailed CalPERS membership history including total service credit, membership status, and employment history.

In addition, these enhancements will allow reciprocal systems to upload their Intersystem Membership Advice forms (ISMA) and service verification requests. We are encouraging reciprocal retirement systems to use this functionality to ensure receipt and timely processing

of the documentation. Uploading the ISMA to my|CalPERS will also allow reciprocal retirement systems to check the status of their ISMA requests to determine if they've been processed. Furthermore, the new functionality will provide the opportunity for reciprocal retirement systems to submit inquiries and receive replies from the appropriate CalPERS program area through my|CalPERS.

Although these enhancements will provide more detailed and timely information regarding a member's CalPERS membership status and employment history, access to this information does not take the place of the current reciprocity determination and ISMA process. For reciprocity to be requested and determined, we still need to exchange information via the ISMA.

Access to my|CalPERS

To provide access to my|CalPERS, each system must identify a system access administrator (SAA). For assistance gaining access email the contact information for your designated SAA to the Member Elections Team at MemberElectionTeam@calpers.ca.gov. Establishing a SAA by October 1, 2019, will allow time to add contacts and grant access to other representatives within your system prior to upcoming outreach efforts.

Training

CalPERS will provide resources and direction regarding how to sign up for my|CalPERS access and how to navigate my|CalPERS to obtain membership information. These resources will also explain how to interpret the membership information being accessed.

A training guide is available providing details regarding how to sign in and use my|CalPERS. We will send all identified system access administrators the guide once the administrator has been established. You may also email the Member Elections Team to request a copy of the training guide.

We will host webinars on October 16, 2019, and November 13, 2019, between 2:00-3:00 p.m. to provide further guidance regarding how to navigate my|CalPERS and answer any questions you may have. We request that prior to the webinars, representatives sign in and access my|CalPERS, as well as review the training guide. More information regarding how to access the webinars will be shared as they approach.

Additional Enhancements

CalPERS will be developing additional enhancements to my|CalPERS for reciprocal systems. Over the next several months, the information available to reciprocal systems will expand to include service credit purchase information, final average compensation data, and approved reciprocal determinations specific to the system that is accessing the member's account. In addition, correspondence including reciprocal determination letters will be available to reciprocal systems through the my|CalPERS document history. In support of the CalPERS

Strategic Plan objective to reduce complexity across the organization and streamline our operations, future releases will also add functionality to automate real-time determinations and documentation.

Questions

If you have any questions regarding CalPERS membership information or how to navigate my|CalPERS, contact the Member Elections Team at MemberElectionTeam@calpers.ca.gov.

Renee Ostrander, Chief
Employer Account Management Division