



my|CalPERS Course 101
Health Enrollment Basics for Public
Agencies & Schools

Student Guide

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Health Enrollment Basics for Public Agencies and Schools

Overview

Class Description

This class is designed to prepare you to accomplish these objectives:

- Navigate my|CalPERS
 - Query health enrollment information
 - Understand health enrollment transactions
 - View health statement and billing roster
 - Generate a health report
-

Introduction

Welcome to my|CalPERS Health Enrollment Basics for Public Agencies and Schools training! Thank you for taking advantage of this training opportunity.

We are committed to providing assistance and support for both new and experienced my|CalPERS users.

This student guide is divided into units which contain transactional navigation with step actions and helpful illustrations. The soft copy of this guide is easily accessible on the CalPERS website. Simply navigate to the my|CalPERS Student Guides page.

Pathway: CalPERS website > Employers > I Want To...: Find [my|CalPERS Student Guides](#).

Disclaimer: No actual employer or member information was compromised in the making of this my|CalPERS student guide.

In addition to the student guide, there is a [my|CalPERS Quick Reference Guide for Employers](#) online to assist users on getting started on performing common my|CalPERS functions.

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Basic Navigation

Overview

Introduction

This section was created to help first-time users with basic navigation tools such as the following:

- Learn my|CalPERS and Windows tips
 - Understand the different global navigation tabs
 - Use the Common Tasks tools
 - Know all communication outlets
 - Locate the Online Help tool
-

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my|CalPERS and Windows Tips

Introduction Listed are tips to make using my|CalPERS easier and more efficiently.

Windows Font Size

- Press and hold the “Ctrl” key to scroll up and down with your mouse wheel
- Press and hold the “Ctrl” key and use the “+” or “-“ key

Open a New Tab in Windows

Open multiple my|CalPERS tabs to multi-task.

On any tab or link, right click and select “Open in new tab” or click the mouse wheel to open item in a new tab.

Open Multiple Windows

Open multiple my|CalPERS windows to multi-task.

Right click on any tab or link select “Open in new window.”

To evenly split the multiple windows, use the “Windows”  key (between Ctrl & Alt keys) and select the “left or right” arrow key.

Or, grab the top of the window with your cursor and drag the window to the side of the screen. Let go when window shaded area is in the desired position.

Quick Keyboard Entry

- Tab to move forward, Shift+Tab to go back
- Dates and phone number can be entered without / - (or)
- If the cursor is on a button on the page, press the Enter key
- If the cursor is on a radio button, press the spacebar
- The drop-down fields are letter sensitive, if you type the first letter or number, it will populate that item e.g., “f” for female, “h” for hourly, etc.

Refresh my|CalPERS

Selecting  at the top left is a refresh option and returns you to the Home page.

If you receive an error page and you no longer see the global navigation tabs, select the my|CalPERS logo to refresh.

Also, refresh between queries.

Go Back

Avoid using the Internet “back” arrow or Backspace key, unless using Cognos (reports).

Use the navigation tabs and links to return to the previous page.

Global Navigation Tabs

Introduction my|CalPERS global navigation tabs do not change. Knowing what each tab is used for can help you navigate through my|CalPERS more easily.



Each tab populates different local navigation links located directly below the tabs and also populates different left-side navigation links located under the Menu left-side column.

For more details about these links, please see Navigating my|CalPERS in the appendix of this student guide.

Home Refresh the query page to search for another employee or retiree with the agency.

Tip! On the Home page is the left side **Contact Personal Security Settings** link that will allow users to change their password, challenge questions, or security image and message.

Profile Displays an agency's Business Partner Summary page which lists employer address, communication information, contacts, business partner relationships, and retirement contract/agreements.

Reporting Process a new retirement enrollment, health enrollments, and report payroll.

Person Information Verify membership status.
Query and maintain employee and retiree profile pages.

Education Sign up for employer instructor-led or online classes.

Other Organizations View other employer contact information e.g., addresses, email, name and phone numbers if the employer opted to make it viewable to other organizations.

Common Tasks Tools

Introduction

Common Tasks on the left side includes additional tools and is available on the **Home**, **Profile**, **Reporting**, and **Education** global navigation tabs.

Select the Common Tasks title or the carrot to expand the menu.



Reports

Run reports via the Cognos application.

Document History

View documents that your agency sent or those CalPERS provided for the agency.

Inquiry List

View your communication and inquiry/response history with CalPERS.

Submit Inquiry

This tool allows you to securely request information, submit a question, or clarify a particular issue regarding your CalPERS record. The inquiry may include confidential data, such as an SSN.

After a CalPERS representative replies, you can view the response to your inquiry.

For step actions on how to submit an inquiry through my|CalPERS, please see my|CalPERS Submit Inquiry in the appendix of this student guide.

Communication Resources

Introduction

Listed below are various methods to communicate with CalPERS:

- Submit Inquiry
 - Employer system educators
 - Employer Response Team
 - Contact center
 - CalPERS website contact link
-

Submit Inquiry

This tool allows you to securely request information, submit a question, or clarify a particular issue regarding your CalPERS record.

Employer System Educators

Email CalPERS_Employer_Communications@CalPERS.CA.GOV to connect with training staff.

Contact Center

Employer Contact Center at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

Employer Response Team

Email Employer.Response.Team@CalPERS.CA.GOV for when you need more specialized or escalated assistance, or contact them at (800) 253-4594.

CalPERS Website Contact Link

Submit questions, comments or complaints via the CalPERS website.

Pathway: CalPERS website > Contact > [Questions, Comments, & Complaints](#)

Online Help Tool

Introduction

Access the my|CalPERS Online Help tool by selecting the **Help** link in the header of any page in my|CalPERS.



The intuitive Online Help tool opens a new window and refers to the my|CalPERS page you are currently viewing.

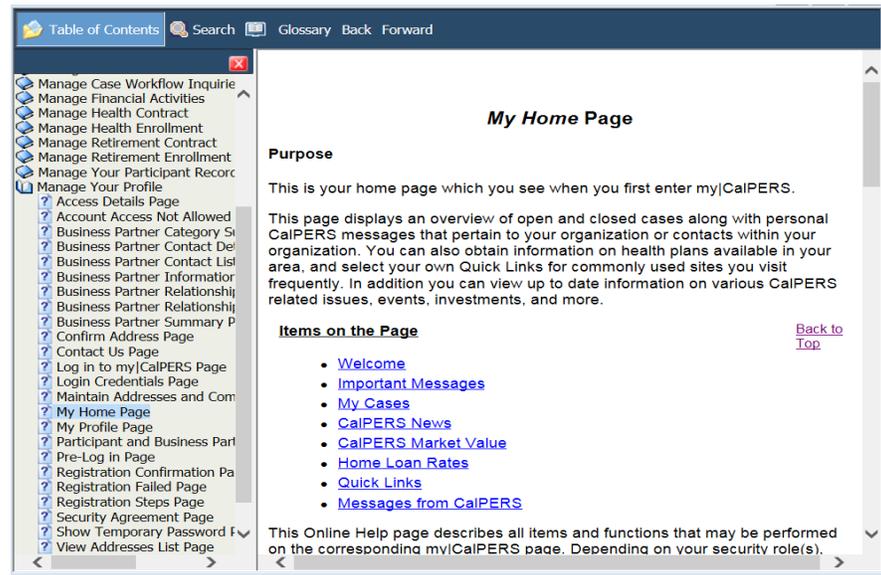


Table of Contents

The Table of Contents is organized by business processes or common functionality.

Search

The **Search** button allows users to search for and view keywords or phrases within all online help and “How To...” pages.

Glossary

The Online Help glossary contains key acronyms and common terms that appear throughout online help and displays alphabetical links along the top.

Back and Forward

The **Back** and **Forward** buttons only work in the Online Help tool.

Unit 1: my|CalPERS Query Feature

Overview

Introduction

The my|CalPERS query feature enables you to verify an employee's current demographic and address information, CalPERS benefit summary, health benefit information summary, and appointment history. In addition, for active and retirees enrolled in health benefits through your agency, you can view the details of their health benefits.

In this unit, you will learn how to view health enrollment details for an active employee with your agency.

For your retirees, you can view their health but their addresses will not display.

Contents

This unit contains the following scenario:

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Scenario: Verify an Active Employee's Health Enrollment Information



my|CalPERS allows you to search and view health enrollment details for active employees and retirees from your agency. After an employee's health is cancelled, you may still utilize the **Enrollment History** and **Deduction History** left-side links.

Scenario: Your employee has a question about their health benefits, and they also provided proof of a dependent's Social Security number (SSN). You will research your employee's health enrollment information and add an SSN to a dependent by using my|CalPERS.

Note: It's recommended to verify newly keyed health transactions after processing them to ensure accuracy e.g., all the dependents are listed, enrolled in the correct health plan, etc.

Step-by-Step Follow the steps below to view your employee's health enrollment information.

Step	Action	Result
1	Select the Person Information global navigation tab, or from the My Home page, you can also select the Person Search left-side link.	See Figure 1-1. Person Information global navigation tab and the Person Search left-side link Search for a Person page displays.
2	Enter the employee's CalPERS ID in the CalPERS ID field, then select the Search button. You may also search for an employee by Social Security number.	See Figure 1-2. Person Search section My Profile page displays.
3	Select the Health Enrollment local navigation link.	See Figure 1-3. Health Enrollment local navigation link Select Health Account page displays.

Continued on next page

Scenario: Verify an Active Employee's Health Enrollment Information, Continued

Figure 1-1. Person Search left-side link and Person Information global navigation tab

The screenshot shows the application's navigation interface. At the top, a dark blue bar contains global navigation tabs: Home, Profile, Reporting, Person Information (highlighted with a red circle), Education, and Other Organizations. Below this, a secondary bar contains 'My Home' and 'Requests'. On the left, a 'Common Tasks' menu is visible, with 'Person Search' (highlighted with a red circle) listed under the 'Menu' section. To the right, a 'My Cases' table is displayed with columns for Case ID, Case Title, Case Type, Program, and Status.

Case ID	Case Title	Case Type	Program	Status
1482025		Non-PERS Health Contract		Open
1700408		PERS Health Contract		Closed
1662911		Amend Retirement Contract		Closed
1637536		Valuation Request Case		Closed
1611361		Valuation Request Case		Closed

Figure 1-2. Person Search section

The screenshot shows the 'Person Search' section. It contains a text box with the instruction: 'Please enter the social security number or CalPERS ID of the person for whom you are searching.' Below this are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button is located at the bottom left of the section.

Figure 1-3. Health Enrollment local navigation link

The screenshot shows the 'Health Enrollment' section with a 'Summary' profile for Chris Webber. The profile includes personal information such as SSN, Name, Date of Birth, and CalPERS ID. It also lists membership details like 'Prior School Membership' and 'Membership Date'. The 'Communication' section is highlighted with a callout box and includes fields for 'Preferred Communication', 'Primary Phone Number', 'Primary Email Address', and 'Mailing Address'. There are 'Update' links for each of these fields. A note at the bottom states: 'Note: Dependent has a different Health Address'.

Communication area will reflect when a dependent has a different address than the subscriber

Continued on next page

Scenario: Verify an Active Employee's Health Enrollment Information, Continued

Step	Action	Result
4	<p>Within the Select Health Account section*, select the CalPERS Employment link (enrolled retirees would show a CalPERS Retiree link) for the employee's detailed health enrollment information in the following sections:</p> <ul style="list-style-type: none"> • Health Account Summary • Health Enrollment Information • Covered Persons Summary lists the subscriber and all covered and formerly covered dependents. To the right, a View More Actions link may be displayed, which you would need to select to view more current or former dependents. • Health Plan Summary • Future Health Events i.e., transactions with future effective dates like open enrollment • Pending Health Events (Public agencies and schools will not have any pending health events) <p>*If you select the Health Account Summary link below the Select Health Account section, you will see high-level health enrollment information (i.e., current plan name and party rate) for the enrollee.</p>	<p>See Figure 1-4. Select Health Account section on Select Health Account page</p> <p>Health Enrollment Summary page displays.</p> <p>Select a name link for the enrollee for detailed health enrollment information such as the parent-child relationship certification expiration date</p> <p>Tip! To reset the Health Enrollment Summary page to view the lower sections, select the Enrollment Summary left-side link.</p>
5	<p>Review the following left-side navigation links:</p> <ul style="list-style-type: none"> • Enrollment Summary: Summary information for a subscriber's health enrollment. On this page you can view information related to their enrollment, such as the covered persons* enrolled in health plans, the premium costs of health plans, the employer and enrollee portions of the costs, and future or pending health enrollment transactions. <p>*To add or correct a dependent's SSN, select the dependent's name link, select the edit link, add or correct the SSN, choose a verification document type, then select the Save button at the bottom right.</p>	<p>See Figure 1-5. Health Enrollment Summary page</p> <p>In order to determine what address the employee's health is based, you can perform a query of their health. You can view the Zip Code Override Indicator field. "No" indicates the employee's address is used and "Yes" means an override address is being used.</p>

Continued on next page

Scenario: Verify an Active Employee's Health Enrollment Information, Continued

Figure 1-4. Select Health Account section on Select Health Account page

Select the **CalPERS Employment** link for detailed health enrollment information

Qualifying PERS ID	Health Account Status	Employer Name	Employer CalPERS ID
6948738203	Employment	City of Santa Ana	4843991156

[Health Account Summary](#)

Figure 1-5. Health Enrollment Summary page

Health Enrollment Information
Your health enrollment is based on the following information: **Health Enrollment Summary As Of:** 09/25/2014

Health Eligibility Information
Appointment ID: 92065387
Employer CalPERS ID: 4015143822
Employer: City of Oakland
Division CalPERS ID: 4015143822
Division: City of Oakland
Agency Type: Public Agency
Qualifying CalPERS ID: 6845392893
Medical Group: 001 UNREP UNIT A H M W & X
Permanent Separation Date:
Retirement Date:
Health Benefit Appointment Same As Health Eligibility: Yes

Enrollment Information
Affiliated Retirement System: PERS
Financially Responsible CalPERS ID:
Payroll Office Code: 5
Affiliated Association:
Health Account Status: Active E
Health Eligibility Zip Code: 95650
Zip Code Override Indicator: Yes
Override Zip Code Type: Employer Address
Region: SAC
County: Placer

Covered Persons Summary
Below are your covered persons. Select the name of a covered person to

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
Chris Webber	01/22/1968	Self	NA	Basic	No	No

Health Plan Summary
Below is your plan and premium information.

Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	Blue Shield Access+ Sacramento Area (1011)	Self/B	08/01/2014	\$734.87

Select the **dependent name** link to view more dependent health enrollment information or to **add or correct their SSN**

Physical, Mailing, or Employer Address

Continued on next page

Scenario: Verify an Active Employee's Health Enrollment Information, Continued

Figure 1-6. Health Enrollment History page

Search Criteria for Health Enrollment History

Please enter search criteria to view historical health enrollment transactions.

Health Benefit Type: **To:**

Effective Date Range:

Include Rescissions?:

Qualifying Life Events Only?:

Health Enrollment History

Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status
08/01/2015	New Enrollment	Late or Loss of Coverage (Emp)	Annie Cisneros	Medical	Rescinded
08/01/2015	New Enrollment	Late or Loss of Coverage (Emp)	YI-LIN PEYTON A HERNANDEZ-CISNEROS	Medical	Rescinded
12/01/2014	Cancel Coverage	Subscriber request	YI-LIN PEYTON A HERNANDEZ-CISNEROS	Medical	Confirmed
11/01/2012	New Enrollment	Time Base & Tenure	LIVAS GANI SANNIE JAPHA	Medical	Confirmed
11/01/2012	New Enrollment	Time Base & Tenure	YI-LIN PEYTON A HERNANDEZ-CISNEROS	Medical	Confirmed

Figure 1-7. Health Deduction History page

Search Criteria

View Payment History

Health Benefit Type:HLM

Deduction Source:

Coverage Date Range- From: **Coverage Date Range- To:**

Continued on next page

Scenario: Verify an Active Employee's Health Enrollment Information, Continued

Step	Action	Result
5 cont.	<p>Review the following left-side navigation links:</p> <ul style="list-style-type: none"> • Premium Search Tool: You can search for the premium of a health plan by specific criteria, such as the health eligibility ZIP code, benefit type, carrier name, and party type. Search results display below the search criteria in the Available Health Plans section. This page displays details for informational purposes only. You may not change the displayed content. • Summary As-Of Date: You can view health enrollment details by specific date. For example, to view a future health plan change, use the effective date in the Enter Date field and the health enrollment view will be summarized as of that date. 	<p>See Figure 1-8. Health Premium Search Tool page</p> <p>See Figure 1-9. Search Criteria page</p>
	You have completed this scenario.	To query another health subscriber, refresh by selecting the my CalPERS logo at the top left or the Home global navigation tab before repeating this scenario's steps.

Viewing Health Details for Someone Not Enrolled As Of Current Date

- For viewing a future enrollment or health for a former enrollee, you will receive the message, "This participant currently does not have a health account associated to your organization; therefore, you cannot view their health enrollment information." You will still have access to the **Menu** left-side links except for the Enrollment Summary.
- For viewing a former dependent who is a COBRA subscriber, you will need to enter a date in the Anticipated Hire Date field before you can access their health enrollment details.

Continued on next page

Scenario: Verify an Active Employee's Health Enrollment Information, Continued

Figure 1-8. Health Premium Search Tool page

Health Premium Search Tool

Please enter the search criteria:

Year: * 2013

Health Benefit Type: * Medical

Health Eligibility ZIP Code: Personal Employer

Party Type: * Self/B

ZIP Code: * 95814

Carrier Name: All

Available Health Plans

The following health plans are available for this service area. Service area is determined by health eligibility ZIP code. To view the Medicare reimbursement amount, use the View Medicare Plans button.

Health Plan Name	Party Type	Gross Premium
------------------	------------	---------------

Figure 1-9. Search Criteria page

Search Criteria for Health Enrollment Summary Snapshot

Enter Date: *

Health Business Rules

Business Rules Effective dates generate based on the type of transaction (permissive or mandatory), health event reason, and the event and received dates used.

Permissive vs. Mandatory Transactions **Permissive** transactions are types that allow the employee to voluntarily enroll or make changes. For example, enrolling an eligible new hire, adding a dependent spouse due to marriage, deleting a dependent who gains other coverage, changing plans due to a move, and canceling due to subscriber request. Depending on the transaction and dates used, employers are able to process some retroactive permissive transactions i.e., new enrollment, recertify dependent*, update enrollment, dependent address change, and change health plan up to 90 days from the current date. However:

- On most permissive transactions, the employee's request must be received within 60 days of the event date in order to be effective the first of the month following the received date
- Open Enrollment (OE) transactions are effective January 1st. OE transactions cannot be retroactively processed by employers.

Mandatory transactions are types that have no time limit on processing retroactively e.g., deleting ex-spouse due to divorce, adding a dependent child due to birth or placement for adoption (mandatory unless they have other coverage), etc. **Retroactive premiums will be reimbursed up to six months.** On most mandatory transactions, the effective date is the first of the month following the event date. Two examples of exceptions:

-Cancellations due to a permanent separation are effective the first day of the second month

-Adding a dependent due to a court order will process with the effective date after the HBO received date. If the court order specifies a retroactive effective date, contact CalPERS.

*If a dependent in a parent-child relationship has already been deleted and you need to retroactively recertify that dependent, you will need to contact CalPERS to rescind the deletion prior to processing the recertification.

Event Date and Received Date **Event Date** (Permitting Event Date/box 15 of the HBD-12) is the date of the qualifying event for the transaction e.g., hire date, newborn's birth date, marriage date, divorce date, etc.

Received Date (Date received in employing office/box 33 of the HBD-12) is the date the request/HBD-12 was received in the employing office. This may be a later date than when the employee signed the HBD-12.

Unit 2: Add and Update Health Transactions

Overview

Introduction

In this unit, you will learn how to process your employees' new health enrollment and health enrollment changes using my|CalPERS. In all of these training scenarios, the employees have provided all of their required health forms e.g., HBD-12, HBD-12A, etc. along with their additional documentation e.g., copies of marriage certificate, birth certificate, divorce decree, front page of the employee's tax return, etc. to their health benefits officer. Documents are kept on file at your agency; however, CalPERS may ask for a copy.

When processing, a Social Security number (SSN) or Individual Taxpayer Identification Number (ITIN) is not required for a dependent child; however, it is required to provide this information to CalPERS later. To enroll or add a spouse or domestic partner, the SSN or ITIN becomes a required field.

Unit Objectives

After completing this unit, you will be able to process a variety of health transactions.

Contents

This unit contains the following scenarios:

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Scenario 1: New Health Enrollment to an Active Appointment



For any PERS employees, their appointment must be updated in my|CalPERS prior to processing any new health enrollment.

Scenario: Your employee has an active appointment in my|CalPERS. Today, they submitted proof that they are losing medical coverage at the end of this month and is requesting to enroll in health benefits with their daughter as a dependent.

Note: For new health enrollments for nonPERS, CalSTRS, or those eligible due to Affordable Care Act (ACA), refer to the nonPERS scenarios in the appendix.

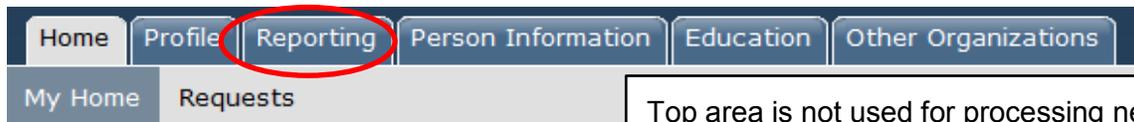
Step-by-Step Follow the steps below to process a new health enrollment.

Step	Action	Result
New Health Enrollment		
1	From the My Home page, select the Reporting global navigation tab.	See Figure 2-1. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Do not use the upper Search Preprocessing Data section when starting a new transaction. Any employees displayed under the Enrollment List are incomplete transactions. Refer to the Appendix for more information. Within the Enrollment List section, select the Add New button.	See Figure 2-2. Health Enrollment Preprocessing page Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter the employee's CalPERS ID in the CalPERS ID field, then select Search button. You may search for an employee by SSN.	See Figure 2-3. Search Results section is populated with employee's information
6	Verify that the correct employee's name displays, then select the Select button.	Health Event Information page displays.

Continued on next page

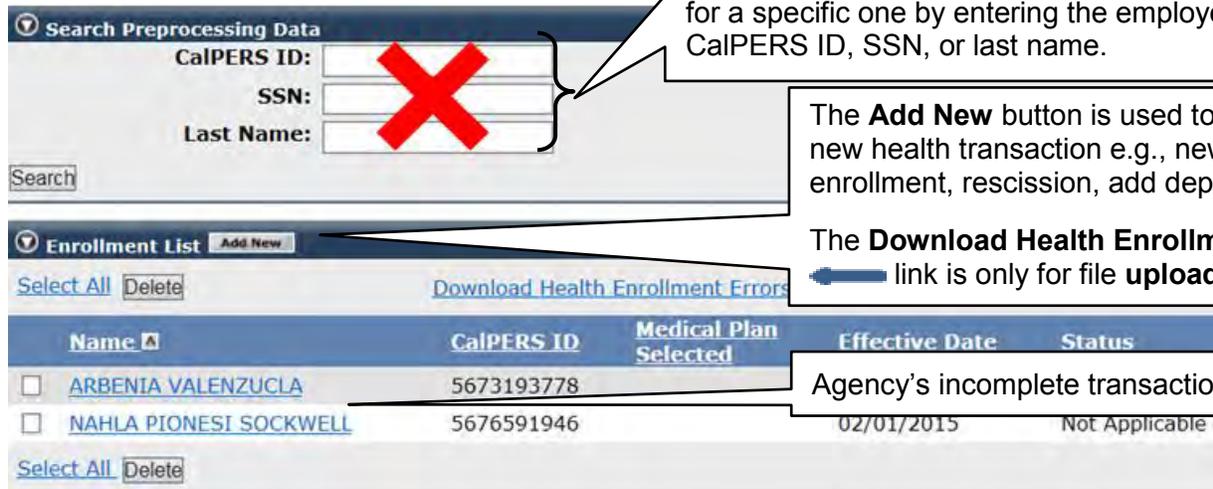
Scenario 1: New Health Enrollment to an Active Appointment, Continued

Figure 2-1. Reporting global navigation tab



Top area is not used for processing new transactions. If an agency has many pages of incomplete transactions, you can search for a specific one by entering the employee's CalPERS ID, SSN, or last name.

Figure 2-2. Health Enrollment Preprocessing page

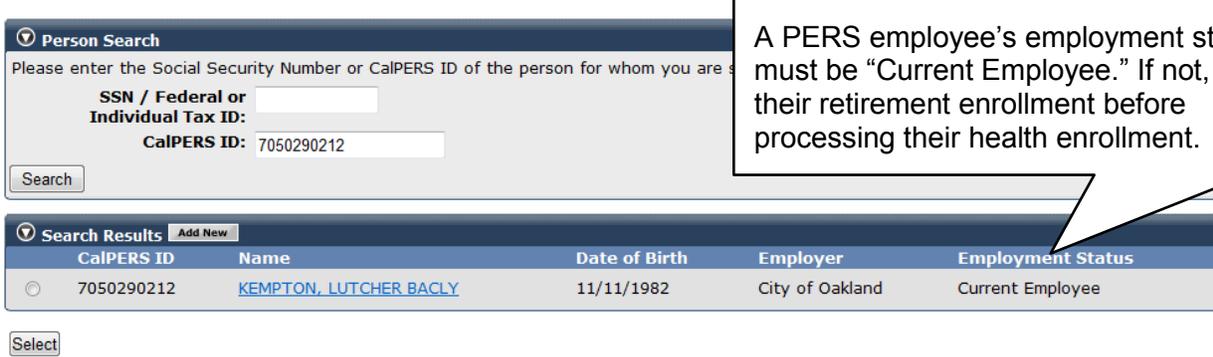


The **Add New** button is used to add *any* new health transaction e.g., new enrollment, rescission, add dependent, etc.

The **Download Health Enrollment Errors** link is only for file **upload** agencies.

Agency's incomplete transactions

Figure 2-3. Search Results section is populated with employee's information



A PERS employee's employment status must be "Current Employee." If not, add their retirement enrollment before processing their health enrollment.

Loss of Other Health Coverage

If you initially declined (or canceled) enrollment for yourself or your dependents because you had other private or CalPERS health coverage at that time, you are able to enroll in a CalPERS health plan if the other coverage involuntarily ends. To qualify, you will need to request enrollment within 60 days after the other coverage ends and provide proof that the other coverage has ended.

Continued on next page

Scenario 1: New Health Enrollment to an Active Appointment, Continued

Step	Action	Result						
7	<p>Populate the following fields in the Health Event Information section:</p> <ul style="list-style-type: none"> • Health Event Type: “New Enrollment” • Health Event Reason: “Late or Loss of Coverage (Emp)” • Event Date: (Date of loss of coverage) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button <p>Select the Save & Continue button.</p>	<p>See Figure 2-4. Health Event Information section</p> <p>Maintain Address, Communication, and Appointment Details sections display.</p> <p>It's highly recommended to use the View Effective Date button at the bottom right to view the effective date based on the reason, event date, and received date entered</p>						
8	<p>When the appointment is active, the Address and Communication Details sections are prepopulated. my CalPERS will automatically use the physical address ZIP code. If there's no physical address, then it will use the mailing address as long as it's not a P.O. box.</p> <p>From the Medical Group drop-down list, select the employee's medical group.</p>	<p>See Figure 2-5. Health Event Information page</p> <p>At this time, you can add an address. If a P.O. box is used for mailing, you must add a physical address for health eligibility.</p>						
9	<p>Is employee part of the PORAC association?</p> <table border="1" data-bbox="313 1213 1000 1381"> <thead> <tr> <th data-bbox="313 1213 402 1243">If...</th> <th data-bbox="402 1213 1000 1243">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="313 1243 402 1318">Yes</td> <td data-bbox="402 1243 1000 1318">Choose the appropriate association from the Affiliated Association drop-down list</td> </tr> <tr> <td data-bbox="313 1318 402 1381">No</td> <td data-bbox="402 1318 1000 1381">leave the Affiliated Association drop-down field blank</td> </tr> </tbody> </table> <p>Select the Save & Continue button.</p>	If...	Then...	Yes	Choose the appropriate association from the Affiliated Association drop-down list	No	leave the Affiliated Association drop-down field blank	<p>See Figure 2-5. Health Event Information page</p> <p>Select Covered Person page displays.</p>
If...	Then...							
Yes	Choose the appropriate association from the Affiliated Association drop-down list							
No	leave the Affiliated Association drop-down field blank							
10	<p>Optional: Enter the doctor's name in the Medical Provider field.</p> <p>Is employee enrolling dependents?</p> <table border="1" data-bbox="313 1621 781 1730"> <thead> <tr> <th data-bbox="313 1621 402 1650">If...</th> <th data-bbox="402 1621 781 1650">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="313 1650 402 1688">Yes</td> <td data-bbox="402 1650 781 1688">Continue to step 11</td> </tr> <tr> <td data-bbox="313 1688 402 1730">No</td> <td data-bbox="402 1688 781 1730">Skip to step 17</td> </tr> </tbody> </table>	If...	Then...	Yes	Continue to step 11	No	Skip to step 17	<p>See Figure 2-6. Covered Person List section</p> <p>Don't select the Save & Continue button! If you did and you need to add a dependent, select the Cancel button and start over.</p>
If...	Then...							
Yes	Continue to step 11							
No	Skip to step 17							

Continued on next page

Scenario 1: New Health Enrollment to an Active Appointment, Continued

Figure 2-4. Health Event Information section

Figure 2-5. Health Event Information page

3/10/14 Circular Letter 600-005-14 As your employee changes jobs, you may need to update their medical group (loosely called bargaining unit) if your agency contracts for multiple medical groups. Updates are made on a current basis! Process the health transaction by using:

- **Health Event Type:** Update Enrollment,
- **Health Event Reason:** Change Medical Group,
- **Event Date:** When the medical group changed,
- **Received Date:** Current Date

Figure 2-6. Covered Person List section

Name	Date of Birth	Relationship	Medical	Dental	Vision
annette ponce	04/05/1960	Self	BAS	No	No

Continued on next page

Scenario 1: New Health Enrollment to an Active Appointment, Continued

Step	Action	Result						
Add Dependent								
11	<p>Select the Add New button.</p> <p>Is the dependent in the Existing Relationships Eligible for Health section?</p> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Select the radio button associated to the dependent's name, select the Continue button, then skip to step 14</td> </tr> <tr> <td>No</td> <td>Continue to step 12</td> </tr> </tbody> </table>	If...	Then...	Yes	Select the radio button associated to the dependent's name, select the Continue button, then skip to step 14	No	Continue to step 12	Existing Relationships Eligible for Health page displays.
If...	Then...							
Yes	Select the radio button associated to the dependent's name, select the Continue button, then skip to step 14							
No	Continue to step 12							
12	Select the Add New button to add a dependent that's not on the Existing Relationships Eligible for Health section.	Demographic Information page displays.						
13	<p>Populate the following fields under the Person Details:</p> <ul style="list-style-type: none"> • First Name and Last Name • SSN • Gender • Relationship • Dependent Type • Date of Birth <p>Deselect the Checkbox if the dependent's address is different than the primary subscriber's, then update their address.</p>	<p>See Figure 2-7. Person Details section</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>If dependent is in the system, their last name must match. You can query the dependent to verify their last name.</p> <p>If the dependent is in the system without a birth date and/or gender, contact CalPERS.</p> </div>						
14	Select the Save & Continue button.	Dependent Information page displays.						
15	<p>If adding a dependent in a parent-child relationship, select the Maintain Certification link, select the checkboxes for the Certify Dependent and the disclaimer, then select the Save & Continue button.</p> <p>Select the next Save & Continue button.</p>	Select Covered Person page displays.						
16	<p>Do you have additional dependents to add?</p> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Repeat steps 12 through 16</td> </tr> <tr> <td>No</td> <td>Continue to step 17</td> </tr> </tbody> </table>	If...	Then...	Yes	Repeat steps 12 through 16	No	Continue to step 17	
If...	Then...							
Yes	Repeat steps 12 through 16							
No	Continue to step 17							

Continued on next page

Scenario 1: New Health Enrollment to an Active Appointment, Continued

Figure 2-7. Person Details section

The screenshot shows a 'Person Details' form with the following fields and labels:

- Prefix: [dropdown]
- First Name: * [text input]
- Middle Name: [text input]
- Last Name: * [text input]
- Suffix: [dropdown]
- SSN: [dropdown]
- Gender: * [dropdown]
- Relationship: * [dropdown]
- Dependent Type: * [dropdown]
- Date Of Birth: * [calendar icon]

Social Security Number (SSN) for a Dependent Child

Dependent children can be added without a Social Security number (SSN); however, the employer is required to create a follow-up process to collect the SSN within 90 days of enrollment per (Circular Letter [600-060-10](#)). Once the employee can provide the dependent's SSN, you can update it in myCalPERS (see unit 1, step 5).

For a new health enrollment that includes dependent children without an SSN, you will receive this warning which you can bypass by selecting the **OK** button.

The warning dialog box contains the following text:

Warning [close button]

⚠ Dependent Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) is a required field for Health - do you wish to bypass?

OK Cancel

Continued on next page

Scenario 1: New Health Enrollment to an Active Appointment, Continued

Step	Action	Result
17	<p>Optional: Include physicians' names in the Medical Provider fields.</p> <p>Select the Save & Continue button.</p>	Plan Selection page displays.
Select Medical Plan		
18	<p>The Health Eligibility ZIP Code Override checkbox is used if using a work or different personal ZIP code for health eligibility. The Personal option is available when there is a mailing and physical address in the system.</p> <p>Select the radio button for the employee's chosen medical plan, then select the Save & Continue button.</p>	<p>See Figure 2-8. Plan Selection page</p> <p>Health Enrollment Preprocessing page displays.</p>
	You have completed this scenario.	<p>Recommendation: Query your updated transaction to verify it updated correctly, such as the health plan and all the dependents. Or run the Employer Health Event Notification Report or the Employer Health Event Transaction Report to view any updated health transactions.</p>

Tip!

To later cancel or change a work eligibility ZIP code, you need to process a health transaction using:

- Health Event Type: Update Enrollment
- Health Event Reason: Cancel Eligibility Zip or Change Eligibility Zip

Continued on next page

Scenario 1: New Health Enrollment to an Active Appointment, Continued

Figure 2-8. Plan Selection page

▼ **Preselections**

Health Eligibility ZIP Code
Health Eligibility Address: 400 P ST, SACRAMENTO, CA 95814-5345 Sacramento SAC (Address Start Date 09/25/2014)
Medical Party Type: Self/B

Select an address below to override the current health Eligibility Address.

NOTE - Overriding the current Health Eligibility Address will create a Change Eligibility ZIP transaction in conjunction with the enrollment transaction.

Health Eligibility ZIP Code Override:

If a ZIP code override is being used after you save, it will display on the Health Enrollment Summary page when you query their health

▼ **Medical Plan Selections**

	Plan Name	Party	Premium	COBRA Premium
<input type="radio"/>	Anthem Blue Cross Select HMO Sacramento Area	Self/B	750.27	765.28
<input type="radio"/>	Anthem Blue Cross Traditional HMO Sacramento Area	Self/B	840.43	857.24
<input type="radio"/>	Blue Shield Access+ Sacramento Area	Self/B	734.87	749.57
<input type="radio"/>	Blue Shield NetValue Sacramento Area	Self/B	618.39	630.76
<input type="radio"/>	Kaiser Permanente California Sacramento Area	Self/B	681.59	695.22
<input type="radio"/>	PERS Choice Sacramento Area	Self/B	665.99	679.31
<input type="radio"/>	PERS Select Sacramento Area	Self/B	637.85	650.61
<input type="radio"/>	PERSCare Sacramento Area	Self/B	694.26	708.15
<input type="radio"/>	UnitedHealthcare Alliance HMO Sacramento Area	Self/B	643.34	656.21

Health Enrollment Survey

Every 30 days, the employer will receive a pop-up five question survey after selecting the **Save & Continue** button at the end of processing a new health enrollment. The survey results will be distributed to a project team to help gauge customer satisfaction and to target potential process improvements.

- If you take or decline the survey, the survey will be suppressed for 30 days
- If the survey is ignored, it will be presented when the user processes the next new health enrollment

Scenario 2: Rescission



An employee may request to rescind a permissive (not mandatory) health enrollment transaction prior to the effective date. You may also need to process a rescission in order to correct a transaction e.g., you forgot to include a dependent on a new health enrollment, so then you need to reprocess the new health enrollment after the rescission.

Scenario: Today, your employee requested to rescind their new health enrollment that's effective next month.

Step-by-Step Follow the steps below to process a rescission.

Step	Action	Result
1	From the My Home page, select the Reporting global navigation tab.	See Figure 2-9. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Do not use the upper Search Preprocessing Data section when starting a new transaction. Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link. Do not select the right-side Rescind an Existing Transaction link.	Search for a Person page displays.
5	Enter the employee's CalPERS ID in the CalPERS ID field, then select the Search button. You may also search for an employee by their Social Security number.	See Figure 2-10. Search Results section is populated with employee's information
6	Verify that the correct employee's name displays, then select the Select button.	Health Event Information page displays.
7	Within the Demographics Information section, select the Rescind an Existing Transaction link.	See Figure 2-11. Rescind an Existing Transaction link Health Enrollment History page displays.

Continued on next page

Scenario 2: Rescission, Continued

Figure 2-9. Reporting global navigation tab

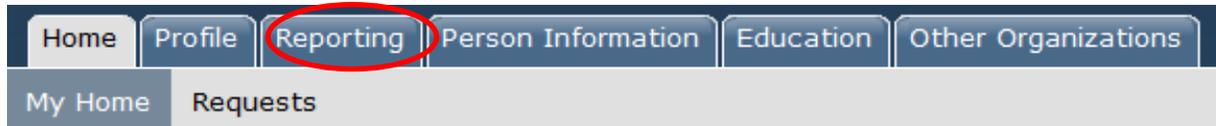


Figure 2-10. Search Results section is populated with employee's information

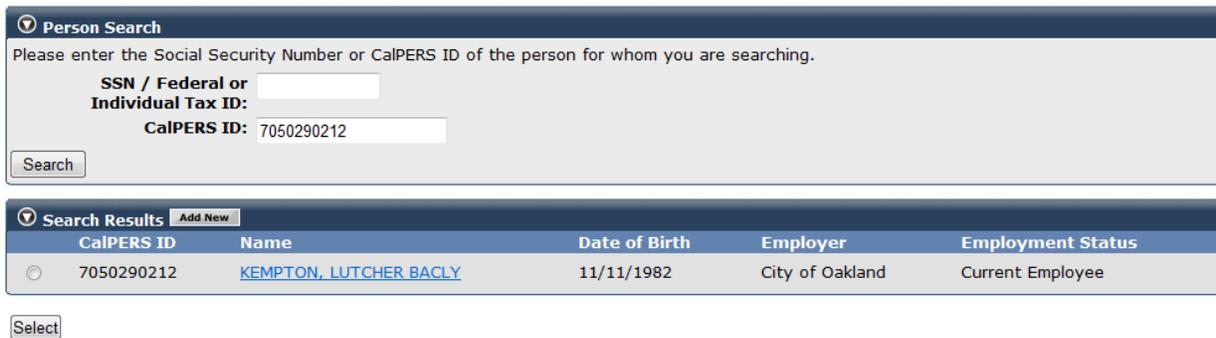
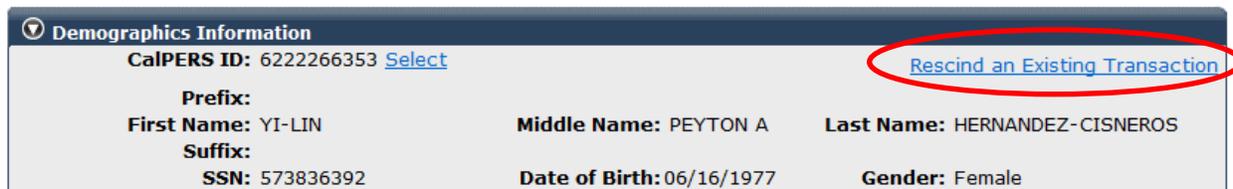


Figure 2-11. Rescind an Existing Transaction link



Tip!

To view a rescinded new health enrollment, select the **Person Information** global tab, select the **Health Enrollment** local link, then select their **Enrollment History** or **Deduction History** left-side link.

Continued on next page

Scenario 2: Rescission, Continued

Step	Action	Result
8	<p>Important! If rescinding the entire new health enrollment with dependents, ensure that you select the radio button of the employee's transaction line. If you select a dependent's radio button, only that dependent will be rescinded.</p> <p>The transaction MUST have a status of "Future" in order to rescind it.</p> <p>Within the Health Enrollment History section, select the radio button associated to the health event to be rescinded, then select the Rescind button.</p>	<p>See Figure 2-12. Health Enrollment History section</p> <p>Health Transactions Details page displays.</p>
9	<p>Within the Rescission Confirmation section, select the appropriate option from the Reason for Rescission drop-down list, then select the Save & Continue button.</p> <p>Additional Information field is optional.</p>	<p>See Figure 2-13. Rescission Confirmation section</p> <p>Health Event Information page displays. Within the Health Event Information section, the Request for Rescission field will read "true" and the Reason for Rescission field will be populated accordingly.</p>
10	<p>Select the Save & Continue button.</p>	<p>See Figure 2-14. Health Event Information section</p> <p>Health Enrollment Preprocessing page displays.</p>
<p>You have completed this scenario.</p>		

Continued on next page

Scenario 2: Rescission, Continued

Figure 2-12. Health Enrollment History section

Search Criteria for Health Enrollment History

Please enter search criteria to view historical health enrollment transactions.

Health Benefit Type: Medical

Effective Date Range: **To:**

Include Rescissions?: No

Qualifying Life Events Only?: Yes

Health Enrollment History

Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status
<input checked="" type="radio"/> 05/01/2012	New Enrollment	Time Base & Tenure	KATELYN GRACE TETA	Medical	Future
<input type="radio"/> 10/01/2005	Cancel Coverage	Subscriber request	KATELYN GRACE TETA	Medical	Confirmed
<input type="radio"/> 01/01/2005	Change Health Plan	Rollover/Mass Change - Batch	KATELYN GRACE TETA	Medical	Confirmed
<input type="radio"/> 01/01/2003	Change Health Plan	Rollover/Mass Change - Batch	KATELYN GRACE TETA	Medical	Confirmed
<input type="radio"/> 10/01/1996	New Enrollment	Conversion: To Covered	KATELYN GRACE TETA	Medical	Confirmed
<input type="radio"/> 10/01/1996	New Enrollment	Conversion: To Covered	GEORGIA ROSE DISHELLAI TETA	Medical	Confirmed
<input type="radio"/> 10/01/1996	New Enrollment	Conversion: To Covered	NIEVITAS MALLAVII TETA	Medical	Confirmed
<input type="radio"/> 10/01/1996	New Enrollment	Conversion: To Covered	CLYDETTE DISHELLAI TETA	Medical	Confirmed

Figure 2-13. Rescission Confirmation section

Rescission Confirmation

Reason for Rescission:*

Additional Information:

Additional Information is optional, but it is recorded permanently

Figure 2-14. Health Event Information section

Health Event Information

Health Event Type: New Enrollment

Health Event Reason: Time Base & Tenure

Event Date: 04/01/2012

Received Date: 04/01/2012

Apply Change to: Medical

Request for Rescission: true

Reason for Rescission: Administrative Correction

Request for Rescission:

Scenario 3: Change Health Plan



A physical move of residences is a permitting health event to change plans outside of Open Enrollment e.g., an employee physically moves to another city or from apartment A to apartment B. Addresses should be updated in my|CalPERS prior to processing the health plan change.

Scenario: Your employee moved last month and their new address is reflected in my|CalPERS. They are now requesting to change health plans.

Note: If the employee wants to start using the employer ZIP code for health eligibility, prior to processing a plan change, an **Update Enrollment** transaction type/**Change Eligibility Zip** reason needs to be processed to add the employer ZIP code. When processing this transaction, the event and received dates should be on a current basis. Use the **Cancel Eligibility Zip** reason if you need to cancel a work ZIP code used for health eligibility.

Step-by-Step Follow the steps below to process a change of health plan.

Step	Action	Result
1	From the My Home page, select the Reporting global navigation tab.	See Figure 2-15. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select “Add or Edit Health Enrollment” from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Do not use the upper Search Preprocessing Data section when starting a new transaction. Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter the employee’s CalPERS ID in the CalPERS ID field, then select the Search button. You may also search for an employee by SSN.	See Figure 2-16. Person Search section
6	Verify that the correct employee’s name displays, then select the Select button	Health Event Information page displays with Demographics Information section populated with employee’s information.

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Scenario 3: Change Health Plan, Continued

Figure 2-15. Reporting global navigation tab

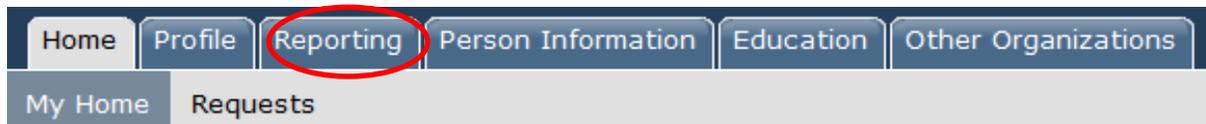
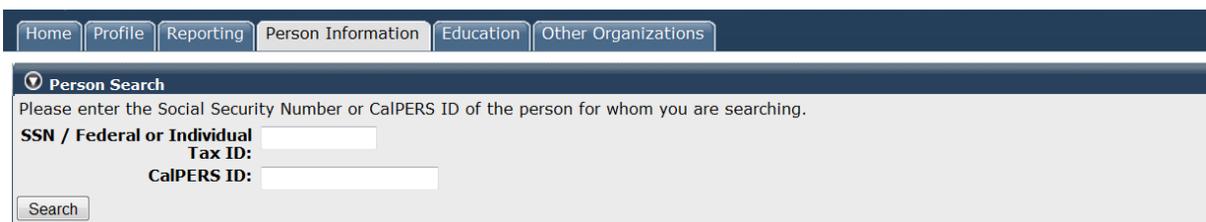


Figure 2-16. Person Search section

A screenshot of the 'Person Search' section in a web application. At the top, there is a navigation bar with tabs for 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Below the navigation bar is a search form titled 'Person Search'. The form contains the instruction: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button is located at the bottom left of the form.

If Your Employee Moves Out of Area



Employees must change plans if they move out of the health plan's service area. When your employees move, they may submit a health plan change up to 60 days after the move. The effective date of the change will be the first of the month following the date the employer receives the request.

If a subscriber moves and is out of the HMO's service area, which means there are no providers within a 30 mile radius of their eligibility ZIP code:

1. There is an Out of Service batch process that our system runs each month. If the subscriber is identified as out of the service area, a notice is generated and sent to the subscriber.
2. If the subscriber does not change plans to one in their service area or use the work ZIP code within 60 days, my|CalPERS will change the subscriber to PERSChoice. For public agencies and schools, if the subscriber is out of the service area for the region they are enrolled in but not out of the service area for the health carrier, they still receive a notice when the batch runs and if no change is made in 60 days, the subscriber is administratively moved to the correct regional health plan.

Continued on next page

Scenario 3: Change Health Plan, Continued

Step	Action	Result
7	Populate the Health Information section fields: <ul style="list-style-type: none"> • Health Event Type: “Change Health Plan” • Health Event Reason: “Move” • Event Date: (Date employee moved) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button If changing health plans during Open Enrollment, then select the following options: <ul style="list-style-type: none"> • Health Event Type: “Open Enrollment” • Health Event Reason: “Open Enrollment Change Health Plan” 	See Figure 2-17. Health Event Information section
8	Select the Save & Continue button.	Plan Selection page displays.
9	Select the employee’s chosen medical plan radio button. Optional: Include physician’s names in the Medical Provider fields.	See Figure 2-18. Plan Selection page Health Enrollment Preprocessing page displays.
10	Select the Save & Continue button.	
	You have completed this scenario.	

Continued on next page

Scenario 3: Change Health Plan, Continued

Figure 2-17. Health Event Information section

Health Event Information

Health Event Type: Change Health Plan

Health Event Reason: Move

Event Date: [Calendar Icon]

Received Date: [Calendar Icon]

Apply Change to: Medical

Figure 2-18. Plan Selection page

Preselections

Health Eligibility ZIP Code

Health Eligibility Address: Physical Address, 95821 Sacramento SAC (Address Start Date 10/01/2014)

Medical Plan Selections

Plan Name	Party	Premium	COBRA Premium
<input type="radio"/> PERS Select Bay Area	Self/B and 2+/B	1266.72	1292.05
<input checked="" type="radio"/> PERSCare Bay Area	Self/B and 2+/B	2816.09	2872.41
<input type="radio"/> Kaiser Permanente California Bay Area	Self/B and 2+/B	1738.44	1773.21
<input type="radio"/> PERS Choice Bay Area	Self/B and 2+/B	1734.28	1768.97
<input type="radio"/> Blue Shield of California Bay Area	Self/B and 2+/B	2040.04	2080.84

Provider Information

Name	Dependent Type	Medical Provider	Dental Provider	Vision Provider
WREESMAN, BOT	Spouse	[Text Field]		
WREESMAN, BOT	Natural Born Child	[Text Field]		
WREESMAN, JAFIA	Step Child	[Text Field]		
BUDENSIEK, MEDARDO	Self	[Text Field]		

Note for a Plan Change to PORAC Health plan change into PORAC association plan for a new association member:

1. Select Change Health Plan for the health event type
2. Choose the "Association membership" for the health event reason
3. Select the PORAC from the Affiliated Association drop-down list, select the **Display Plans** button, select the **medical plan** radio button, and save.

If the employee is enrolled in a plan but the association sends a notification to CalPERS that the employee is not a dues-paying member into the applicable association, CalPERS will get a notification from the association plan and change the enrollee to PERS Choice due to not being a member and not eligible.

Scenario 4: Add Dependent



Refer to the 12/9/2015 Circular Letter [600-008-15](#) "Eligibility Criteria for Dependents in a Parent-Child Relationship" and its four attachments for the January 1, 2016 requirement changes:

- [PCR Regulatory Language](#)
- [Affidavit of Parent-Child Relationship](#)
- [PCR Subscriber Letter](#)
- [Employer FAQs](#)

Scenario: Your employee has just become the legal guardian of her niece, Kitty Kooper. The employee wants to add Kitty to her health (medical) benefits and she has completed the Affidavit of Parent-Child Relationship. You will add the child as a dependent.

Please see "Recertifying a Dependent in a Parent-Child Relationship" in the appendix of this student guide for recertification information.

Step-by-Step Follow the steps below to process adding a dependent.

Step	Action	Result
Select Subscriber		
1	From the My Home page, select the Reporting global navigation tab.	See Figure 2-19. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Do not use the upper Search Preprocessing Data section when starting a new transaction. Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	See Figure 2-20. Demographics Information section Search for a Person page displays.
5	Enter the employee's CalPERS ID in the CalPERS ID field, then select the Search button. (You may also search by SSN)	Below the Person Search section, the Search Results section is populated with employee's information.
6	Verify that the correct employee's name displays, then select the Select button.	See Figure 2-21. Search Results section Health Event Information page displays.

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Scenario 4: Add Dependent, Continued

Figure 2-19. Reporting global navigation tab

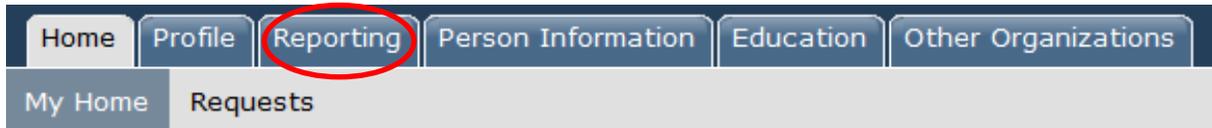


Figure 2-20. Demographics Information section



Figure 2-21. Search Results section

S

Search Results		Add New		
CalPERS ID	Name	Date of Birth	Employer	Employment Status
<input type="radio"/> 3371816918	TETA, KATELYN GRACE	06/13/1964	City of Oakland	Current Employee

Continued on next page

Scenario 4: Add Dependent, Continued

Step	Action	Result
7	Populate the following fields in the Health Event section: <ul style="list-style-type: none"> ● Health Event Type: “Add Dependent” ● Health Event Reason: “Parent-Child Relationship” ● Event Date: (Date employee assumed the primary custodial parental role for the child) ● Received Date: (Date the request was received in the employing office) ● Apply Change to: Select the Medical radio button 	See Figure 2-22. Health Event Information section
8	Select the Save & Continue button.	Existing Relationships Eligible for Health page displays.
Add Dependent		
9	Within the Existing Relationships Eligible for Health section, select the Add New button. If the dependent is listed, select their checkbox, then select the Continue button.	Demographic Information page displays.

Continued on next page

Scenario 4: Add Dependent, Continued

Figure 2-22. Health Event Information section

The screenshot shows a web form titled "Health Event Information" with a dark blue header. The form contains the following fields and controls:

- Health Event Type:** A dropdown menu with "Add Dependent" selected.
- Health Event Reason:** A dropdown menu with "Parent-Child Relationship" selected.
- Event Date:** A text input field with a calendar icon to its right.
- Received Date:** A text input field with a calendar icon to its right.
- Apply Change to:** A radio button labeled "Medical" is selected.
- View Effective Date:** A button located in the bottom right corner of the form area.

Below the form, there are three buttons: "Save & Continue", "Cancel", and "Clear".

Continued on next page

Scenario 4: Add Dependent, Continued

Step	Action	Result
10	<p>Populate the following fields in the Person Details section:</p> <ul style="list-style-type: none"> • First Name • Last Name • SSN • Gender • Relationship • Dependent Type • Date of Birth <p>Deselect the Checkbox if the dependent's address is different than the primary subscriber's and then update their address.</p>	
	<p>If dependent is in the system, their last name must match. You can query the dependent to verify their last name that is in my CalPERS.</p> <p>If the dependent is in the system without a birth date and/or gender, contact CalPERS.</p>	
11	Select the Save & Continue button.	See Figure 2-23. Parent-Child Relationship Certification section
12	<p>Within the Existing Relationships Eligible for Health section, select the Provide Certification link.</p> <p>Optional: Include dependent's doctor's name.</p>	<p>See Figure 2-24. Parent-Child Relationship Certification section</p> <p>Update Certifications page displays.</p>
13	Select the Certify Dependent checkbox and the disclaimer checkbox, "I recognize that this affidavit is a legal binding document..." then select the Save & Continue button.	Existing Relationships Eligible for Health page displays.
14	<p>Provide Certification link now displays an Update Certification link.</p> <p>Select the Continue button.</p>	The information is saved and the Health Enrollment Preprocessing page displays.
	You have completed this scenario.	

Viewing the Parent-Child Relationship Certification Expiration Date

When you query the subscriber's health enrollment details, under the Covered Persons Summary section, select the dependent's name of the dependent in a parent-child relationship. Part of the dependent's health coverage details includes the parent-child relationship certification expiration date which is the last day of the employee's (or retiree's) birth month.

Continued on next page

Scenario 4: Add Dependent, Continued

Figure 2-23. Existing Relationships Eligible for Health section

Existing Relationships Eligible for Health [Add New](#)

Our records indicate a relationship with the following individuals who are eligible for health, listed below. Additional relationships may exist in our system, but are not eligible for health and are not displayed here. Please select the dependent you would like to enroll. If the dependent is not listed, click the Add New button. For new enrollments only, if you choose to add no dependents, please click the continue button.

Name	Date of Birth	Relationship	Medical	Dental	Vision	Parent-Child Relationship	Provider
<input type="checkbox"/> SADIS, MINAS	08/11/1972	Spouse	Yes	No	No		
<input type="checkbox"/> SADIS, ONIEL	11/25/2005	Child	Yes	No	No		
<input type="checkbox"/> SADIS, SAIQA	03/26/2001	Child	Yes	No	No		
<input checked="" type="checkbox"/> Kooper, Kitty	09/15/2012	Niece	Yes	No	No	Provide Certification	

Figure 2-24. Parent-Child Relationship Certification section

Acquired Date: The date the employee assumed the primary custodial parental role for the child

Parent-Child Relationship Certification

Please complete the following certification/recertification:

The Public Employee's Medical and Hospital Care Act (PEMHCA) and regulations allow for the enrollment of a child (other than natural, adopted, or step-child) in the CalPERS-sponsored health plan if the employee or Annuitant has a "parent-child relationship" with the child. The child must never have been married and must be under the age of 26 (except for certain disabled dependents).

In order to enroll or continue enrollment in a CalPERS-sponsored health plan, please certify the parent-child relationship by selecting the appropriate certification reason.

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kitty Kooper	04/01/2014	12/31/2014	<input checked="" type="checkbox"/> Certify Dependent

* I recognize that this affidavit is a legally binding document and accept full responsibility for notifying my Personnel Office or CalPERS immediately if there are any changes pertaining to this child's status as my dependent. I agree to provide supporting documentation, such as, but not limited to, court records, birth certificate, proof of school registration, tax returns, statement of financial liability, or any other documents, when requested by my employer (or CalPERS) as long as the child is enrolled as my dependent. I understand that certification of existing miscellaneous children must be completed on an annual basis. I hereby certify, under penalty of perjury, that the information provided by me is true and correct to the best of my knowledge.

Scenario 5: Delete Dependent



Divorce is a mandatory event that requires the deletion of an ex-spouse.

Scenario: Your employee brought in a copy of their divorce decree which shows it was finalized last month. You will delete their ex-spouse from the employee's health (medical) benefits.

Step-by-Step Follow the steps below to process a deletion of a dependent.

Step	Action	Result
Select Subscriber		
1	From the My Home page, select the Reporting global navigation tab.	See Figure 2-25. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Do not use the upper Search Preprocessing Data section when starting a new transaction. Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter the employee's CalPERS ID in the CalPERS ID field, then select the Search button. You may also search for an employee by their Social Security number.	See Figure 2-26. Below the Person Search section, the Search Results section is populated with employee's information
6	Verify that the correct employee's name displays, then select the Select button.	Health Event Information page displays with Demographics Information section populated with employee's information.
7	Populate the Health Event section fields: <ul style="list-style-type: none"> • Health Event Type: "Delete Dependent" • Health Event Reason: "Divorce" • Event Date: (Date of divorce) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select Medical radio button 	See Figure 2-27. Health Event Information section

Continued on next page

Scenario 5: Delete Dependent, Continued

Figure 2-25. Reporting global navigation tab

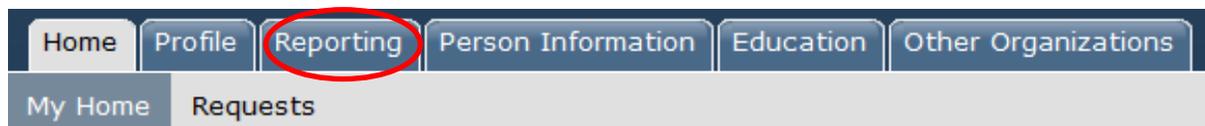
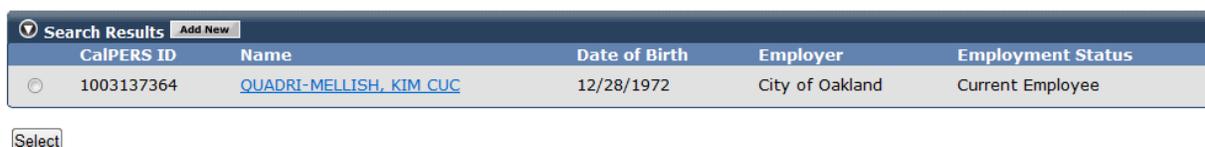


Figure 2-26. Search Results section is populated with employee's information

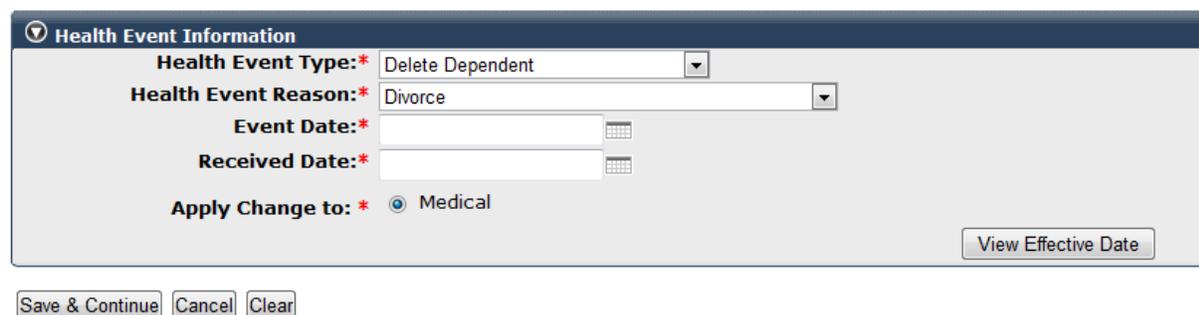


The screenshot shows a 'Search Results' section with a table containing one row of data. Below the table is a 'Select' button.

CalPERS ID	Name	Date of Birth	Employer	Employment Status
1003137364	QUADRI-MELLISH, KIM CUC	12/28/1972	City of Oakland	Current Employee

Select

Figure 2-27. Health Event Information section



The screenshot shows a 'Health Event Information' form with the following fields and options:

- Health Event Type:** Delete Dependent
- Health Event Reason:** Divorce
- Event Date:** (calendar icon)
- Received Date:** (calendar icon)
- Apply Change to:** Medical
- View Effective Date** (button)
- Save & Continue** (button)
- Cancel** (button)
- Clear** (button)

Change in Marital or Registered Domestic Partnership Status



Changes in relationship status as a result of divorce, termination of a registered domestic partnership or death affects your health plan enrollment. When you divorce or terminate a registered domestic partnership, your former spouse or registered domestic partner is no longer eligible to receive CalPERS health benefits under your enrollment.

The coverage terminates on the first day of the month following the date the divorce decree or termination of registered domestic partnership is granted. A copy of the final Divorce Decree or Termination of Domestic Partnership is required when you delete a former spouse or registered domestic partner from your health plan.

Continued on next page

Scenario 5: Delete Dependent, Continued

Step	Action	Result
8	Select the Save & Continue button.	Select Covered Persons page displays.
Select Dependent(s) to be Deleted		
9	<p>Select the dependent's checkbox next to the dependent's name who is being deleted, then select the Continue button.</p> <p>Due to divorce, any dependent with the relationship of "Step Child" will automatically be deleted at the same time.</p>	<p>See Figure 2-28. Existing Relationships Eligible for Health section</p> <p>The information is saved and the Health Enrollment Preprocessing page displays.</p>
	You have completed this scenario.	

Continued on next page

Scenario 5: Delete Dependent, Continued

Figure 2-28. Existing Relationships Eligible for Health section

Existing Relationships Eligible for Health

Our records indicate a relationship with the following individuals who are eligible for health, listed below. Additional relationships may exist in our system, but are not eligible for health and are not displayed here. Please select the dependent you would like to enroll. If the dependent is not listed, click the Add New button. For new enrollments only, if you choose to add no dependents, please click the continue button.

	Name	Date of Birth	Relationship	Medical	Dental	Vision
<input checked="" type="checkbox"/>	Flaws, Denise F	07/23/1970	Spouse	Yes	No	No
<input type="checkbox"/>	Flaws, Audrey B	02/06/2003	Natural Born Child	Yes	No	No
<input type="checkbox"/>	Flaws, Ian W	07/22/2004	Natural Born Child	Yes	No	No

Continue Cancel

Due to divorce, only select the ex-spouse and the system will automatically delete the stepchildren as long as their relationship shows "Step Child."

Scenario 6: New COBRA Health Enrollment for a Former Dependent



The Consolidated Omnibus Budget Reconciliation Act (COBRA) is a federal program that allows the continuation of health coverage for a limited time under certain circumstances.

Scenario: Due to divorce, your employee's deleted ex-spouse and their child (employee's step child) were deleted. The ex-spouse is electing COBRA with their child as a dependent.

Step-by-Step Follow the steps below to process a new COBRA health enrollment for a former dependent with one dependent child.

Step	Action	Result
Enroll in COBRA		
1	From the My Home page, select the Reporting global navigation tab.	See Figure 2-29. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Do not use the upper Search Preprocessing Data section when starting a new transaction. Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter the COBRA enrollee's CalPERS ID in the CalPERS ID field, then select the Search button. You may also search by their SSN.	Search results display in Search Results section.
6	Verify that the correct enrollee's name displays. For a former dependent enrolling as a subscriber, their first and last names must match with what's already in the system. Then select the Select button.	See Figure 2-30. Search Results section Health Event Information page displays.
7	In the Demographics Information section, enter the required fields for the COBRA enrollee if not already populated.	See Figure 2-31. Demographics Information section

Continued on next page

Scenario 6: New COBRA Health Enrollment for a Former Dependent, Continued

Figure 2-29. Reporting global navigation tab

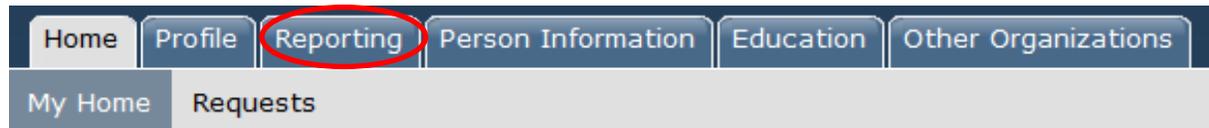


Figure 2-30. Search Results section

Search Results Add New				
CalPERS ID	Name	Date of Birth	Employer	Employment Status
<input type="radio"/> 3971964400	Jones, Jessica	04/15/1968		Not Enrolled

[Select](#)

Important! Prior to processing a dependent's new COBRA enrollment, verify the spelling of the new enrollee's name in my|CalPERS. The demographics that you enter must match exactly with what's on the system.

Figure 2-31. Demographics Information section

Demographics Information

CalPERS ID: 3971964400 [Select](#) [Rescind an Existing Transaction](#)

Prefix:

First Name:* Middle Name: Last Name:*

Suffix:

SSN:* Date of Birth:* Gender:*

COBRA for Dependents



Dependents may also enroll in COBRA for up to 36 months as a result of any of the following:

- Death of the member under which they were dependents
- Eligibility applies whether the member was working or retired at the time of death (dependent must have been enrolled in the health plan at the time of member's death)
- Divorce, termination of registered domestic partnership, or legal separation
- Enrolled child reaches age 26

The former dependent enrolling as a new subscriber may choose any plan that they're eligible for and in their residence or work ZIP code area.

Continued on next page

Scenario 6: New COBRA Health Enrollment for a Former Dependent, Continued

Step	Action	Result						
8	Populate the following fields in the Health Event Information section: <ul style="list-style-type: none"> • Health Event Type: “COBRA New Enrollment” • Health Event Reason: “COBRA Div/Sep/Mv from Household” • Event Date: (Date of divorce) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button 	See Figure 2-32. Health Event Information section						
9	Select the Save & Continue button.	Health Enrollment Information page displays.						
Add Contact Information, Qualifying Information, and Medical Group								
10	Enter a mailing address for the COBRA enrollee. If they use a P.O. box for the mailing, a physical address is also required.							
11	In the Qualifying Information section, select the Select link to populate the employee’s information.	See Figure 2-33. Qualifying Information section Search for a Person page displays.						
12	Enter the employee’s CalPERS ID in the CalPERS ID field, then select the Search button.							
13	Verify that the correct employee’s name displays, then select the Select button.	Health Enrollment Information page displays.						
14	Select a medical group from the Medical Group drop-down list.							
15	Select the Save & Continue button.	Figure 2-34. Select Covered Person page with the Add New button to add dependents						
16	Is employee including a dependent on this COBRA? <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Continue to step 17</td> </tr> <tr> <td>No</td> <td>Skip to step 21</td> </tr> </tbody> </table>	If...	Then...	Yes	Continue to step 17	No	Skip to step 21	
If...	Then...							
Yes	Continue to step 17							
No	Skip to step 21							

Continued on next page

Scenario 6: New COBRA Health Enrollment for a Former Dependent, Continued

Figure 2-32. Health Event Information section

Health Event Information

Health Event Type: * COBRA New Enrollment

Health Event Reason: * COBRA Div/Sep/Mv from Household

Event Date: *

Received Date: *

Apply Change to: * Medical

[View Effective Date](#)

[Save & Continue](#) [Cancel](#) [Clear](#)

Figure 2-33. Qualifying Information section

Qualifying Information

CalPERS ID: [Select](#)

SSN 553012366

First Name: * Jon

Last Name: * Jones

Gender: * Male

Date Of Birth: * 03/17/1968

Appointment Details

Employer: Sacramento Area Flood Control Agency

CalPERS ID 4232217023 (Employer):

Original Hire Date: * 01/01/2016

Division:

Appointment ID: 92371880

Separation Date:

Retirement Date:

Additional Details

Position Title:

CBU:

Begin Date: 01/01/2016

Medical Group: *

Appointment Status: Active

Retirement Program: * PERS

End Date:

Affiliated Association:

COBRA Enrollment

Original COBRA Start Date: 10/01/2016

COBRA End Date: 09/30/2019

Eligibility Basis: * COBRA Qualifying Dependent

[Save & Continue](#) [Cancel](#) [Clear](#)

COBRA end date

Figure 2-34. Covered Person List section on the Select Covered Person page

Covered Person List [Add New](#)

Name	Date of Birth	Relationship	Medical	Dental	Vision
Jessica Jones	04/15/1968	Self	Basic	No	No

[Save & Continue](#) [Cancel](#)

Continued on next page

Scenario 6: New COBRA Health Enrollment for a Former Dependent, Continued

Step	Action	Result						
Add Dependent								
17	Select the Add New button next to the Covered Person List section heading.	See Figure 2-35. Select Covered Person page with the Add New button						
18	<p>Populate the following fields under the Person Details:</p> <ul style="list-style-type: none"> • First Name and Last Name • SSN • Gender • Relationship • Dependent Type • Date of Birth <p>Deselect the Checkbox if the dependent's address is different than the primary subscriber's, then update their address.</p> <p>Note: If a dependent is listed in the Existing Relationships Eligible for Health section, select the dependent's radio button, then select the Continue button. This would only occur if the subscriber was enrolled in active health at one time with these dependents.</p>	<p>See Figure 2-36. Person Details section</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>If dependent is in the system, their last name must match. You can query the dependent to verify their last name.</p> <p>If the dependent is in the system without a birth date and/or gender, contact CalPERS.</p> </div>						
19	Select the Save & Continue button.	See Figure 2-37. Dependent Information page						
20	Select the Save & Continue button.	Select Covered Person page displays with the dependent showing "Basic" medical coverage.						
21	If adding a dependent in a parent-child relationship, select the Maintain Certification link, select the checkboxes for the Certify Dependent and the disclaimer, then select the Save & Continue button.	Select Covered Person page displays.						
22	<p>Do you have additional dependents to add?</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Repeat steps 17 through 22</td> </tr> <tr> <td>No</td> <td>Continue to step 23</td> </tr> </tbody> </table>	If...	Then...	Yes	Repeat steps 17 through 22	No	Continue to step 23	
If...	Then...							
Yes	Repeat steps 17 through 22							
No	Continue to step 23							
23	Select the next Save & Continue button.	Plan Selection page displays with the COBRA premiums.						

Continued on next page

Scenario 6: New COBRA Health Enrollment for a Former Dependent, Continued

Figure 2-35. Covered Person List section with the **Add New** button

Covered Person List Add New					
Name	Date of Birth	Relationship	Medical	Dental	Vision
Jessica Jones	04/15/1968	Self	Basic	No	No

Save & Continue Cancel

Figure 2-36. Person Details section

Person Details	
Prefix:	<input type="text"/>
First Name:*	<input type="text"/>
Middle Name:	<input type="text"/>
Last Name:*	<input type="text"/>
Suffix:	<input type="text"/>
SSN:	<input type="text"/>
Gender:*	<input type="text"/>
Relationship:*	<input type="text"/>
Dependent Type:*	<input type="text"/>
Date Of Birth:*	<input type="text"/>

Figure 2-37. Dependent Information page

Dependent Information		
Benefit Type		
Benefit Type	Enrollment	Change Enrollment?
Medical	No	<input checked="" type="checkbox"/>

Save & Continue Cancel Clear

Social Security Number (SSN) for a Dependent Child

Dependent children can be added without a Social Security number (SSN); however, the employer is required to create a follow-up process to collect the SSN within 90 days of enrollment per (Circular Letter [600-060-10](#)). Once the employee can provide the dependent's SSN, you can update it in my|CalPERS (see unit 1, step 5).

For a new health enrollment that includes dependent children without an SSN, you will receive a warning which you can bypass by selecting the **OK** button.

Continued on next page

Scenario 6: New COBRA Health Enrollment for a Former Dependent, Continued

Step	Action	Result
Select Medical Plan		
24	<p>The Health Eligibility ZIP Code Override checkbox is used if using a work or different personal ZIP code for health eligibility. The Personal option is available when there is a mailing and physical address in the system.</p> <p>Select the radio button for the employee's chosen medical plan.</p>	<p>See Figure 2-38. Plan Selection page</p> <p>Health Enrollment Preprocessing page displays.</p> <p>COBRA premium is listed in the far right column</p>
25	Select the Save & Continue button.	
	<p>You have completed this scenario.</p> <p>Note: From the Person Information global tab, you can view the COBRA health enrollment after you enter an Anticipated Hire Date for the enrollee.</p>	The COBRA subscriber will start to get billed by the health carrier for 102% of the gross premium.

Tip!

To later cancel or change a work eligibility ZIP code, you need to process a health transaction using:

- Health Event Type: Update Enrollment
- Health Event Reason: Cancel Eligibility Zip or Change Eligibility Zip

Continued on next page

Scenario 6: New COBRA Health Enrollment for a Former Dependent, Continued

Figure 2-38. Plan Selection page

▼ **Preselections**

Health Eligibility ZIP Code
Health Eligibility Address: 400 P ST, SACRAMENTO, CA 95814-5345 Sacramento SAC (Address Start Date 09/25/2014)
Medical Party Type: Self/B

Select an address below to override the current health Eligibility Address.

NOTE - Overriding the current Health Eligibility Address will create a Change Eligibility ZIP transaction in conjunction with the enrollment transaction.

Health Eligibility ZIP Code Override:

[Display Plans](#)

If a ZIP code override is being used after you save, it will display on the Health Enrollment Summary page when you query their health

▼ **Medical Plan Selections**

Plan Name	Party	Premium	COBRA Premium
<input type="radio"/> Anthem Blue Cross Select HMO Sacramento Area	Self/B	750.27	765.28
<input type="radio"/> Anthem Blue Cross Traditional HMO Sacramento Area	Self/B	840.43	857.24
<input type="radio"/> Blue Shield Access+ Sacramento Area	Self/B	734.87	749.57
<input type="radio"/> Blue Shield NetValue Sacramento Area	Self/B	618.39	630.76
<input type="radio"/> Kaiser Permanente California Sacramento Area	Self/B	681.59	695.22
<input type="radio"/> PERS Choice Sacramento Area	Self/B	665.99	679.31
<input type="radio"/> PERS Select Sacramento Area	Self/B	637.85	650.61
<input type="radio"/> PERSCare Sacramento Area	Self/B	694.26	708.15
<input type="radio"/> UnitedHealthcare Alliance HMO Sacramento Area	Self/B	643.34	656.21

Scenario 7: Cancel Coverage



When cancelling health (medical) benefits for the subscriber, it affects not only the employee, but also their dependents.

Scenario: Your employee is going to be receiving health coverage through their spouse, so they are voluntarily cancelling their CalPERS health benefits.

Step-by-Step Follow the steps below to process cancelling coverage.

Step	Action	Result
1	From the My Home page, select the Reporting global navigation tab.	See Figure 2-39. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select “Add or Edit Health Enrollment” from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Do not use the upper Search Preprocessing Data section when starting a new transaction. Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter the employee’s CalPERS ID in the CalPERS ID field, then select Search button. You may also search for an employee by their Social Security number.	Below the Person Search section, the Search Results section is populated with employee’s information.
6	Verify that the correct employee’s name displays, then select the Select button.	See Figure 2-40. Search Results section

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Scenario 7: Cancel Coverage, Continued

Figure 2-39. Reporting global navigation tab

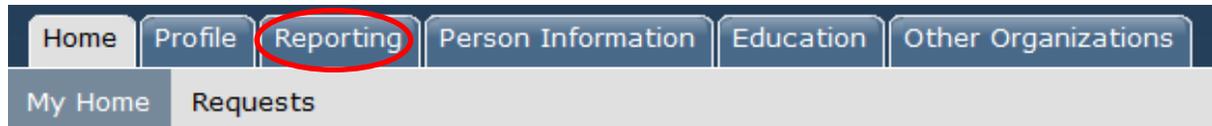
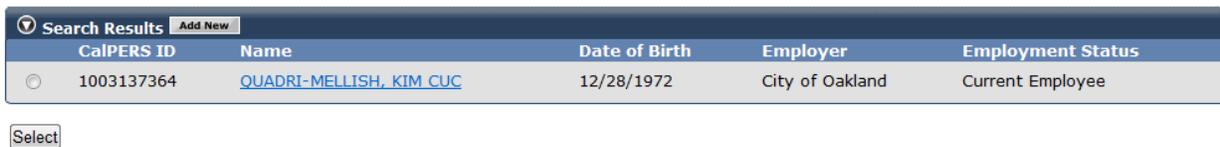


Figure 2-40. Search Results section



A screenshot of the Search Results section. It features a table with a dark blue header and a light gray body. The header has a dropdown arrow and the text 'Search Results' followed by an 'Add New' button. The table has five columns: 'CalPERS ID', 'Name', 'Date of Birth', 'Employer', and 'Employment Status'. There is one data row with a radio button in the first column. Below the table is a 'Select' button.

CalPERS ID	Name	Date of Birth	Employer	Employment Status
<input type="radio"/> 1003137364	QUADRI-MELLISH, KIM CUC	12/28/1972	City of Oakland	Current Employee

Select

Continued on next page

Scenario 7: Cancel Coverage, Continued

Step	Action	Result
7	Populate the following fields: <ul style="list-style-type: none"> • Health Event Type: “Cancel Coverage” • Health Event Reason: “Subscriber request” • Event Date: (Date employee made the request) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button 	See Figure 2-41. Health Event Information section
8	Select the Save & Continue button.	Health Enrollment Preprocessing page displays.
You have completed this scenario.		

Continued on next page

Scenario 7: Cancel Coverage, Continued

Figure 2-41. Health Event Information section

The screenshot shows a web form titled "Health Event Information". It contains the following fields and controls:

- Health Event Type:** A dropdown menu with "Cancel Coverage" selected.
- Health Event Reason:** A dropdown menu with "Subscriber request" selected.
- Event Date:** A date input field with a calendar icon.
- Received Date:** A date input field with a calendar icon.
- Apply Change to:** A radio button labeled "Medical" is selected.
- Buttons:** "Save & Continue", "Cancel", "Clear", and "View Effective Date".

Cancellation of Health due to a Permanent Separation

Regardless of the employee's retirement system, if an employee permanently separates from your agency, you must update their appointment to reflect the employee has permanently left your agency.

The permanent separation will automatically cancel the employee's health benefits effective the first day of the second month following their last day with your agency.

Add an appointment event to the employee's appointment history:

1. Select the **Person Information** global tab
2. Enter the employee's SSN or CalPERS ID, then select the **Search** button
3. Select your **agency's name** link under the Appointment History for their active appointment
4. Select the **Add New** button next to Appointment Event History
5. Complete the Appointment Event Details section
 - **Event:** Permanent Separation
 - **Event Date:** At least one day after the employee's last day with your agency*
 - **Separation Reason:** Select from the drop-down list
6. Select the **Save** button

*If the employee's last day is the end of the month, their permanent separation date in the system will be the first of the following month. The system will use their actual last day with your agency to calculate the health cancellation.

Example: Employee resigned and their last day with your agency is July 31st.

- **Event:** Permanent Separation
- **Event Date:** August 1
- **Separation Reason:** Resigned

Health benefits will be cancelled automatically effective September 1.

Scenario 8: Direct Pay



An employee's appointment must reflect an unpaid leave in my|CalPERS before processing the direct pay. For an "unpaid leave" appointment event, my|CalPERS will automatically cancel their health benefits. The cancellation must be rescinded before processing the direct pay.

An example of the order of events:

1. Employee's appointment reflects an unpaid leave 06/15/2016
2. System automatically cancels the health benefits 08/01/2016
3. Employer rescinds the health cancellation (must have future eff. date)
4. Employer processes the direct pay

Scenario: An employee is going on an unpaid leave of absence and is electing to go on direct pay to continue their health benefits while on leave. The employee's appointment has been updated for the unpaid leave, and you have already rescinded the health cancellation. You will process the direct pay, so the health carrier can start to bill your employee for the full premiums.

Step-by-Step Follow the steps below to process a direct pay.

Step	Action	Result
1	From My Home page, select the Reporting global navigation tab.	See Figure 2-42. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Do not use the upper Search Preprocessing Data section when starting a new transaction. Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter the employee's CalPERS ID in the CalPERS ID field, then select the Search button.	Below the Person Search section, the section is populated with employee's information.
6	Verify that the correct employee's name displays, then select the Select button.	See Figure 2-43. Search Results section Health Enrollment Preprocessing page displays.

Continued on next page

Scenario 8: Direct Pay, Continued

Figure 2-42. Reporting global navigation tab

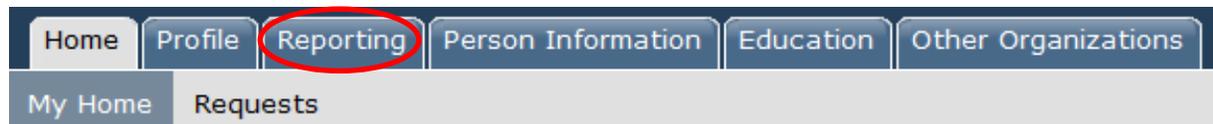


Figure 2-43. Search Results section

The screenshot shows a table with the following columns: CalPERS ID, Name, Date of Birth, Employer, and Employment Status. There is one row of data with a radio button in the first column.

CalPERS ID	Name	Date of Birth	Employer	Employment Status
<input type="radio"/> 2027222272	PEGNATORI, MEREDIT KEISHIRA	03/03/1967	City of Oakland	Current Employee

Below the table is a 'Select' button.

Adding Appointment Events

Steps on updating an appointment to reflect an employee's leave of absence and their return to work:

1. Select the **Person Information** global tab
2. Enter the employee's SSN or CalPERS ID, then select the **Search** button
3. Select your **agency's name** link under the Appointment History
4. Select the **Add New** button next to Appointment Event History
5. For a leave of absence, from the **Event** drop-down list, select **Begin Leave**
6. In the **Event Date** field:
 - for **PERS** employees, enter the day after the employee is on pay status.
Note: If the employee's last day is at the end of the calendar month, process a "Cancel Coverage" health event type, "Off Pay Status Cancel" health event reason prior to updating the appointment with the Unpaid Leave.
 - for **nonPERS and CalSTRS** employees, enter the last day on pay status
7. From the **Leave Type** drop-down list, select the reason for the leave
8. Select the **Save** button

The system will automatically cancel the employee's health benefits the first day of the second month following the event date, and your agency will not be billed for the employee.

When the employee returns to work, repeat steps 1-4, then:

1. from the **Event** drop-down list, select **End Leave**,
2. in the **Event Date** field, enter the date of the first day the employee returns to work, then
3. select the **Save** button

Continued on next page

Scenario 8: Direct Pay, Continued

Step	Action	Result
7	Populate the following fields: <ul style="list-style-type: none"> • Health Event Type: “Change Premium Payment Method” • Health Event Reason: “LOA” • Event Date: (Last day on pay status prior to when the employee goes on leave) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button 	See Figure 2-44. Health Event Information section
8	Select the Save & Continue button.	Health Enrollment Information page displays.
9	Select the Save & Continue button.	Health Enrollment Preprocessing page displays.
	You have completed this scenario.	

Temporary Leaves Affect Health Benefit Enrollments

Family Medical Leave and Maternity/Paternity Leave will automatically put the employee on direct pay and will be billed by the health carrier. Some employers reimburse their employees for their direct payments. Their health enrollment will reflect:

Health Event Type: Change Premium Payment Method
Health Event Reason: chg to deduct- FMLA

All other temporary separations will automatically cancel the employee's health benefits. Their health enrollment will reflect:

Health Event Type: Cancel Coverage
Health Event Reason: Off Pay Status Cancel

Permanent separations always automatically cancel health enrollments.

Continued on next page

Scenario 8: Direct Pay, Continued

Figure 2-44. Health Event Information section

The screenshot shows a window titled "Health Event Information". It contains the following fields and controls:

- Health Event Type:** * Change Premium Payment Method (dropdown menu)
- Health Event Reason:** * LOA (dropdown menu)
- Event Date:** * (text input field with a calendar icon)
- Received Date:** * (text input field with a calendar icon)
- Apply Change to:** * Medical
- View Effective Date** (button)
- Save & Continue** (button) **Cancel** (button) **Clear** (button)

Employee Returns to Work after Being on a Leave of Absence (LOA)

Update the appointment with an "End Leave." my|CalPERS will change the employee's premium payment method from direct pay to standard deduction and your employee's premium will return to your agency's health bill.

If the system doesn't automatically change your employee from direct pay to standard deduction, you can process the update in my|CalPERS using:

- **Health Event Type:** Change Premium Payment Method
- **Health Event Reason:** Chg to deduct-Return to Work
- **Event Date:** Date employee returns to work
- **Received Date:** Date employee returns to work

If the employee chose to keep their health benefits cancelled, when they return, update the appointment and then process a new enrollment into the same plan and same dependents they had before their leave.

- **Health Event Type:** New Enrollment
- **Health Event Reason:** Return from Off Pay Status
- **Event Date:** Date employee returns to work
- **Received Date:** Date employee returns to work

Note: Returning to work from a leave of absence is not a permitting event to change plans or add dependents. The employee would return to their original plan and dependents (or no dependents).

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Unit 3: Health Statement and Billing Roster

Overview

Introduction

In this unit, you will learn how to view your agency's receivables. As a public agency or school district, you can view your health account information online.

Date the monthly bill gets generated: On the evening of the 14th each month (viewable on the 15th). If the 14th falls on a holiday or weekend, bills are generated on the next available business day.

After viewing how much your agency is being billed, it's important to reconcile your bill. You can access your monthly billing roster that shows the total number of active and retired employees enrolled in a specific plan and charges for a selected month. Some important items to ensure that are correct:

- Enrollee truly should be covered and your agency isn't being billed for anyone who shouldn't be covered due to a leave of absence, permanently separated, etc.
- Enrollees are showing the correct medical group which is particularly important for your retirees
- Retirees aren't showing "active" (not retired) on the roster

Your monthly billing summary shows your payment information, such as account status and payment due.

Unit Objectives

After completing this unit, you will be able to:

- Access your monthly health statements
 - Download a billing roster
-

Contents

This student guide contains the following scenarios:

Topic	See Page
Scenario: View Monthly Health Statement and Billing Roster	64
Health Billing Cut-Off Dates	68

Scenario: View Monthly Health Statement and Billing Roster



Scenario: You will access your agency's monthly health statement through my|CalPERS to view the receivables-due amount. Since you need to reconcile the bill, you will view the listing of the total number of active and retired enrollees in a specific plan (and party rate) and the amount billed to your agency for their premiums.

Step-by-Step Follow the steps below to view and download your monthly health statement and billing roster.

Step	Action	Result						
1	From the My Home page, select the Reporting global navigation tab.	Manage Reports page displays.						
2	Select the Billing and Payments local navigation link.	Billing Payment and Summary page displays.						
3	Within the Billing and Payment Summary section, select the appropriate Fiscal Year from the drop-down list, then select the Display button.	See Figure 3-1. Billing and Payment summary section						
4	Within the Health Premium Deduction section, select the View Invoice History link.	See Figure 3-2. Health Premium Deduction section Invoice History page displays.						
5	Select the appropriate Receivable ID link.	Monthly Billing Summary page displays.						
6	If mailing a check to pay for your agency's premiums, at the bottom left of the Monthly Billing Summary page, you can select the View Invoice button to download the Health Premium Statement and Remittance Slip. Within the Monthly Billing Summary section, in the top far right, select the View Billing Roster link.	See Figure 3-3. Monthly Billing Summary section Monthly Billing Roster page displays.						
7	Do you want to download your monthly billing roster? <table border="1" data-bbox="310 1570 938 1675"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Continue to step 8</td> </tr> <tr> <td>No</td> <td>Skip to step 9</td> </tr> </tbody> </table>	If...	Then...	Yes	Continue to step 8	No	Skip to step 9	
If...	Then...							
Yes	Continue to step 8							
No	Skip to step 9							

Continued on next page

Scenario: View Monthly Health Statement and Billing Roster, Continued

Figure 3-1. Billing and Payment summary section

Common Tasks

Menu

Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Member Requests Health Reconciliation

Name: City of Oakland CalPERS ID: 4015143822

Billing and Payment Summary

Fiscal Year: 2015/2016 Display

Total Obligations

Total Obligation: \$6,726,448.00 [Make Payment](#) [Remittance Advice for Manual Check](#)

Note: The Year-To-Date Outstanding Balance includes contributions, less payments, plus adjustments (both positive and negative) relative to the Fiscal Year selected above. Payments received against receivables with a \$0.00 balance will not be posted until the next time contributions are reported. The Year-To-Date Outstanding Balance includes the amount in delinquent status for the selected Fiscal Year. Delinquencies from Prior Fiscal Years are relative to the selected Fiscal Year and are not included in the Percentage of Contributions paid.

Figure 3-2. Health Premium Deduction section

Health Premium Deduction

Year-To-Date Billed Premiums	: \$47,686,779.52
Year-To-Date Admin Fees/Interest	: \$169,594.57
Total Year-To-Date Payments	: \$40,778,886.15
Year-To-Date Outstanding Balance	: \$7,077,487.94

[View Payment Details](#)
[View Invoice History](#)

Figure 3-3. Monthly Billing Summary section

Select the **View Billing Roster** link to verify enrollees for whom your agency is being billed

Monthly Billing Summary

Receivable ID: 100000014692525 Coverage Month: February Enrollment Effective 01/14/2016 as of:

[View Billing Roster](#)

Continued on next page

Scenario: View Monthly Health Statement and Billing Roster, Continued

Step	Action	Result						
8	Select the Download Roster link in the Monthly Employer Billing Roster Summary section to download the monthly employer billing roster.	IBM Cognos application opens in new a window. Note: Generate report according to procedure in unit 4.						
9	Do you want to view an employee's health deduction history? <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Continue to step 10</td> </tr> <tr> <td>No</td> <td>You have completed this scenario</td> </tr> </tbody> </table>	If...	Then...	Yes	Continue to step 10	No	You have completed this scenario	
If...	Then...							
Yes	Continue to step 10							
No	You have completed this scenario							
10	Search for employee by selecting the Status (Active or Retired) from the drop-down list in the Roster Search section. Refine your search by entering the CalPERS ID or Medical Group . You can sort and search for employees in the Monthly Employer Billing Roster section by using the Status, CalPERS ID, Retirement System, or Medical Group links in the headers. You can view deduction history on an enrollee by selecting their Name link. Then in the Search Criteria section, select a deduction source and coverage date range, then select the Search button.	See Figure 3-4. Roster Search and Monthly Employer Billing Roster sections on Monthly Billing Roster page						
	You have completed this scenario.							

Tip!

The **Health Reconciliation** local link is only for our health carriers.

Continued on next page

Scenario: View Monthly Health Statement and Billing Roster,
Continued

Figure 3-4. Roster Search and Monthly Employer Billing Roster sections on Monthly Billing Roster page

▼ **Roster Search**

Status:* <input type="text"/>	Health Benefit Type:* <input type="text" value="Medical"/>
CalPERS ID: <input type="text"/>	Medical Group: <input type="text"/>
Base Plan Code: <input type="text"/>	

▼ **Monthly Employer Billing Roster**

Status	Name	CalPERS ID	Plan Code	Retirement System	Payment Type	Amount Billed	Medical Group
Active	ADDISON-TERRY, FREDAH	5426238419	1243	PERS	Retroactive	\$-2,263.56	005 SWORN POLICE UNIT
Active	ADDISON-TERRY, FREDAH	5426238419	3753	PERS	Retroactive	\$-2,101.94	005 SWORN POLICE UNIT
Active	BAUTHEROT, MAI LANI	2155609160	1041	PERS	On-going	\$746.47	004 UPE, LOCAL 790 UNIT B C D

Tip!

When reconciling, verify that:

- enrollees are in the correct medical group
- no one on unpaid leave or permanently separated are on the roster
- retirees are showing the status of “Retired”

Health Billing Cut-Off Dates

Refer to this
Chart to
Assist with
Health Billing
Reconciliation

2016 Health Billing Cut-Off Dates Contracting School Districts and Public Agencies

Health Coverage Month	STRS Employees and Annuitants	PERS and OTHER Employees and Annuitants
January 2016	12/8/15	12/9/15
February 2016	1/5/16	1/6/16
March 2016	2/2/16	2/10/16
April 2016	3/8/16	3/9/16
May 2016	4/5/16	4/13/16
June 2016	5/3/16	5/11/16
July 2016	6/7/16	6/8/16
August 2016	7/5/16	7/13/16
September 2016	8/9/16	8/10/16
October 2016	9/6/16	9/12/16
November 2016	10/4/16	10/12/16
December 2016	11/1/16	11/8/16
January 2017	12/6/16	12/7/16

Note: All my|CalPERS transactions must be keyed and submitted by 11:59:59 p.m. on the cut-off date. Transactions keyed after the cut-off will be captured in the next month's statement.

Unit 4: Health Reports

Overview

Introduction

The IBM Cognos tool runs the reports within my|CalPERS.

In this unit, you will learn how to access Cognos through the my|CalPERS **Reports** link and locate and download reports relevant to health reporting.

Cognos online resources are also included in this unit such as:

- my|CalPERS report descriptions, user roles, and status
 - Web browser settings requirements
 - Email address to request health data
-

Contents

This section contains the following scenario:

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Sample: Employer Health Event Transaction Report	78
Cognos Reports Online Resources	80

Comparison of Two Health Reports

Two Health Reports

There are several health reports; however, the Employer Health Event Notification Report and/or the Employer Health Event Transaction Report will assist employers on reconciling their bill and identify system batch transactions such as 26-year-old deleted dependents*, cancellations due to permanent separations, etc.

Before running the reports, the system may show two different sets of criteria like Effective Dates and Event Create Dates. If this occurs, only use one set of criterion to get a more defined report.

*The 26-year-old delete monthly batch runs in the first three business days of the month to be effective the following month. It's recommended to run the report after the first three business days.

Employer Health Event Notification Report

This report uses posting start and end dates for its criterion, it's a useful report to view all changes that occurred (updated by the agency's staff, CalPERS staff, and system batch). These transactions may have retroactive effective dates for mandatory deletions, cancellations, or corrections.

The data provided for this report are under these columns:

- Participants CalPERS ID (employee's personal CalPERS ID)
 - Appointment ID (ID that's associated for their position that qualifies them for health benefits)
 - Subscriber Name (enrolled person's name; subscriber's name also displays for their dependents' lines)
 - Effective Date (when the transaction took effect)
 - Health Event Type (New Enrollment, Change Health Plan, etc.)
 - Health Event Reason (Time base & Tenure, Move, etc.)
 - Plan Name (name of the health plan the enrollee is enrolled)
 - Health Benefit Type (Health – Medical)
 - Status (Rescinded or Confirmed)
-

Continued on next page

Comparison of Two Health Reports, Continued

Employer Health Event Transaction Report

This report uses effective date or event create date criterion. You may want to run this report to view transactions that were all effective on a particular date, such as:

- Open enrollment transactions effective January 1
 - 26 year old delete transactions effective on the 1st of a specific month/s
- The 26-year-old delete monthly batch runs in the first three business days of the month to be effective the following month. It's recommended to run the report after the first three business days.

This report displays dependent names which makes it easy to identify who's enrolled, been added, or been deleted.

The data provided for this report are under these columns:

- Subscriber CalPERS ID (subscriber's personal CalPERS ID)
 - Subscriber Name (enrolled person name)
 - Subscriber Status (Employment, Retired)
 - Enrollee Name (dependent's name)
 - Enrollee Date of Birth (dependent's date of birth)
 - Retirement System (PERS, CalSTRS, etc.)
 - Dependent Type (Natural Born Child, Self, Spouse, etc.)
 - Medical Group (000, 001, 002, etc.)
 - Effective Date (when the transaction took effect)
 - Health Event Type (New Enrollment, Change Health Plan, etc.)
 - Event Create Date (when the transaction was updated to the system)
 - Created By User (Service=system batch, External Business Partner, etc.)
 - Event Status (Rescinded or Confirmed)
 - Plan Name (name of the health plan the enrollee is enrolled)
 - Plan Code (health plan's three digit plan code)
 - Health Benefit Type (Health – Medical)
 - Participant County (county in which the enrollee's health is based)
 - Health Benefit Type (Medical)
 - Party Rate (Self/B and 1/B, Self/B and 2+/B, etc.)
 - Employee Premium Share (the amount billed to the employer for the employee or retiree's premium)
 - Employer Premium Share (the amount billed to the employer for the enrollee's premium)
 - Total Premium (the total amount for the enrollee's plan and party rate)
-

Scenario: Generate an Employer Health Event Notification Report



The Employer Health Event Notification Report will list the health event transactions that were updated in my|CalPERS for your active employees and retirees. A health event includes Open Enrollment, demographic changes, plan changes, cancel coverage, adding dependents, 26 year old deletes, etc.

Scenario: You would like to view all health transactions that were updated for your agency since January 1. You will generate an Employer Health Event Notification Report via Cognos in my|CalPERS.

Step-by-Step Follow the steps below to generate an Employer Health Event Notification Report via Cognos in my|CalPERS.

Step	Action	Result
Open and Navigate through Cognos Application		
1	From the my CalPERS – My Home page select the Common Tasks left-side folder heading.	Common Tasks expands to display additional left-side navigation selections.
2	Select the Reports left-side navigation link.	See Figure 4-1. Reports link under Common Tasks on left-side navigation menu New window opens featuring Cognos application.
3	Select the My home icon from the Cognos window.	See Figure 4-2. My home icon on Cognos window IBM Cognos Connection displays in separate Cognos window featuring report folders.
4	Select the PSR REPORTS ENV98 link located next to the (yellow) folder  . (In class, the training environment folder will read PSR REPORTS ENV89.) Options for a better view: <ul style="list-style-type: none"> • Maximize the window • Increase the font size of the report names by holding down the Ctrl key and use the wheel on your mouse 	See Figure 4-3. Public folders in Cognos Folder opens displaying reports contained inside.

Continued on next page

Scenario: Generate an Employer Health Event Notification Report, Continued

Figure 4-1. Reports link under Common Tasks on left-side navigation menu

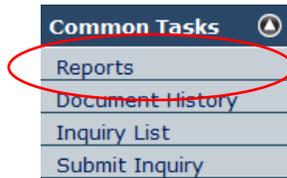
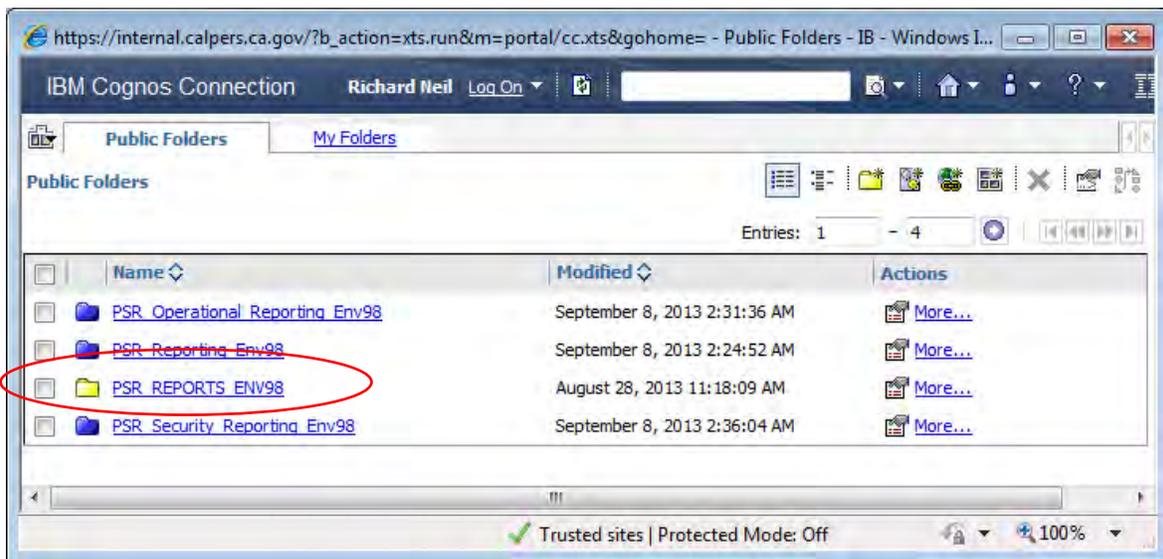


Figure 4-2. My home icon on Cognos window



Figure 4-3. Public folders in Cognos



Continued on next page

Scenario: Generate an Employer Health Event Notification Report, Continued

Step	Action	Result												
Run and Save Report														
5	<p>Navigate through reports using right hand   directional arrows or enter the name of the report in the field,  then select the magnifying glass icon.</p> <p>Reports are listed alphabetically.</p>	See Figure 4-4. Reports in Cognos window												
6	Select the Employer Health Event Notification Report link.	Report opens, prompting user to enter required information.												
7	Select the Employer CalPERS ID from Business Partner's CalPERS ID drop-down list.													
8	<p>Enter dates in the Posting Start Date and Posting End Date fields. Posting dates are the dates when the transactions were updated, not the effective dates.</p> <p>Recommendation: If providing dates, use the calendar icon to enter dates in their respective fields in the Select Posting Date Range section.</p> <p>If reconciling your agency's health bill, it may be helpful to reference the annual Circular Letter attachment "Health Billing Cut-Off Dates Contracting School Districts and Public Agencies" to view the changes that affected the month's bill.</p> <table border="1" data-bbox="321 1306 971 1507"> <thead> <tr> <th>Health Coverage Month</th> <th>STRS Employees and Annuitants</th> <th>PERS and OTHER Employees and Annuitants</th> </tr> </thead> <tbody> <tr> <td>January 2016</td> <td>12/8/15</td> <td>12/9/15</td> </tr> <tr> <td>February 2016</td> <td>1/5/16</td> <td>1/6/16</td> </tr> <tr> <td>March 2016</td> <td>2/2/16</td> <td>2/10/16</td> </tr> </tbody> </table>	Health Coverage Month	STRS Employees and Annuitants	PERS and OTHER Employees and Annuitants	January 2016	12/8/15	12/9/15	February 2016	1/5/16	1/6/16	March 2016	2/2/16	2/10/16	<p>See Figure 4-5. Select Posting Date Range section</p> <p>If reconciling the March bill for active PERS and/or nonPERS employees, use:</p> <ul style="list-style-type: none"> • Posting Start Date=01/07/2016 • Posting End Date=02/10/2016
Health Coverage Month	STRS Employees and Annuitants	PERS and OTHER Employees and Annuitants												
January 2016	12/8/15	12/9/15												
February 2016	1/5/16	1/6/16												
March 2016	2/2/16	2/10/16												
9	Select the Finish button to generate report.	<ul style="list-style-type: none"> • Rotating hour glass displays indicating that report is running • Report displays in open Cognos window 												

Continued on next page

Scenario: Generate an Employer Health Event Notification Report, Continued

Figure 4-4. Reports in Cognos window

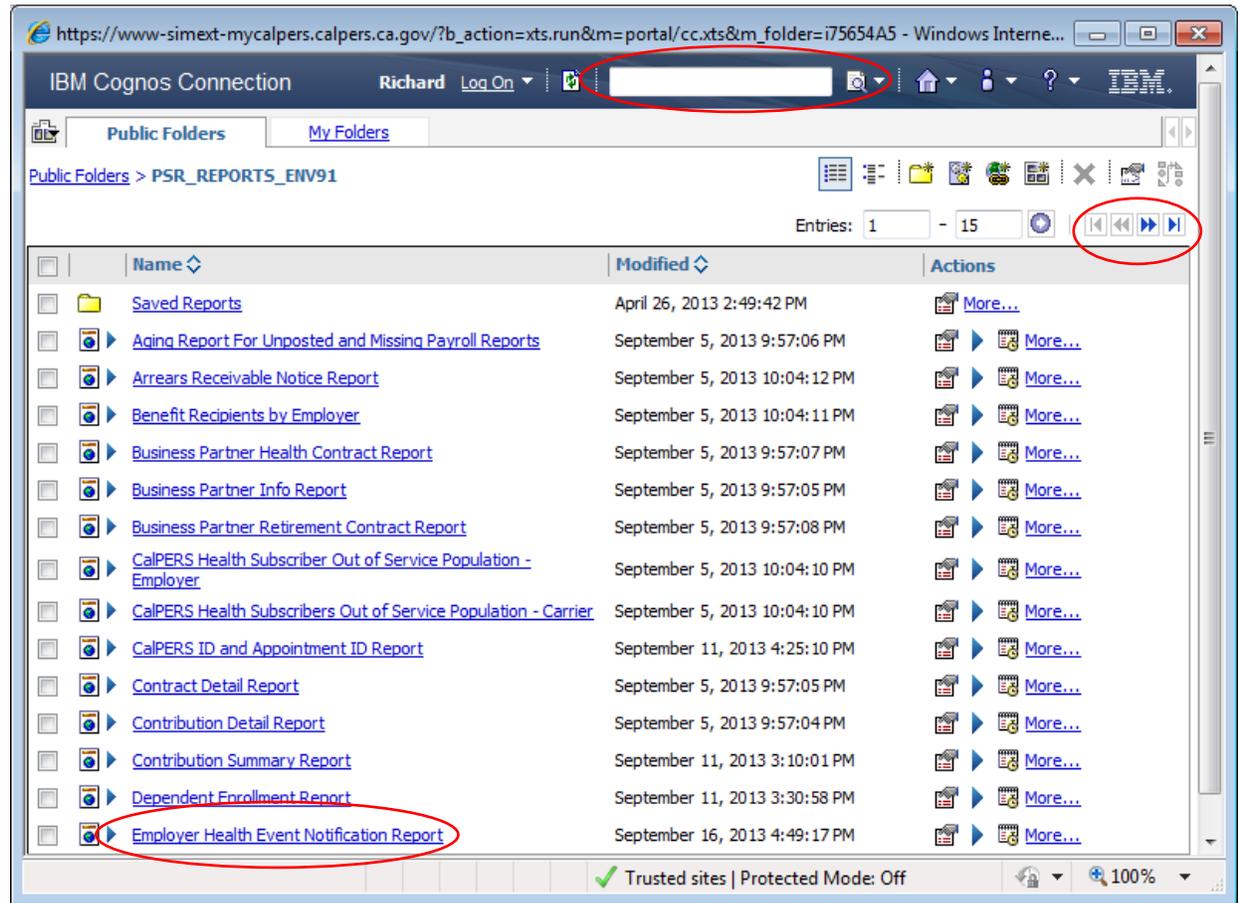


Figure 4-5. Select Posting Date Range section

Select Posting Date Range

Posting Start Date :

Posting End Date :

The Employer Health Event Notification Report uses posting date criteria. It's a useful report to view all changes that occurred that affected a change in your health bill amount.

Continued on next page

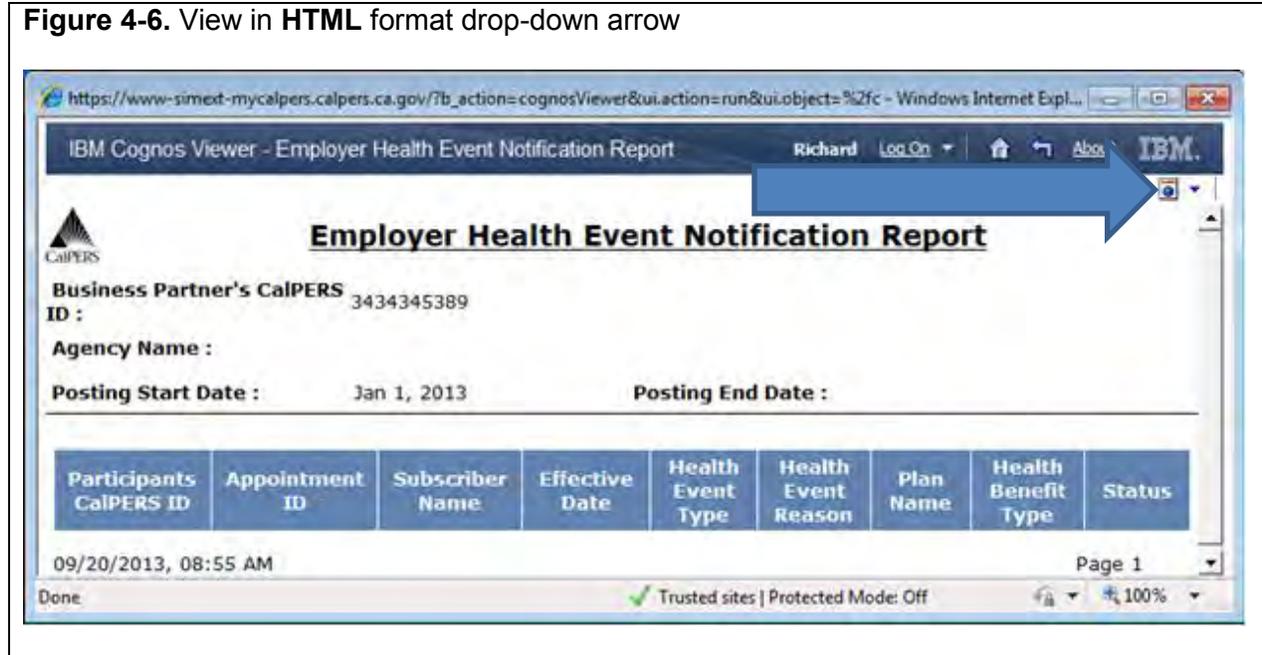
Scenario: Generate an Employer Health Event Notification Report, Continued

Step	Action	Result
Export to Excel		
10	<p>Select the View in HTML Format  drop-down arrow to indicate the different selections.</p> <p>In selecting the View in Excel Options link, different versions and options are available:</p> <div data-bbox="321 638 751 863" style="border: 1px solid black; padding: 5px;"> <p> View in Excel 2007 Format</p> <p> View in Excel 2002 Format</p> <p> View in Excel 2000 Single Sheet Format</p> <p> View in Excel 2000 Format</p> <p> View in CSV Format</p> </div> <p>For best results, select the View in CSV Format link. You may save the CSV file in Excel to your computer.</p>	<p>Figure 4-6. View in HTML Format drop-down list</p> <p>The globe drop-down arrow expands to display the following:</p> <div data-bbox="976 638 1268 816" style="border: 1px solid black; padding: 5px;"> <p> View in HTML Format</p> <p> View in PDF Format</p> <p> View in XML Format</p> <p> View in Excel Options ▶</p> </div>
11	Make selection to “Open,” “Save,” or “Save as” after dialogue box appears.	
12	Select the Yes button after the Microsoft Excel dialogue appears.	
	<p>You have completed this scenario.</p> <p>If you wish, save your Excel sheet, then close it along with the IBM Cognos View window.</p>	<p>If you want to return to the Reports list, hover over the blue area before the About link at top right and select the left-facing Return arrow:</p> <div data-bbox="976 1339 1414 1451" style="border: 1px solid black; padding: 5px;">  </div> <p>Or right mouse click and select Back or press your Backspace key.</p>

Continued on next page

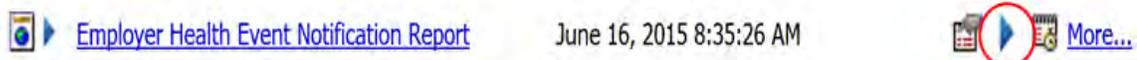
Scenario: Generate an Employer Health Event Notification Report, Continued

Figure 4-6. View in HTML format drop-down arrow



If you only want to view a report in another format like Excel or PDF, instead of selecting the **report name** link in step 6, run the report in that format using these steps to save time:

1. Select the **Run with Options** icon  to the right of the report name:



2. Select the format you want the report to be run in the Format drop-down list:
Select how you want to run and receive your report.

Format:

Delimited text (CSV) ▼

3. Select the **Run** button at the bottom left.
4. Continue with steps 7-9 above (enter the required field, dates, and **Finish** button).

Sample: Employer Health Event Transaction Report

Examples of When to Use

The Employer Health Event Transaction Report uses effective date or event create date criterion. This report displays dependent names, so it's easy to view the specific dependent(s).

You may want to run this report to view transactions that were all effective on a particular date, such as:

- Open enrollment transactions effective January 1
- 26 year old delete transactions effective on the 1st of a specific month(s).
The 26-year-old delete monthly batch runs within the first three business days of the month to be effective the following month. It's recommended to run the report after the first three business days.

Or, you may want to run this report to view transactions that were all created within two dates, such as retroactive transactions that affect your bill.

It's best to use only one criterion when running the report.

Criteria

Select Employer Name

Employer Name :

Select Effective Date Range

Effective From Date : 

Effective To Date : 

Select Event Create Date Range

Event Create From Date : 

Event Create To Date : 

Continued on next page

Sample: Employer Health Event Transaction Report, Continued

Generated

Subscriber CalPERS ID	Subscriber Name	Subscriber Status	Enrollee Name	Enrollee Date of Birth	Retirement System
1919378966	Dias Jr, R Allen, E	Employment	Parham-Battles, Marisa Sherb,	12/06/2014	PERS
3032608343	Woelfer, Buehl, B	Retired			PERS
5177446788	Torrez-Haun, Sarra, E	Employment	Torrez-Haun, Lajena, C	12/12/2014	PERS
5673193778	Valenzuela, Arbenia,	Employment	Recalde, Juarez, M	06/03/1963	PERS
	Valenzuela, Arbenia,	Employment			PERS
5792920380	Coquelin, Nicole C, D	Employment			PERS
6326852793	Jeide, Carterr, D	Employment			PERS
6775154610	Ramirez-Brown, Marciano, G	Employment			PERS
7927012949	Van Dang, Chrislina, R	Employment			PERS

Dependent Type	Medical Group	Effective Date	Health Event Reason	Health Event Type	Event Create Date
Natural Born Child	006 SWORN FIRE UNIT	01/01/2015	Birth/placement	Add Dependent	01/06/2015
Self	005 SWORN POLICE UNIT	01/01/2015	Open Enrollment Change Health Plan	Open Enrollment	10/10/2014
Natural Born Child	006 SWORN FIRE UNIT	01/01/2015	Birth/placement	Add Dependent	12/26/2014
Spouse	001 UNREP UNIT A H M W & X	01/01/2015	Open Enrollment Add Dep	Open Enrollment	10/29/2014
Self	001 UNREP UNIT A H M W & X	01/01/2015	Open Enrollment Change Health Plan	Open Enrollment	10/29/2014
Self	004 UPE, LOCAL 790 UNIT B C D	01/01/2015	Open Enrollment Change Health Plan	Open Enrollment	10/20/2014
Self	001 UNREP UNIT A H M W & X	01/01/2015	Open Enrollment Change Health Plan	Open Enrollment	10/23/2014
Self	006 SWORN FIRE UNIT	01/01/2015	Open Enrollment Change Health Plan	Open Enrollment	01/12/2015
Self	001 UNREP UNIT A H M W & X	01/01/2015	Open Enrollment Change Health Plan	Open Enrollment	10/23/2014

Created by User	Event Status	Plan Name	Plan Code	Health Eligibility Zip Code	Participant County
External Business Partner	Confirmed	Blue Shield Access+ Bay Area	102	95033	Santa Cruz
	Confirmed	PERSCare Out of State	329	75001	Out of State
External Business Partner	Confirmed	Kaiser Permanente California Bay Area	104	94606	Alameda
External Business Partner	Confirmed	Anthem Blue Cross Select HMO Bay Area	454	94503	Napa
External Business Partner	Confirmed	Anthem Blue Cross Select HMO Bay Area	454	94503	Napa
External Business Partner	Confirmed	Kaiser Permanente California Bay Area	104	94601	Alameda
External Business Partner	Confirmed	Anthem Blue Cross Select HMO Bay Area	454	94587	Alameda
	Confirmed	Kaiser Permanente California Bay Area	104	94116	San Francisco
External Business Partner	Confirmed	Anthem Blue Cross Select HMO Bay Area	454	94805	Contra Costa

Health Benefit Type	Party Rate	Employee Premium Share	Employer Premium Share	Total Premium
Medical	Self/B and 2+/B	\$557.49	\$1,857.57	\$2,415.06
Medical	Self/B	\$8.29	\$714.45	\$722.74
Medical	Self/B and 2+/B	\$0.00	\$1,857.57	\$1,857.57
Medical	Self/B and 1/B	\$1,202.82	\$122.00	\$1,324.82
Medical	Self/B	\$1,202.82	\$122.00	\$1,324.82
Medical	Self/B and 2+/B	\$1,735.57	\$122.00	\$1,857.57
Medical	Self/B and 1/B	\$1,202.82	\$122.00	\$1,324.82
Medical	Self/B and 2+/B	\$0.00	\$1,857.57	\$1,857.57
Medical	Self/B and 1/B	\$1,202.82	\$122.00	\$1,324.82

Cognos Reports Online Resources

Introduction The CalPERS website has a page where you can view reports descriptions; user roles needed, and web browser settings procedures.

my|CalPERS Reports Descriptions, User Roles, and Status The my|CalPERS Employer Reports (Cognos) page includes a listing of the Cognos reports available to employers, a description of each report, the user roles* needed to run each report, and the status (if the report is available or unavailable) of the report. Each **report name** link includes a sample of the generated report.

[my|CalPERS Employer Reports \(Cognos\)](#)

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > my|CalPERS Employer Reports (Cognos)

*If you don't have the user roles needed to run a report, your agency's system access administrator (SAA) can grant the roles to you. SAAs can select the [System Access Administrators](#) link for some helpful resources.

See Figure 4-7. my|CalPERS Technical Requirements page

Web Browser Settings A document outlining step-by-step procedures to update your web browser settings is located at:

[my|CalPERS Cognos Reports Browser Requirements](#)

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > my|CalPERS Employer Reports (Cognos) > my|CalPERS Cognos Reports Browser Requirements

See Figure 4-8. my|CalPERS Employer Reports (Cognos) page

Email a Request for Health Data Email MAMD_Data_Services@calpers.ca.gov if you need data that's not in a current report or in the event a health report isn't working. Please include:

- A detailed list of every element being requested
- A brief explanation of why it is needed

The estimated turnaround time is ten business days.

Continued on next page

Cognos Reports Online Resources, Continued

Figure 4-7. my|CalPERS Technical Requirements page

Figure 4-8. my|CalPERS Employer Reports (Cognos) page

Within my|CalPERS, you can use the Cognos application to query your agency's data and generate reports in multiple formats using criteria you choose. Before generating Cognos reports, you'll want to:

- Confirm the report you want to generate is enabled and you have the system access to run it. Refer to the table below to see report descriptions, example PDFs, required user access roles, and status.
- Ensure your Web browser's security settings aren't too restrictive, which will prevent you from using Cognos' functionality. Refer to [my|CalPERS Cognos Reports Browser Requirements \(PDF\)](#).

For instructions on generating reports, view [my|CalPERS Course 205: So You Want to Run a Cognos Report? \(PDF, 4.29 MB\)](#).

To access Cognos reports, log in to [my|CalPERS](#) and select **Reports** under the **Common Tasks** menu in the left-side navigation area.

✔ Available
 ✘ Unavailable

Show entries

Report	Type	User Role	Status
Arrears Receivable Detail Report (PDF) Provides a detailed list of individual member receivables created for mandatory and 20283 arrears	Financials	<ul style="list-style-type: none"> • AR/Billing • Employer Maintenance • PA Billing • Payroll • Retirement Enrollment 	✔
Benefit Recipient by Employer Report (PDF) Lists benefit recipients (CalPERS retirees/survivors) who have a benefit being paid for by an employer, basic information about recipients, and a breakdown of benefit by disbursement (can filter by providing	Benefits	<ul style="list-style-type: none"> • Retirement Enrollment 	✔

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Appendix: my|CalPERS Health Enrollment for Public Agencies and Schools Resources, CalPERS Resources, and Contacts

Overview

Introduction Additional my|CalPERS instructional scenarios are available within this appendix and may be beneficial to you.

Contents This section contains the following topics:

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Incomplete Transactions



Incomplete transactions are health or retirement transactions that were not completed or saved appropriately. The list will include all incomplete transactions for all the users at your agency that reports through my|CalPERS.

Scenario: You processed a transaction for an employee. A few days later, you notice that his transaction is showing in the Enrollment List section. If his transaction hasn't been updated to my|CalPERS, you would complete it. If it has already been updated, you would delete the incomplete transaction.

Note: You should query the employee that is associated to the incomplete transaction record before completing or deleting the transaction.

Step-by-Step Follow the steps below on managing incomplete transactions.

Step	Action	Result
Locating Incomplete Transactions		
1	From the My Home page, select the Reporting global navigation tab.	Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	The incomplete transactions are listed in the Enrollment List section. If the Enrollment List is empty, there are no incomplete transactions for your agency.	
Completing or Deleting the Incomplete Transaction		
4	Select the Name link of the employee and view the incomplete transaction.	Health Event Information page displays.
5	Query the employee's health enrollment history to verify if the same transaction has been updated.	
6	If the transaction has been completed, repeat steps 1-3, select the checkbox next to the employee's name, and then select the Delete button. If the transaction has not been updated, repeat steps 1-4 and complete the transaction.	
	You have completed this scenario.	

New CalSTRS or NonPERS Appointment for a Former Employee with Your Agency



If your CalSTRS or nonPERS employee previously had CalPERS retirement and/or health benefits with your agency, you will need to create an appointment prior to processing the new health enrollment. Because you can view employee appointment history with your agency in my|CalPERS, you will have access to add additional appointments for your active employees.

Important for former CalPERS employees! Ensure that the employee has a permanent separation on the CalPERS appointment before processing the new nonPERS or CalSTRS appointment. If the employee has a concurrent active CalPERS appointment, contact CalPERS to add the nonPERS or CalSTRS appointment.

Important for school employees! If a county office processes all CalPERS appointments for your employees, wait for the CalPERS appointment to be updated in my|CalPERS and then process the new health enrollment.

Scenario: Your agency has a new CalSTRS employee who is eligible for health benefits. The employee was a previous employee with your agency and was a CalPERS member.

Step-by-Step Follow the steps below to process a CalSTRS or nonPERS appointment for a former employee with your agency.

Step	Action	Result
1	From the My Home page, select the Person Information global navigation tab.	See Figure A-1. Reporting global navigation tab Person page displays.
2	Within the Person Search section, enter employee's SSN into the SSN / Federal or Individual Tax ID field, select the Search button. Since this is a new employee, you will use their SSN to perform the person search.	See Figure A-2. Search for a Person page My Profile page displays.
3	Within the Appointment History section, the employee's prior CalPERS appointment with your agency is listed. Select the Add New button to create a new CalSTRS appointment.	See Figure A-3. Appointment History section Appointment Details page displays.

Continued on next page

New CalSTRS or NonPERS Appointment for a Former Employee with Your Agency with Your Agency, Continued

Figure A-1. Reporting global navigation tab

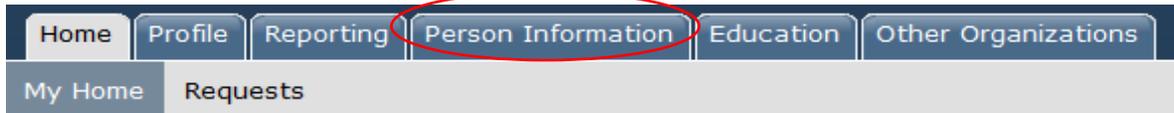


Figure A-2. Search for a Person page

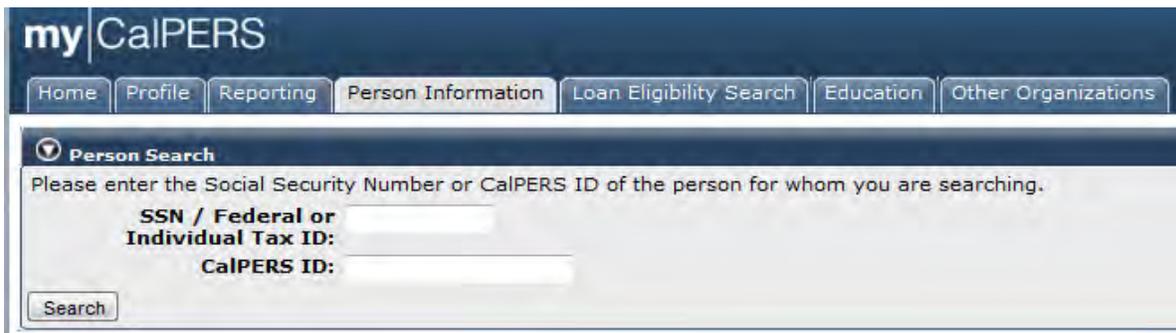


Figure A-3. My Profile page

The screenshot displays the 'My Profile' page. It has a 'Summary' section with the following details:

- Name:** Test Pers
- Prior School Membership:** Yes
- Date of Birth:** 01/22/1968
- Member:** Yes
- Membership Date:** 01/01/2015
- Last Reporting Date:**
- Separation Date:** 07/01/2015
- Prior School Membership Date:** 01/01/2015
- Date of Death:**
- Retired:** No
- Retirement Date:**

Below the summary is the 'Pre-Retirement Benefit Information' section, which is currently 'Inactive'. It shows:

- Account Type:** Member
- Membership Date:** 01/01/2015
- Taxed Contributions:**
- Tax Deferred Contributions:**
- Interest on Contributions:**
- Balance:**
- Posted Service Credit:**
- Service Credit Total:**

A callout box points to the 'Inactive' status with the text: 'Since this is a former CalPERS employee with your agency, the employee's appointment displays and should have an end date if they permanently separated from their original appointment'.

At the bottom is the 'Appointment History' section, which includes an 'Add New' button (circled in red) and a table of appointments:

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date	More Actions
Los Angeles County Schools	Sulphur Springs Union Elementary Sch Dist	Regular		Miscellaneous	Perm Sep	01/01/2015	07/01/2015	

Continued on next page

New CalSTRS or NonPERS Appointment for a Former Employee with Your Agency with Your Agency, Continued

Step	Action	Result
4	<p>Within the Appointment Details section, select and enter the following:</p> <ul style="list-style-type: none"> • Program: Health from the drop-down list. The Retirement System field will display after selecting Health for the program. • Retirement System: CalSTRS (select Other for nonPERS) from the drop-down list • Enrollment Eligibility Date: HLT*=Employee's eligibility date to receive benefits for the specific appointment e.g., employee's hire date that meets the time base & tenure requirement, date their appointment later changed to become eligible, etc. • Original Hire Date:*=Original hire date when first hired by the agency. This would be located in the appointment details of the employee's first appointment information with your agency. However, the system will override and correct an incorrect date after the appointment is saved. • CBU:*=Disregard this drop-down <p>Toward the bottom, you may see a Reciprocity section which you should disregard.</p>	<p>See Figure A-4. Demographics Information section</p>
5	<p>At the bottom left, select the Save button.</p> <p>This message may appear at the top:</p> <p>"An appointment with the same employer has been previously submitted with a different Original Hire Date. Verify your entry. The oldest original hire date will be kept in the system." The system has corrected your original hire date to the original hire date from the employee's first appointment with your agency.</p>	<p>See Figure A-5. Appointment Event History and Appointment Details sections</p>
	<p>You have completed this scenario.</p> <p>Continue with the next scenario to add a new CalSTRS or nonPERS health enrollment.</p>	

Continued on next page

New CalSTRS or NonPERS Appointment for a Former Employee with Your Agency, Continued

Figure A-4. Appointment Details section

Member Details
Name: Test Pers **CalPERS ID:** 4833525575
Gender: Male **Date of Birth:** 01/22/1968

Appointment Details
Program: Health **Enrollment Eligibility Date:** HLT * 07012016
Retirement System: CalSTRS

Position Information
Employer: Los Angeles County Schools **CalPERS ID (Employer):** 1315
Division: Sulphur Springs Union Elementary Sch Dist **CalPERS ID (Division):** 2493
Original Hire Date: 01012015
CBU: *

Reciprocity
Reciprocal Member: Yes
Indicator: No

Save Clear

Figure A-5. Appointment Event History and Appointment Details sections

Appointment Event History Add New
Correct Event Delete View All Site Events Display

Event Date	Event	Event Details
07/01/2016	New Appointment	View Event Details

Correct Event Delete View All Site Events Display

Appointment Details
Programs
Program: Health
Retirement System: CalSTRS

Position Information
Employer: Los Angeles County Schools **CalPERS ID (Employer):** 1315715064
Division: Sulphur Springs Union Elementary Sch Dist **CalPERS ID (Division):** 2493370016
CBU: -

Appointment Status: Active **Appointment ID:** 92325600
Enrollment Level: Classic **Leave Type:**
Member Base Rate: **Formula Name:**
Contribution Modification: **Cost Share:** 0.0

Created by User: Employer
Created on: 06/01/2016 10:00 AM

Refunded Appointment: No

New Health Enrollment for a NonPERS Employee Who Has Never Had an Active Appointment with Your Agency



Scenario: Your agency has a new nonPERS employee who is eligible for health benefits. The employee has requested to enroll without dependents.

If you're a PERS agency enrolling an employee who is eligible for health due to Affordable Care Act (ACA) but who is not eligible for our retirement, select "PERS" on step 11 unless it's truly a nonPERS or CalSTRS position. This does not enroll the employee as a CalPERS member, but it allows the system to display the correct medical group options.

Important! If your CalSTRS or nonPERS employee was a former employee with your agency with CalPERS retirement and/or medical benefits, you will need to create an appointment prior to processing the new health enrollment. Follow the steps in the previous scenario.

Step-by-Step Follow the steps below to process a new nonPERS health enrollment.

Step	Action	Result
Demographic and Appointment Details		
1	From the My Home page, select the Reporting global navigation tab.	See Figure A-6. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, select the Continue button.	Health Enrollment Preprocessing page displays.
3	Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter employee's SSN into the SSN / Federal or Individual Tax ID field, select the Search button. Since this is a new employee, you will use their SSN to perform the person search.	See Figure A-7. Search for a Person page
6	Within the Search Results section, if there are no results, select the Add New button. If the employee's name displays, select the Select button.	Health Event Information page displays.
7	Populate the Demographic Information section: <ul style="list-style-type: none"> • First Name, Last Name • SSN, Date of Birth • Gender 	See Figure A-8. Demographics Information section

Data in the required fields must match if the person is already in the system

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New Health Enrollment for a NonPERS Employee Who Has Never Had an Active Appointment with Your Agency, Continued

Figure A-6. Reporting global navigation tab

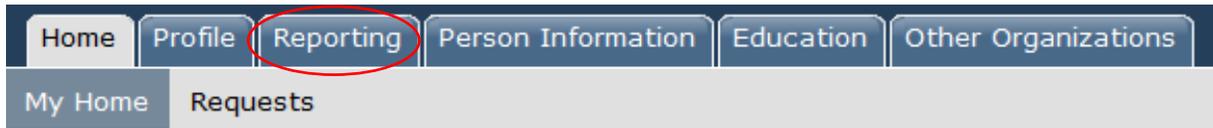


Figure A-7. Search for a Person page

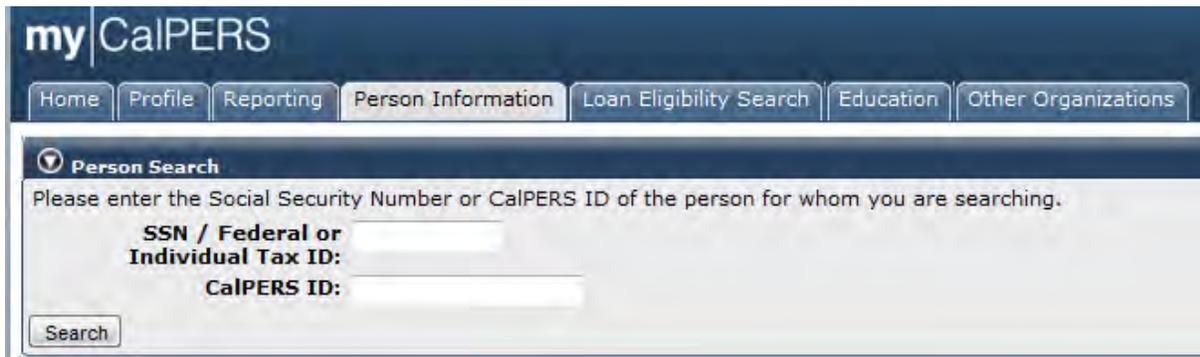
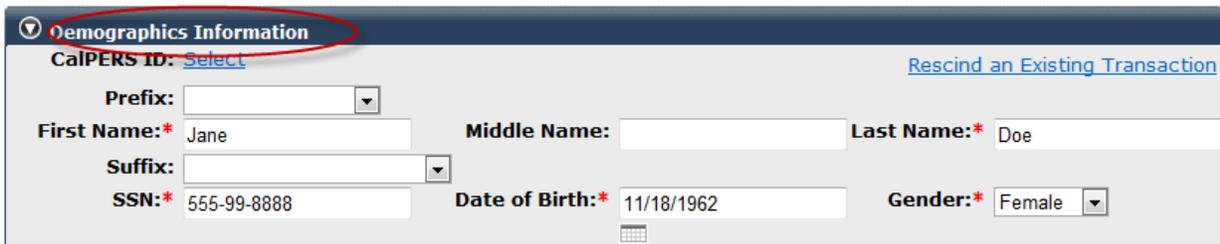


Figure A-8. Demographics Information section



Continued on next page

New Health Enrollment for a NonPERS Employee Who Has Never Had an Active Appointment with Your Agency, Continued

Step	Action	Result
8	Populate the following fields in the Health Event Information section: <ul style="list-style-type: none"> ● Health Event Type: “New Enrollment” ● Health Event Reason: “Time Base & Tenure” ● Event Date: (Date of eligibility) ● Received Date: (Date the request was received in the employing office) ● Apply Change to: Select the Medical radio button 	See Figure A-9. Health Event Information section It’s highly recommended to use the View Effective Date button at the bottom right to view the effective date based on the reason, event date, and received date entered
9	Select the Save & Continue button.	Health Enrollment Information page displays.
Address Details and Plan Selection		
10	Populate the following fields in the Maintain Address Details section: <ul style="list-style-type: none"> ● Address Type ● Use address for Health checkbox is marked if using address for health plan eligibility ● Address ● Country ● City ● State ● Zip Code Optional: Select the radio button for the Primary radio button(s) and populate the following: <ul style="list-style-type: none"> ● Phone Type from the drop-down list & Number ● Email 	See Figure A-10. Maintain Address Details section
11	Populate the following in the Appointment Details section: <ul style="list-style-type: none"> ● Original Hire Date: Date of appointment ● Retirement Program: “Other” from the drop-down list (Select “CalSTRS” if enrolling an employee who is a member of the California State Teachers’ Retirement System) ● Medical Group: Select appropriate medical group 	See Figure A-11. Appointment Details section For ACA-health eligible appointments, select the retirement program type for that position so the correct medical groups are available in the drop-down list

Continued on next page

New Health Enrollment for a NonPERS Employee Who Has Never Had an Active Appointment with Your Agency, Continued

Figure A-9. Health Event Information section

Health Event Information

Health Event Type: * New Enrollment

Health Event Reason: * Time Base & Tenure

Event Date: *

Received Date: *

Apply Change to: * Medical Other

View Effective Date

Save & Continue Cancel Clear

Figure A-10. Maintain Address Details section

Maintain Address Details

Address Type: * Physical Address Use address for health

Care Of: *

Address: *

Country: * United States

City: *

State: * California

Zip Code: *

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Work			<input type="checkbox"/>
<input type="radio"/>	Email: *			

Figure A-11. Appointment Details section

Appointment Details

Employer: City of Oakland CalPERS ID (Employer): 4015143822

Original Hire Date: *

Division: *

Appointment ID: *

Separation Date: *

Retirement Date: *

Additional Details

Position Title: *

CBU: *

Begin Date: *

Medical Group: *

Appointment Status:

Retirement Program: * PERS

End Date: *

Affiliated Association: *

Continued on next page

New Health Enrollment for a NonPERS Employee Who Has Never Had an Active Appointment with Your Agency, Continued

Step	Action	Result						
12	<p>Is employee part of the PORAC association?</p> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Choose the appropriate association from the Affiliated Association drop-down list</td> </tr> <tr> <td>No</td> <td>Leave the Affiliated Association drop-down list blank</td> </tr> </tbody> </table> <p>Select the Save & Continue button.</p>	If...	Then...	Yes	Choose the appropriate association from the Affiliated Association drop-down list	No	Leave the Affiliated Association drop-down list blank	Confirm Address section displays.
If...	Then...							
Yes	Choose the appropriate association from the Affiliated Association drop-down list							
No	Leave the Affiliated Association drop-down list blank							
13	Select the radio button for correct Entered Address or U.S. Postal Service Matches , then select the Confirm button.	Maintain Address, Communication, and Appointment Details sections displays.						
14	<p>Ensure the medical group field is still populated; otherwise, the transaction won't be saved.</p> <p>Select the Save & Continue button.</p>	<p>Select Covered Person page displays.</p> <p>In the Appointment Details section, the system has created an Appointment ID for the employee.</p>						
15	Optional: Include the employee's chosen physician's name in the Medical Provider field.							
16	<p>Is employee enrolling dependents?</p> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>Select the Add New button. Review scenario 4 to review how to enroll dependents.</td> </tr> <tr> <td>No</td> <td>Select the Save & Continue button and continue to step 17</td> </tr> </tbody> </table>	If...	Then...	Yes	Select the Add New button. Review scenario 4 to review how to enroll dependents.	No	Select the Save & Continue button and continue to step 17	<p>See Figure A-12. Covered Person List section</p> <p>Plan Selection page displays.</p>
If...	Then...							
Yes	Select the Add New button. Review scenario 4 to review how to enroll dependents.							
No	Select the Save & Continue button and continue to step 17							
17	Select the radio button for the employee's chosen medical plan, then select the Save & Continue button.	<p>See Figure A-13. Preselections and Medical Plan Selections sections</p> <p>Health Enrollment Preprocessing page displays.</p>						
	You have completed this scenario.							

Continued on next page

New Health Enrollment for a NonPERS Employee Who Has Never Had an Active Appointment with Your Agency, Continued

Figure A-12. Covered Person List section

▼ Covered Person List
Add New

Name	Date of Birth	Relationship	Medical	Dental	Vision
Animai Tran	05/18/1989	Self	BAS	No	No

▼ Provider Information

Name	Dependent Type	Medical Provider	Dental Provider	Vision Provider
Animai Tran	Self	<input type="text"/>		

Figure A-13. Preselections and Medical Plan Selections sections

▼ Preselections

Medical Party Type: Self/B

Select Health Eligibility ZIP Code:* Personal Employer

ZIP Code:*

County:* ▼

City: SACRAMENTO

▼ Medical Plan Selections

Plan Name	Party	Premium	COBRA Premium
<input type="radio"/> PERS Select Sacramento Area	Self/B	453.21	462.27
<input type="radio"/> PERS Choice Sacramento Area	Self/B	620.49	632.90
<input type="radio"/> Blue Shield of California Sacramento Area	Self/B	702.75	716.81
<input type="radio"/> Kaiser Permanente California Sacramento Area	Self/B	613.42	625.69
<input type="radio"/> PERSCare Sacramento Area	Self/B	1007.54	1027.69
<input type="radio"/> Blue Shield NetValue Sacramento Area	Self/B	606.11	618.23

Transition NonPERS Health into Retirement



Scenario: Your nonPERS employee is retiring from your agency and wants to continue medical benefits into retirement. To transition a nonPERS employee's medical benefits into retirement, you will process a two-part transaction using my|CalPERS.

1. Process a permanent separation
2. Process a new health enrollment due to retirement (Event Date: first of the month after the permanent separation date). Exception: If the employee or dependent is Medicare eligible, do not process the new health enrollment. Send a completed [HBD-30](#) with a copy of their Medicare information to CalPERS.

Important: my|CalPERS will automatically cancel the nonPERS employee's health enrollment on the first day of the second month following the permanent separation. Therefore, it's important to immediately process the new health enrollment.

Step-by-Step Follow the steps below to process a transition nonPERS health into retirement.

Step	Action	Result
Part I - Permanent Separation		
1	From the My Home page, select either the Person Search left-side navigation link or the Person Information global navigation tab.	See Figure A-14. Person Search link and Person Information global navigation tab Search for a Person page displays.
2	Enter the employee's SSN / Federal or Individual Tax ID or CalPERS ID in the Person Search section, and then select the Search button.	Search Results section displays.
3	Within the Appointment History section, select the appropriate active Employer link.	See Figure A-15. Appointment History section Appointment Details and Event page displays.
4	Within the Appointment Event History section, select the Add New button.	See Figure A-16. Appointment Event section Appointment Change page displays.

Continued on next page

Transition NonPERS Health into Retirement, Continued

Figure A-14. Person Search link and Person Information global navigation tab

myCalPERS

Home Profile Reporting **Person Information** Loan Eligibility Search Education Other Organizations

My Home Requests

Common Tasks

Menu

- Person Search**
- Change Password
- Change Challenge Questions
- Home and Personal Loan

My Cases

Case ID	Case Title	Case Type	Program	Status
1567788		Amend Retirement Contract		Open
1482025		Non-PERS Health Contract		Open
1481883		PERS Health Contract		Open
1563334		Valuation Request Case		Closed
1563326		Valuation Request Case		Closed
42610		Initiate DA Agreement		Closed
49071		Initiate Retirement Contract		Closed
48312		Initiate Reciprocal Agreement		Closed

Figure A-15. Appointment History section

Appointment History Add New View More Actions»

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City of Oakland		Regular			Active	04/01/2012	

Figure A-16. Appointment Event section

Appointment Event History Add New

Correct Event Delete View All Site Events Display

Event Date	Event	Event Details
04/01/2012	New Appointment	View Event Details

Correct Event Delete View All Site Events Display

Continued on next page

Transition NonPERS Health into Retirement, Continued

Step	Action	Result
5	Populate the following fields: <ul style="list-style-type: none"> ● Event: “Permanent Separation” ● Event Date: (Permanent separation date which is at least one day after the last day working)* ● Separation Reason: “Retirement” <p>*The system will use the day prior to the permanent separation date as the event date to cancel the health. Example, permanent separation date is 04-01-2015. System will use 03-31-2015 as the health event date to cancel, so health will be canceled effective 05-01-2015.</p>	See Figure A-17. Appointment Event Details section
6	Select the Save button. In the Appointment Event History section, a new line item indicating the employee’s permanent separation displays in the Event column.	Appointment Details and Events page displays.
Part II - New Enrollment-Retirement		
7	Select the Reporting global navigation tab.	See Figure A-18. Reporting global navigation tab Manage Reports page displays.
8	Within the Create or Edit Report section, select “Add or Edit Health Enrollment” from the Method drop-down, then select the Continue button.	See Figure A-19. Create or Edit Report section Health Enrollment Preprocessing page displays.
9	Within the Enrollment List, select the Add New button.	Health Event Information page displays.
10	Within the Demographics Information section, select the Select link.	Search Employee page displays.
11	Enter the SSN / Federal or Individual Tax ID or CalPERS ID in the appropriate field, then select the Search button.	Search for a Person page displays with Search Results prepopulated.
12	Verify that the correct employee’s name displays, then select the Select button.	Health Event Information page displays.

Continued on next page

Transition NonPERS Health into Retirement, Continued

Figure A-17. Appointment Event Details section

Appointment Event Details

Event:* Permanent Separation

Event Date:* 11152015

Separation Reason:* Retirement

Save Clear

Figure A-18. Reporting global navigation tab

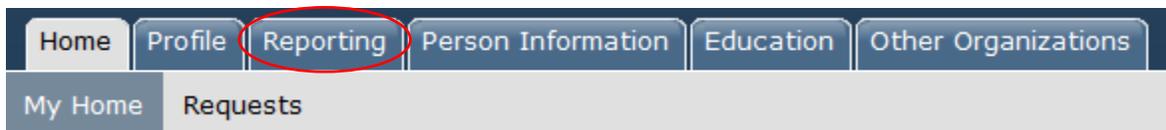


Figure A-19. Create or Edit Report section

Create or Edit Report

Method:* Add or Edit Health Enrollment Continue

Continued on next page

Transition NonPERS Health into Retirement, Continued

Step	Action	Result
13	Populate the following fields: <ul style="list-style-type: none"> • Health Event Type: “New Enrollment” • Health Event Reason: “Retirement” • Event Date: (Ensure this date is in the month that precedes the effective date) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button 	See Figure A-20. Health Event Information section
14	Select the Save & Continue button.	Maintain Address, Communication, and Appointment Details information displays.
15	Update the following fields, if necessary, in the Maintain Address Details and Maintain Communication Details sections: <ul style="list-style-type: none"> • Use address for health checkbox • Phone type, phone number and email 	
16	Select the medical group from the Medical Group drop-down list. If he/she is in PORAC, select PORAC from the Affiliated Association drop-down list.	
17	Select the Save & Continue button.	Select Covered Person page and Provider Information sections display.
18	Optional: Enter retiree’s physician’s name in the Medical Provider field. If necessary, add dependents, then select the Save & Continue button.	Plan Selection page displays.
19	Select the radio button for the retiree’s chosen medical plan, then select the Save & Continue button. Ensure that the County field in the Pre-selections section is populated correctly.	Health Enrollment Preprocessing page displays.
	You have completed this scenario.	

Continued to the next page

Transition NonPERS Health into Retirement, Continued

Figure A-20. Health Event Information section

Health Event Information

Health Event Type:* New Enrollment

Health Event Reason:* Retirement

Event Date:*

Received Date:*

Apply Change to:* Medical

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NonPERS Health Enrollment for CalSTRS Retirees

Introduction

Schools only!

For teachers in CalSTRS who worked at a health contracting school district but never had an active appointment with CalPERS (health or PERS retirement).

Your system-access roles determine which transactions a school district and County Office of Education (COE) can process.

School district has both retirement and health enrollment rights or the Business Partner Appointment Management-Non-PERS and CalSTRS and Health enrollment rights:

- Process the nonPERS health enrollment for the CalSTRS retiree
- Process the permanent separation

For those school districts that do not have retirement enrollment rights or the Business Partner Appointment Management-Non-PERS and CalSTRS rights due to the county office maintaining that responsibility, follow the process below:

- **School district has only health enrollment rights** – Process the nonPERS health enrollment for the CalSTRS retiree
- **County office has retirement enrollment rights** - Process the permanent separation



Scenario: A recently retired teacher with CalSTRS who never had CalPERS health benefits while an eligible, active employee now wants to enroll in health as a retiree.

You will use these special procedures to create an appointment within my|CalPERS. Once the appointment has been permanently separated, the retiree will receive instructions to contact CalPERS to complete their health benefit enrollment.

Continued on next page

NonPERS Health Enrollment for CalSTRS Retirees, Continued

Step-by-Step Follow the steps below to process a new health enrollment for a CalSTRS retiree.

Step	Action	Result
Part I - Non-PERS Health Enrollment for CalSTRS Retiree		
1	From the My Home page, select the Reporting global navigation tab.	See Figure A-21. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter employee's SSN into the SSN / Federal or Individual Tax ID field, then select the Search button. For our training, this is a new employee, so you will use their SSN to perform the person search.	"No Results Found" displays in the Search Results section.
6	Within the Search Results section, if there are no results, select the Add New button. If the employee's name displays, then select the Select button.	Health Event Information page displays.
7	In this scenario, she has never been in my CalPERS, so populate the following fields: <ul style="list-style-type: none"> ● First Name ● Last Name ● SSN ● Date of Birth ● Gender 	See Figure A-22. Demographics Information section

Continued on next page

NonPERS Health Enrollment for CalSTRS Retirees, Continued

Figure A-21. Reporting global navigation tab

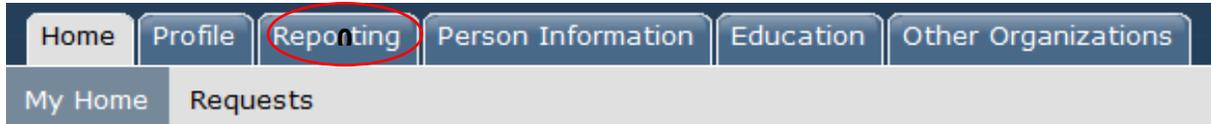


Figure A-22. Demographics Information section

A screenshot of the 'Demographics Information' section in a web application. The section title is 'Demographics Information' with a dropdown arrow. Below the title, there is a 'CalPERS ID: Select' dropdown and a blue link 'Rescind an Existing Transaction'. The form contains several fields: 'Prefix:' with a dropdown, 'First Name:*' with the value 'Jane', 'Middle Name:' with an empty field, 'Last Name:*' with the value 'Crabtree', 'Suffix:' with a dropdown, 'SSN:*' with the value '777885555', 'Date of Birth:*' with the value '07071958' and a calendar icon, and 'Gender:*' with a dropdown set to 'Female'.

Continued on next page

NonPERS Health Enrollment for CalSTRS Retirees, Continued

Step	Action	Result
8	Populate the following fields: <ul style="list-style-type: none"> • Health Event Type: “New Enrollment” • Health Event Reason: “Late or Loss of Coverage (Emp)” • Event Date: (Date of request) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button 	See Figure A-23. Health Event Information section
9	Select the Save & Continue button.	Health Enrollment Information page displays.
10	Populate the following fields in the Maintain Address Details section: <ul style="list-style-type: none"> • Address Type • Use address for Health checkbox is marked if using address for health plan eligibility • Address • Country • City • State • Zip Code <p>Optional: Populate the following fields in the Maintain Communication Details section:</p> <p>Phone Type, Phone Number, Email</p>	See Figure A-24. Maintain Address Details and Maintain Communication Details sections
11	Populate the following in the Appointment Details section: <ul style="list-style-type: none"> • Original Hire Date: Date of appointment • Retirement System: “CalSTRS” from the drop-down list • Medical Group: Medical group 	See Figure A-25. Appointment Details section
12	Select the Save & Continue button.	Confirm Address section displays.
13	Select radio button for correct Entered Address or U.S. Postal Service Matches, then select the Confirm button.	Maintain Address Details, Maintain Communication Details, and Appointment Details sections display.

Continued on next page

NonPERS Health Enrollment for CalSTRS Retirees, Continued

Figure A-23. Health Event Information section

Health Event Information

Health Event Type:* New Enrollment

Health Event Reason:* Late or Loss of Coverage (Emp)

Event Date:* 02/01/2016

Received Date:* 02/01/2016

Apply Change to:* Medical

Effective Date: 03/01/2016 View Effective Date

Save & Continue Cancel Clear

Figure A-24. Maintain Address Details and Maintain Communication Details sections

Maintain Address Details

Address Type:* Mailing Address

Care Of:

Address:* 8323 Baldwin Street

Country:* United States

City:* Oakland

State:* California

Zip Code:* 94621 -

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Cellular	510333444		<input type="checkbox"/>
<input type="radio"/>	Email:			

Figure A-25. Appointment Details section

Appointment Details

Employer: City of Oakland CalPERS ID: 4015143822 (Employer):

Original Hire Date:* 07/05/1998

Division: Port of Oakland

Appointment ID: 92214492

Separation Date: Retirement Date:

Additional Details

Position Title: Appointment Status: Active

CBU: Retirement Program:* STRS

Begin Date: 07/05/1998 End Date:

Medical Group:* 001 UNREP UNIT A H M W & X Affiliated Association:

Save & Continue Cancel Clear

Continued on next page

NonPERS Health Enrollment for CalSTRS Retirees, Continued

Step	Action	Result
14	Ensure the correct medical group is still populated in the Medical Group field, then select the Save & Continue button.	Selected Covered Persons page displays.
15	Within the Covered Person List, do not add any dependents at this time. Select Save and Continue button. Important! Retirees may add dependents upon calling CalPERS to finalize their health plan selection.	See Figure A-26. Plan Selection page displays Health Enrollment Preprocessing page displays.
16	Stop! Upon landing on the Plan Selection page, select the Cancel button.	Health Enrollment Preprocessing page displays
	The my CalPERS appointment has been established! You have completed this scenario and are ready to process the permanent separation.	
Part II - Permanent Separation		
17	From the My Home page, select either the Person Search left-side navigation link or the Person Information global navigation tab.	See Figure A-27. Person Search link and Person Information global navigation tab Search for a Person page displays.
18	Enter the employee's CalPERS ID or SSN in the CalPERS ID or SSN field, then select the Search button.	My Profile page displays.

Continued on next page

NonPERS Health Enrollment for CalSTRS Retirees, Continued

Figure A-26. Plan Selection page

▼ **Preselections**

Health Eligibility ZIP Code

Health Eligibility Address: 8323 BALDWIN ST, OAKLAND, CA 94621-1925 Alameda BAR (Address Start Date 01/27/2016)

Medical Party Type: Self/B

Select an address below to override the current health Eligibility Address.

NOTE - Overriding the current Health Eligibility Address will create a Change Eligibility ZIP transaction in conjunction with the enrollment transaction.

Health Eligibility ZIP Code Override:

[Display Plans](#)

▼ **Medical Plan Selections**

Plan Name	Party	Premium	COBRA Premium
<input type="radio"/> Anthem Blue Cross Select HMO Bay Area	Self/B	721.79	736.23
<input type="radio"/> Anthem Blue Cross Traditional HMO Bay Area	Self/B	855.42	872.53
<input type="radio"/> Blue Shield Access+ Bay Area	Self/B	1016.18	1036.50
<input type="radio"/> Health Net SmartCare Bay Area	Self/B	808.44	824.61
<input type="radio"/> Kaiser Permanente California Bay Area	Self/B	746.47	761.40
<input type="radio"/> PERS Choice Bay Area	Self/B	798.36	814.33
<input type="radio"/> PERS Select Bay Area	Self/B	730.07	744.67
<input type="radio"/> PERSCare Bay Area	Self/B	889.27	907.06
<input type="radio"/> UnitedHealthcare HMO Bay Area	Self/B	855.44	974.55

Save & Continue Cancel Back

You must select the **Cancel** button!

Figure A-27. Person Search link and Person Information global navigation tab

Home
Profile
Reporting
Person Information
Education
Other Organizations

My Home Requests

Common Tasks ▲

Menu ▼

Person Search

Change Password

Change Challenge Questions

▼ My Cases

Case ID	Case Title	Case Type
1482025		Non-PERS Health Contract
1700408		PERS Health Contract
1662911		Amend Retirement Contract
1637536		Valuation Request Case
1611361		Valuation Request Case

Continued on next page

NonPERS Health Enrollment for CalSTRS Retirees, Continued

Step	Action	Result
19	Within the Appointment History section, select the appropriate active Employer link to view your employee's current appointment and event details.	Figure A-28. Appointment History section Appointment Details and Event page displays.
20	Within the Appointment Event History section, select the Add New button.	Appointment Change page displays.
21	Populate the following fields in the Appointment Event Details section: <ul style="list-style-type: none"> ● Event: "Permanent Separation" ● Event Date: Ensure that the separation date is equal to or prior to the retirement date. ● Separation Reason: "CalSTRS – Pending Retirement" 	See Figure A-29. Appointment Event Details section
22	Select the Save button. A new line item indicating the employee's permanent separation displays in the Event column in the Appointment Event History section.	Appointment Details and Event page displays.
23	my CalPERS communicates with the CalSTRS system through an electronic interface. CalSTRS responds to my CalPERS with the employee's retirement date.	When my CalPERS receives the retirement date, my CalPERS generates a letter to the employee with instructions to contact CalPERS with the health plan selection and dependent/s' information.
	You have completed this scenario.	

Continued on next page

NonPERS Health Enrollment for CalSTRS Retirees, Continued

Figure A-28. Appointment History section

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City of Oakland		Regular			Active	04/01/2012	

Figure A-29. Appointment Event Details section

Appointment Event Details

Event:* Permanent Separation

Event Date:* [Calendar icon]

Separation Reason:* CalSTRS - Pending Retirement

Save Clear

New Health Enrollment with a Disabled Dependent

**New Health
with a
Disabled
Dependent**

The my|CalPERS process for a new health enrollment with an over-aged disabled dependent is as follows:

Stage	Description
1	The employer receives the health enrollment form for a new employee with a disabled dependent.
2	The employer completes the new enrollment transaction in my CalPERS for the employee and all dependents except the disabled dependent.
3	<p>As of September 7, 2014, employers are to provide the “Member Questionnaire for the CalPERS Disabled Dependent Health Benefit” (HBD-98) and a “Medical Report for the CalPERS Disabled Dependent Benefit” (HBD-34) to the member, or direction to the forms online, then:</p> <ul style="list-style-type: none"> ● Employee will complete the Member Questionnaire and return it to CalPERS ● Medical Report should be given to the disabled dependent’s physician. The Medical Report instructs the physician to fax or mail it directly to CalPERS. <p>Both documents should be received by CalPERS within 60 days from the subscriber’s eligibility date.</p>
4	Once both documents are received and approved by CalPERS, CalPERS staff will process adding the disabled dependent to the employee’s health enrollment.

Certifying an Enrolled Disabled Dependent

Certifying a Disabled Dependent Who is Turning 26

The my|CalPERS process for an enrolled disabled dependent who is turning age 26 is as follows:

Stage	Description
1	The employee and employer complete the Health Benefit Plan Enrollment form (HBD-12). The HBD-12 form is the my CalPERS 0701 in the Document History.
2	The employer indicates in the HBD-12 Remarks section, "Coverage is contingent upon CalPERS approval," then sends the HBD-12 to CalPERS. Important! If the dependent is deemed ineligible, the deletion will be retroactive and the employee will be responsible for any medical services used.
3	The employee completes and submits the Member Questionnaire for the CalPERS Disabled Dependent Health Benefit form (HBD-98) to CalPERS no earlier than 60 days prior or 60 days after the dependent's birthday.* The Member Questionnaire is the my CalPERS 0715 in the Document History.
4	The dependent's physician completes and submits the Medical Report for the CalPERS Disabled Dependent Benefit form (HBD-34) to CalPERS no earlier than 60 days prior or 60 days after the dependent's birthday.* The Member Questionnaire is the my CalPERS 0709 in the Document History.
5	If the CalPERS Health Account Services (HAS) approves the continuation of the dependent's enrollment, this is complete until the next recertification time.

Important!

*If the Member Questionnaire for the CalPERS Disabled Dependent Health Benefit form or the Medical Report for the CalPERS Disabled Dependent Benefit form is received earlier than 60 days from the dependent's birthday, the employee's request will not be processed and all documentation will need to be resubmitted within the above time frames.

Recertifying a Dependent in a Parent-Child Relationship

Recertifying a Dependent in a Parent-Child Relationship

For dependents in a parent-child relationship to remain covered, an HBD-40 “Affidavit of Parent-Child Relationship” needs to be updated annually. Before the employee’s birth month, a notice will be sent to the employee to notify them that the certification is expiring. For employers, there is a Cognos report called “Parent-Child Relationship Dependents with Expiring Certification.”

Example: Subscriber’s birth date is 04/29/64; therefore, the dependent’s recertification needs to be done prior to 05/01/current year for him/her to continue as a dependent; otherwise, he/she will be deleted on 05/01/current year.

Recertifying a Parent-Child Relationship dependent, use the following:

- **Health Event Type:** “Recertify Dependent”
- **Health Event Reason:** “Recertification of Parent-Child Relationship”
- **Event Date:** 1st day of the month following the employee’s birthday (date the dependent would be cancelled unless recertified)
- **Received Date:** Date new HBD-40 is received in the office

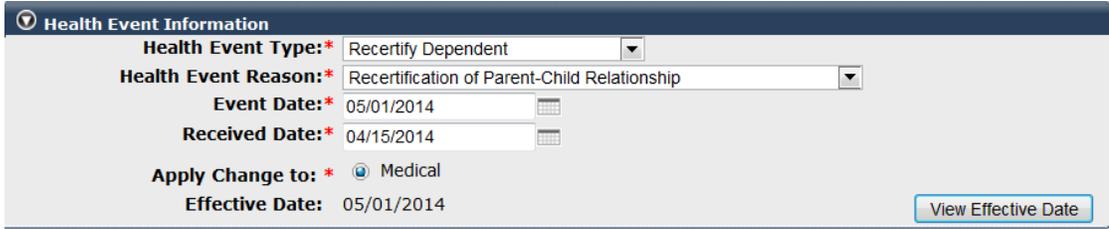
Important!

- Recertify no earlier than 90 days before Parent-Child relationship certification renewal date
- If recertification does not happen at least 30 days before the Parent-Child relationship certification renewal date, the system will apply a termination date
- If you approve the employee’s recertification after the system applies a termination date, you can rescind the termination of enrollment if it’s a future date
- If the termination date has recently passed and you approve the recertification, you must contact CalPERS to request the rescission
- Once the coverage has lapsed, the employee may re-enroll the dependent at a future date with a qualifying permitting event and the proper documentation

Note: Please refer to the 12/9/2015 Circular Letter [600-008-15](#) “Eligibility Criteria for Dependents in a Parent-Child Relationship” and its four attachments ([PCR Regulatory Language](#), [Affidavit of Parent-Child Relationship](#), [PCR Subscriber Letter](#), and [Employer FAQs](#)) for the January 1, 2016 requirement changes.

Continued on next page

Recertifying a Dependent in a Parent-Child Relationship, Continued

Stage	Description
1	The employee needs to complete a new HBD-40 "Affidavit of Parent-Child Relationship." The HBD-40 can be found on the CalPERS website on the Forms & Publications page.
2	If the employer reviews the HBD-40 and approves the recertification, they will process the transaction within my CalPERS. If the dependent is deemed ineligible, the automatic deletion will be effective the first of the month following the employee's birth date.
3	<p>Recertifying a Parent-Child Relationship dependent, use the following in my CalPERS:</p> <ul style="list-style-type: none"> • Health Event Type: "Recertify Dependent" • Health Event Reason: "Recertification of Parent-Child Relationship" • Event Date: 1st day of the month following the employee's birthday (date the dependent would be cancelled unless recertified) • Received Date: Date new HBD-40 is received in the office <p>The system-generated effective date will be the same date as the event date.</p> <p>Below is an example of an employee whose birthday is April 29th and she brought in a new and completed HBD-40 to her HBO on April 15th.</p>  <p>Select the Save & Continue button.</p>
4	<p>Within the Parent-Child Relationship Certification section, check the Certify Dependent check box and the check box for the disclaimer.</p> <p>Select the Save & Continue button.</p>

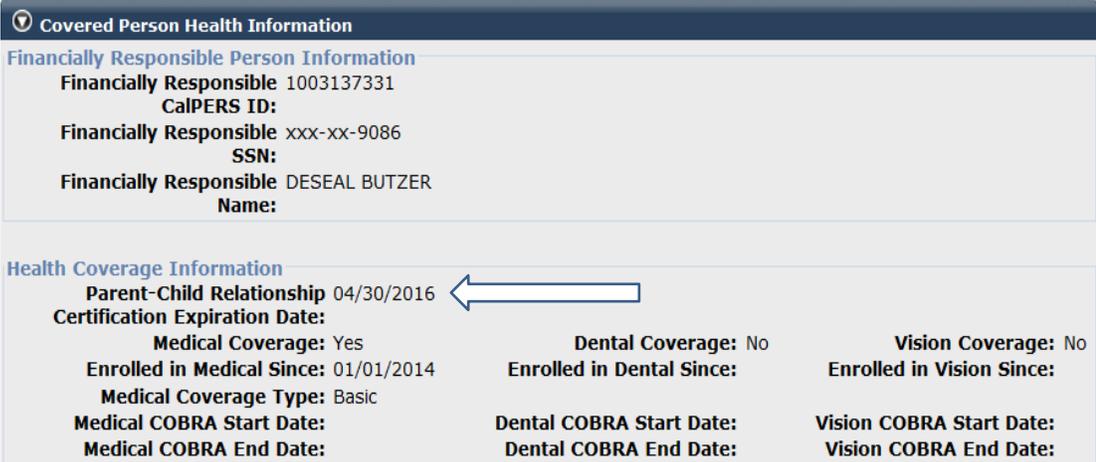
Continued on next page

Recertifying a Dependent in a Parent-Child Relationship, Continued

Verifying the Recertification of a Dependent in a Parent-Child Relationship

When you perform a query after the recertification transaction has been processed, you won't see it in the Health Enrollment History section. However, you will see the updated expiration date next to the Parent-Child Relationship Certification Expiration Date field for the dependent.

Follow the stages below to verify a recertification of a parent-child relationship.

Stage	Description
1	Perform a query to view the employee's health benefits.
2	From the Health Enrollment Summary page, under the Covered Persons Summary section, select the dependent's name link for the one who is in the parent-child relationship.
3	<p>Within the Covered Person Health Information section, under the Health Coverage Information area, the new parent-child relationship certification date will be displayed.</p>  <p>The screenshot shows the 'Covered Person Health Information' section. Under 'Health Coverage Information', the 'Parent-Child Relationship Certification Expiration Date' is listed as 04/30/2016, with a blue arrow pointing to it. Other fields include Financially Responsible Person Information (CalPERS ID, SSN, Name) and Health Coverage Information (Medical, Dental, and Vision coverage status and dates).</p>

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New COBRA Health Enrollment for a Former Employee



The Consolidated Omnibus Budget Reconciliation Act (COBRA) is a federal program that allows the continuation of health coverage for a limited time under certain circumstances.

Scenario: Due to your employee’s permanent separation, your employee’s health benefits got cancelled. You offered them COBRA and they would like to enroll with one dependent.

Step-by-Step Follow the steps below to process a new COBRA health enrollment.

Step	Action	Result
Enroll in COBRA		
1	From the My Home page, select the Reporting global navigation tab.	See Figure A-30. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select “Add or Edit Health Enrollment” from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Do not use the upper Search Preprocessing Data section when starting a new transaction. Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter the COBRA enrollee’s CalPERS ID in the CalPERS ID field, then select the Search button. You may also search by their SSN.	Search results display in Search Results section.
6	Verify that the correct enrollee’s name displays. Then select the Select button.	See Figure A-31. Search Results section Health Event Information page displays.

Continued on next page

New COBRA Health Enrollment for a Former Employee, Continued

Figure A-30. Reporting global navigation tab



Figure A-31. Search Results section



CalPERS ID	Name	Date of Birth	Employer	Employment Status
9105108278	Murray, Mike	01/22/1968	Sacramento Area Flood Control Agency	Former Employee

Select

COBRA for a Formerly Covered Employee



A former covered employee may enroll in COBRA for up to 18 months as a result of employment separation or time base reduction.

Continued on next page

New COBRA Health Enrollment for a Former Employee, Continued

Step	Action	Result						
7	<p>Populate the following fields in the Health Event Information section:</p> <ul style="list-style-type: none"> • Health Event Type: “COBRA New Enrollment” • Health Event Reason: “COBRA Loss of Employment” • Event Date: (Date of the permanent separation) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button 	<p>See Figure A-32. Health Event Information section</p>						
8	<p>Select the Save & Continue button.</p>	<p>Health Enrollment Information page displays.</p>						
9	<p>Select a medical group from the Medical Group drop-down list.</p> <p>If the employee is a dues-paying member of an association, select the association from the Affiliated Association drop-down list at the bottom right.</p>	<p>See Figure A-33. Appointment Details section</p>						
10	<p>At the bottom, you can view the COBRA end date in the COBRA Enrollment section.</p> <p>Select the Save & Continue button.</p>	<p>See Figure A-34. Covered Person List section</p>						
11	<p>Is employee including all dependents on this COBRA?</p> <table border="1" data-bbox="310 1266 1002 1373"> <thead> <tr> <th data-bbox="310 1266 402 1297">If...</th> <th data-bbox="402 1266 1002 1297">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="310 1297 402 1335">No</td> <td data-bbox="402 1297 1002 1335">Continue to step 12</td> </tr> <tr> <td data-bbox="310 1335 402 1373">Yes</td> <td data-bbox="402 1335 1002 1373">Skip to step 16</td> </tr> </tbody> </table>	If...	Then...	No	Continue to step 12	Yes	Skip to step 16	
If...	Then...							
No	Continue to step 12							
Yes	Skip to step 16							

Continued on next page

New COBRA Health Enrollment for a Former Employee, Continued

Figure A-32. Health Event Information section

Health Event Information

Health Event Type: * COBRA New Enrollment

Health Event Reason: * COBRA Loss of Employment

Event Date: *

Received Date: *

Apply Change to: * Medical

Figure A-33. Qualifying Information section

Appointment Details

Employer: Sacramento Area Flood Control Agency **CalPERS ID 4232217023 (Employer):**

Original Hire Date: * 01/01/2016

Division:

Appointment ID: 92371879

Separation Date: 09/30/2016 **Retirement Date:**

Additional Details

Position Title: **Appointment Status:** Perm Sep

CBU: **Retirement Program:** * PERS

Begin Date: 01/01/2016 **End Date:** 09/30/2016

Medical Group: * 000 General Employees **Affiliated Association:**

COBRA Enrollment

Original COBRA Start Date: 11/01/2016 **Eligibility Basis:** * COBRA Qualifying Subscriber

COBRA End Date: 04/30/2018 COBRA end date

Figure A-34. Covered Person List

Covered Person List

Name	Date of Birth	Relationship	Medical	Dental	Vision
Mike Murray			Basic	No	No
Mary Murray			Basic	No	No
Molly Murray		Child	Basic	No	No

Select the dependent's name if they are not to be included

Continued on next page

New COBRA Health Enrollment for a Former Employee, Continued

Step	Action	Result						
12	Select the dependent's name link for the person who will not be included on this enrollment.	Figure A-35. Demographic Information page displays with the hard coded dependent information.						
13	Select the Continue button.	See Figure A-36. Dependent Information page						
14	Select the Save & Continue button.	See Figure A-37. Select Covered Person page Dependent Change section shows the selected dependent with "No" in the Medical column.						
15	Is employee including additional dependents on this COBRA? <table border="1" data-bbox="310 888 1002 995"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>Repeat steps 12-15</td> </tr> <tr> <td>Yes</td> <td>Skip to step 16</td> </tr> </tbody> </table>	If...	Then...	No	Repeat steps 12-15	Yes	Skip to step 16	
If...	Then...							
No	Repeat steps 12-15							
Yes	Skip to step 16							
16	Select the Save & Continue button.							
	You have completed this scenario.	The health plan will start to bill the subscriber for 102% of the gross premium.						

Continued on next page

New COBRA Health Enrollment for a Former Employee, Continued

Figure A-35 Demographic Information page

Person Details

Prefix:
First Name:*
Middle Name:

Last Name:*

Suffix:

SSN
Gender:*

Relationship:*
Dependent Type:*

Date Of Birth:*
Date Of Marriage/Partnership:*

Address Details

Address is the same as Primary Subscriber

Address Type:*

Care Of:

Address:*

Country:*

City:*

State:*

Zip Code:* -

Figure A-36. Dependent Information page

Dependent Information

Benefit Type

Benefit Type	Enrollment	Change Enrollment?
Medical	Basic	<input checked="" type="checkbox"/>

Figure A-37. Dependent Change section displaying the dependent who will not be enrolled

Covered Person List

Name	Date of Birth	Relationship	Medical	Dental	Vision
Mike Murray	01/22/1968	Self	Basic	No	No
Molly Murray	10/17/2015	Natural Born Child	Basic	No	No

Dependent Change

Information for the following dependent has been updated on your health account:

Name	Date of Birth	Relationship	Medical	Dental	Vision
Mary Murray	02/14/1968	Spouse	No	No	No

Direct Pay for a Pending Retirement



A permanently separated employee who is retiring can experience delays in their retirement benefits. During this time if medical services are needed, they may elect to go on direct pay.

The health carrier will bill the subscriber directly for the full premiums.

Scenario: Your former employee has permanently separated for retirement; however, due to a community property issue, the retirement processing will be delayed. The former employee has requested to go on direct pay until placed on retirement roll.

Step-by-Step Follow the steps below to process a direct pay for a pending retirement.

Step	Action	Result
1	From the My Home page, select the Reporting global navigation tab.	See Figure A-38. Reporting global navigation tab Manage Reports page displays.
2	Within the Create or Edit Report section, select "Add or Edit Health Enrollment" from the Method drop-down list, then select the Continue button.	Health Enrollment Preprocessing page displays.
3	Within the Enrollment List section, select the Add New button.	Health Event Information page displays.
4	Within the Demographics Information section, select the Select link.	Search for a Person page displays.
5	Enter the employee's CalPERS ID in the CalPERS ID field, then select Search button. You may also search for an employee by their Social Security number.	Below the Person Search section, the Search Results section is populated with employee's information.
6	Verify that the correct employee's name displays, then select the Select button.	See Figure A-39. Search Results section Health Event Information page displays.

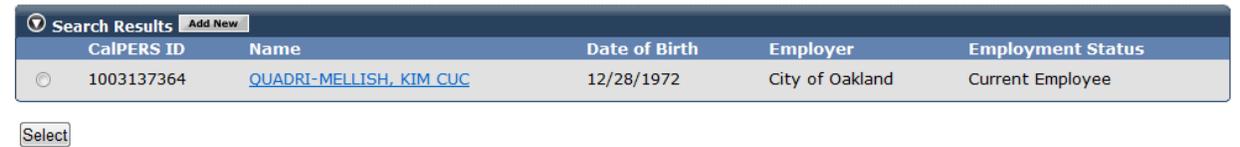
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Direct Pay for a Pending Retirement, Continued

Figure A-38. Reporting global navigation tab



Figure A-39. Search Results section



The screenshot shows a search results interface. At the top, there is a 'Search Results' header with an 'Add New' button. Below the header is a table with the following columns: CalPERS ID, Name, Date of Birth, Employer, and Employment Status. The table contains one row of data for Kim CUC. Below the table is a 'Select' button.

CalPERS ID	Name	Date of Birth	Employer	Employment Status
1003137364	QUADRI-MELLISH, KIM CUC	12/28/1972	City of Oakland	Current Employee

FYI

Once the retiree goes onto retirement roll and health deductions get paid retroactively, the health carrier will reimburse the retiree for the direct payments.

Continued on next page

Direct Pay for a Pending Retirement, Continued

Step	Action	Result
7	Populate the following fields: <ul style="list-style-type: none"> • Health Event Type: “New Enrollment” • Health Event Reason: “Pending Retirement” • Event Date: (Last day on payroll) • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button 	See Figure A-40. Health Event Information section
8	Select the Save & Continue button.	Health Enrollment Information page displays.
9	All sections are prepopulated on the Health Enrollment Information page. If necessary, please correct/complete the remaining items: <ul style="list-style-type: none"> • Check the Use address for health checkbox if using address for health plan eligibility • Communication fields • Medical Group drop-down list Then select the Save & Continue button.	Selected Covered Persons page displays.
10	If not adding any dependents, then select the Save & Continue button.	Plan Selection page displays.
11	Select the radio button for the employee’s chosen medical plan. Select the Save & Continue button.	Health Enrollment Preprocessing page displays.
	You have completed this scenario.	

Continued on next page

Direct Pay for a Pending Retirement, Continued

Figure A-40. Health Event Information section

The screenshot shows a web form titled "Health Event Information" with a dropdown arrow on the left. The form contains the following fields and controls:

- Health Event Type:** * New Enrollment (dropdown menu)
- Health Event Reason:** * Pending Retirement (dropdown menu)
- Event Date:** * (calendar icon)
- Received Date:** * (calendar icon)
- Apply Change to:** * Medical
- View Effective Date** (button)

Below the form are three buttons: **Save & Continue**, **Cancel**, and **Clear**.

Health into Retirement

Health into Retirement Provided below is information for health-enrolled employees in different retirement systems and are separating for retirement.

If your employee has questions about Medicare coordinating with their CalPERS health benefits, refer them to the [Medicare Enrollment Guide](#) or have them contact CalPERS.

Pathway: CalPERS website > In the Search box at top right, enter “Medicare” > select the current year **Medicare Enrollment Guide** link

<p>PERS Members</p>	<p>Process a permanent separation.</p> <p>If the employee is enrolled in health and their separation date and retirement date are within the same month, health will automatically continue into retirement, unless they voluntarily cancel.</p> <p>If the employee does not want their health to automatically continue into retirement and they are voluntarily canceling, you can key the cancellation prior to the permanent separation being entered in my CalPERS.</p>
<p>NonPERS Employees</p>	<p>If employee is eligible to continue health, follow the two-step process:</p> <ol style="list-style-type: none"> 1. Process a permanent separation (my CalPERS will cancel the health) 2. Process a new health enrollment unless the employee and/or dependent is eligible for Medicare (mail the HBD-30 with a copy of their Medicare information to CalPERS): <ul style="list-style-type: none"> – Health Event Type: “New Enrollment” – Health Event Reason: “Retirement” <p>If the employee does not want their health to continue into retirement and they are voluntarily canceling, you can key the cancellation prior to the permanent separation being entered in my CalPERS. This would provide a clear health event reason that the employee made a subscriber request to cancel.</p>
<p>CalSTRS Members</p>	<p>Process a permanent separation.</p> <ul style="list-style-type: none"> ● After receiving the permanent separation notification, CalSTRS will verify retirement and benefit roll dates ● If employee meets the requirements to continue health into retirement and their separation date and retirement date are within the same month, health will automatically continue into retirement, unless they voluntarily cancel. <p>If the employee does not want their health to automatically continue into retirement and they are voluntarily canceling, you can key the cancellation prior to the permanent separation being entered in my CalPERS.</p>

Billing & Payments

Billing Statement

The health billing statement will be generated around the 15th of the month.

- Employers can opt to receive their Health Premium Billing Invoice online by selecting email as their preferred communication method.
 - Employers that select mail as their preferred communication method will continue to receive their Health Premium Billing Invoice by mail.
-

Cut-Off Dates

Agencies will be notified via an annual Circular Letter (CL) as to the billing cut-off dates. The billing cut-off date for CalSTRS employees and annuitants differs from the billing cut-off date for PERS and nonPERS “OTHER” employees and annuitants. All my|CalPERS transactions must be updated by 11:59:59 p.m. on the cut-off date to be included on the next month’s statement. Transactions keyed after the cut-off will be captured in the next month’s statement.

Payments

Payment is due in full and as billed on the 10th of the month. If the 10th falls on a holiday or weekend, payment is due on the last business day prior to the 10th. Payments received after the 10th are considered delinquent and subject to interest. Please refer to CL 600-026-15 for additional information. Payments made via Electronic Funds Transfer (EFT) can help you avoid late payments and interest. Please refer to CL 200-042-15 for additional information.

PEMHCA Sections

Section 22899 (a) of the Public Employees’ Medical and Hospital Care Act (PEMHCA) states, in relevant part: The contributions required of a contracting agency, along with contributions withheld from salaries of its employees, shall be forwarded monthly, no later than the 10th day of the month for which the contribution is due. And, Section 22899 (c) of PEMHCA states: If a contracting agency fails to remit the contributions when due, the agency may be assessed interest at an annual rate of 10 percent and the costs of collection, including reasonable legal fees, when necessary to collect the amounts due. In the case of repeated delinquencies, the contracting agency may be assessed a penalty of 10 percent of the delinquent amount. That penalty may be assessed once during each 30-day period that the amount remains unpaid. Additionally, the contracting agency may be required to deposit one-month’s premium as a condition of continued participation in the program.

New Health Contracting Agency Processing

Introduction

New contracting employers processing new health enrollments for their active employees should have the required employee and dependent information and supporting documentation prior to processing.

Required Information to Have Prior to Processing

- **Social Security numbers (SSNs):** Have SSNs for everyone enrolling. For dependent children, SSN is not a required field. It will be required to submit their SSNs to CalPERS within 60 days of the effective date. Adding or correcting an SSN can be done after the enrollment using my|CalPERS.
- Full marriage or domestic partnership registration date (month, day, year) is required
- Date of when the parent-child relationship was established is required
- Full birth date (month, day, year) is required for everyone enrolling

Note: When processing, you may receive an error that indicates the dependent's name doesn't match with what's already in my|CalPERS. You should query the dependent by SSN, note how they appear in my|CalPERS, and enter the same information when adding the dependent.

If the dependent is in the system without a birth date and/or gender, contact CalPERS.

- For a CalSTRS employee, original hire date will be required when processing. If enrolling a CalSTRS employee who was a former PERS employee with your agency, follow the steps in the second scenario in this appendix to first add their CalSTRS appointment.
 - For a nonPERS employee (one who isn't in PERS or CalSTRS), original hire date will be required when processing
 - Confirm that the employee's signature is on the HBD-12 (Health Benefit Enrollment form)
 - Ensure that the employee's signature is on the HBD-12A (Declaration of Health Coverage form). This is for all employees enrolling, changing, or if they're declining coverage.
-

Forms and Supporting Documentation

All forms and supporting documentation e.g., copies of registered domestic partner relationship, marriage and birth certificates, divorce decrees, Affidavit of Eligibility (HBD-40), HBD-12, HBD-12A, etc. will be kept at the agency unless requested by CalPERS. All forms are available on the CalPERS website.

Continued on next page

New Health Contracting Agency Processing, Continued

Information That Is Entered for Processing

- **Health Event Type:** New enrollment
- **Health Event Reason:** New contracting employee
- **Event Date:** Contract effective date
- **Received Date:** If processing in the future, use the first day of the month prior to the contract effective date. If processing the month prior to the contract effective date, use the actual Health Benefits Officer (HBO) received date.

Example: A new agency is contracting effective January 1, 2016, and the employee submits their HBD-12 and HBD-12A before December 2015:

- **Event Date:** 01/01/2016
- **Received Date:** 12/01/2015

Example: A new agency is contracting effective January 1, 2016, and the employee submits their HBD-12 and HBD-12A in December 2015:

- **Event Date:** 01/01/2016
 - **Received Date:** December date of when the HBO received the HBD-12
-

Billing Cut-Off Dates

Cut-off dates vary month by month. An annual CalPERS Circular Letter will be posted in late December or January for the following year. For example, for the January 2015 health bill, transactions must be entered by December 14, 2014 at 11:59 PM. A transaction entered after that day will reflect on the February bill with January's and February's premium deductions for the employee.

Continued on next page

New Health Contracting Agency Processing, Continued

Pathway to Online CalPERS Health Forms & Publications

***Pathway** to the health forms: CalPERS website > select the [View All](#) link below the Forms & Publications on the right side, select the Health Benefits checkbox under **Active Members** and/or **Employers** and the **Health Program** checkbox under Employers for the health forms and publications.

Active member health forms and publications:

[2016 Health Benefit Summary \(HBD-110\)](#) (PDF)

[2016 Medicare Enrollment Guide \(HBD-65\)](#) (PDF, 1.39 MB)

[A Guide to Changing Your Health Coverage](#) (PDF)

[Affidavit of Marriage/Domestic Partnership \(HBSD-1965\)](#) (PDF)

[Affidavit of Parent-Child Relationship \(HBSD-40\), effective January 1, 2016](#) (PDF)

[Certification of Medicare Status \(PERS08M0021DMC\)](#) (PDF)

[COBRA Election Form \(Active\) \(HBD-85\)](#) (PDF)

[Declaration of Health Coverage \(HBD-12A\)](#) (PDF)

[Direct Payment Authorization \(HBD-21\)](#) (PDF)

[Health Benefit Plan Enrollment Form \(Active\) \(HBD-12\)](#) (PDF)

[Health Benefit Plan Enrollment Form Instructions \(HBD-12\)](#) (PDF)

[Making Your Long-Term Care Decisions](#) (PDF)

[Medical Report for the CalPERS Disabled Dependent Benefit \(HBD-34\)](#) (PDF)

[Member Education Catalog](#) (PDF, 1.1 MB)

[Questionnaire for Disabled Dependent Benefit \(HBD-98\)](#) (PDF)

Employer health forms and publications:

[Electronic Fund Transfer \(EFT Credit\) Authorization Agreement](#) (PDF)

[Employer Exemption Request - Dependent Eligibility Verification \(DEV\) Project](#) (PDF)

[Guide for New Business Partner Contacts](#) (PDF)

[Health Benefit Plan Enrollment Form \(Active\) \(HBD-12\)](#) (PDF)

[Health Benefit Plan Enrollment Form Instructions \(HBD-12\)](#) (PDF)

[Public Agency & Schools Health Benefits Guide](#) (PDF)

[State Health Benefits Guide](#) (PDF)

CalPERS Resources

Information for Employers

Obtain information for employers on the CalPERS website at www.calpers.ca.gov, then select the **Employers** tab.



Forms & Publications Page

Obtain forms and publications by going to the CalPERS website at www.calpers.ca.gov, then select the [View All](#) link under Forms & Publications. From the Forms & Publications page, to view only health forms and publications, you can select the **Health Benefits** checkbox under Active Members and the **Health Program** checkbox under Employers.



Forms & Publications

- [Beneficiary Designation \(PDF\)](#)
- [Facts at a Glance \(PDF\)](#)
- [Health Benefit Summary \(PDF\)](#)
- [Planning Your Service Retirement \(PUB 1\) \(PDF\)](#)
- [Service Credit Purchase Options \(PUB 12\) \(PDF\)](#)
- [Service Retirement Application \(PUB 43\) \(PDF\)](#)
- [Tax Withholding Election \(PDF\)](#)

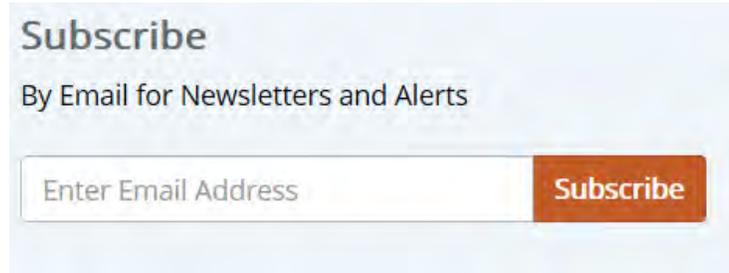
[View All](#) →

Continued on next page

CalPERS Resources, Continued

Subscribe to Employer Bulletins and Circular Letters

Subscribe to Employer Bulletins and receive Circular Letters via email by going to the CalPERS website at www.calpers.ca.gov, then enter your email address under Subscribe.



Note: You may also search for a previously published Circular Letters by subject or date.

Pathway: CalPERS website > Employers > (under Resources) Circular Letters

Health Enrollment Reporting Resources

Health Enrollment Resources on the CalPERS Website

The following links are valuable references to assist you:

[my|CalPERS Student Guides](#)

Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides

[my|CalPERS Quick Reference Guide for Employers](#)

Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides>scroll down to the Supplemental Materials section

[my|CalPERS Health Aid \(Health Event Types and Reasons for Employers\)](#)

Pathway: CalPERS website > Employers > I Want To...: Find my|CalPERS Student Guides>scroll down to the Supplemental Materials section

[Employer Education Schedule](#)

Pathway: CalPERS website > Employers > I Want To... : Find my|CalPERS Student Guides > Resources: Employer Education Schedule

[Frequently Asked Questions \(FAQ\)](#)

Pathway: CalPERS website > About > Resources: Frequently Asked Questions

[my|CalPERS Technical Requirements](#)

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements

[Policies & Procedures](#)

Pathway: CalPERS website > Employers > Policies & Procedures

[Health Program Guide \(HBD-120\)](#)

Pathway: CalPERS website > In the Search box at top right, enter "HBD-120"> select the current year **Health Program Guide** link

[CalPERS Public Agency & Schools Health Benefits Guide](#)

Pathway: CalPERS website > Employers > Policies & Procedures> **Reference & Health Guides** >Public Agency & Schools Health Benefits Guide

[Technical Resources for File Reporters](#)

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > Technical Toolkit > +Employers

Navigating my|CalPERS

my|CalPERS – My Home Page

The screenshot below shows the my|CalPERS – My Home page with a description of the main features. See the following pages for more details about:

- Global navigation tabs
- Local navigation links
- Left-side navigation links
- Help links

The screenshot shows the my|CalPERS My Home page with several callout boxes:

- Global navigation tabs:** Points to the top navigation bar containing Home, Profile, Reporting, Person Information, Education, and Other Organizations.
- Header links:** Points to the top right of the page, including links for Welcome Hillary, Help, Contact Us, CalPERS, Log out, and the date January 12, 2016.
- Local navigation links:** Points to the sub-navigation tabs: My Home, Requests, and Reports.
- Access the Forms and Publications page:** Points to the 'Forms and Publications Center' button on the right side.
- Left-side navigation links:** Points to the left-hand menu with options like Person Search, Contact Personal Security Settings, and a 'Menu' dropdown.
- Check My Messages for important updates and upcoming training opportunities:** Points to the 'My Messages' section.
- Box/area is called a section:** Points to the 'My Messages' section header.
- Employer News at the top. CalPERS News at the bottom.:** Points to the 'Welcome Employer News' section at the top and the 'CalPERS News' section at the bottom.
- View More Actions expands section to show more items:** Points to the 'View More Actions' link next to the 'My Cases' table.
- Health Plan Search by ZIP Code:** Points to the search form for health plans.

My Messages Section:

Date	Message
01/11/2016	CalPERS Benefit Education Events - Rohnert Park (Jan 29-30) CalPERS is hosting the CalPERS Benefits Education Events to help your employees make informed decisions about their retirement. Get the word out by posting the attached flier at your workplace. View Document
01/07/2016	2016 Employer Education Classes (Jan 12-14, Jan 26-28) CalPERS offers both Business Rules and my CalPERS training to help you successfully conduct business with us. Register now for classes offered at the Walnut Creek Regional Office. View Document
12/30/2015	IRS Extension of Affordable Care Act Reporting for 2015 (Section 6055 & 6056) The IRS extended due dates for 2015 information reporting requirements under the Affordable Care Act. The extension applies to applicable larger employers and providers of minimum essential coverage. View Document

My Cases Section:

Case ID	Case Title	Case Type	Program	Status
2120725		Non-PERS Health Contract		Closed
2083391		Amend Retirement Contract		Open
2078300		Amend Retirement Contract		Closed

Health Plan Search by ZIP Code Section:

To find out which CalPERS health plans are available in your area, enter the information below and select Search to display results.

ZIP Code:

Member Category: State/CSU Public Agency/School

Search Year:

Continued on next page

Navigating my|CalPERS, Continued

my|CalPERS – Global Navigation Tabs, Local Navigation Links, and Left-Side Links

Listed below are descriptions of the global navigation tabs and the commonly-used local navigation links and left-side navigation links. Local and left-side navigation links change depending on the global navigation tab you selected.

Common Tasks items do not change.

Global Navigation Tabs



Home: Refresh the query page to search for another employee or retiree with the agency.

Profile: Displays an agency's Business Partner Summary page which lists employer address(s) & communication information, contacts & users for the agency, business partner relationships, and retirement contract/agreements. Refreshing by selecting the Profile tab will prevent the expiring password reminder from reoccurring.

Reporting: Process a new retirement enrollment, health enrollments, and payroll. See the **Billing and Payments** local link below for additional information.

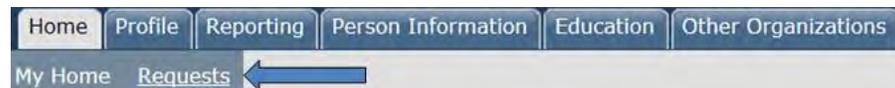
Person Information: Query employee and retiree health and retirement information; add, correct, and delete appointment information.

Education: Sign up for employer instructor-led or online classes.

Other Organizations: View other employer contact information e.g., addresses, email, name and phone numbers, if the employer opted to make it public to other employers.

Local Navigation Links

The first local links are not included in this list because they refresh the same page as the global tab.



- From the **Home** global navigation tab:
 - **Requests:** Request publications
-

Continued on next page

Navigating my|CalPERS, Continued

Local Navigation Links, continued

- From the **Profile** global navigation tab:
 - **Payments:** View the status of payments e.g., pending, posted, cancelled, etc.
 - **Receivables:** View open & closed receivables, due dates & amounts, receivable balance, and receivable description. You can also generate an employer receivable report.
 - **Retirement Contract:** View, add, or modify a resolution, submit a valuation request, request an amendment to an agency's CalPERS contract
 - **Health Contract:** View an agency's health contract(s) and their effective dates
- From the **Reporting** global navigation tab:
 - **Billing and Payments:** View year-to-date billing and payments for contributions and health, receivable history, health billing roster, and the option to quick pay a receivable or download a Remittance Advice Report to mail with a check to pay contributions
 - **Payroll Schedule:** Add a new schedule, request an extension or exemption
 - **Member Requests:** Update the status of an employment certification request, view historical certification information, provide employer certification for a period of service that is not listed, and add a new employment service period
 - **Health Reconciliation:** This is only used by health carriers

Left-Side Navigation Links

- From the **Common Tasks** folder left-side link:
 - **Reports:** Run reports via the Cognos application (See unit 4)
 - **Document History:** View documents that you sent or those CalPERS provided for the agency
 - **Inquiry List:** View communication and inquiry/response history. Refer to the Submit Inquiry steps 6 – 7 which are located after this information on Navigating my|CalPERS.
 - **Submit Inquiry:** Submit a question or information to CalPERS through a secure connection with my|CalPERS. You can include confidential data, such as an SSN. Refer to the Submit Inquiry details which are located after this information on Navigating my|CalPERS.



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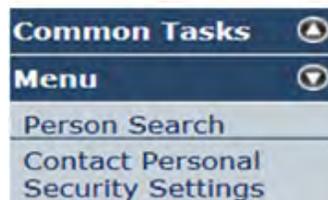
Navigating my|CalPERS, Continued

Left-Side Navigation Links, continued

The left-side links are dictated by the global navigation tabs, local navigation links, and some links within the body of the pages.

- From the **Home** global navigation tab:

- **Person Search:** Query employee/retiree information
- **Contact Personal Security Settings:** Change your password, challenge questions, or security image and message



- From the **Profile** global navigation tab:

- **Contacts:** Lists current and former my|CalPERS contacts
- **Relationships:** Lists any business partner relationships that you established to do business on behalf of your agency
- **Divisions:** Lists an agency under the umbrella of your agency e.g., a school district is a division of a county office
- **Findings:** Displays the findings after a CalPERS auditor has reviewed the agency

- From the **Profile** tab, **Receivables** local link:

- **Payments:** View payments e.g., pending, posted, cancelled etc.
- **Payment Accounts:** View, add, or delete banking accounts
- **Rate Plan Details:** View the year-to-date PERS contributions

- From the **Profile** tab, **Retirement Contract** local link:

- **View Benefits:** View benefit levels and provision
- **Maintain Positions:** Add or update positions. Each agency determines the codes and position names for each category.

- From the **Profile** tab, **Health Contract** local link, select a left-side link:

- **Group Summary:** View the medical groups
- **Contribution Preview:** View the agency's contribution toward enrollees' health premiums & vesting information
- **Subscriber List:** View all enrolled under the agency and the number covered
- **Contract History:** View the contract's state, type, status, etc.

Continued on next page

Navigating my|CalPERS, Continued

Left-Side Navigation Links, continued

- From the **Reporting** global navigation tab:
 - **Adjustment Reports:** Create a payroll adjustment report to add adjustment records
 - **Search Payroll Records by Participant:** To search for posted or unposted payroll records for a specific employee
- From the **Reporting** tab, **Billing and Payments** local link:
 - **Super Funded Accounts:** View the details of rate plans for which you are super funded
 - **Payment Accounts:** Add or delete a banking account for online payments
- From the **Reporting** tab, **Payroll Schedule** local link:
 - **Fees List:** View a list of your assessed fees and waived fees, view the date, type, amount and status of all fees by program and fiscal year. You can change the displayed information by selecting a program and/or fiscal year and the **Display** button.

my|CalPERS Help Link

Access the my|CalPERS **Help** link in the header of any page in my|CalPERS:

Use Table of Contents and Search to search by topic or key word

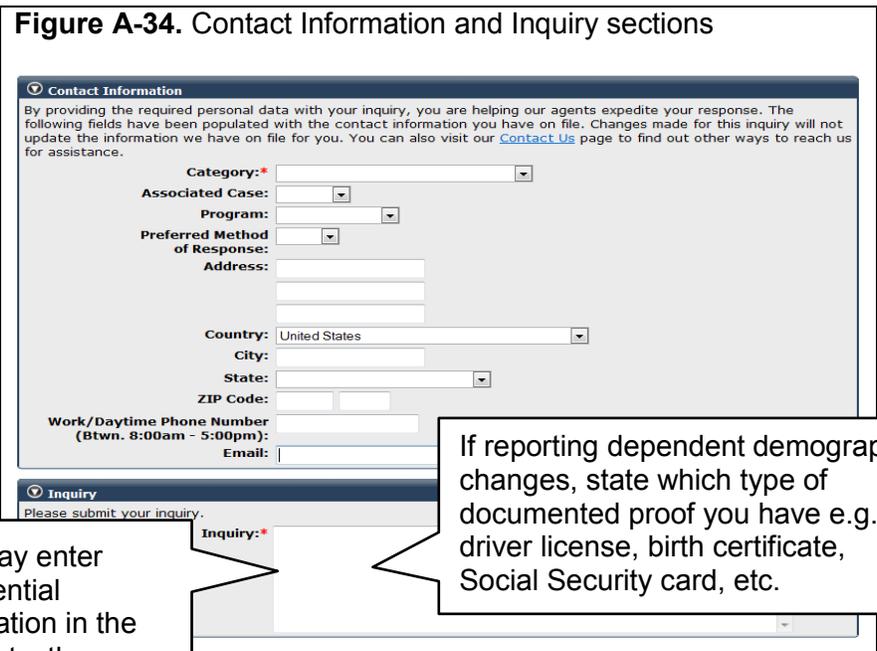
The my|CalPERS **Help** link features information that will assist you with conducting business and transactions in my|CalPERS.

The screenshot shows the my|CalPERS Help page. At the top, the navigation bar includes links for 'Skip to: Content | Footer | Welcome mail | **Help** | Contact Us | CalPERS On-Line | Log out'. The main content area is titled 'My Home Page' and contains a 'Table of Contents' on the left, a 'Search' box, and a 'Glossary' section. The 'Glossary' section lists various CalPERS terms in alphabetical order. A callout box points to the 'Help' link in the navigation bar, stating 'Help is intuitive and refers to the my|CalPERS page you are currently viewing'. Another callout box points to the 'Glossary' section, stating 'Help features an alphabetical glossary of CalPERS terms'. A third callout box points to the 'Table of Contents' and 'Search' boxes, stating 'Use Table of Contents and Search to search by topic or key word'. The 'Items on the Page' section lists links for Welcome, Important Messages, My Cases, CalPERS News, CalPERS Market Value, Home Loan Rates, Quick Links, and Messages from CalPERS.

my|CalPERS Submit Inquiry

my|CalPERS Submit Inquiry Access and use my|CalPERS Submit Inquiry by following the steps below.

Step	Action	Result
Submit Inquiry		
1	From any page in my CalPERS, select the Common Tasks menu left-side navigation link.	See Figure A-33. Common Tasks menu on left-side navigation links
2	Select the Submit Inquiry link from the left-side navigation menu.	See Figure A-33. Submit Inquiry left-side navigation link
3	Select or enter: <ul style="list-style-type: none"> • Category (Required field) • Associated Case (Select the case number from the drop-down list if there is one) • Program (Selecting one is encouraged) • Preferred Method of Response • Work/Daytime Phone Number (Ensure your contact phone number is populated) • Email (Ensure your email is populated) 	See Figure A-34. Contact Information section When your inquiry is answered, you will receive a system-generated email.
4	Type inquiry in Inquiry field.	See Figure A-34. Inquiry section
5	Select the Submit button.	Self-Serve Inquiry page displays.



Continued on next page

my|CalPERS Submit Inquiry, Continued

Step	Action	Result
View Response		
6	To view the details of your inquiry after receiving a system generated notification via email, select Inquiry List from Common Tasks from the left-side navigation links.	Inquiry List page displays.
7	Select Inquiry ID number . CalPERS does not send confidential information via email. The email that you receive is only to notify you that your inquiry has been worked and most likely completed.	See Figure A-35. Inquiries section Self -Serve Inquiry page displays.

Figure A-22. Inquiries section

Select **Inquiry ID** link to view inquiry and response

You may sort by column headers to find submitted inquiries

Inquiries					
Inquiry ID	Date Received	Category	Program	Status	Contacted About
0001884439	04/23/2013	Health Enrollment	Health - Medical	Closed	City of Oakland
0001413538	12/13/2012	Retirement Contract	CalPERS	Closed	City of Oakland
0000186068	11/22/2011	Payroll Reporting	CalPERS	Closed	City of Oakland
0000039389	09/29/2011	Service Credit Purchase	CalPERS	Closed	City of Oakland

Defect/Enhancement Instructions

Email Instructions

If you encounter any defect in my|CalPERS, please submit defect information by including a brief description of the issue in the Subject line of your email. Examples would be: "Slow Page Load of UID #" or "Health Plan Enrollment Error Message." This can also be used to request enhancements. Include all the sections listed below, then email the information to:

CalPERS_Employer_Communications@CalPERS.CA.GOV

A my|CalPERS employer educator will contact you.

Sections & Instructions

Please include each section below in your email:

Section	Instructions
1. Date of Incident	Enter the date the incident occurred.
2. Time of Incident	Enter the time the incident occurred.
3. Agency CID #	Enter your agency CalPERS ID (CID) #.
4. Agency Name	Enter your agency name reporting the possible defect.
5. Person's Name	Enter the name of the person reporting the defect.
6. Employer Phone #	Enter phone number where the person can be reached. You can include more than one number.
7. UID Screen #	User Interface Design (UID) # is assigned to each individual Web page within my CalPERS. This is used to identify the page where the defect or issue occurred. You can locate the UID in the upper right hand corner by hovering over the date with your cursor.
8. Participant ID #	Enter the employee's CalPERS ID (CID) # if the defect/issue is on an employee's profile page.
9. Participant Name	Enter the employee's name if the defect/issue is on an employee's profile page.
10. Description	When describing the defect/issue, please include the following two pieces of information: <ul style="list-style-type: none"> ▪ What was the defect/issue (include error message # and language if applicable) ▪ What should have happened
11. Steps	Provide step-by-step detail on how to get to where the defect/issue occurred within the system; include data being used (drop-down selections, fields entered, links selected, etc.).
12. Screen Shot(s)	Include two screen shots of the UID page, one with the defect/issue and one of the UID page prior to that.
13. Comments	Add any additional information relevant to this issue not included above.

CalPERS Contacts

Contact CalPERS via Email

- To connect with training staff and CalPERS subject matter experts for questions and inquiries, email CalPERS_Employer_Communications@CALPERS.CA.GOV
- Email Employer.Response.Team@CALPERS.CA.GOV for when you need more specialized assistance. The Employer Response Team (ERT) will help your executives to resolve time-critical, sensitive and complex issues quickly. For more ERT information, refer to the January 17, 2014 Circular Letter [#200-005-14](#).

Pathway: CalPERS website > Employers > Resources: [Circular Letters](#)

Contact CalPERS by 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 a Question, Comment, or Complaint

General questions, comments, or complaints can be submitted to CalPERS through the [CalPERS website](#). We'll respond to general inquiries within five business days. If you have a complaint, we may contact you within 30 days if further information is needed. This is not a secure method to contact CalPERS; therefore, confidential information should not be included.

Pathway: CalPERS website > Contact > [Questions, Comments, & Complaints](#)

To submit a secure online message, log in to your business partner my|CalPERS account to use the Submit Inquiry feature. See page 131 for more information.

Request a Health Data Extract via Email

If you need data that is not in a current report or in the event that a health report is unavailable, email MAMD_Data_Services@calpers.ca.gov and include:

- a detailed list of every element being requested
- a brief explanation of why it is needed

The estimated turnaround time is 10 business days.
