



my|CalPERS Course 102
Health Enrollment Basics for Central &
Non-Central State Agencies

Student Guide

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Health Enrollment Basics for Central & Non-Central State Agencies

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
 - Generate a health report
-

Introduction

Welcome to my|CalPERS Health Enrollment Basics for Central & Non-Central State Agencies 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 and 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 To 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 To 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 you’re using Cognos (reports). Use the navigation tabs and links to return to the previous page.

See Defect/Enhancement Instructions in the appendix to request for **Return** links.

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.

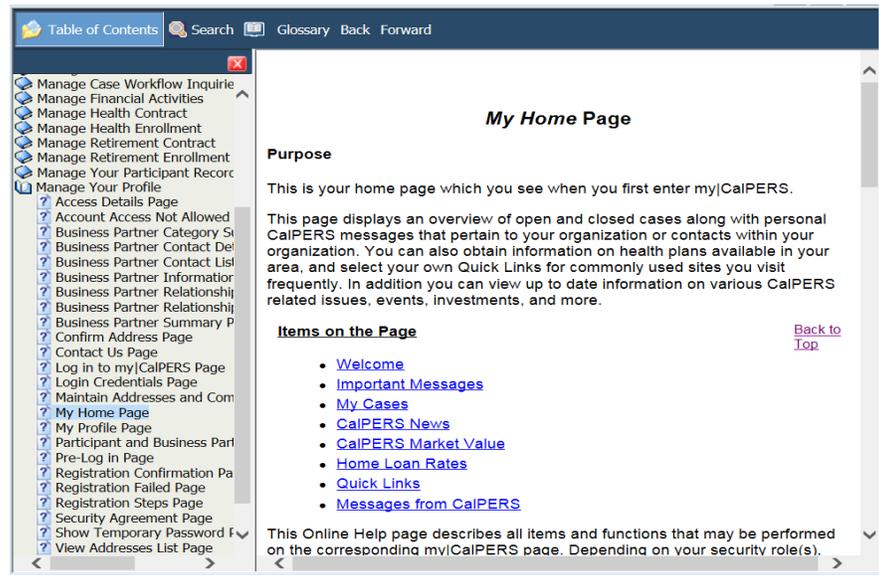


Table of Contents

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.

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 correct a dependent’s SSN 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 may 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

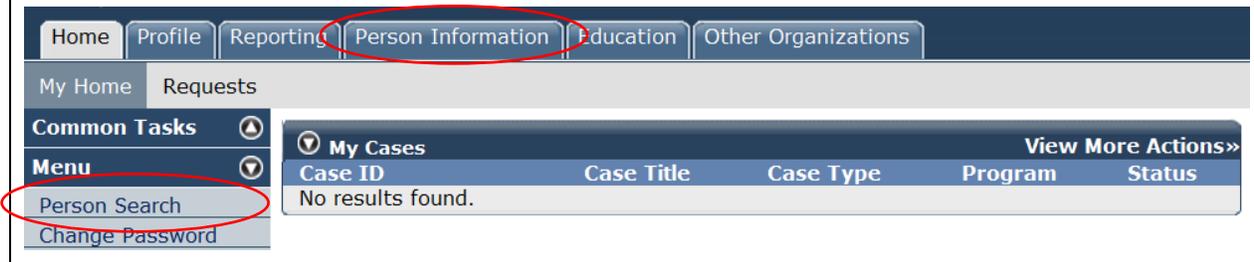


Figure 1-2. Person Search section

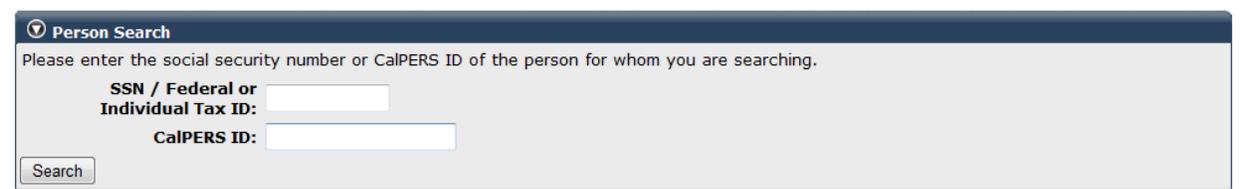


Figure 1-3. Health Enrollment local navigation link



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 displays the covered employee and 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 deps. ● Health Plan Summary ● Future Health Events (i.e., transactions with future effective dates like open enrollment) ● Pending Health Events (e.g., new dental enrollment into retirement transition until the retiree goes on retirement roll) <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</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. 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 employee 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

Health Account	Qualifying Participant Name	Qualifying CalPERS ID	Health Account Status	Employer Name	Employer CalPERS ID
CalPERS Employment	KYJON MALLAVII FRINT	7720142483	Employment	State of California	5402440716

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

[Health Account Summary](#)

Select the **Health Account Summary** link for high-level health enrollment information

Figure 1-5. Health Enrollment Summary page

Health Account Summary
Health Account: CalPERS Employment **Qualifying Participant Name:** KYJON MALLAVII FRINT
Qualifying CalPERS ID: 7720142483 **Health Account Status:** Active Employment

Health Enrollment Information
Your health enrollment is based on the following information: **Health Enrollment Summary As Of:** 07/07/2015

Health Eligibility Information

Appointment ID: 91605140	Medical Group: R01-Rnk&File/Admin, Finan&Staf
Employer CalPERS ID: 5402440716	Permanent Separation Date:
Employer: State of California	Retirement Date:
Division CalPERS ID: 6167063247	
Division: Department Of Corrections	
Agency Type: State of California	Health Benefit Appointment Same As Health Eligibility: Yes

Qualifying CalPERS ID: 7720142483

Enrollment Information

Affiliated Retirement System: PERS	Health Eligibility Zip Code: 95168
Financially Responsible CalPERS ID: 7720142483	Zip Code Override Indicator:
Payroll Office Code: 0	Override Zip Code Type:
Affiliated Association:	Region: BAR
Health Account Status: Active	County: Solano

Covered Persons Summary
Below are your covered persons for this health account. Select the name of a covered person to view more dependent health enrollment information or to **add or correct their SSN**.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
KYJON FRINT	12/15/1977	Self	NA	Basic	No	No
VANESLA JESION	11/12/2000	Step Child	NA	No	No	No
DE VALLE JESION	07/25/1994	Step Child	NA	No	No	No
HASEN JESION	11/18/1991	Step Child	NA	No	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	Kaiser Permanente California (0562)	Self/B and 1/B	02/01/2012	\$1,266.08

Physical, Mailing, or Employer Address

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

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: All

Effective Date Range: **To:**

Include Rescissions?: Yes

Qualifying Life Events Only?: Yes

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 Medical

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:* 2015

Health Benefit Type:* Medical

Health Eligibility ZIP Code: Personal Employer

Party Type:* Self/B

ZIP Code:* 95620

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 (medical and dental) transactions.

Contents

This unit contains the following scenarios:

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Scenario 1: New Health Enrollment to an Active Appointment



If you initially declined (or canceled) enrollment for yourself or your dependents because you had other private or CalPERS health coverage, 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.

Scenario: Your employee has an active appointment in my|CalPERS. They brought in proof that they are losing medical coverage at the end of the month and is requesting to enroll in health benefits with one dependent.

Note: It takes 1-2 days for appointment information in Personnel Information Management System (PIMS) to update my|CalPERS. After two days and the appointment is not updated in my|CalPERS, contact CalPERS.

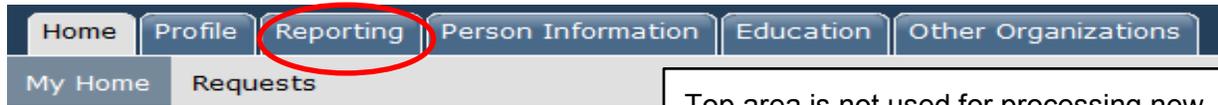
Step-by-Step Follow the steps below to process a new health enrollment.

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. See Appendix. 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

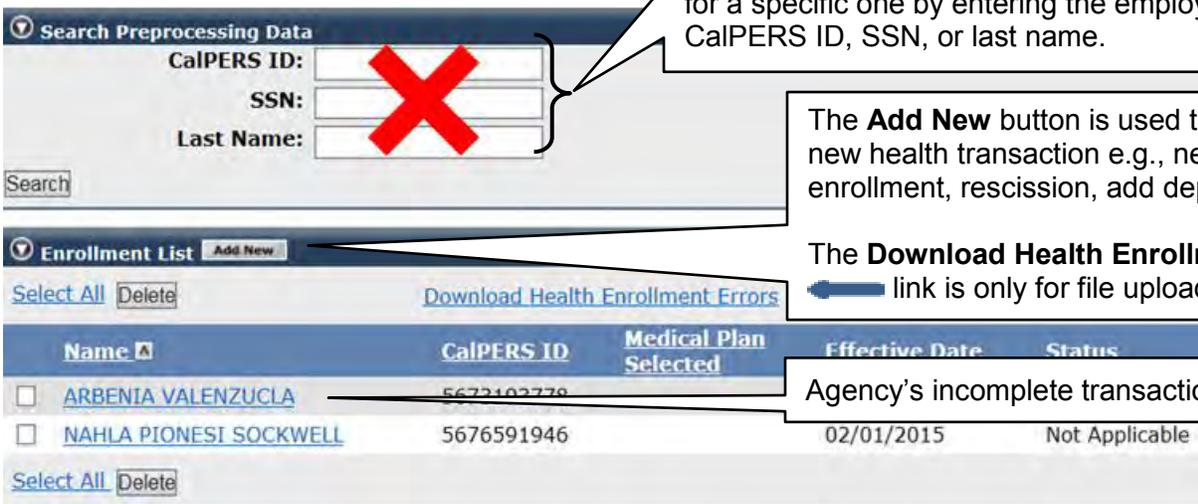
Scenario 1: New Health Enrollment to an Active Appointment, Continued

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

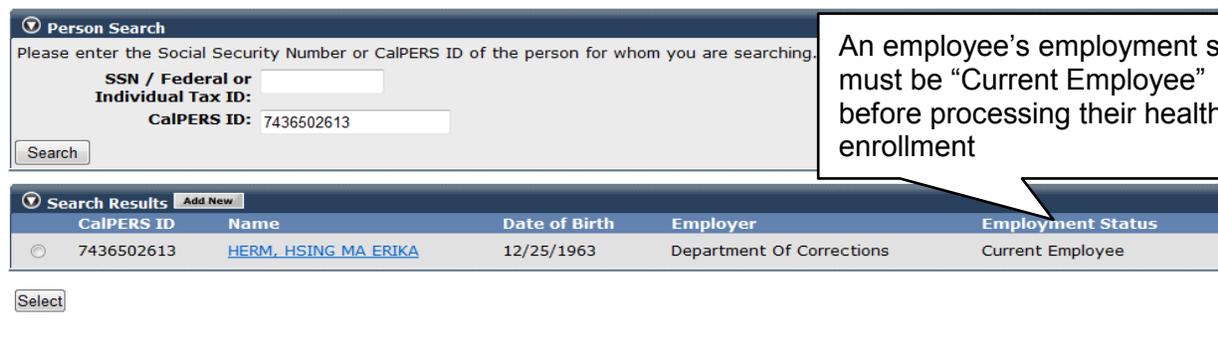


The **Add New** button is used to add any new health transaction e.g., new enrollment, rescission, add dependent, etc.

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



An employee's employment status must be "Current Employee" before processing their health enrollment

Continued on next page

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

Step	Action	Result						
7	<p>In the Health Event Information section, enter:</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 request was received) • Apply Change to: Select the Medical radio button <p>Then select the Save & Continue button.</p>	<p>See Figure 2-4. Health Event Information section</p> <p>Maintain Address, Communication, & 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>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>	<p>See Figure 2-5. Health Event Information page displays</p>						
9	<p>Is employee part of the CAHP or CCPOA association?</p> <ul style="list-style-type: none"> • If yes, choose the appropriate association from the Affiliated Association drop-down list • If no, leave the Affiliated Association drop-down list blank <p>Select the Save & Continue button.</p>	<p>See Figure 2-5. Health Event Information page displays</p>						
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="310 1549 769 1661"> <thead> <tr> <th data-bbox="310 1549 396 1587">If...</th> <th data-bbox="396 1549 769 1587">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="310 1587 396 1625">Yes</td> <td data-bbox="396 1587 769 1625">Continue to step 11</td> </tr> <tr> <td data-bbox="310 1625 396 1661">No</td> <td data-bbox="396 1625 769 1661">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 displays</p>
If...	Then...							
Yes	Continue to step 11							
No	Skip to step 17							
<p>Do not select the Save & Continue button! If you did and you need to add a dependent, select the Cancel button and start over.</p>								

Continued on next page

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

Figure 2-4. Health Event Information section

Health Event Information

Health Event Type: * New Enrollment

Health Event Reason: *

Event Date: *

Received Date: *

Apply Change to: * Medical

Save & Continue Cancel Clear

If the last day of the month falls into the next month's pay period, you may need to adjust the received date when entering the transaction.

Example: If July 31st is the beginning of the August pay period and an employee is hired July 31st and turns in their HBD-12 on July 31st, they are unable to have an August 1st effective date due to no pay for July. Therefore, change the received date to August 1 to make it effective September 1st.

Figure 2-5. Health Event Information page

Maintain Address Details

Address Type: * Physical Address

Care Of:

Address: * 400 P ST

Country: * United States

City: * SACRAMENTO

State: * California

Zip Code: * 95814 - 5345

Appointment Details

Employer: State of Californ CalPERS ID (Employer): 6167063247

Original Hire Date: * 11/04/1996

Division:

Appointment ID: 15587420

Exempt Authority: Exempt Authority A

Separation Date:

Retirement Date:

Additional Details

Position SENIOR PERSONNEL SPECIALIST Appointment Status: Active

Title:

CBU: Rank & File/ Admin, Financial & Staff Svc

Retirement Program: * CalPERS

End Date:

Begin Date: 07/29/2005

Medical Group: Rank & File/ Admin, Financial & Staff Svc

Affiliated Association:
 Calif Assoc of Highway Patrol
 Calif Correct Peace Off Assoc

Figure 2-6. Covered Person List section

Covered Person List Add New

Name	Date of Birth	Relationship	Medical	Dental	Vision
HSING HERM	12/25/1963	Self	Basic	No	No

Provider Information

Name	Dependent Type	Medical Provider	Dental Provider	Vision Provider
HSING HERM	Self			

Save & Continue Cancel

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 who is not on the Existing Relationships Eligible for Health section.	Demographic Information page displays.						
13	<p>Populate the following fields in the Person Details section:</p> <ul style="list-style-type: none"> • First Name and Last Name • SSN • Gender • Relationship and 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>						
<p>• First Name and Last Name — If dependent is in the system, their last name must match. You can query the dependent to verify their last name.</p> <p>• Date of Birth — If the dependent is in the system without a birth date and/or gender, contact CalPERS.</p>								
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

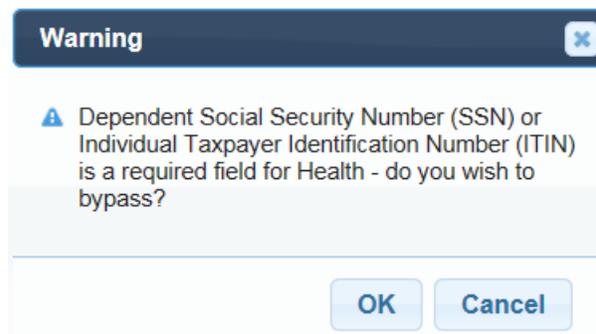
The screenshot shows a 'Person Details' form with the following fields and controls:

- Prefix:** A dropdown menu.
- First Name:*** A text input field.
- Middle Name:** A text input field.
- Last Name:*** A text input field.
- Suffix:** A dropdown menu.
- SSN:** A dropdown menu with a text input field.
- Gender:*** A dropdown menu.
- Relationship:*** A dropdown menu.
- Dependent Type:*** A dropdown menu.
- Date Of Birth:*** A date picker control.

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 this warning which you can bypass by selecting the **OK** button.



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. This information gets sent to the health plan; however, you should contact the health plan directly if you want to guarantee a specific physician to be assigned to you.</p> <p>Next, 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 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: 460 NORTH MAGNOLIA AVE, SAN QUENTIN, CA 94964 Marin BAS (Address Start Date: 09/22/2003)
Medical Party Type: Self/B and 1/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 Traditional HMO California	Self/B and 1/B	1454.68	1483.77
<input type="radio"/> Blue Shield Access+ California	Self/B and 1/B	1436.32	1465.05
<input type="radio"/> Blue Shield NetValue California	Self/B and 1/B	1340.72	1367.53
<input type="radio"/> Kaiser Permanente California	Self/B and 1/B	1266.08	1291.40
<input type="radio"/> PERS Choice	Self/B and 1/B	1280.90	1306.52
<input type="radio"/> PERS Select California	Self/B and 1/B	1236.44	1261.17
<input type="radio"/> PERSCare	Self/B and 1/B	1437.86	1466.62

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, it 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

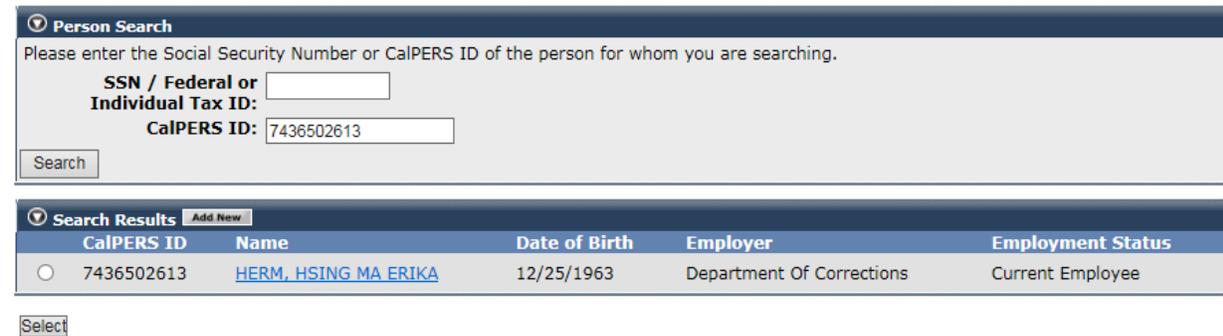


Figure 2-11. Rescind an Existing Transaction link



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: All **To:**

Effective Date Range:

Include Rescissions?: No

Health Enrollment History

Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status
<input type="radio"/> 03/01/2016	New Enrollment	Late or Loss of Coverage (Emp)	Annie Herm	Medical	Future
<input checked="" type="radio"/> 03/01/2016	New Enrollment	Late or Loss of Coverage (Emp)	HSING MA ERIKA HERM	Medical	Future

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: Late or Loss of Coverage (Emp)

Event Date: 01/31/2016

Received Date: 02/01/2016

Apply Change to: * Medical

Request for Rescission: true

Reason for Rescission: Subscriber Request

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. Update the new address in PIMS and let it update my|CalPERS (it takes 1-2 days) prior to processing the 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 Search Preprocessing Data section. 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 2-16. 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

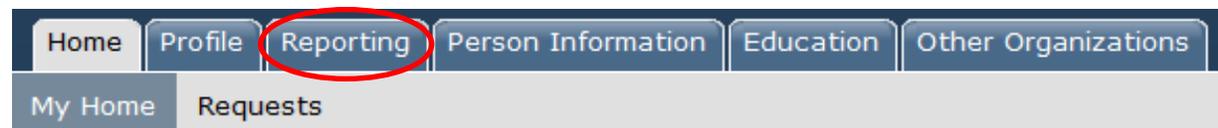
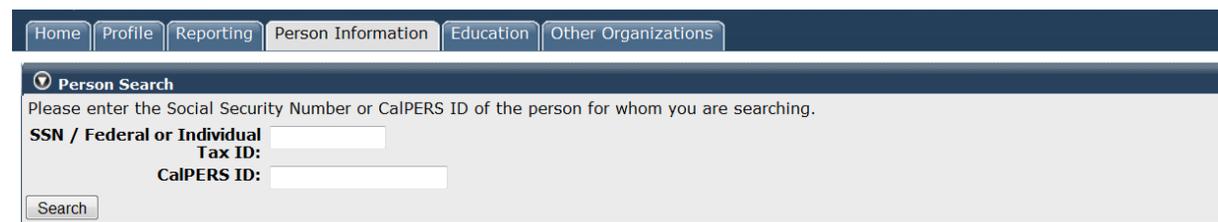


Figure 2-16. Person Search section

A screenshot of the 'Person Search' section. It shows a search form with the following fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. There is a 'Search' button at the bottom left of the form. The background shows the same navigation tabs as in Figure 2-15.

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	<p>Populate the following fields in the Health Information section:</p> <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 <p>If changing health plans during Open Enrollment, then select the following options:</p> <ul style="list-style-type: none"> ● Health Event Type: “Open Enrollment” ● Health Event Reason: “Open Enrollment Change Health Plan” 	<p>See Figure 2-17. Health Event Information section</p>
8	Select the Save & Continue button.	Plan Selection page displays.
9	<p>Select the employee’s chosen medical plan radio button.</p> <p>Optional: Include physician’s names in the Medical Provider fields.</p>	<p>See Figure 2-18. Plan Selection page</p> <p>Health Enrollment Preprocessing page displays.</p>
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:*

Received Date:*

Apply Change to: *

Medical

Dental

View Effective Date

Save & Continue Cancel Clear

Figure 2-18. Plan Selection page

Current Selections

Current Medical Plan: Kaiser Permanente California Current Dental Plan:

Current Vision Plan:

Preselections

Health Eligibility ZIP Code

Health Eligibility 11852 MOUNT VERNON AVE #Z579, VACAVILLE, CA 95687 Solano BAR (Address Start Date Address: 07/31/2015)

Medical Plan Selections

Plan Name	Party	Premium	COBRA Premium
<input type="radio"/> Anthem Blue Cross Traditional HMO California	Self/B and 1/B	1504.96	1535.06
<input type="radio"/> Blue Shield Access+ California	Self/B and 1/B	1534.90	1565.60
<input type="radio"/> Health Net SmartCare California	Self/B and 1/B	1302.46	1328.51
<input type="radio"/> Kaiser Permanente California	Self/B and 1/B	1323.52	1349.99
<input type="radio"/> PERS Choice	Self/B and 1/B	1431.40	1460.03
<input type="radio"/> PERS Select California	Self/B and 1/B	1299.52	1325.51
<input type="radio"/> PERSCare	Self/B and 1/B	1603.16	1635.22
<input type="radio"/> UnitedHealthcare HMO California	Self/B and 1/B	1251.56	1276.59

Provider Information

Name	Dependent Type	Medical Provider	Dental Provider	Vision Provider
ORIVA, KERRIKA	Natural Born Child			
FRINT, KYJON	Self			

Save & Continue Cancel Clear

Note for a Plan Change to an Association Plan

Health plan change into the CAHP, CCPOA, or PORAC association plan:

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

Refer to “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

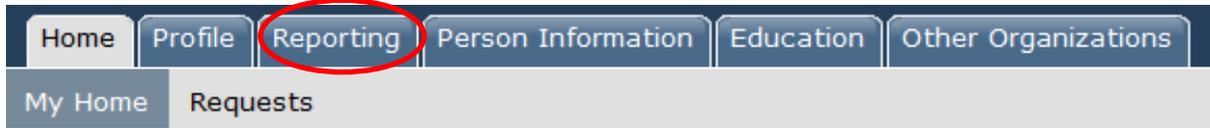


Figure 2-20. Demographics Information section



Figure 2-21. Search Results section

A screenshot of the 'Search Results' section. It features a table with the following data:

CalPERS ID	Name	Date of Birth	Employer	Employment Status
<input type="radio"/> 1003066021	DELACRUZ CP PEND, UTHAN	05/01/1985	Department Of Corrections	Current Employee

Below the table is a 'Select' button.

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

Health Event Information

Health Event Type:* Add Dependent

Health Event Reason:* Parent-Child Relationship

Event Date:* [Date Picker]

Received Date:* [Date Picker]

Apply Change to: *

- Medical
- Dental

[View Effective Date](#)

[Save & Continue](#) [Cancel](#) [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, then update their address.</p>	<div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <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> </div>
11	Select the Save & Continue button.	
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 Relationship 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"/> DELACRUZ CP PEND, NELVIE DISHELLAI	02/14/1984	Spouse	Yes	No	No		<input type="text"/>
<input type="checkbox"/> DELACRUZ CP PEND, DEFFIN YUEH-HSIA	06/18/2010	Child	Yes	No	No		<input type="text"/>
<input type="checkbox"/> DELACRUZ CP PEND, ETTA MA ERIKA	10/05/2007	Child	Yes	No	No		<input type="text"/>
<input checked="" type="checkbox"/> Kooper, Kitty	09/15/2012	Niece	No	No	No	Provide Certification	<input type="text"/>

[Continue](#) [Cancel](#)

Figure 2-24. Parent-Child Relationship Certification section

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 when 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	<input type="text" value="02/01/2016"/>	05/31/2017	<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.

[Save & Continue](#)

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

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

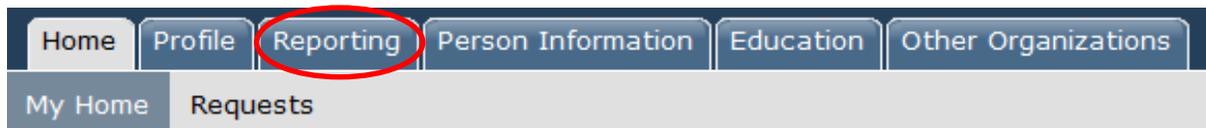


Figure 2-26. Search Results section is populated with employee's information

CalPERS ID	Name	Date of Birth	Employer	Employment Status
1167792622	ZEUDEJAS, STEPHANOS BONDY	02/05/1974	Department Of Corrections	Current Employee

Select

Figure 2-27. Health Event Information section

Health Event Information

Health Event Type:* Delete Dependent

Health Event Reason:* Divorce

Event Date:*

Received Date:*

Apply Change to: *

Medical

Dental

View Effective Date

Save & Continue Cancel Clear

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"/>	ZEUDEJAS, GARZIA AUXIE	07/24/1975	Spouse	Yes	No	No
<input type="checkbox"/>	ZEUDEJAS, JAYLYNNE	10/02/2001	Child	Yes	No	No
<input type="checkbox"/>	ZEUDEJAS, JAYLYNNE	12/06/2009	Child	Yes	No	No
<input type="checkbox"/>	ZEUDEJAS, STEPHEN	04/02/1996	Child	Yes	No	No

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.

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.

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. 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.	

Continued on next page

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

Figure 2-29. Reporting global navigation tab

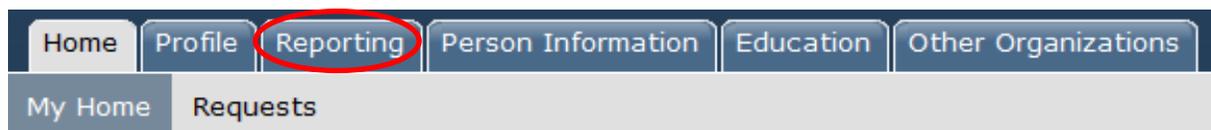
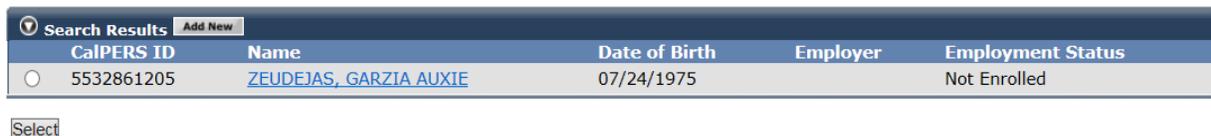


Figure 2-30. Search Results section



The image 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. There is one row of data in the table. Below the table is a 'Select' button.

CalPERS ID	Name	Date of Birth	Employer	Employment Status
5532861205	ZEUDEJAS, GARZIA AUXIE	07/24/1975		Not Enrolled

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	<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 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 2-31. Health Event Information section						
9	Select the Save & Continue button.	Health Enrollment Information page displays.						
Add Qualifying Information and Address								
10	In the Qualifying Information section, select the Select link to populate the employee’s information. See Figure 2-32.	See Figure 2-32. Qualifying Information section						
11	Enter the employee’s CalPERS ID in the CalPERS ID field, then select the Search button.							
12	Verify that the correct employee’s name displays, then select the Select button.							
13	If necessary, update a mailing address for the COBRA enrollee. If they use a P.O. box for the mailing, a physical address is also required.							
14	Select the Save & Continue button.							
15	<p>If you updated a new address, you will need to confirm the address by selecting the Confirm button.</p> <p>Then select the Save & Continue button from the Health Enrollment Information page again.</p>	See Figure 2-33. Covered Person List section with the COBRA enrolled with “Basic” medical coverage						
16	<p>Is employee including a dependent on this COBRA?</p> <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 22</td> </tr> </tbody> </table>	If...	Then...	Yes	Continue to step 17	No	Skip to step 22	
If...	Then...							
Yes	Continue to step 17							
No	Skip to step 22							

Continued on next page

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

Figure 2-31. Health Event Information section

Health Event Information

Health Event Type: * COBRA New Enrollment

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

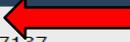
Event Date: *

Received Date: *

Apply Change to: * Medical Dental

Figure 2-32. Qualifying Information section

Qualifying Information

CalPERS ID: [Select](#) 

SSN: 558847137

First Name: * STEPHANOS **Last Name:** * ZEUDEJAS

Gender: * Male **Date Of Birth:** * 02/05/1974

Appointment Details

Employer: State of California **CalPERS ID (Employer):** 5402440716

Original Hire Date: * 12/31/2012

Division: Department Of Corrections

Appointment ID: 91739923

Exempt Authority: None Identified

Separation Date: **Retirement Date:**

Additional Details

Position Title: PROJECT DIRECTOR II **Appointment Status:** Active

CBU: R09 Rank & File/ Professional Engineers **Retirement Program:** * PERS

Begin Date: 12/31/2012 **End Date:**

Medical Group: * R09-Rnk&File/Professional Engr **Affiliated Association:**

COBRA Enrollment

Original COBRA Start Date: 10/01/2016 **Eligibility Basis:** * COBRA Qualifying Dependent

COBRA End Date: 09/30/2019 COBRA end date

Figure 2-33. Covered Person List

Covered Person List

Name	Date of Birth	Relationship	Medical	Dental	Vision
GARZIA ZEUDEJAS	07/24/1975	Self	Basic	No	No

Continued on next page

Scenario 6: New COBRA Health Enrollment for a Former Dependent 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 2-34. 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 2-35. 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	<p>Select the Save & Continue button.</p> <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>	See Figure 2-36. Dependent Information page						
20	Select the Save & Continue button.	Select Covered Person page displays with the dependent showing "Basic" medical coverage.						
21	<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 20</td> </tr> <tr> <td>No</td> <td>Continue to step 22</td> </tr> </tbody> </table>	If...	Then...	Yes	Repeat steps 17 through 20	No	Continue to step 22	Select Covered Person page displays.
If...	Then...							
Yes	Repeat steps 17 through 20							
No	Continue to step 22							
22	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 for a Former Dependent, Continued

Figure 2-34. Covered Person List section with the **Add New** button

Covered Person List Add New					
Name	Date of Birth	Relationship	Medical	Dental	Vision
GARZIA ZEUDEJAS	07/24/1975	Self	Basic	No	No

Save & Continue Cancel

Figure 2-35. 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 2-36. 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 for a Former Dependent, Continued

Step	Action	Result
Select Medical Plan		
23	<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 subscriber's chosen medical plan.</p>	<p>See Figure 2-37. Plan Selection page</p> <p>Health Enrollment Preprocessing page displays.</p>
24	Select the Save & Continue button.	<div style="border: 1px solid black; padding: 2px; display: inline-block;"> COBRA premium is listed in the far right column </div>
	<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 for a Former Dependent, Continued

Figure 2-37. 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

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

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 2-38. 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	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 2-39. Search Results section

Continued on next page

Scenario 7: Cancel Coverage, Continued

Figure 2-38. Reporting global navigation tab

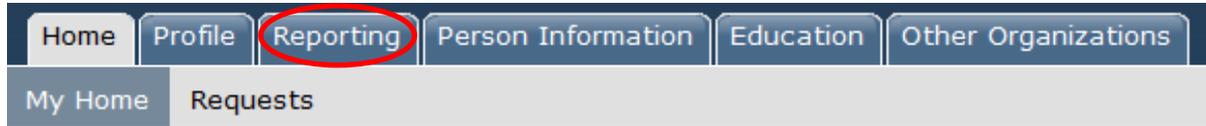


Figure 2-39. Search Results section

A search results section with a table. The table has columns for CalPERS ID, Name, Date of Birth, Employer, and Employment Status. Below the table is a 'Select' button.

CalPERS ID	Name	Date of Birth	Employer	Employment Status
<input type="radio"/> 1002817673	SCHOLFIELD, EMARE CARANZA	03/17/1969	Department Of Corrections	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 2-40. 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 2-40. Health Event Information section

The screenshot shows a web-based form titled "Health Event Information". The form 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:** Two radio buttons: "Medical" (selected) and "Dental".
- View Effective Date:** A button located at the bottom right of the form area.

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



The Open Enrollment reason of **"Enrolled into Flex Elect"** is used when an employee is cancelling their coverage to enroll in Flex during the health Open Enrollment period. This does not enroll the employee in Flex but only cancels their health.

Follow CalHR procedures on how to process the FlexElect program.

Scenario 8: Direct Pay



For employees who are on off-pay status and no longer eligible for the state employer contribution, the employer needs to know if the employee wants to enroll in direct pay or cancel their health benefits. An employee's unpaid leave must be reflected in my|CalPERS before processing the direct pay. Ref. the Oct. 1, 2014 [Circular Letter #600-050-14](#) and the Oct. 3, 2014 [Circular Letter #600-054-14](#).

An example of the order of events for direct pay:

1. Employee starts unpaid leave 06/15/2016 and it's keyed in PIMS
2. Employee fills out a Direct Pay Authorization form (HBD-21)
3. Employer processes the direct pay which will be effective 08/01/2016

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 unpaid leave reflects in my|CalPERS. 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 2-41. 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 2-42. Search Results section Health Enrollment Preprocessing page displays.

Continued on next page

Scenario 8: Direct Pay, Continued

Figure 2-41. Reporting global navigation tab



Figure 2-42. Search Results section

The screenshot shows a search results table with a header row and one data row. 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

Employee Opts to Cancel Their Health Benefits During Their Unpaid Leave

Process a health cancellation using:

- **Health Event Type:** "Cancel Coverage"
- **Health Event Reason:** "Off Pay Status Cancel"
- **Event Date:** Last day on pay status unless it's at the end of the month which falls into the next pay period
- **Received Date:** When the request was received in the employing office

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 <p>* If employee doesn't have enough pay to cover their portion of the next month's premium, change the Event Date to the month prior to generate an earlier effective date.</p>	See Figure 2-43. 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.	

Continued on next page

Scenario 8: Direct Pay, Continued

Figure 2-43. Health Event Information section

Health Event Information

Health Event Type:* Change Premium Payment Method

Health Event Reason:* LOA

Event Date:* [Date Picker]

Received Date:* [Date Picker]

Apply Change to: * Medical Dental

Important! If the employee doesn't have enough pay to cover their portion of the next month's premium, you may need to change the event date to make the effective day a month earlier.

View Effective Date

Save & Continue Cancel Clear

Employee Returns to Work

my|CalPERS should automatically cancel their direct pay after the appointment status is updated in PIMS. 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 opted to cancel their health and has returned to work and wants to re-enroll and has completed an HBD-12, process:

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).

Beginning October 2014

Employees on a leave of absence with an active health enrollment who have not received a health deduction for the current month and the previous two months will be administratively placed on direct pay. The effective date will be the first of the month after the last health deduction occurred. This excludes employees who are on Family Medical Leave and Maternity/ Paternity Leave. The employee will receive a notice indicating a change to their health enrollment. Ref. the Oct. 3, 2014 [Circular Letter #600-054-14](#).

Scenario 9: Dental Enrollment into Retirement



The term “health” encompasses medical, dental, and vision. If you have submitted the information online, you do not need to mail the std-692 (Dental Plan Enrollment Authorization form).

Scenario: One of your employees wants to continue their dental into retirement. Prior to processing their permanent separation, you will input the dental enrollment for the new retiree using myCalPERS.

Note: You can query the state retiree-dental enrollment in the Health Enrollment Summary page under the Pending Health Events section until they go on retirement roll.

Any dental changes in retirement i.e., adding, changing, deleting, or cancelling, the retiree should contact CalPERS or submit the changes online via myCalPERS Member Self Service (MSS).

Step-by-Step Follow the steps below for a dental enrollment into retirement.

Step	Action	Result
New Health Enrollment		
1	From the My Home page, select the Reporting global navigation tab.	See Figure 2-44. 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.	See Figure 2-45. 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 9: Dental Enrollment into Retirement, Continued

Figure 2-44. Reporting global navigation tab



Figure 2-45. Search Results section is populated with employee's information

The screenshot displays a search interface. At the top is a 'Person Search' section with a search form. Below it is a 'Search Results' section containing a table with one row of data. A 'Select' button is located below the table.

Person Search
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.
SSN / Federal or Individual Tax ID:
CalPERS ID: 7050290212

Search Results

CalPERS ID	Name	Date of Birth	Employer	Employment Status
7050290212	KEMPTON, LUTCHER BACLY	11/11/1982	City of Oakland	Current Employee

If the employee has permanently separated (employment status will read "Not Enrolled"), mail or fax the dental form to CalPERS for processing

Continued on next page

Scenario 9: Dental Enrollment into Retirement, Continued

Step	Action	Result						
7	<p>Populate the Health Event Information section:</p> <ul style="list-style-type: none"> • Health Event Type: “New Enrollment” • Health Event Reason: “State Retiree-Dental Enrollment” • Event Date: (Last day with your agency)* • Received Date: (Date the request was received) • Apply Change to: Select the Dental radio button <p>Then select the Save & Continue button.</p> <p>*Important! It’s strongly recommended that the user selects the View Effective Date button to ensure the correct effective date is derived!</p>	<p>See Figure 2-46. Health Event Information section</p> <p>Health Enrollment Information page displays.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>If the employee’s last day is between the 1st - 10th, the effective date should be the 1st of the following month for the retired benefits.</p> <p>If employee’s last day is the 10th, you may need to adjust the event date to be the 9th.</p> </div>						
8	<p>All appointment sections are prepopulated on the Health Enrollment Information page. If necessary, complete the remaining item:</p> <p>Is employee part of the CAHP association?</p> <table border="1" data-bbox="310 1108 938 1396"> <thead> <tr> <th data-bbox="310 1108 418 1140">If...</th> <th data-bbox="418 1108 938 1140">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="310 1140 418 1329">Yes</td> <td data-bbox="418 1140 938 1329">Choose “Calif Assoc of Highway Patrol” from the Affiliated Association drop-down list, so that the CAHP dental plan will display in the Plan Selection list</td> </tr> <tr> <td data-bbox="310 1329 418 1396">No</td> <td data-bbox="418 1329 938 1396">Leave the Affiliated Association drop-down field blank</td> </tr> </tbody> </table> <p>Select the Save & Continue button.</p> <p>Note for CSUs: If you need to enroll members in FERP, please contact CalPERS to process the enrollment.</p>	If...	Then...	Yes	Choose “Calif Assoc of Highway Patrol” from the Affiliated Association drop-down list, so that the CAHP dental plan will display in the Plan Selection list	No	Leave the Affiliated Association drop-down field blank	<p>See Figure 2-47. Health Enrollment Information page</p> <p>Select Covered Person page displays.</p>
If...	Then...							
Yes	Choose “Calif Assoc of Highway Patrol” from the Affiliated Association drop-down list, so that the CAHP dental plan will display in the Plan Selection list							
No	Leave the Affiliated Association drop-down field blank							

Continued on next page

Scenario 9: Dental Enrollment into Retirement, Continued

Figure 2-46. Health Event Information section

Health Event Information

Health Event Type:* New Enrollment

Health Event Reason:* State Retiree - Dental Enrollment

Event Date:*

Received Date:*

Apply Change to: * Medical Dental

Important! The effective date is driven by the event date.

Select the **View Effective Date** button to ensure the correct date is derived.

Figure 2-47. Health Enrollment Information page

Maintain Address Details

Address Type:* Mailing Address

Care Of:

Address:* 1160 E NORTHRIDGE AVE

Country:* United States

City:* PINE GROVE

State:* California

Zip Code:* 95665 -

Appointment Details

Employer: State of Californ **CalPERS ID (Employer):** 6167063247

Original Hire Date:* 11/04/1996

Division:

Appointment ID: 15587420

Exempt Authority: Exempt Authority A

Separation Date: **Retirement Date:**

Additional Details

Position Title: SENIOR PERSONNEL SPECIALIST

Appointment Status: Active

CBU: Rank & File/ Admin, Financial & Staff Svc

Retirement Program:* CalPERS

Begin Date: 07/29/2005

End Date:

Medical Group: Rank & File/ Admin, Financial & Staff Svc

Affiliated Association:

- Calif Assoc of Highway Patrol
- Calif Correct Peace Off Assoc
- Peace Off Resrc Assoc of Calif

California State University Faculty Early Retirement Program (CSU FERP)

FERP Subscriber Status: Yes No

FERP Status Begin Date: **FERP Status End Date:**

Continued on next page

Scenario 9: New Dental Enrollment into Retirement, Continued

Step	Action	Result						
9	<p>Optional: Enter the dentist's name in the Dental Provider field.</p> <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>Continue to step 10</td> </tr> <tr> <td>No</td> <td>Skip to step 15</td> </tr> </tbody> </table>	If...	Then...	Yes	Continue to step 10	No	Skip to step 15	<p>See Figure 2-48. Covered Person List page displays</p>
If...	Then...							
Yes	Continue to step 10							
No	Skip to step 15							
Add Dependent and Select Medical Plan								
10	Select the Add New button.	Existing Relationships Eligible for Health page displays.						
11	Next, select the Add New button.	Demographic Information page displays.						
12	<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 subscriber's, then update their address.</p>	<p>See Figure 2-49. Person Details section</p>						
13	Select the Save & Continue button.	Dependent Information page displays.						
14	Again, select the Save & Continue button. If adding more dependents, repeat steps 10-14.	Select Covered Person page displays.						
15	Next, select the Save & Continue button.	Plan Selection page displays.						
16	Select the radio button for the employee's chosen medical plan, then select the Save & Continue button.	<p>See Figure 2-50. Plan Selection page</p> <p>Health Enrollment Preprocessing page displays.</p>						
	You have completed this scenario.							

Continued on next page

Scenario 9: Dental Enrollment into Retirement, Continued

Figure 2-48. Covered Person List page

Covered Person List Add New					
Name	Date of Birth	Relationship	Medical	Dental	Vision
DEHWEI SURDUCAN	05/11/1983	Self	No	Yes	No

Provider Information				
Name	Dependent Type	Medical Provider	Dental Provider	Vision Provider
DEHWEI SURDUCAN	Self		<input type="text"/>	

Save & Continue

Figure 2-49. Person Details section

Person Details	
Prefix: <input type="text"/>	Middle Name: <input type="text"/>
First 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 2-50. Plan Selection page

Current Selections	
Current Medical Plan: Blue Shield NetValue	Current Dental Plan:
Current Vision Plan:	

Preselections	
Select Health Eligibility ZIP Code: <input checked="" type="radio"/> Personal <input type="radio"/> Employer	Dental Party Type: Self/B
ZIP Code: <input type="text" value="95864"/>	
County: <input type="text" value="Sacramento"/>	
City: SACRAMENTO	

Dental Plan Selections			
Plan Name	Party	Premium	COBRA Premium
<input type="radio"/> Safeguard Enhanced	Self/B	0.00	0.00
<input type="radio"/> Western Dental	Self/B	0.00	0.00
<input type="radio"/> Delta Premier	Self/B	0.00	0.00
<input type="radio"/> DELTA DENTAL DIRECT PAY	Self/B	0.00	0.00
<input type="radio"/> Premier Access	Self/B	0.00	0.00
<input type="radio"/> Delta Preferred Opt	Self/B	0.00	0.00
<input type="radio"/> DeltaCare USA	Self/B	0.00	0.00

Save & Continue

This page intentionally left blank.

Unit 3: 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:

Topic	See Page
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Scenario: Generate an Employer Health Event Transaction Report	72
Sample: Employer Health Event Notification 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 identifying 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 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 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, STRS, 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 Transaction Report

Introduction The Employer Health Event Transaction 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. 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.



Scenario: You would like to view all of the 26-year-old-delete (dependent) health transactions that will be effective the first of the following month so that you can later delete these dependents from their parent's dental benefits and also offer them COBRA. You will generate this report using Cognos.

Step-by-Step Follow the steps to generate an Employer Health Event Transaction Report.

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 3-1. 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 3-2. 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  . (The training environment folder will read PSR REPORTS ENV89.) Options for a better view: Maximize the window and increase the font size of the report names by holding down the Ctrl key and use the wheel on your mouse.	See Figure 3-3. Public folders in Cognos Folder opens displaying reports contained inside.

Continued on next page

Scenario: Generate an Employer Health Event Transaction Report, Continued

Figure 3-1. Reports link under Common Tasks on left-side navigation menu

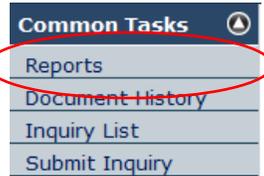
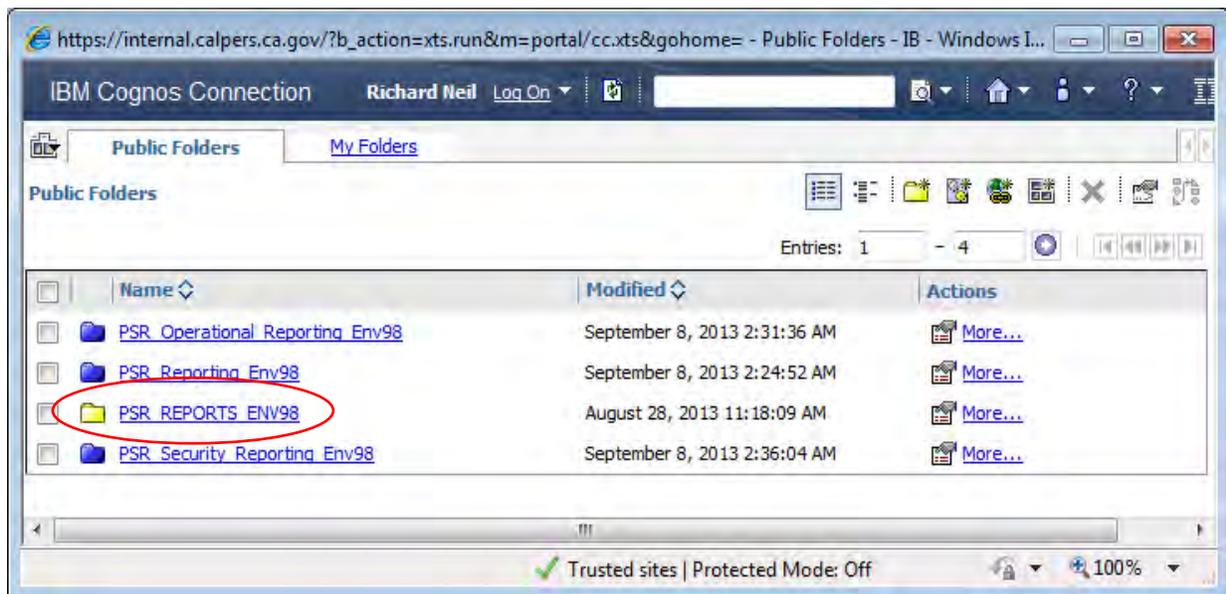


Figure 3-2. My home icon on Cognos window



Figure 3-3. Public folders in Cognos



Continued on next page

Scenario: Generate an Employer Health Event Transaction Report, Continued

Step	Action	Result
Run and Save Report		
5	<p>Navigate through reports using right-side   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 3-4. Reports in Cognos window
6	Select the Employer Health Event Transaction 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:</p> <ul style="list-style-type: none"> • Effective From Date and Effective To Date fields or • Event Create From Date and Event Create To Date fields <p>Recommended: If providing dates, use the calendar icon to enter dates in their respective fields in the Date Range fields.</p> <p>If trying to run a report that offers two criteria options, only use one to generate a more defined report.</p>	See Figure 3-5. Select Posting Date Range section
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 Transaction Report, Continued

Figure 3-4. Reports in Cognos window

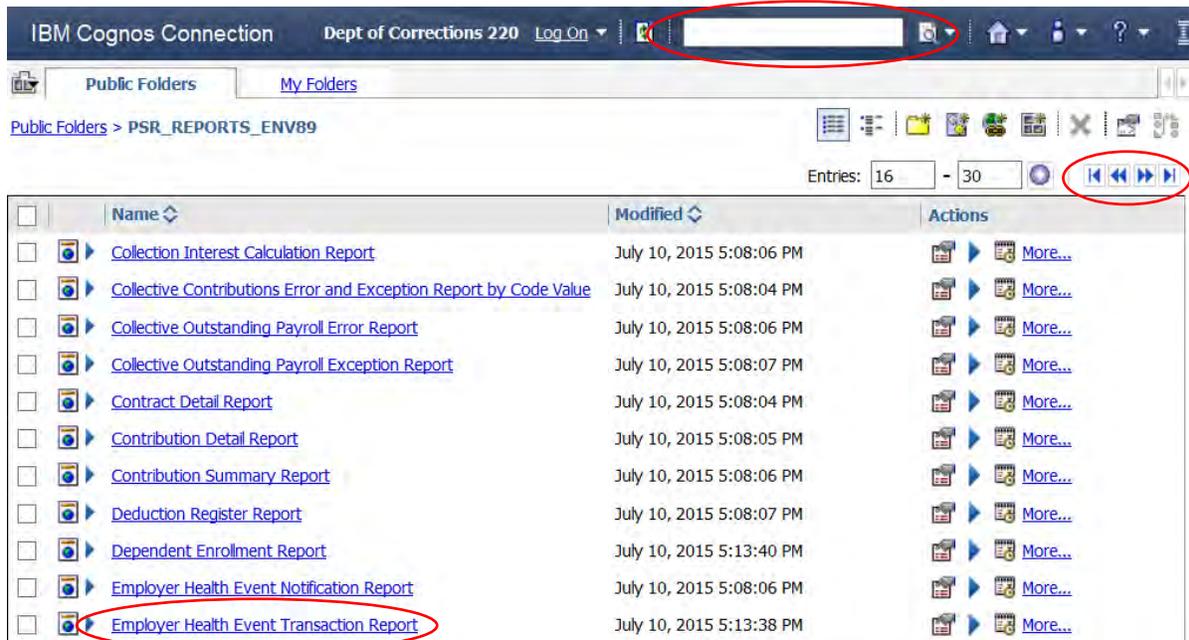


Figure 3-5. Effective Date Range and the Event Create Date Range

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 :

For best results, only use one of the date ranges

Continued on next page

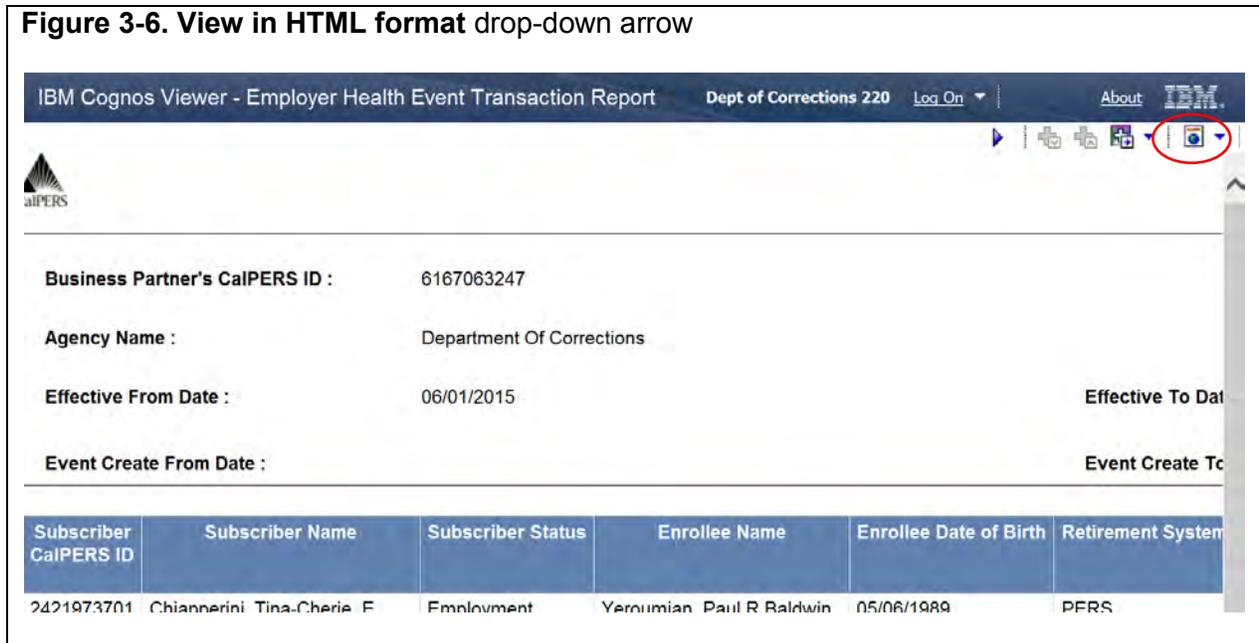
Scenario: Generate an Employer Health Event Transaction Report, Continued

Step	Action	Result
Export to Excel		
10	<p>Select the View in HTML Format  drop-down arrow to indicate saving selections.</p> <p>In selecting the View in Excel Options link, different versions and options are available:</p> <div data-bbox="310 636 745 861" style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none">  View in Excel 2007 Format  View in Excel 2002 Format  View in Excel 2000 Single Sheet Format  View in Excel 2000 Format  View in CSV Format </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>You may rename the file and designate a location in My Folders to save it.</p>	<p>Figure 3-6. View in HTML Format drop-down list</p> <p>The globe drop-down arrow expands to display the following:</p> <div data-bbox="943 632 1239 814" style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none">  View in HTML Format  View in PDF Format  View in XML Format  View in Excel Options ▶ </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="943 1402 1382 1522" 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

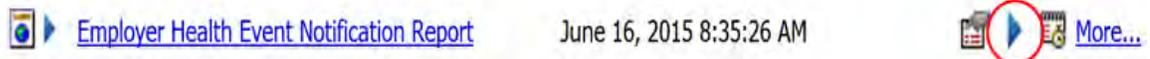
Scenario: Generate an Employer Health Event Transaction Report, Continued

Figure 3-6. 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:



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 Notification Report

Examples of When to Use

This report only uses posting date (when the transaction was updated to the system) criterion. You may want to run this report to view transactions that were all processed between particular dates, such as:

- the posting/processing dates of when Open Enrollment transactions were keyed
- to view 26-year-old delete transactions. These are updated on the 2nd of every month to be effective the following month.

Criteria

Select Posting Date Range

Posting Start Date :

Posting End Date :

Generated

Business Partner's CalPERS ID :

Department Of Corrections

Agency Name :

Department Of Corrections

Posting Start Date :

Apr 15, 2015

Participants CalPERS ID	Appointment ID	Subscriber Name	Effective Date
1000082709	19512180	BROSHEARS, SKYWALKER THOMAS E.	08/01/2015
1001687853	21969750	ASGHARNIA, OLIVIA MAY E.	08/01/2015
2421973701	27469240	CHIAPPERINI, TINA-CHERIE E.	06/01/2015
2421973701	27469240	CHIAPPERINI, TINA-CHERIE E.	06/01/2015
5884416923	14769340	OBLIZALO, TERRY D.	02/01/2015
7720142483	91605140	FRINT, KYJON M.	08/01/2015

Health Event Type	Health Event Reason	Plan Name	Health Benefit Type	Status
Change Health Plan	Move	Blue Shield NetValue California	Health - Medical	Rescinded
Change Health Plan	Move	Blue Shield NetValue California	Health - Medical	Rescinded
Delete Dependent	26 year old delete	Kaiser Permanente California	Health - Medical	Confirmed
Add Dependent	Medically Disabled	Kaiser Permanente California	Health - Medical	Confirmed
Cancel Coverage	Off Pay Status Cancel	Kaiser Permanente California	Health - Medical	Rescinded
Change Health Plan	Move	Kaiser Permanente California	Health - Medical	Rescinded

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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 3-7. 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 3-8. 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 3-7. my|CalPERS Technical Requirements page

Figure 3-8. 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 Central & Non-Central State Agencies 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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Recertifying a Dependent in a Parent-Child Relationship	87
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Incomplete Transactions



Incomplete transactions are health 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 under 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	Has the transaction been completed? <ul style="list-style-type: none"> • If yes, repeat steps 1-3, select the checkbox next to the employee's name, and then select the Delete button • If no, repeat steps 1-4 and complete the transaction 	
	You have completed this scenario.	

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 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

*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 for the January 1, 2016 requirement changes:

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

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> <div data-bbox="305 982 1443 1213" style="border: 1px solid #ccc; padding: 5px;"> <p>Health Event Information</p> <p>Health Event Type:* Recertify Dependent</p> <p>Health Event Reason:* Recertification of Parent-Child Relationship</p> <p>Event Date:* 05/01/2014</p> <p>Received Date:* 04/15/2014</p> <p>Apply Change to: * <input checked="" type="radio"/> Medical</p> <p>Effective Date: 05/01/2014 View Effective Date</p> </div> <p><input type="button" value="Save & Continue"/> <input type="button" value="Cancel"/> <input type="button" value="Clear"/></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>

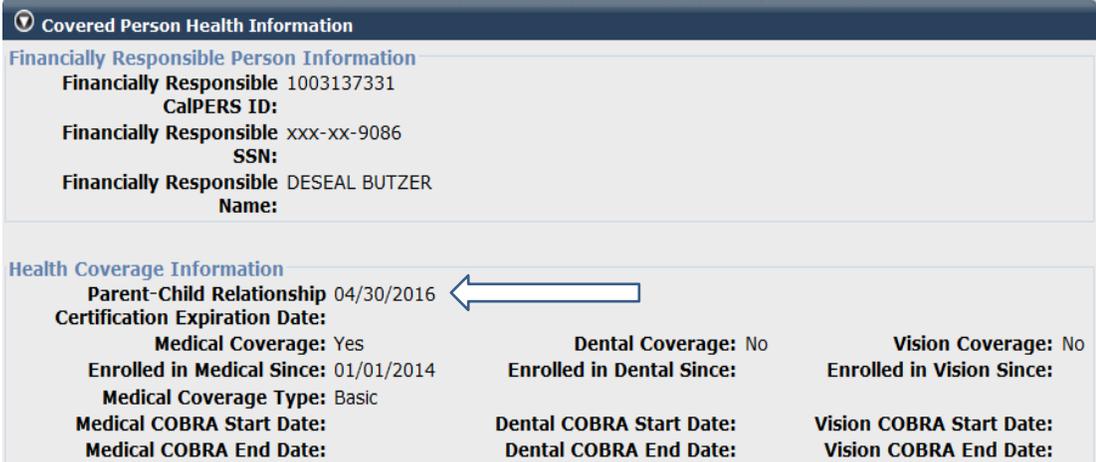
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Recertifying a Dependent in a Parent-Child Relationship, Continued

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 'Financially Responsible Person Information', the name is DESEAL BUTZER. Under 'Health Coverage Information', the 'Parent-Child Relationship Certification Expiration Date' is 04/30/2016, with a blue arrow pointing to it. Other fields include Medical Coverage (Yes), Dental Coverage (No), and Vision Coverage (No), along with their respective enrollment and COBRA dates.</p>

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-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. 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-2. Search Results section Health Event Information page displays.

Continued on next page

New COBRA Health Enrollment for a Former Employee, Continued

Figure A-1. Reporting global navigation tab

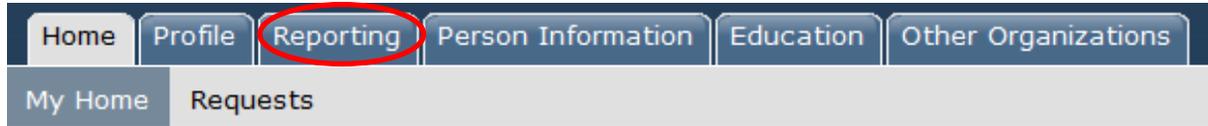
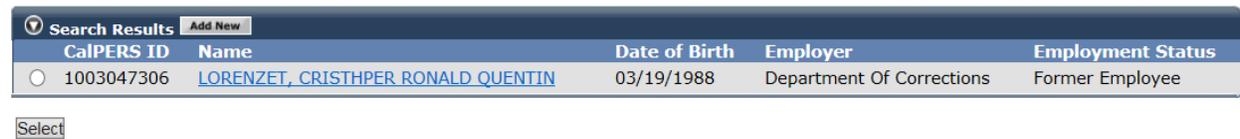


Figure A-2. Search Results section



CalPERS ID	Name	Date of Birth	Employer	Employment Status
1003047306	LORENZET, CRISTHPER RONALD QUENTIN	03/19/1988	Department Of Corrections	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 	See Figure A-3. Health Event Information section						
8	Select the Save & Continue button.	Health Enrollment Information page displays.						
9	If the employee is a dues-paying member of an association, select the association from the drop down list.	See Figure A-4. Appointment Details section						
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>	See Figure A-5. Covered Person List section						
11	<p>Is employee including all dependents on this COBRA?</p> <table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>Continue to step 12</td> </tr> <tr> <td>Yes</td> <td>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							
12	Select the dependent's name link for the person who will not be included on this enrollment.	Demographic Information page displays with the hard coded dependent information.						

Continued on next page

New COBRA Health Enrollment for a Former Employee, Continued

Figure A-3. 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-4. Appointment Details section

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

Appointment Details

Employer: State of California **CalPERS ID** 5402440716
(Employer):

Original Hire Date:* 01/11/2010

Division: Department Of Corrections

Appointment ID: 43932610

Exempt Authority: None Identified

Separation Date: 09/15/2016 **Retirement Date:**

Additional Details

Position Title: ASSOCIATE GOVERNMENTAL PROGRAM ANALYST	Appointment Status: Perm Sep
CBU: R01 Rank & File/ Admin, Financial & Staff Svc	Retirement Program: * PERS
Begin Date: 01/11/2010	End Date: 09/15/2016
Medical Group: * R01-Rnk&File/Admin, Finan&Staf	Affiliated Association:
	California Association of Highway Patrolmen (CAHP) California Correctional Peace Officers Association (CCPOA) Peace Officers Research Association of California (PORAC)

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-5. Covered Person List

Covered Person List

Name	Date of Birth	Relationship	Medical	Dental	Vision
CRISTHPER LORENZET	03/19/1988	Self	Basic	No	No
LORENZET, A'AONE		Child	Basic	No	No
LORENZET, KINSLEE GABRI			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						
13	Select the Continue button.	See Figure A-6. Dependent Information page						
14	Select the Save & Continue button.	See Figure A-7. Benefit Type section displays a medical change 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"> <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-6 Demographic Information page

Person Details

Prefix:
First Name:* KINSLEE GABRI **Middle Name:** KEISHIRA
Last Name:* LORENZET
Suffix:
SSN 227360412 **Gender:*** Male
Relationship:* Spouse **Dependent Type:*** Spouse
Date Of Birth:* 12/14/1982 **Date Of Marriage/Partnership:*** 10/29/2010

Address Details

Address is the same as Primary Subscriber
Address Type:* Mailing Address
Care Of:
Address:* 508 S SANTA CRUZ RD

Country:* United States
City:* ELK GROVE
State:* California
Zip Code:* 95757 -

Figure A-7. Benefit Type section

Dependent Information

Benefit Type

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

Figure A-8. Dependent Change section displaying the dependent who will not be enrolled

Covered Person List

Name	Date of Birth	Relationship	Medical	Dental	Vision
CRISTHPER LORENZET	03/19/1988	Self	Basic	No	No
A'AONE LORENZET	06/20/2013	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
KINSLEE GABRI LORENZET	12/14/1982	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. Once the retiree goes onto retirement roll and health deductions get paid retroactively, the health carrier will reimburse the retiree for the direct payments.

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-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	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.	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-10. Search Results section Health Event Information page displays.

Continued on next page

Direct Pay for a Pending Retirement, Continued

Figure A-9. Reporting global navigation tab



Figure A-10. Search Results section

A screenshot of the 'Search Results' section. It features a table with a dark blue header and a light blue 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'. 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

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) If last day is the 1st - 10th of the month, use the month prior for the event date. • Received Date: (Date the request was received in the employing office) • Apply Change to: Select the Medical radio button 	See Figure A-11. 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 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 are populated correctly Then select the Save & Continue button.	Selected Covered Persons page displays.
10	If not adding any dependents, 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

Scenario 9: Direct Pay for a Pending Retirement, Continued

Figure A-11. 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 "New Enrollment" selected.
- Health Event Reason:** A dropdown menu with "Pending Retirement" 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:** Two radio buttons: "Medical" (selected) and "Dental".
- 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".

Health into Retirement

Health into Retirement

Employees who have health benefits and are separating for retirement:

Key the permanent separation in PIMS. If the employee is enrolled in health and their separation date and retirement are within one pay period, health will automatically continue into 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

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 into PIMS.

If they are continuing their dental into retirement, remember to enter the dental into retirement transaction prior to the permanent separation.

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Permanent Separation Correction



State agencies and California State Universities (CSUs) should continue to report permanent separations and sick leaves in the Personnel Information Management System (PIMS).

However, if any corrections need to be made after the permanent separation and unused sick leave have been reported in PIMS, state agencies and CSUs should make changes in my|CalPERS and not through PIMS.

Users would need the appropriate my|CalPERS access to make appointment changes! If you have the Appointment Event Details grayed out, it means you do not have access to make appointment corrections. This can be granted by your agency's System Access Administrator (SAA).

Scenario: Your employee's updated permanent separation date conflicts with what's on payroll. Using my|CalPERS, you will correct your employee's permanent separation date, and if necessary, update their sick and educational leave.

Note: The permanent separation must be reported as the day after the last day an employee works for your agency, which is often the day after the last day on payroll. For example, an employee's last day on payroll is January 15th; therefore, the earliest reported permanent separation date is January 16th.

Step-by-Step Follow the steps below to correct an employee's appointment.

Step	Action	Result
1	From the My Home page, select either the Person Search left-side navigation link or the Person Information the global navigation tab.	Search for a Person page displays.
2	Enter the employee's CalPERS ID in the CalPERS ID field, then select the Search button.	See Figure A-12. Person Search section
3	In the Appointment History section select the employer name link for the employer that has an active appointment status.	See Figure A-13. Appointment History section
4	In the Appointment Event History section, select the radio button associated to the permanent separation to correct the event details.	See Figure A-14. Appointment Event History section

Continued on next page

Permanent Separation Correction, Continued

Figure A-12. Person Search section

Person Search

Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

CalPERS ID:

Figure A-13. Appointment History section

Appointment History [View More Actions»](#)

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
County of Placer		Regular		Miscellaneous	Active	04/30/2005	

Figure A-14. Appointment Event History section

Appointment Event History

View All Site Events

	Event Date	Event	Event Details
<input checked="" type="radio"/>	02/05/2013	Permanent Separation	Other
<input type="radio"/>	04/30/2005	New Appointment	View Event Details

View All Site Events

Continued on next page

Permanent Separation Correction, Continued

Step	Action	Result
5	<p>Within the Appointment Event Details section, correct the Permanent Separation fields as necessary.</p> <ul style="list-style-type: none"> ● Event Date: ● Separation Reason: ● Unused Sick Leave: ● Unused Education Leave: (Only for certain Bargaining Units) <p>Report Unused Sick and Education Leave in days by dividing total hours by eight.</p>	<p>See Figure A-15. Appointment Event Details section</p>
6	<p>Select the checkbox for I acknowledge that this information is correct.</p>	
7	<p>Select the Save button.</p>	<p>Appointment Details and Event page displays.</p>
	<p>You have completed this scenario.</p>	<p>See Figure A-16. Appointment Event History section</p> <p>The corrected employee's Permanent Separation event will display in the Appointment Event History section.</p>

Continued on next page

Permanent Separation Correction, Continued

Figure A-15. Appointment Event Details section

Appointment Event Details

Event: * Permanent Separation
Event Date: * 02/05/2013

Separation Reason: * Other

Unused Sick Leave: Days
Unused Education Leave: Days

Unused Sick Leave: 0.0 Days **Unused Education Leave:** 0.0 Days

I acknowledge that this information is correct

Date Updated: 02/25/2013 **User Name:** trncop251

Figure A-16. Appointment Event History section

Appointment Event History

View All Site Events

Event Date	Event	Event Details
02/16/2013	Permanent Separation	Other
04/30/2005	New Appointment	View Event Details

View All Site Events

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.

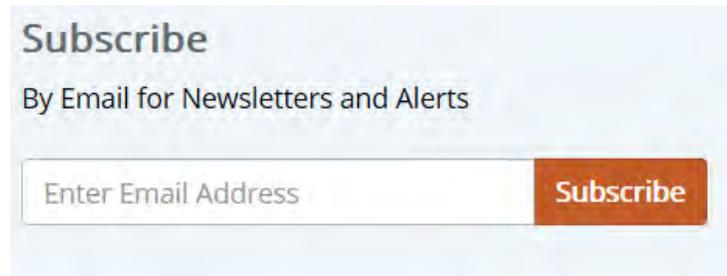


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CalPERS Resources, Continued

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.



The image shows a screenshot of a subscription form on the CalPERS website. The form has a light blue background. At the top, the word "Subscribe" is written in a bold, dark blue font. Below it, the text "By Email for Newsletters and Alerts" is displayed in a smaller, dark blue font. The form consists of a white input field with the placeholder text "Enter Email Address" and a dark orange button with the word "Subscribe" in white text.

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

Pathway: CalPERS website > Employers > [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 State Health Benefits Guide](#)

Pathway: CalPERS website > Employers > Policies & Procedures> Reference & Health Guides >State Health Benefits Guide

[Technical Resources for File Reporters](#)

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

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:** Home, Profile, Reporting, Person Information, Education, Other Organizations.
- Header links:** Content | Footer | Welcome Hillary | Help | Contact Us | CalPERS | Log out | January 12, 2016.
- Local navigation links:** My Home, Requests.
- Access the Forms and Publications page:** Forms and Publications Center >>
- Left-side navigation links:** Common Tasks, Menu, Person Search, Contact Personal Security Settings.
- Check My Messages for important updates and upcoming training opportunities:** My Messages section with a table of messages.
- Box/area is called a section:** My Messages, My Cases, Health Plan Search by ZIP Code.
- Employer News at the top:** Welcome Employer News.
- CalPERS News at the bottom:** CalPERS News section.
- View More Actions expands section to show more items:** View More Actions >> link next to the My Cases table.
- Health Plan Search by ZIP Code:** Search form with fields for ZIP Code, Member Category, and Search Year.
- Don't Miss Out!** Access training via the Education tab. Go Now button.
- QUICK LINKS:** CalPERS Quick Picks, CalPERS On-Line, Edit Quick Links >>

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

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

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.

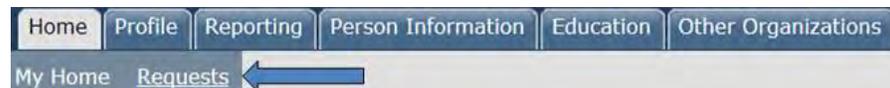
Person Information: Query employee and retiree health and retirement information; add, correct, and delete appointment information.

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:
 - **Reports:** Run reports via the Cognos application (See unit 3)
 - **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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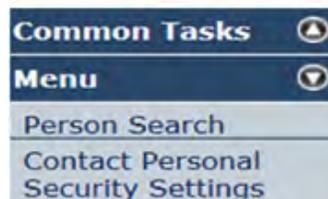
Navigating my|CalPERS, Continued

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 **health contract** 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.

Help is intuitive and refers to the my|CalPERS page you are currently viewing

Help features an alphabetical glossary of CalPERS terms

Items on the Page

- [Welcome](#)
- [Important Messages](#)
- [My Cases](#)
- [CalPERS News](#)
- [CalPERS Market Value](#)
- [Home Loan Rates](#)
- [Quick Links](#)
- [Messages from CalPERS](#)

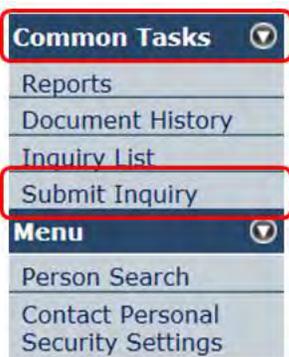
This Online Help page describes all items and functions that may be performed on the corresponding my|CalPERS page. Depending on your security role(s).

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-17. Common Tasks menu on left-side navigation links
2	Select the Submit Inquiry link from the left-side navigation menu.	See Figure A-17. 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-18. Contact Information section When your inquiry is answered, you will receive a system-generated email.
4	Type inquiry in Inquiry field.	See Figure A-18. Inquiry section
5	Select the Submit button.	Self-Serve Inquiry page displays.

Figure A-17. Common Tasks menu and Submit Inquiry left-side link



You may enter confidential information in the **Inquiry** textbox

Figure A-18. Contact Information and Inquiry sections

If reporting dependent demographic changes, state which type of documented proof you have e.g., driver license, birth certificate, Social Security card, etc.

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-19. Inquiries section Self -Serve Inquiry page displays.

Figure A-19. 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 and 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 information on ERT, 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 103.

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.
