

my|CalPERS Direct Authorization Vendor

User Guide

November 2011

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my|CalPERS Login, Demographics and Profile Maintenance for Direct Authorization Vendors

Part 1: my|CalPERS Login

Log in to my|CalPERS

Log in to my|CalPERS for the first time with a temporary password assigned by your organization's system access administrator

Your organization"s system access administrator will need to assign a username and system access roles before a system user can log in to my|CalPERS. my|CalPERS will generate a temporary password that will need to be documented and provided to the user by the system access administrator (this process is covered in the Establish a Business Partner Contact and the Assign and Modify Business Partner Contact Roles activities later in this user guide). Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The my|CalPERS *Business Partner Login* page displays.

myCalPERS	Help Contact Us CalPERS On-Line March 8, 2011
Business Partner Please log in with your Username and Password. Username: * filereporter Password: * Log In Forgot Your Password?	* Required Fields Notice: Authorization to access this system is limited to users authorized by the California Public Employees' Retirement System, and may only be used in the proper conduct of official business. All other access is unauthorized and unlawful.
Please be sure to log out when you are done. For your security, we also recomme New User Registering is easy. Register Now	end that you close all of your browser windows after you log out.
Copyright ⊜ 2008 ∦ Privacy Policy ⊨	Conditions of Use Site Requirements

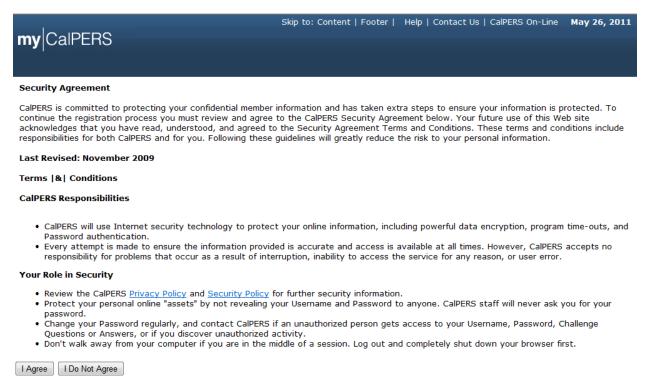
Enter your assigned username in the **Username** field and the temporary password provided by your organization"s system access administrator in the **Password** field and then select the **Log In** button.

my	Help Contact Us CalPERS On-Line May 24, 2011
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have bookmarked this login page. Another Heading More text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login Required Please log in with your Username and Password New Password New Password Save
Copyright @ 2008 Privacy Policy Conditions of	r Use (Site Réquirements

The my|CalPERS Business Partner Login page refreshes.

You will need to establish your new password. Enter the temporary password in the **Old Password** field and your new password in the **New Password** and **Confirm New Password** fields and then select the **Save** button.

The my|CalPERS Security Agreement page displays.



Read the security agreement and then select the **I Agree** button.

You will be prompted to set up responses to five security questions in case you forget your password. By providing the correct answers to the selected security questions, you will be able to reset your password in the future.

skip to: 0 my CalPERS	Content Footer	Welcome Edward	Customize	Help Con	tact Us CalP	ERS On-Line Log (out May 26, 2011
							*Required Fields
💿 Update Your Challenge Qu	estions						
Please modify your Challenge	questions and answ	ers below:					
Question 1:*				•			
Answer 1:*							
Question 2:*			-				
Answer 2:*							
Question 3:*			•				
Answer 3:*							
Question 4:*					•		
Answer 4:*							
Question 5:*							
Answer 5:*							
Save and Continue Clear							

Select a question from each dropdown and provide a response that you will recall at a future date. Select the **Save and Continue** button.

Here is an example of five selected challenge questions and answers:

skip to: my CalPERS	Content Footer Welcome Edward Customize Help Contact Us CalPERS On-Line Log out May 26, 2011
	*Required Fields
👽 Update Your Challenge Qu	jestions
Please modify your Challenge	questions and answers below:
Question 1:*	In what city did you meet your Spouse or Significant other? 💌
Answer 1:*	New York
Question 2:*	In what city were you born?
Answer 2:*	Atlanta
Question 3:*	What was the first concert you attended?
Answer 3:*	The Beatles
Question 4:*	What was the name of your best man or maid of honor at your wedding?
Answer 4:*	George
Question 5:*	What is your favorite ice cream flavor?
Answer 5:*	Strawberry

Save and Continue Clear

The Conditions of Use for Business Partners (Employers) page displays.

O Conditions of U	Ise for Business Partners (Employers)
	application you acknowledge that all information accessible to you will be used only to assist you in conducting official business

Read the my|CalPERS conditions of use and then select the **Accept** button to acknowledge the condition that the user is accessing the system for official business. Please note that the data within my|CalPERS is confidential and should be treated accordingly.

The my|CalPERS *Home* page displays.

s my∣CalPERS		t Footer W	Velcome Walter Customize	Help Contact Us	CalPERS On-Lir	e Log out	May 25, 20	11
Home Profile Repo	rting Person	Information 0	ther Organizations					
Common Tasks 🛛 🔕	💿 My Cases	i		View	More Actions»			
Menu 🕥	Case ID	Case Title	Case Type	Program	Status			
Person Search	731239		Initiate DA Agreement		Closed			- 12
Change Password	731151		Initiate DA Agreement		Closed			
Change Challenge								
Questions								

Log in to my|CalPERS after initial log in

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them loging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password?
	Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

	Skip to: Conter	it Footer 👘	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Line	e Log out	May 26, 2011
my CalPERS							
IIIy Call LING	,						
Home Profile Repo	orting Person	Information (Other Organizations				
My Home							
Common Tasks 🔕	💿 My Cases			View	More Actions»		
Menu 👽	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge							
Ouestions							

This scenario illustrates the error message displayed if an incorrect username and/or password are entered:

nyCalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner	New User? Registering is easy. Register Now Business Partner Login
This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	Please log in with your Username and Password. * Username: sample-user * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log In button.

my|CalPERS Direct Authorization Vendor User Guide

my	Help Contact Us CalPERS On-Line May 26, 20
You have entered an incorrect Username and Password combination. Please try again.	New User?
Wetcome to my/CaIPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More text that could talk about new features or issues that the user should see prior to them logging in. They normally see prelogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	Registering is easy. Register Now Business Partner Login Please log in with your Username and Password. * Username: * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

If you enter an incorrect username and/or password, the error message "You have entered an incorrect Username and Password combination. Please try again" will display on the my|CalPERS *Business Partner Login* page.

Part 2: Update Business Partner Demographics

Business Partner Demographics

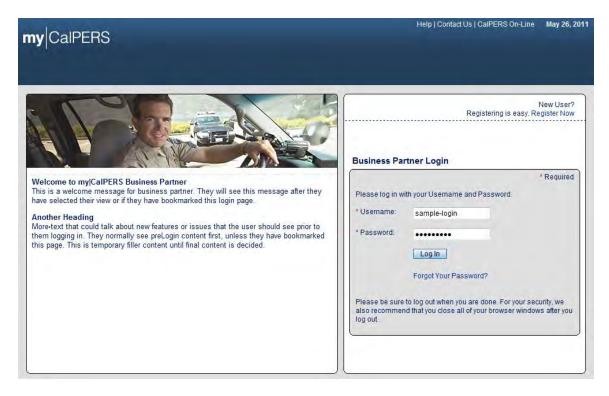
Update a business partner's address and communication information

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the **Accept** button.

The my|CalPERS *Home* page displays.

my CalPERS		nt Footer M	/elcome Bobbie Customize	Help Contact Us	CalPERS On-Line Log ou	ut May 26, 2011
Home Profile Repo	rting Person	Information 0	ther Organizations			
My Home						
Common Tasks 🛛 🔕	💿 My Cases			View	More Actions»	
Menu 💿	Case ID	Case Title	Case Type	Program	Status	
Person Search	731879		Initiate DA Agreement		Closed	
Change Password						
Change Challenge Questions						

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

The second state of the second s	kip to: Content Footer	Welcome Bobbi	e Customize	Help Cont	tact Us CalPE	RS On-Line	Log out May 26, 2011
my CalPERS							
Home Profile Repo	rting Person Information	Other Organizat	tions				
Summary Agreements	3						
Common Tasks 🛛 🔕	Summary						
Menu 💿	Profile						
Summary							Request Update
Contacts	CalPERS ID:					s: Active	
	Federal Tax ID:	1234567-89			Name	e: Direct Auth Organizatio	
	Category:	Direct Authorizat	ion Organizati	on		organizatio	
	Addresses	49 Mailing Street,	Sacramento C	٨		49 Mailing	Street, Sacramento, CA
	Physical:	84567	ouclamento, e		Mailin	9: 84567	succey succence, or
	Communication Inform						
	Preferred Communica						
	Primary E	mail: robert@dao	ocu.org	Primary I	Phone Numbe	r: 916-789-11	11
	Contacts Add New						View More Actions»
		ontact Type Det	ail	Program	Name		Phone Number
	<u>General</u> M	ain		CalPERS	Robert Dillman		
	💿 Business Relationship	c Add New					
	i			D		Service	Ct-tu-
	Name	CalPE	KS ID	Progra	····	Provided	Status
	No results found.						
	Contracts/Agreement	5					
	Contract/Agreement 1		Date Status Changed	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agre	ement Active	04/01/1978	04/01/1978			

Select the **Physical** link in the Addresses area within the Summary section.

The current physical address ("49 Mailing Street, Sacramento, CA 84567" in this example) displays within the Maintain Address Details section.

Home Profile Rec	porting Person Information Other Organizations	
2 C C		
Common Tasks		Required Field
tenu C		Kednise Haid
Summary	Maintain Address Details	
Contacts	All address changes are effective immediately.	
telationships Divisions	Address Type: Physical Address Start Date: 05/25/2011	
Indings	Address:* 49 Mailing St	
	Country:* United States -	
	City:* Sacramento	
	State:* California	
	Zip Code:* 84567 -	
ny CalPER	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE	ERS On-Line Log out May 26, 201
Home Profile Re;	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE S porting Person Information Other Organizations	ERS On-Line Log out May 26, 201
Home Profile Reg ummary Agreemen ommon Tasks	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE Southing Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897260905	
Home Profile Reg cummary Agreemer common Tasks @ enu @	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE Sourcing Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897160905 Organization	
Home Profile Rep Summary Agreemer ommon Tasks @ enu @ Summary	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE Southing Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897260905	
Home Profile Rep summary Agreemer ommon Tasks C lenu C summary contacts	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE Sourcing Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897160905 Organization @ Maintain Address Details	
Home Profile Rep ommany Agreemen ommon Tasks C enu C ommany ontacts elaboriships	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE porting Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897260905 Organization Organization O Maintain Address Details All address changes are effective immediately. Address Type: Physical Address Start Date: 05/25/2011	
Home Profile Rep ommany Agreemen pommon Tasks C enu C ontacts elaboriships invisions	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE S S S S S S S S S S S S S S S S S S S	
Home Profile Rep ommany Agreemen pommon Tasks C enu C ontacts elaboriships invisions	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE porting Person Information Other Organizations Ints Ints Ints Ints Ints Ints Ints In	
Home Profile Rep summary Agreemer ommon Tasks C enu C summary contacts ielabonships invisions	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE porting Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897260905 Organization Maintain Address Details All address changes are effective immediately. Address: Type: Physical Address Start Date: 05/25/2011 Address: T691 Farwell St	
Home Profile Rep summary Agreemer ommon Tasks C enu C summary contacts ielabonships invisions	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE porting Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897260905 Organization Maintain Address Details All address changes are effective immediately. Address: Type: Physical Address Start Date: 05/25/2011 Address: T691 Farwell St Country: United States	
Home Profile Rep ommany Agreemen pommon Tasks C enu C ontacts elaboriships invisions	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE porting Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897260905 Organization Maintain Address Details All address changes are effective immediately. Address Type: Physical Address Start Date: 05/25/2011 Address: 7691 Farwell St Country: United States City: Addison	
Summary Agreemen	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPE porting Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897260905 Organization Maintain Address Details All address changes are effective immediately. Address: Type: Physical Address Start Date: 05/25/2011 Address: T691 Farwell St Country: United States	ERS On-Line Log out May 26, 201 Required Field

Enter the revised address information in the Maintain Address Details section. In this example, we entered "7691Farwell St, Addison, CA 92020-4567". Select the **Save** button.

The *Confirm Address* page displays. my|CalPERS searches for matching U.S. postal records. Select either the **Entered Address** or the **U.S. Postal Service Matches** radio button next to the correct physical mailing address and then select the **Confirm** button.

myCalPERS	Skip to: Content Footer	Help Contact Us CalPERS On-Line	March 15, 2011
👁 Confirm Address			
We have validated your address against U.S. postal rec address you wish to use or select the Cancel button to			Please choose the
Entered Address: 💿 7691 Farwell	Street, Addison, CA 92020		
U.S. Postal Service Matches:	ELL STREET, ADDISON, CA 92020-45	67	

Confirm

The confirmed physical address displays in the Maintain Address Details section.

my CalPERS	rting Person Information Other Organiz		Contact Us CalPERS O	n-Line Log out May 26, 2011
Common Tasks 💿 Menu 💿	Name: Direct Authorization Ca Organization	IPERS ID: 3897160905	1	"Required Fields
Summary Contacts Relabonships Divisions Findings	Start Date:	Physical Address		
	City:* State:*	United States Addison Caldornia 92020 - 4567	•	

If the revised physical address is displayed correctly, select the **Save** button.

The updated physical address is displayed in the Addresses area of the Summary section. Note that the process is the same for updating a mailing address.

- hadron and a standard standard - C.S. constant.	kip to: Content Footer	Welcome Bobbi	e Customize	Help Cont	tact Us CalPE	RS On-Line	Log out May 26, 2011
my CalPERS							
Home Profile Repor	ting Person Information	Other Organiza	tions				
Summary Agreements	3						
Common Tasks 🛛 🔕	Summary						
Menu 😨	Profile						
Summary		22274 62225					<u>Request Update</u>
Contacts	CalPERS ID: Federal Tax ID:					 s: Active e: Direct Auth 	norization
						Organizati	
		Direct Authorizat	ion Organizati	on			
	Addresses Physical:	7691 Farwell St Addison, CA 92020	4567		Mailin	49 Mailing 9: 84567	Street, Sacramento, CA
	Communication Inform	Audison, CA 92020	-4507			84507	
	Preferred Communica						
	Primary E	mail: robert@da	ocu.org	Primary I	Phone Numbe	r: 916-789-1	111
	Contacts Add New						View More Actions»
		ontact Type Det		Program	Name		Phone Number
	<u>General</u> M	lain	1	CalPERS	Robert Dillman		
	💿 Business Relationship	Add New					
	Name	CalPE	RS ID	Progra		Service Provided	Status
	No results found.						
	• Contracts/Agreement	ts					
	Contract/Agreement		Date Status Changed	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agr	eement Active	04/01/1978	04/01/1978			

my CalPE	RS									
Liono Drofilo	Depart	ing Person Informati	ion Other	Orappiza	tions					
		ing Person Informati		Organiza	LIONS					
, 5	ements									
ommon Tasks		Summary								
enu	\odot	Profile								
ummary									<u>R</u>	<u>equest Updat</u>
ontacts			ID: 3897160					s: Active		
		Federal Tax 1	ID: 1234567	-89			Nam	e: Direct Aut Organizat		
		Catego	rv: Direct /	\uthorizat	tion Organizat	ion		Organizat	ION	
		Addresses	y. Directy	aution20	aon organizae	ion				
		Physic		rwell St			Mailin	49 Mailing 9: 84567	Street, Sacra	mento, CA
		Communication Info	Addisor	, CA 9202)-4567			84567		
		Preferred Commun		mail						
			y Email: n		ocu.org	Primary	Phone Numbe	er: 916-789-1	111	
			-			-				
	1	Contacts Add New							View	More Action
		Contact Type	Contact	Type De	tail	Program	Name		Phone Nu	mber
	l	<u>General</u>	Main			CalPERS	Robert Dillman			
	1									
		Business Relations	ships Add No	aw.				Service		
		Name		CalP	ERS ID	Progra		Provided	Sta	itus
		No results found.								
	1									
		Contracts/Agreen	ients							
		Contracts/Agreem		Status	Date Status Changed	Effective Date	Termination Date	Related Parties		

Update Business Partner Demographics

Similar to the address update process, select the **Communication Information** link within the Summary section to update your organization^s contact information within my|CalPERS.

Your organization"s current contact information displays within the Maintain Communication Details section.

my CalPERS		ter Welcome Bobbie C	lustomize Help	Contact Us CalPERS On-Line Log	out May 26, 2011
Home Profile Repairs		ition Other Organizations	1		
Common Tasks	Name: Direct Author Organization	ization CalPERS	ID: 389716090	05	
Menu 📀 Summary	the second se	ed Communication Details red	2.0		-
Contacts	Communicat	ion:			
Relationships Divisions	Maintain Commu	nication Details			_
Findings	Primary Phone Ty	pe Phone Number	Extension	International	
	Work	(707)421-6284			
	E FAX	(707)421-6014		0.	
	TYY				
	() Cellula	r		0	
	Other				
	Primary	Emi	ail		
		robert@daocu.org			
	U.				
	-				
	Save Clear				

Note that you can select your organization's preferred method of communication in the Maintain Preferred Communication Details section so that CalPERS will contact your organization using your requested method of communication.

Home Profile Reporting Person Information Other Organizations Summary Agreements Common Tasks Image: Direct Authorization CalPERS ID: 3897160905 Menu Organization CalPERS ID: 3897160905 Summary Of Maintain Preferred Communication Details Summary Preferred Communication Details Contacts Of Maintain Communication Details Privations Of Maintain Communication Details Divisions Of Maintain Communication Details Primary Phone Type Phone Number Extension Work (707)421-6284 Image: Celular Other Image: Celular Image: Celular	my CalPERS	kip to: Content Footer	Welcome Bobbie C	ustomize Help	Contact Us CalPERS On-Line Lo	ig out May 26, 2011
Common Tasks Image: Direct Authorization Organization CalPERS ID: 3897160905 Menu Organization Image: Direct Authorization Details Sommary Image: Direct Authorization Details Contacts Preferred Email + Communication Details Divisions Image: Direct Authorization Details Findings Primary Phone Type Primary Phone Type Phone Number Extension International Image: Primary Phone Type Phone Number Image: Primary Phone Type Phone Number Image: Primary Phone Type Phone Number Image: Phone Ty	Home Profile Repor	ting Person Informatio	n Other Organizations	i		
Menu Organization CalPERS ID: S897180905 Sommary	Summary Agreements					
Menu Image: Preferred Communication Details Sommary Preferred Email + Communication: Drysions Image: Primary Phone Type Phone Number Extension Findings: FAX (707)421-6284 Image: Primary Phone Type FAX (707)421-6284 Image: Primary Phone Type Image: Primary Phone Type Other Image: Primary Phone Type Image: Primary Phone Type Image: Primary Phone Type	Common Tasks	Name:	tion CalPERS	ID: 389716090	05	
Sommary Preferred Email + Côntacts Communication: Communication: Relationships Maintain Communication Details Divisions Primary Phone Type Phone Number Extension Findings PA: (707)421-6284 Image: Communication Communicatin Communicati	Menu 💿	Charles and the second s	Communication Details			
Primary Phone Type Phone Number Extension International Work (707)421-6284 Image: Contract of the state of the s	Summary	Preferre	d Email +			
Divisions Maintain Communication Details Findings Primary Phone Type Phone Number Extension International Work (707)421-6284 Image: Communication Communication Communication Image: Communication Communication Image: Communication Communication FAX (707)421-6284 Image: Communication Communication Image: Communication Communication FAX (707)421-6284 Image: Communication Communication Image: Communication Communication FAX (707)421-6284 Image: Communication Communication Image: Communication Communication TYY Image: Communication Communication Image: Communication Communication Image: Communication Communication Other Image: Communication Communication Image: Communication Communication Image: Communication Communication Image: Communication Communication	Contacts	Communication	1:			
Findings Primary Phone Type Phone Number Extension International Work (707)421-6284 Image: Compare the second	Relationships	Q				
Work (707)421-6284 FAX (707)421-6014 Cellular Cellular Other Cellular	Dryisións-	Maintain Communic	ation Details			
FAX (707)421-6014	Findings	Primary Phone Type	Phone Number	Extension	International	
Celular D Other D		Work	(707)421-6284		8	
Celular E Other E		E FAX	(707)421-6014		D	
O Other		E TYY			13	
		Celular				
Primary Email		O Other			10	
		Primary	Eme	ii iii		
alice@dsocu.org			slice@dsocu.org			
robert Bidsoculorg			obert@daocu.org			

In this example, we selected "Email" from the **Preferred Communication** dropdown in the Maintain Preferred Communication Details section and entered a new primary email address ("alice@daocu.org" instead of "robert@daocu.org" in this example). Select the **Primary** radio button associated with the primary email address. You can also update phone numbers within the Maintain Communication Details section, which we did not do in this example. Select the **Save** button.

Note that in the Communication Information area of the Summary section, the Preferred Communication now displays as "Email" and the Primary Email displays as "alice@daocu.org".

my CalPERS	kip to: Content Footer Welco	ome Bobbie Customizo	e Help Cont	act Us CalPE	RS On-Line	Log out May 26, 2011
Home Profile Report	rting Person Information Other	Organizations				
Common Tasks 🛛 🔕	O Summary					
Menu 💿	Profile					
Summary						Request Update
Contacts	CalPERS ID: 3897160				s: Active	
	Federal Tax ID: 1234567	-89		Name	e: Direct Auth Organizati	
	Category: Direct /	Authorization Organizat	tion		9	
		arwell St a, CA 92020-4567		Mailing	49 Mailing 84567	Street, Sacramento, CA
	Communication Information Preferred Communication: E Primary Email: a		Primary F	Phone Numbe	r: 916-789-11	111
	O Contacts Add New					View More Actions»
	Contact Type Contact General Main	Type Detail	Program CalPERS	Name Robert Dillman		Phone Number
	General Main		CalPERS	Nobert Diliniari		
	😡 Business Relationships 🔤 Add N	ew				
	Name	CalPERS ID	Progra	m	Service Provided	Status
	No results found.					
	• Contracts/Agreements					
	Contract/Agreement Type	Status Date Status Changed	s Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active 04/01/1978	04/01/1978			

Part 3: Business Partner Profile Maintenance

Business Partner Profile Maintenance

Establish a business partner contact

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. More-text that could talk about new features or issues that the user should see prior to them loging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out

Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and select the **Accept** button.

The my|CalPERS Home page displays.

my CalPERS		t Footer N	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Li	ne Log out	May 26, 2011
Home Profile Report	ting Person 1	Information (Other Organizations				
My Home							
Common Tasks							
				View	More Actions»		
	My Cases Case ID	Case Title	Case Type	View Program	More Actions» Status		
			Case Type Initiate DA Agreement				
Menu 💿	Case ID		<i></i>		Status		

If your organization is a school, public agency or State agency and the contact you are adding is a CalPERS covered employee, you will add them as a contact using their CalPERS ID. You can look up the person information for the contact to retrieve this information.

Select **Person Search** from the left-side navigation and then select the **Person Information** tab.



The *Person Search* page displays. Enter the Social Security number (SSN) of the contact in the **SSN / Federal or Individual Tax ID** field and then select the **Search** button.

The *Summary* page displays. The CalPERS ID of "Laura Tester" is displayed ("3846381465" in this example).

my CalPERS	the second s	Second research of the second s
Home Profile Report	ting Person Information Loan Eligibility Search Educatio	Other Organizations
Summary Health Enroll	ment Benefit Application	
Common Tasks 🛛 🔕	💿 Summary	
Menu 📀	Profile	
Appointment History		Update Personal Information
Payroll Information	SSN: xxx-xx-7336	CalPERS ID: 3846381465
Member Elections	Name: Laura Tester	Optional Member: No
Contributory	Date of Birth: 09/08/1971	Date of Death:
Appointment History	Prior School No	Prior School
Report Death	Membership: NO	Membership Date:
	Restrictions: No	
	Communication	
		Undeliverable Date
	Preferred Communication: Mail	
	Primary Phone Number:	Update
	Primary Email Address:	Update
	Mailing Address: 555 BRIDGE ST VACAVILLE, CA 95687	Update
	Phone Authentication Code: No	

Make note of the CalPERS ID for "Laura Tester" ("3846381465" in this example) and then select the **Profile** global navigation tab.

If the individual you are adding has never been a member of CalPERS, they will not have a CalPERS ID and you can add them using **Add New Person** on the *Maintain Contact Details* page. See below for detailed instructions on how to do this.

	Skip to: Content Footer	Welcome Laura Cu	stomize Help	Contact Us (CalPERS On-Line	Log out June 27, 2011
my CalPERS	5					
Home Profile Rep	orting Person Information	Other Organizations	1			
Summary Agreemen		oundi organizationo				
Common Tasks						
Menu 😨	Summary					
Summary	Profile					Request Update
Contacts	CalPERS ID:	3047155671		s	tatus: Active	<u>Kequest opuate</u>
	Federal Tax ID:			I		horization Organization
	Category:	Direct Authorization O	rganization		Credit Uni	on
	Addresses Physical:				ailing:	
				M	<u>aning:</u>	
	Communication Inform Preferred Communica					
	Primary Er	mail:	Prin	nary Phone Nu	mber:	
	O Contacts Add New					View More Actions
		ontact Type Detail	Progra	am Name	2	Phone Number
		lain lain	CalPER CalPER		kample Redwood	(916)789-3344
	👽 Business Relationship	5 Add New				
	Name	CalPERS II) P	rogram	Service Provided	Status
	No results found.					
	• Contracts/Agreement	5				
	Contract/Agreement T		Date Status Changed	Effective Date	Termination Date	Related Parties
	Direct Authorization Agre	ement Active	04/01/1980	04/01/1980		

The Business Partner Profile Summary page displays.

Select the Add New button in the Contacts section title banner.

The Maintain Contact Details page displays. This is a view of the entire page.

my CalPERS	kip to: Content	Footer Welcome Ro	bert Customize	Help Contact Us CalPERS Or	n-Line Log out May 26, 2011
Home Profile Repo	rting Person Info	ormation Other Organ	izations		
Summary Agreements	5				
Common Tasks 🛛 🔕	Name: Direct Au	thorization C	alPERS ID: 30471	55671	
Menu 👽		ion Credit Union			
Summary					*Required Fields
Contacts	💿 Maintain Con	tact Details			
	By indicating that purposes. They detail.	at this contact is a Prin will also receive autom	ary Contact, you ated corresponden	are specifying that they should l ce sent to contacts based upon	pe reached for communication contact type - contact type
	Co	ntact Type:*		•	Contact Type Detail:* 🖃
	Program	s Supported: CalF	ERS		
	, ,		rson CalPERS ID:		
		-	dividual Name: /		
		⊙ Ot			
			System Access		
				to Other Organizations	
			ry Contact	to other organizations	
			-		
		ferred Communication	Details		
	Preferred Con	nmunication:			
		tact Address Details			
		ing Business None	-		
		ner Address :			
		Address:*			
		Country:* United S	tates		
		City:*			
		State:* California		•	
		Zip Code:*	-		
	🗑 Maintain Con	nmunication Details			
	Primary Phor		r Extension	International	
	Тур	e			
	Hom				
	Cellu				
	Other	er			
	O Wor				
	O TY				
	○ FA>	<			
	Primary	Email		Undeliverable	
	0			Date	
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	0				
	Save Clear				

Maintain Contact Details	and the second	the second second second second
	s a Primary Contact, you are specifying that the automated correspondence sent to contacts ba	
Contact Type:*	۲	Contact Type Detail:* -
Programs Supported:	CalPERS	
Entity:*	Person CalPERS ID:	
	Tindividual Name: Add New Person	
	O Other:	
1	Allow System Access	
1	Make Contact Viewable to Other Organizations	
1	Primary Contact	

Step 1: Within the Maintain Contact Details section, select the appropriate contact type from the **Contact Type** dropdown. In most cases, this will be "General".

Step 2: Select the appropriate contact type detail from the **Contact Type Detail** dropdown.

Step 3: Select the appropriate checkbox(es) for Programs Supported.

Step 4: Select the **Person CalPERS ID Entity** radio button, and enter the CalPERS ID of the individual that you noted previously in the **Person CalPERS ID** field. Skip to **Step 7**.

Step 5: If the individual is not in my|CalPERS, select the **Individual Name Entity** radio button and then the **Add New Person** link.

ne Profile Repo	rting Dore	on Informat	ion Other Orga	nizations						
		on informat		anizations						
mary Agreement	5									"Required
mon Tasks 🕘	0	A REAL PROPERTY AND		_	_	_	_	_	_	Nequireu
0	O Person	n Details efix:	121							
acts	First Nan				iddle Nam				ast Name:"	
ionships	100000000000000000000000000000000000000	ffix:			nume num				ast indune.	
ons		SSN:			ate of Birt			-	Gender:	-
N26		53m.		b	ate or birth			=	Genuer,	
	Prefer	red Commu	nication Details	-						
		d Commu		-						
				-						
	O Addre	ss Details								
		A	ddress Type:							
			Address:							
					_					
					_					
			Country:	United Stat	es		-			
			City:				-			
			State: (California		1				
			Zip Code:	and the second						
		_		_	_					
	Comm	unication D	etails							
	Primary	Phone	Phone Numb	per 1	Extension	Internatio	onal			
	10	Type Cellular								
		Fax		-						
	10.	Home								
	100	Office								
	- 98	Other				10				
	13	TYY				0				
	Primary			Email						
	D									
	-									

The Person Details page displays.

Step 6: Enter the contact information for the contact person within the Person Details section. Note that the only required fields are **First Name** and **Last Name**, as indicated by the red asterisks. Including the **SSN** and **Date of Birth** will ensure that the contact is matched with their existing CalPERS ID if they have one. You will want to enter as much contact information as you have available, and then select the **Save** button.

Note that if you have the contact person"s Social Security number and date of birth, you can enter them in the **SSN** and **Date of Birth** fields, and after selecting the **Save** button, my|CalPERS will match the entered information to information already in the system, to prevent duplication of individual participant records. If information is not already in the system, then my|CalPERS will save the entered contact information and assign a new Participant CalPERS ID.



Maintain Contact Details	and the second	and the second
	is a Primary Contact, you are specifying that they a automated correspondence sent to contacts bas	
Contact Type:		Contact Type Detail:* 🔹
Programs Supported:	CalPERS	
Programs Supported: Entity:*	Person CalPERS ID: Individual Name: Add New Parson Other:	
	Allow System Access Make Contact Viewable to Other Organizations Primary Contact	

Step 8: Select the **Allow System Access** checkbox. If appropriate for this contact person, select the **Make Contact Viewable to Other Organizations** and/or the **Primary Contact** checkbox(es).

👽 Maintain Preferred Communication Details
Preferred Communication:
referred communication. ▼

Step 9: Select the preferred method of communication from the **Preferred Communication** dropdown within the Maintain Preferred Communication Details section.

💿 Maintain Contact Address D	
Existing Business Partner Address :	None
Address:*	
Country:*	United States
City:*	
State:*	California
Zip Code:*	

Step 10: Select the appropriate value from the **Existing Business Partner Address** dropdown if the business address is used for the contact person. Otherwise, enter the mailing address in the **Address** field, select the country from the **Country** dropdown, and enter the city in the **City** field, the state in the **State** field and the ZIP Code in the **ZIP Code** field within the Maintain Contact Address Details section. The Confirm Address page displays.

s	kip to: Content Footer Welcome Sylvia Customize Help Contact Us CalPERS On-Line Log out June 16, 201
my CalPERS	
Home Profile Repo	rting Person Information Other Organizations
Summary Agreement	S
Common Tasks 🕘	Participant Name: Laura Tester CalPERS ID: 3047155671
Menu 💿	Confirm Address
Search	We have validated your address against U.S. postal records and no results have been found. Please select the correct
Contacts	address and cick Confirm to return to the address page.
Relationships	
Findings	Entered Address: @ 1100 Fuller St, Visalia, CA 95432
Divisions	U.S. Postal Service Matches:
Capture Interaction Information	Confirm

Step 11: my|CalPERS searches for matching U.S. postal records and displays the results within the Confirm Address section. In this example, no results were found. Select the **Entered Address** radio button and then the **Confirm** button.

Primary	Phone Type	Phone Number	Extension	International	
0	Home				
0	Cellular				
O	Other				
0	Work				
0	TYY	1			
0	FAX		1		
Primary		Email		Undeliverable Date	
0					
0					
0					
0					

Step 12: Within the Maintain Communication Details section, select the radio button associated with the appropriate primary phone type and enter the phone number and extension in the **Phone Number** and **Extension** fields. Use the **International** checkbox to indicate if it is an International phone number. Select the radio button associated with the primary email address and enter the email address.

Here is how the *Maintain Contact Details* page might look when completed:

Home Profile Repo	rting Pers	on Informat	tion Oth	er Organizatio	ons				
Summary Agreement		on inonia		organizatio					
Common Tasks					c-tere				_
Menu 💿	Participar	nt Name: L	aura Test	er	CalPER	S ID: 304	7155671	-Required I	Field
Search	() Malata	ain Contact	Datalle						
Contacts				is a Primary	Contact, you	are specif	ving that they	should be reached for communication	n
Relationships	purposes.							d upon contact type - contact typ	
Findings	detail.	Conta	t Type:*	Canaral				Contact Type Detail:* Ma	
Divisions Capture Interaction		Deactivati		General	-	-		contact type betan ma	12
Information	Programs Supported: V CalPERS								
	Entity:* Person CalPERS ID:					-	-		
			chuty.		fual Name: L	aura Test	ber		
				Other:					
				Allow Sys	tem Access			System Access	
					tact Viewable	to Other	Organizations		
		7 Primary Contact							
	Mainta	Maintain Preferred Communication Details							
		ed Commu							
	Maintain Contact Address Details								
	ez Hainte	Existing	Business	etens	_				-
		Parmer	tooress ;						
		^	ddress:*	1100 Fuller St		_			
						-			
		c	ountry:*	United States		1.	1		
			City:*	Vișalia					
			State:	California					
		Zi	p Code:*	95432					
	Maintain Contact Communication Details								
	Malata	In Contact							-
		Phone			A CONTRACTOR	Internet	distant.		
	Primary	Phone Type		Number	Extension				
	Primary	Phone Type Home			A CONTRACTOR	E	1		
	Primary	Phone Type Home Cellular			A CONTRACTOR	1	1		
	Primary	Phone Type Home Cellular Other	Phone	Number	A CONTRACTOR				
	Primary	Phone Type Home Cellular Other Work		Number	A CONTRACTOR				
	Primary	Phone Type Home Cellular Other	Phone	Number	A CONTRACTOR	1000			
	Primary	Phone Type Home Cellular Other Work TYY	Phone	Number	A CONTRACTOR				
	Primary	Phone Type Home Cellular Other Work TYY	Phone	Number 14	A CONTRACTOR	Unde	liverable		
	Primary	Phone Type Home Cellular Other Work TYY FAX	Phone 209888432	Number	A CONTRACTOR	Unde			
	Primary	Phone Type Home Cellular Other Work TYY	Phone 209888432	Number 14	A CONTRACTOR	Unde	liverable		
	Primary	Phone Type Home Cellular Other Work TYY FAX	Phone 209888432	Number 14	A CONTRACTOR	Unde	liverable		

Step 13: Select the **System Access** link within the Maintain Contact Details section.

The System Access page displays.

Home Profile Repor	ting Pe	rson Information Other Organiza	ations				
Summary Agreements							
	Participa	ant Name: Laura Tester	CalPERS ID: 3047155671				
enu 💿	0	A CONTRACTOR OF THE OWNER	"Required Field				
iearch Iontacts		ned Username Contact Name: Laura Tester	the second section of a second line and a provide				
elationships	Conta	ct Username:* laurat	Usernames must consist of 6-35 characters with no spaces. Valid				
indings			characters are numbers, letters, and the following special characters: a signs (@), periods (.), underscores (_), and hyphens (-). Usernames				
apture Interaction			must also start with a letter. Usernames are not case sensitive.				
	() Assi						
	Select A	Role					
		Authorized Personal Loan Re	presentative				
		Business Partner AP/Billing RO					
	12	Business Partner Direct Authonization					
		Business Partner Employer Inquiry					
	23	Business Partner Employer Maintenance					
	10	Business Partner Health Contracts					
	10	Business Partner Health Enrollment					
	0	Business Partner Health Enrollment RO					
		Business Partner IME/JA					
		Business Partner Limited					
	13	Business Partner PA Billing					
	13	Business Partner Payroll					
		Business Partner Payroll RO					
		Business Partner Reciprocal					
	0	Business Partner Retirement	Contracts				
	11	Business Partner Retirement	Enrollment				
	13	Business Partner Retirement	Enrolment RO				
	11	Business Partner SCP Certific	cation				
	171	Business Partner Supplement					
		Carrier					
	W	System Access Administrato	*				
	Select Al						

Step 14: Enter the assigned username for the new contact person in the **Contact Username** field, select the appropriate checkbox(es) in the Assign Roles section, and then select the **Save** button. Note that there are only two roles for direct authorization vendor organizations: Business Partner Direct Authorization and System Access Administrator. Some direct authorization vendor organizations are also CalPERS-contracting employers, so other roles may be appropriate for these organizations.

The *Password Maintenance* page displays. The username just created is assigned a temporary password.

. Si	kip to: Content Footer Welcome Sylvia Customize Help Contact Us CalPERS On-Line Log out June 16, 2011
my CalPERS	
Home Profile Repo	rting Person Information Other Organizations
Summary Agreements	
Common Tasks	Participant Name: Laura Tester CalPERS ID: 3047155671
Menu 💿	Password Maintenance
Search	The following Username has been created and assigned the displayed temporary password. This password will expire in 30
Contacts	days:
Relationships	Username: laurat
Findings	Password: pg8he-gsQ
Divisions	
Capture Interaction Information	Continue

Step 15: <u>Be sure to capture this username and temporary password</u>. It is the only time the temporary password will be made available. Note that the temporary password will expire in 30 days.

Select the **Continue** button.

The Maintain Contact Details page displays.

my CalPERS	kip to: Cont	ent Foo	ter Weld	come Sylvia	Customize	Help Contact	Us CalPEF	S On-Line Log out	June 16, 2011		
Home Profile Repo	rting Pers	on Informa	ation Oth	er Organizat	ions						
Summary Agreements	5										
Common Tasks 🙆 Menu 📀	Participar	nt Name:	Laura Test	er	CalPER	S ID: 3047155	671		*Required Fields		
Search	• Mainta	In Control	Detalle						Negalied Ficial		
Contacts Relationships Findings	By indicat	ing that th	his contact					ould be reached for upon contact type			
Divisions			ct Type:*	General				Contact Type	Detail: Main 💌		
Capture Interaction Information			tion Date:		-						
D BOO BEDOON	Pro	ograms S	upported:	V CalPERS							
	Entity:				n CalPERS ID:	i					
					dual Name: 1	aura Tester					
				Other							
				Make Co	stem Access ntact Viewable	to Other Orga	nizations	System Access			
	O Maintain Preferred Communication Details										
	Preferre	Preferred Communication:									
	Maintain Contact Address Existing Business Partner Address: Address:			Mana In	R	_					
	Country:			United State	6						
				Visalia							
			State:	California							
		2	ip Code:	95432							
	0	-		and some of the	_				_		
	1 Mainta	100 C 20 C 100 C	t Communic	ation Detail	5	-	-				
	Primary	Phone Type	Phone	Number	Extension	Internationa	h.				
	0	Home				0					
	Ð	Cellular				10					
	-0-	Other				5					
		Work:	209888433	24							
	-0	TYY		_		12					
	0	FAX				10					
	Primary			Email		Undeliver					
		laura@davo	rg.com				100				
	0										
	10					1					
	10:						-				
	Save Clea	6									

Step 16: Review the entire page to verify that the contact information entered is accurate and select the **Save** button.

The new contact person has been added successfully and now displays within the Contacts section.

my CalPERS	ting Person	t Footer Welc		omize Help Cont	act Us CalPERS On-Lir	ne Log out	June 16, 2011
Common Tasks	Participant	Name: Laura Teste	r -	CalPERS ID: 3047	155671		
Menu 💿	Contacts	to Division					
Search	Contacts	to Display	Active: Yes				
Contacts			Program: All				
Relationships	(Recent)		the second second				
Findings	Display						
Divisions							
Capture Interaction	Contacts						
Information	Contact	Contact Type Detail	Program	Name	Phone Number	Active	Primary
-	General	Main	CalPERS	Laura Tester	(209)888-4324	¥.	Y

Be sure to provide the username and temporary password to the new contact person so they can log in to establish their new password and responses to security questions.

Business Partner Contact Roles

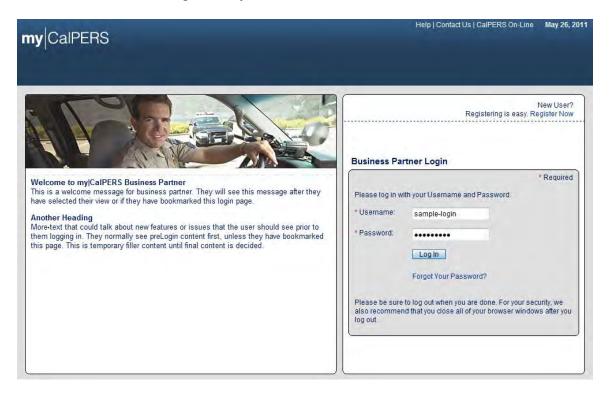
Modify business partner contact roles

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the Business Partner radio button and then the Continue button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

	Skip to: Content I	ooter Wel	come Bobbie Customize H	lelp Contact Us	CalPERS On-Lin	ne Log out	May 26, 2011
my CalPERS	5						
Home Profile Rep	orting Person Info	rmation Othe	er Organizations				
My Home							
Common Tasks	💿 My Cases			View	More Actions»		
Menu 💿		ise Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

my CalPERS		oter Welcom	ie Laura Cu	stomize Help	Contact Us	CalPERS On-Line	Log out June 27, 20					
	orting Person Informa	ation Other O	rganizations									
Summary Agreement	ts											
Common Tasks 🛛 🔕	Summary		0101010101010101010101010									
lenu 💿 Summary	Profile											
Contacts	Federal Tax	S ID: 30471556 C ID: Ory: Direct Aut		Status: Active Name: Direct Authorization Organization ganization Credit Union								
	Addresses Phys Communication In				M	lailing:						
	Preferred Comm Prima	unication: ary Email:		Primary Phone Number:								
	Contacts Add New	v					View More Action					
	Contact Type	Contact Ty	ype Detail	Progr	am Nam	5	Phone Number					
	General	Main		CalPER		xample	(916)789-3344					
	<u>General</u> <u>General</u>	Main Main		CalPEF CalPEF		Tester Redwood	(209)888-4324					
	💿 Business Relatio	nships Add New	I	notalaintototototototototototo		uninteletetetetetetetetetetetetetetetetetet						
	Name		CalPERS II) P	rogram	Service Provided	Status					
	No results found.											
	Contracts/Agree	ements										
	Contract/Agreem		Status	Date Status Changed	Effective Date	Termination Date	Related Parties					
	Direct Authorization	n Agreement	Active	04/01/1980	04/01/1980							

To modify a contact person's business partner contact role, select the link (**General** in this example) associated with the contact person ("Laura Tester" in this example) under the Contact Type column within the Contacts section.

my CalPERS	kip to: Cont	tent Foo	ter Weld	come Sylvia	Customize	Help	Contact Us CalPEI	RS On-Line Log out	June 16, 2011		
Home Profile Repo		on Informa	ation Oth	er Organizati	ons						
Summary Agreements											
Common Tasks 🕑 Menu 💿	Participar	nt Name:	Laura Test	er	CalPER	IS ID:	3047155671		-Required Fields		
Search	Mainta	in Contac	Details								
Contacts Relationships	Maintain Contact Details By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type – contact type detail.										
Findings Divisions	chi chin.	Conta	ct Type:	General				Contact Type	Detail: Main 💌		
Capture Interaction	0	Deactiva	tion Date:			-					
Information	Pro	ograms S	upported:	V CalPERS							
			Entity:*	Perso	n CalPERS ID:	-					
					dual Name: 1	aura 1	Tester				
				Other							
				Allow Sys	her Organizations	System Access					
		Maintain Preferred Communication Details Preferred Communication:									
	Maintain Contact Address Details Existing Business Inc.										
	Partner Address :			reone 🔻							
			Address:*	1100 Fuller S	t	_					
	Country:*			United States			1				
				• Vișalia							
			State:	California							
		7	ip Code:*	95432							
	• Mainta	in Contac	Communie	cation Details							
	Primary	Phone		Number	Extension	Inte	mational				
	D	Home				_					
	0	Cellular	_			-	10				
	-0-	Other	_		_	-	10				
		Work	20988843	24	-		0				
	-0-	TYY					8				
	101	FAX	-				10				
	Primary			Email		U	ndeliverable Date				
		laura@davo	rg.com								
	10						-				
	10.						-				
	10						-				
	Read Inc.	2									
	Save Clea	9									

The Maintain Contact Details page for "Laura Tester" displays.

You can modify the information within the Maintain Contact Details section, including the **Contact Type** and **Contact Type Detail** dropdowns, the **Deactivation Date** field and the **Programs Supported** checkboxes.

If applicable, you can enter a business partner contact deactivation date in the **Deactivation Date** field.

my CalPERS	kip to: Content Footer Welc	ome Edward Customize Help Cont	act Us CalPERS On-Line Log out May 26, 2011								
Home Profile Repor	rting Person Information Othe	er Organizations									
Summary Agreements	5										
Common Tasks (a) Menu (c)	Name: Direct Authorization Organization Credit Union	CalPERS ID: 3047155671	*D-mind Field								
Summary	*Required Fields										
Contacts	👽 Maintain Contact Details										
			ng that they should be reached for communication contacts based upon contact type - contact type								
	Contact Type:*	General 🔹	Contact Type Detail:* Main 👻								
	Deactivation Date:										
	Programs Supported:	🖉 Calendar - Windows In 🗖 🔲 💌									
	Entity:*	about:blank									
		< May > < 2011 >	t								
		SMTWTFS									
		1 2 3 4 5 6 7 8 9 10 11 12 13 14	nizations								
		15 16 17 18 19 20 21									
		22 23 24 25 26 27 28									
	💿 Maintain Preferred Commun	29 30 31 1 2 3 4									
	Preferred Communication:	5 6 7 8 9 10 11 Today									
	💿 Maintain Contact Address D										
	Existing Business	🌍 Internet Protec 🖓 🔻 🍕 100% 🔻									
	Partner Address :		-								
	Address:*										
	Country:*	United States									
	City:*										

Enter a date in the **Deactivation Date** field or select the calendar icon to select the date. Since this is an optional field, we will go back to the previous screen to complete the modify contact role activity.

The Maintain Contact Details page displays.

my CalPERS	kip to: Conte	nt Foo	ter Weld	come Sylvia	Customize	Help C	Contact Us CalPE	RS On-Line Log out June 1	16, 2011	
Home Profile Repor		n Informa	ation Oth	er Organizati	ons					
<u>Summary</u> Agreements										
Common Tasks (A) Menu (2)	Participant	Name:	Laura Test	er	CalPER	ID: 30	047155671	-Partie	red Fields	
COLUMN E		-			_			Nequi	red Fields	
Search Contacts	Maintain Contact Details By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication									
Relationships Findings								I upon contact type - contact		
Divisions		Conta	ct Type:*	General				Contact Type Detail:*	Main 💌	
Capture Interaction	D	eactival	tion Date:		-					
Information	Pro	grams Se	upported:	V CalPERS						
	Entity:* Person CalPERS ID:									
				Individ	dual Name: L	aura Te	ester			
				Other	:					
				Allow Sys	stem Access			System Access		
		Make Contact Viewable to Other Organizations								
				Primary C	Contact					
	Maintain Preferred Communication Details									
			unication:							
	🕐 Maintain Contact Address Dotails									
	© Maintain Contact Address Details Existing Business									
			Address :	None 👻						
			Address:*	1100 Fuller S	a.					
				_						
						_	-			
			100 C 100	United States			-			
				Visalia	_	121				
		,	ip Code:	California						
			ip coue.	37452						
	Maintai	n Contact	Communic	ation Details	5					
		Phone		Number	Extension	Interr	national		-	
		Home								
	0	Cellular			_	-	0			
	0	Other			_	-	6			
		Work	209888432	24	-	-	n i			
	-0	TYY					8			
	D	FAX	-		-		0			
	Primary			Email		Un	deliverable Date			
	- 10 C	ura@davo	a com	100						
	0	- British				-	-			
	0 -	_				-	-			
							-			
						-				
	Save Clear									

Select the System Access link within the Maintain Contact Details section.

The Assigned Username page for "Laura Tester" displays.

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The system access administrator can reset a user's password by selecting the **Reset Password** link, or they may prevent a user from accessing my|CalPERS by selecting the **Prevent the user from accessing the site** checkbox to remove access privileges for a specific user within the Assigned Username section.

Note the previously selected **Role** checkboxes within the Assign Roles section, Business Partner Direct Authorization and System Access Administrator. These are the only roles available for direct authorization vendor organizations.

nmary Agreements								
	ticipant Name: Laura Tester	CalPERS ID: 3047155671						
u 🛈	A REAL PROPERTY AND A REAL	"Required Field						
tacts	Assigned Username Contact Name: Laura Tester							
	ontact Username:* laurat	Usernames must consist of 6-35 characters with no spaces. Valid characters are numbers, letters, and the following special characters: a						
sions		characters are numbers, letters, and the tollowing special characters: a signs (@), periods (.), underscores (_), and hyphens (-). Usernames must also start with a letter. Usernames are not case sensitive.						
ture Interaction								
	Assign Roles							
Suite	Role							
15	Authorized Personal Loan Representative							
	Business Partner AP/Billing							
1	Business Partner AP/Billing R	Business Partner AP/Billing RO						
2	Business Partner Direct Auth	onzation						
11	Business Partner Employer In	iquiry						
	Business Partner Employer M	aintenance						
1	Business Partner Health Con	racts						
	Business Partner Health Enro	liment						
10	Business Partner Health Enro	ilment RO						
	Business Partner IME/JA	Business Partner IME/JA						
1	Business Partner Limited	Business Partner Limited						
	Business Partner PA Billing							
E	Business Partner Payroll							
	Business Partner Payroll RO							
	Business Partner Reciprocal							
0	Business Partner Retirement	Contracts						
1	Business Partner Retirement	Enroliment						
1	Business Partner Retirement	Enrollment RO						
1								
7	Business Partner Supplemental Income Plan							
10	Carrier							
14	System Access Administrato							

Select the appropriate system access administrator checkbox(es) and then select the **Save** button to update the business partner contact role.

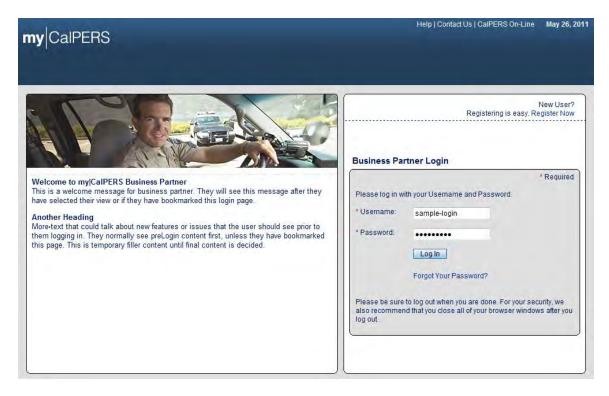
Unlock a business partner contact account (SAA Only)

Your system access administrator can lock or unlock your account. Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the Business Partner radio button and then the Continue button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPERS On-Line Log out May 26, 2011 May CalPERS Home Profile Reporting Person Information Other Organizations										
My Home	rung Person		other Organizations							
Common Tasks	💿 My Cases				View	More Actions»				
Menu 🕥	Case ID	Case Title	Case Type		Program	Status				
Person Search	731879		Initiate DA Agre	eement		Closed				
Change Password										
Change Challenge Questions										

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

and the second		Welcome Laura Cu	istomize Help	Contact Us C	CalPERS On-Line	Log out June 27, 2011					
my CalPERS											
Home Profile Repo	rting Person Information	Other Organizations									
Summary Agreement	s										
Common Tasks 🛛 🙆											
Menu 🔽	Summary										
Summary	Profile					Request Update					
Contacts	CalPERS ID:	CalPERS ID: 3047155671 Status: Active									
	Federal Tax ID:	Federal Tax ID: Name: Direct Authorization Organization									
	Category:	Direct Authorization C	rganization		Credit Uni	on					
	Addresses										
	Physical:	<u>ailing:</u>									
	Communication Inform										
	Preferred Communic										
	Primary I	Email:	Prim	ary Phone Nu	mber:						
	O Contacts Add New					View More Actions»					
		Contact Type Detail	Progra	m Name	;	Phone Number					
		Main	CalPERS		ample	(916)789-3344					
		Main	CalPERS		Tester	(209)888-4324					
	<u>General</u>	Main	CalPERS	6 Laura	Redwood						
	💿 Business Relationshi	DS Add New									
	Name	CalPERS I	D Pr	ogram	Service Provided	Status					
	No results found.										
	• Contracts/Agreemen	its									
	Contract/Agreement	Type Status	Date Status Changed	Effective Date	Termination Date	Related Parties					
	Direct Authorization Ag	reement Active	04/01/1980	04/01/1980							

To unlock a contact"s account, select the link (**General** in this example) under the Contact Type column associated with the contact person ("Joe Example" in this example) within the Contacts section.

The *Maintain Contact Details* page for "Joe Example" displays.

5	Skip to: Cont	tent Footer	Welcome Laura	Customize	Help Contact Us CalP	ERS On-Line Log out	June 27, 2011
my CalPERS							
				_			
Home Profile Repor		on Information	Other Organizatio	ons			
Summary Agreements							
Common Tasks (a) Menu (c)	Name: Dir	ect Authorizati dit Union	ion Organization Cal	PERS ID: 3047	7155671		*Required Fields
Menu 💽 Summary			-11-				Required Fields
Contacts		in Contact Det		Contact you :	are specifying that they	should be reached for co	mmunication
						ed upon contact type - c	
			ype:* General		•	Contact Type De	etail:* Main 💌
		Deactivation					
	Pro	grams Suppo	orted: 🔽 CalPERS				
		En		CalPERS ID:			
			Individent of the individent of the individual of the individua	iual Name: J	oe Example		
			Allow Sys			System Access	
					to Other Organizations	System Access	
			Primary C	ontact			
		in Droforrod C	communication Deta	ile			
		d Communica		115			
	V Maintai	in Contact Add Existing Bus	iress Details				
		Partier Auu	1655.				
		Addr	'ess:*		_		
					_		
		Cour	ntry:* United States		•		
			City:*				
		St	tate:* California		•		
		Zip C	ode:* -				
	💿 Mainta	in Communica	tion Details				
	Primary	Phone	Phone Number	Extension	International		
	0	Type Home					
	0	Cellular					
	0	Other					
	۲	Work 91	67893344				
	O	TYY					
	0	FAX					
					Undeliverable		
	Primary		Email		Date		
	_	e@davorg.com					
	©						
	Save Clear]					

Select the System Access link within the Maintain Contact Details section.

The Assigned Username page for "Joe Example" displays.

	Skip to: Content Footer Welcome Laura Customize Help Contact Us CalPERS On-Line Log out June 27, 2011
my CalPERS	
Home Profile Rep	orting Person Information Other Organizations
Summary Agreemen	ts
Common Tasks	Direct Authorization Organization
	Name: Dredit Validor Adultor organization CalPERS ID: 3047155671
Menu 🔽	
Jiena 🔍	🖸 Assigned Username
Summary	Reset Password
Contacts	
contacts	Contact Name: Joe Example
	Contact Username: jexample
	Prevent the user from accessing the site

You can lock or unlock a contact person"s account by selecting or de-selecting the **Prevent the user from accessing the site** checkbox.

The *Maintain Contact Details* page for "Joe Example" displays.

and the second of the second se	kip to: Conte	nt Footer	Welcome Laura	Customize	Help Contact Us Ca	IPERS On-Line Log out June 27, 2011
my CalPERS						
Home Profile Repor	ting Person	Information	Other Organizat	ions		
Summary Agreements	;					
Common Tasks 🛛 🔕	Name:	ct Authorization	Organization Ca	IPERS ID: 304	7155671	
Menu 💿	Cred	it Union			10007.	*Required Fields
Summary	💿 Maintain	Contact Detail	5			
Contacts						y should be reached for communication sed upon contact type - contact type
		Contact Typ	e:* General		•	Contact Type Detail:* Main 💌
		eactivation Da				
	Prog	rams Support	ed: 🔽 CalPERS	5		
		Entit		on CalPERS ID:		
				idual Name: J	oe Example	
			O Other			
				stem Access	to Other Organizations	System Access
			Primary (to other organizations	
	-		munication Det	ails		
	Preferred	Communicati	on: 🔻			
	💿 Maintain	Contact Addre	ss Details			
	E	xisting Busine	None 🔻			
		Addres				
			y:* United State	s		
		Cit			_	
		Stat Zip Cod	e:* California		•	
		Zip Cou	8.*			
	👽 Maintain	Communicatio	n Details			
		Phone Ph	one Number	Extension	International	
		Type ''' Home				
		Cellular		1		
	0	Other		1		
	۲	Work 91678	93344	1		
	O	ТҮҮ				
	O	FAX				
	Primary		Email		Undeliverable Date	
	joe	@davorg.com				
	0					
	0					
	O					
	Save Clear					

Review the page to ensure that the information is accurate and then select the **Save** button.

The *Contacts to Display* page displays. Note that contact person "Joe Example" is now listed as an active contact as indicated by the "Y" under the Active column within the Contacts section.

s my CalPERS			come Laura Cu r Organizations	stomize Help Conta 	ct Us CalPERS On-Lin	e Log out	June 27, 2011
Summary Agreements							
Common Tasks	Name: Direc	ct Authorization Orga it Union	anization CalPER	S ID: 3047155671			
Menu 👽	😨 Contacts	to Display					
Summary Contacts			Active: Yes Program: All	▼ ▼			
	Display						
	Contacts	Add New					
	<u>Contact</u> <u>Type</u>	Contact Type Detail	<u>Program</u>	<u>Name</u>	Phone Number	Active	<u>Primary</u>
	<u>General</u>	Main	CalPERS	Laura Redwood		Y	Y
	General	Main	CalPERS	Joe Example	(916)789-3344	Y	N
	General	Main	CalPERS	Laura Tester	(209)888-4324	Y	N

Reset a business partner contact's password (SAA Only)

Your system access administrator can reset your password. Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

myCalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and select the **Accept** button.

The my|CalPERS *Hom*e page displays.

my CalPERS		nt Footer	Welcome Bobbie Cu	ustomize Help	Contact Us	CalPERS On-L	ine Log out	May 26, 2011
Home Profile Rep My Home	orting Person	Information	Other Organizations					
Common Tasks 🙆	🗑 My Cases				View	lore Actions»		
Menu 💿	Case ID	, Case Title	Case Type		Program	Status		
Person Search	731879		Initiate DA Agre	ement		Closed		
Change Password								
Change Password								

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

my CalPERS	Skip to: Content Footer W	elcome Laura Cu	ıstomize Help	Contact Us (CalPERS On-Line	Log out June 27, 2011
Home Profile Repo	rting Person Information Ot	her Organizations)			
Summary Agreement	S					
Common Tasks 🛛 🔕	Summary					
Menu 💿	Profile					
Summary Contacts	CalPERS ID: 304 Federal Tax ID: Category: Dire Addresses Physical: Communication Informatio Preferred Communication Primary Email	ct Authorization O n			Credit Uni Iailing:	Request Update
				•		
	Contacts Add New Contact Type Cont	act Type Detail	Progra	am Name		View More Actions» Phone Number
	General Main	act Type Detail	CalPER		a xample	(916)789-3344
	General Main		CalPER		(209)888-4324	
	<u>General</u> Main		CalPER	S Laura	Redwood	
	💿 Business Relationships 🔺	dd New				
	Name	CalPERS I	D P	rogram	Service Provided	Status
	No results found.					
	• Contracts/Agreements					
	Contract/Agreement Type	e Status	Date Status Changed	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreeme	ent Active	04/01/1980	04/01/1980		

To reset a contact person's password, select the link (**General** in this example) under the Contact Type column associated with the contact person ("Laura Tester" in this example) under the Contact Type column within the Contacts section.

	kip to: Cont	tent Foo	ter Weld	come Sylvia	Customize	Help	Contact Us CalPE	RS On-Line Log out	June 16, 2011		
Home Profile Repo		on Informa	ation Oth	er Organizati	ons						
Summary Agreements	5										
Common Tasks	Participar	nt Name:	Laura Test	er	CalPER	S ID:	3047155671				
Menu 💿									"Required Fields		
Search	Mainta	in Contac	Details								
Contacts Relationships	purposes.	By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type detail.									
Findings	Contact Type: General							Contact Tune	Detail: Main *		
Divisions Capture Interaction			tion Date:	General	-			contact type	veran main [*]		
Information				2 CalPERS							
	-	ograms a			n CalPERS ID:	-					
			Entity:*		dual Name: 1	aura T	Testor				
				Other							
				Allow Sve	stem Access			System Access			
						to Oth	her Organizations				
			_	Primary C	Contact	100					
	(C) and all and a	Maintain Preferred Communication Details									
			unication:		115						
	Maintain Contact Address Details Existing Business None										
	Partner Address : None +										
	Address:* 1100 Fuller St										
				_		_					
			City:	United States	1	-	-				
				California		•					
		7	ip Code:	and the second s		121					
	💿 Mainta	in Contac	Communic	ation Details	5						
	Primary	Phone	Phone	Number	Extension	Inte	rnational				
		Home									
	0	Cellular			_	-	E.				
	-0-	Other	_		_		10				
		Work	209888432	24	-		0				
	-0.	TYY			-		0				
	101	FAX			-		0				
	Primary			Email		U	ndeliverable Date				
		laura@davo	rg.com				-				
	0					-	-				
	0						-				
	10.						-				
	-	_				-					
	Save Clea	r,									

The Maintain Contact Details page for "Laura Tester" displays.

Select the System Access link within the Maintain Contact Details section.

The Assigned Username page for "Laura Tester" displays.



Select the **Reset Password** link within the Assigned Username section.

The *Password Maintenance* page displays. my|CalPERS assigns a temporary password.

SI	kip to: Content Footer Welcome Sylvia Customize Help Contact Us CalPERS On-Line Log out June 16, 2011
my CalPERS	
Home Profile Repo	rting Person Information Other Organizations
Summary Agreements	5
Common Tasks	Participant Name: Laura Tester CalPERS ID: 3047155671
Menu 💿	© Password Maintenance
Search	The following Username has been created and assigned the displayed temporary password. This password will expire in 30
Contacts	days:
Relationships	Username: laurat
Findings	Password: pq8he-qsQ
Divisions	
Capture Interaction Information	Continue

<u>Be sure to capture the temporary password</u>. It is the only time the temporary password will be made available. Note that the temporary password will expire in 30 days.

Select the **Continue** button.

my CalPERS	kip to: Conte	nt Foot	er Welc	ome Sylvia	Customize	Help Co	ontact Us CalPEF	RS On-Line Log out	June 16, 2011		
Home Profile Repo		Toforma	tion Oth	er Organizati	000						
Summary Agreements		1 Informa		er organizati							
Common Tasks					0-1050						
Menu 💿	Participant	Name: I	Laura Teste	er	CalPER	(S ID; 30-	47155671		Required Fields		
Search	Maintair	Contact	Details						-		
Contacts	By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type - contact type										
Relationships	purposes. T detail.	hey will	also receive	e automated	corresponden	ce sent t	o contacts based	upon contact type -	contact type		
Findings Divisions	Contact Type Deactivation Dat			General				Contact Type	Detail: Main 💌		
Capture Interaction				—							
Information	Prog	grams Su	pported:	V CalPERS							
			Entity:*	Perso	n CalPERS ID:	-					
				and the set	dual Name: 1	aura Tes	iber				
				Other							
					tem Access			System Access			
				Make Cor Primary C		to Other	Organizations				
	-			er runnert e	or is and a						
	Maintain Preferred Communication Details										
	Preferred Communication:										
	Maintain Contact Address Details										
	Existing Business None *										
				1100 Fuller S	t						
		(and the second second	United States	_	1	-				
			City:* State:*		_						
		7	ip Code:	statements of the local division of the		N.					
	_	-				_					
	💿 Maintair	n Contact	Communic	ation Details							
	Primary	Phone Type	Phone	Number	Extension	Interna	ational				
	5	Home					8				
	0	Cellular				1.1	5				
	0	Other									
		Work	209888432	14			2				
	-0	TYY		_			9				
	- P	FAX				1.1	9				
	Carlo			1.16		Und	eliverable				
	Primary			Email		0.10	Date				
		ura@davor	g.com	_			-				
		_				-	-				
	8					-					
						-	1.00				
	Save Clear										

The Maintain Contact Details page for "Laura Tester" displays.

Select the **Save** button.

The *Contacts to Display* page displays and lists your organization"s updated contact within the Contacts section.

	Skip to: Conten	t Footer V	Velcome Laura Cust	tomize Help Con	tact Us CalPERS On-Line	Log out	June 27, 2011
my CalPERS							
Home Profile Repo	orting Person I	Information O	ther Organizations				
Summary Agreement	S						
Common Tasks	Namo	: Authorization O t Union	rganization CalPERS	ID: 3047155671			
Menu 👽							
Summary	🖸 Contacts t	to Display		7			
			Active: Yes -	·			
Contacts			Program: All	-			
	Display						
	Display						
	🛛 🛈 Contacts						
	<u>Contact</u> <u>Type</u>	Contact Type Detail	<u>Program</u>	<u>Name</u>	Phone Number	<u>Active</u>	<u>Primary</u>
	<u>General</u>	Main	CalPERS	Laura Redwood		Y	Y
	General	Main	CalPERS	Joe Example	(916)789-3344	Y	N
	<u>General</u>	Main	CalPERS	Laura Tester	(209)888-4324	Y	N

The business partner contact"s password has been reset successfully.

my|CalPERS Agreement Administration and Deduction Processing for Direct Authorization Vendors

Part 1: Direct Authorization Agreement Administration

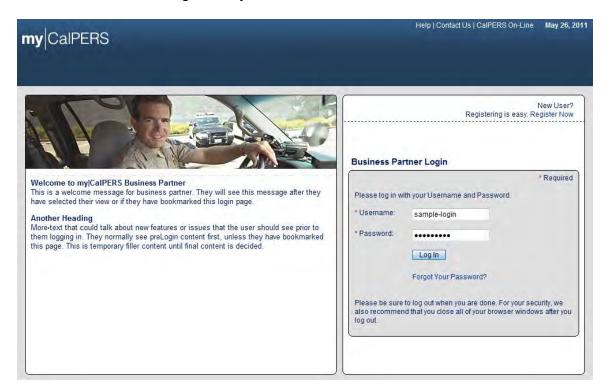
Setup a New Direct Authorization Agreement

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Review the conditions of use statement and then select the **Accept** button.

The my|CalPERS *Home* page displays.

my CalPERS		t Footer ١	Welcome Bobbie Customi	ze Help Contact Us	CalPERS On-L	ine Log out	May 26, 2011
Home Profile Repo	rting Person	Information (Other Organizations				
My Home							
Common Tasks 🛛 🔕	💿 My Cases			View	More Actions»		
Menu 💿	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge Questions							

Select the **Profile** global navigation tab.

The Business Partner Profile page displays.

s my CalPERS	kip to: Content Footer Welco	ome Bobbie Customize	e Help Contac	t Us CalPERS On-Line	Log out May 26, 2011		
		Organizations					
Common Tasks 🔕	💿 Summary						
Menu 📀	Profile						
Summary Contacts	CalPERS ID: 449908 Federal Tax ID: 1234567 Category: Direct /	-89	ion	Status: Active Name: Direct Aut Credit Un			
	Category: Direct Authorization Organization Addresses 49 Mailing Street, Sacramento, CA Physical: 84567 Communication Information Preferred Communication: Email Primary Email: robert@daocu.org Primary Phone Number: 916-789-1111						
	Contacts Add New				View More Actions»		
		Type Detail		lame bert Dillman	Phone Number		
	Business Relationships Add N Name	calPERS ID	Program	Service Provided	Status		
	No results found.			Provided			
	Contracts/Agreements Contract/Agreement Type	Status Date Status Changed		ermination Related ate Parties			
	Direct Authorization Agreement	Active 04/01/1978	04/01/1978				

Select the Agreements local navigation tab.

The Agreements page displays.

my CalPERS	kip to: Content Footer V rting Person Information C			Help Contact (Js CalPERS O	n-Line Log out May 26, 2011
Common Tasks 🔕	• Agreements Add New					
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Accident Insurance
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insurance Group

Select the Add New button within the Agreements section title banner.

The Add New Agreement page displays.

my CalPERS	kip to: Content Footer Welcome George Customize Hel	p Contact Us CalPERS On-Line Log out June 15, 2011
Home Profile Repo	rting Person Information Other Organizations	
Summary Agreements	s	
Common Tasks 🛛 🔕		*Required Fields
	Direct Authorization Deductions	
	allow Will the deductions be managed by a Third Party Admin O Yes No	t:* Provide Document Download Coversheet this agreement?*
	Save & Continue	

To setup a direct authorization agreement for the first time, you will need to enter the information as displayed on the Agreements screen.

Enter the appropriate information in the Direct Authorization Information area within the Direct Authorization Deductions section. Note that the red asterisks indicate required fields. This includes selecting the program from the **Program** dropdown ("CalPERS" in this example), the type of deduction from the **Deduction Type** dropdown ("Credit Union Deduction" in this example), the **Please confirm** checkbox, to indicate if "The contract between the organization and your carrier allows for the continuation of coverage into retirement.", and the **Yes** or **No** radio button, to indicate "Will the deductions be managed by a Third Party Administrator (TPA)?" ("No" in this example). Select which organization will submit the deductions for this agreement and which organization will receive the deduction payments ("Sponsor" was selected for both in this example).

To upload the appropriate Charter/Constitution/By-Laws Contract document(s), select the **Provide Document** link.

Skip to: Content Footer Welcome George Customize Help Contact Us CalPERS On-Line Log out J	une 15, 2011
my CalPERS	
Home Profile Reporting Person Information Other Organizations	
Summary Agreements	
Common Tasks 💿 Name: Direct Authorization CalPERS ID: 4499089095	
Credit Union *F	Required Fields
⑦ Submit Documentation	
For faster processing of the required documentation, you can upload documents directly to CalPERS. If a con- generated when you submit, please print the cover sheet and submit it along with the document you are ser CalPERS.	
Document Category: Direct Authorization Agreement	
Document Type:* Charter/Constitution/By-Laws Contract	
Submission Method:* Upload	
Path:* Browse	
Submit	

The Submit Documentation page displays.

Select **Upload from the Submission Method** dropdown. Browse to the appropriate document(s) and select for uploading to my|CalPERS.

The Direct Authorization Deductions section is updated with the information we entered. Note that **Date Constitution/Charter/bylaws Submitted** displays the date we uploaded the document ("6/15/2011" in this example), and a **View Document** link, which may be used to view the document.

Sk	ip to: Content Footer Welcome George Customize Help Contact Us CalPERS On-Line Log out June 15, 2011
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Common Tasks 🛛 🙆	*Required Fields
	⑦ Direct Authorization Deductions
	Direct Authorization Information
	Program:* CalPERS 💌
	Deduction Type:* Credit Union Deduction
	Please confirm:* 🗹 The contract between the organization and your carrier
	allows for the continuation of coverage into retirement.
	Will the deductions be managed by a Third Party Administrator (TPA)?* O Yes
	No No
	Charter/Constitution/By-laws Contract:* Replace Document Download Coversheet Date Constitution/Charter/bylaws Submitted: 06/15/2011 View Document
	Who will submit the Direct Authorization Deductions for this agreement?* Sponsor
	Which organization should receive the deduction payments?:* Sponsor
	Save & Continue

Select the **Save & Continue** button.

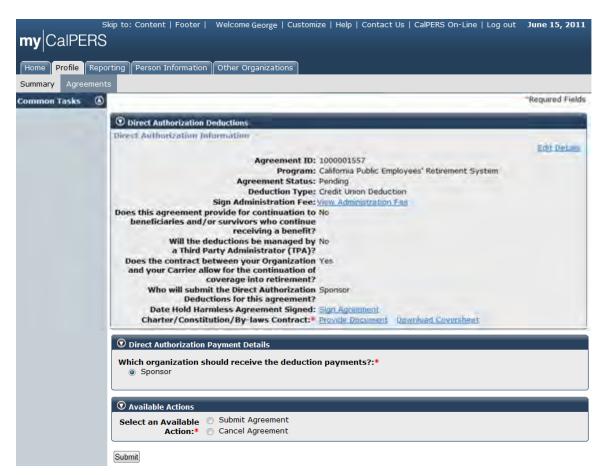
The Direct Authorization Agreement page displays.

my CalPERS	kip to: Content Footer Welcome George Customize Help Contact Us CalPERS On-Line Log out June 15, 2011					
Home Profile Repo	ting Person Information Other Organizations					
Summary Agreements						
Common Tasks 🔕	Name: Direct Authorization Credit CalPERS ID: 4499089095 Union *Required Fields					
	 CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM AGREEMENT RELATING TO DEDUCTIONS FOR "Credit Union Deduction" Direct Authorization Credit Un, hereinafter referred to as Sponsor requests that the Executive Officer approve, as authorized in Section 581 Title 2, California Administrative Code, the filing directly with said Sponsor of authorizations for retirement allowance deductions of dues for the Sponsor charges under Section 21264, Government Code. In consideration of such approval and of forbearance by the Public Employees' Retirement System at the request of the Sponsor of the Board's right to require a waiver from retired persons of any liability for inadvertence or error as a condition of making such deductions and of benefits accruing to the Sponsor as a result of such forbearance, the Sponsor hereby agrees: To supply to the Board statements, in such forms as the Executive Officer may prescribe, of deductions specified in authorizations received by it. To save the State of California, Board of Administration, the Public Employees' Retirement System and its employees harmless from any liability for andy errors in transmitting such dues, or charges except for liability to the Sponsor for money actually withheld but not transmitted. To keep all authorizations received by it available for inspection by authorized representatives of the Board. The Sponsor further agrees that any amounts which have been deducted and paid to the Sponsor and which are refundable under the plan because of the death of a retired persons shall be refunded to the Board for distribution under the Public Employees' Retirement Law. This agreement applies to authorization for deductions from retirement allowance of retirees who are members of the Direct Authorization C					
	♥ e-Signature You Are Not Required to Complete This Transaction Electronically					
	If you <u>do not</u> wish to complete this transaction electronically, please call the CalPERS Customer Contact Center at 1-888- CalPERS (1-888-225-7377) for assistance. The TTY - For Speech & Hearing Impaired number is (916) 795-3240.					
	Electronic Signature Agreement You may complete this transaction electronically by selecting the "Sign Now" button which appears on your computer screen.					
	By completing this transaction electronically, you acknowledge and agree that:					
	(1) This transaction will be conducted by electronic means in accordance with the federal Electronic Signatures in Global and National Commerce Act (E-Sign), 15 U.S.C.A. sections 7001-7031 and the Uniform Electronic Transactions Act, California Civil Code sections 1633.1 to 1633.17;					
	(2) You have read and understand the terms and conditions regarding this transaction;					
	(3) You accept the terms and conditions of this Electronic Signature Agreement and the above terms and conditions regarding this transaction; and					
	(4) Completion of this transaction electronically shall have the same effect as if you signed your name in ink on a piece of paper to accomplish the transaction and CalPERS will store by electronic means an electronic record of this transaction.					
	* I have read and agree to the Electronic Signature Agreement above.					
	Sign Now					

Read the important information related to the direct authorization agreement, including the one-time administration fee and the deductions processing service charge for each deduction.

my|CalPERS uses e-Signature for electronic signatures in lieu of signing hard copy documents. You may submit your new agreement request by reviewing the agreement terms within the e-Signature section, selecting the checkbox associated with the statement "I have read and agree to the Electronic Signature Agreement above," and then selecting the **Sign Now** button. Note that red asterisks indicate required fields. Also note that if you do not wish to submit your new agreement request using e-Signature, there is information within the e-Signature section to instruct you how to submit the new agreement request via hard copy.

The *Direct Authorization Agreement* page displays. my|CalPERS displays the confirmation message "Thank you for submitting your information." Note that the **Agreement Status** indicates "Pending" within the Direct Authorization Deductions section.



Select the **Submit Agreement** radio button within the Available Actions section and then select the **Submit** button.

my|CalPERS displays the confirmation message "Thank you for your initial agreement submission. A CalPERS Contract Analyst will review the submitted information and documentation and will contact you with the next steps to complete your agreement submission." Once a CalPERS Contract Analyst reviews and approves the submitted new agreement, the **Agreement Status** will be updated to "Active".

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	Agreements Add New					
	O Agreements Add New Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties
		Status Active		Effective Date 04/01/1978		Related Parties Atlas Credit Union
	Agreement Type		Provided By			
	Agreement Type Direct Authorization Agreement	Active	Provided By 04/01/1978	04/01/1978		Atlas Credit Union
	Agreement Type Direct Authorization Agreement Direct Authorization Agreement	Active Active	Provided By 04/01/1978 04/01/1978	04/01/1978 04/01/1978		Atlas Credit Union Atlas Credit Union
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Select the **Profile** global navigation tab.

The new direct authorization agreement is displayed as "Work In Progress" under the Status column within the Contracts/Agreements section.

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Summary Agreements	1					
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	CalPERS ID: 4499	089095		Status	s: Active	
	Federal Tax ID:			Name	e: Direct Authori	zation Credit
	Category: Direc	t Authorization Organiza	ition		Union	
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	Preferred Communication:	:				
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	Name	CalPERS ID	Progra	P P	Provided	Status
	No results found.					
	© Contracts/Agreements					
	Contract/Agreement Type	Status	Date Status Changed		Termination Date	Related Parties
	Direct Authorization Agreeme	nt Active	04/01/1978	04/01/1978		zation Credit Union
	Direct Authorization Agreeme	nt Work In Progress	06/15/2011			
	Direct Authorization Agreemen		04/01/1978	04/01/1978		zation Credit Union
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Sign the Hold Harmless agreement

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* screen displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS		nt Footer W	/elcome Bobbie Custon	iize Help Cont	tact Us C	CalPERS On-Line	e Log out	May 26, 2011
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My Home								
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Menu 💿	Case ID	Case Title	Case Type	Prog		Status		
Person Search	731879		Initiate DA Agreemer	t		Closed		
Change Password								
Change Challenge Questions								

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

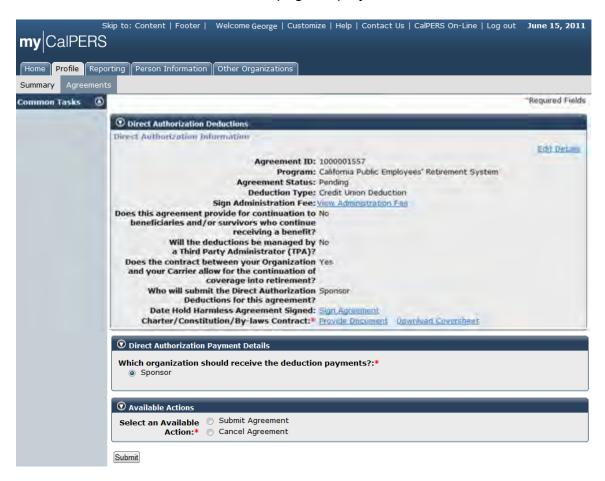
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		ent Type	Status Active			Date	
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	Contract/Agreeme Direct Authorization Direct Authorization Direct Authorization	ent Type Agreement Agreement Agreement	Active Work In Progress Active	Changed 04/01/1978 06/15/2011 04/01/1978	Date 04/01/1978 04/01/1978	Date Direct Authori Direct Authori	Parties ization Credit Union zation Credit Union
	Contract/Agreeme Direct Authorization Direct Authorization	ent Type Agreement Agreement Agreement Agreement	Active Work In Progress	Changed 04/01/1978 06/15/2011	Date 04/01/1978	Date Direct Authori Direct Authori Direct Authori	Parties ization Credit Union

Select the Agreements local navigation tab.

The Agreements page displays.

my CalPERS	kip to: Content Footer ' ting Person Information (Help Contact (Js CalPERS O	n-Line Log out	May 26, 2011
Common Tasks 🛛 🔕	• Agreements Add New						
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Insurance	Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insu	rance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column within the Agreement section for the agreement and organization for which you would like to sign the Hold Harmless Agreement.



The Direct Authorization Deductions page displays.

Select the **Sign Agreement** link to the right of the Date Hold Harmless Agreement Signed within the Direct Authorization Deductions section.

The Hold Harmless Agreement page displays.

	xip to: Content Footer Welcome George Customize Help Contact Us CalPERS On-Line Log out June 15, 2011						
my CalPERS							
Home Profile Repo	rting Person Information Other Organizations						
Summary Agreement	5						
Common Tasks 🔕	Name: Direct Authorization Credit CalPERS ID: 4499089095 Union *Required Fields						
	♥ Hold Harmless Agreement						
	CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM AGREEMENT RELATING TO DEDUCTIONS FOR "Credit Union Deduction"						
	Direct Authorization Credit Un., hereinafter referred to as Sponsor requests that the Executive Officer approve, as authorized in Section 581 Title 2, California Administrative Code, the filing directly with said Sponsor of authorizations for retirement allowance deductions of dues for the Sponsor charges under Section 21264, Government Code. In consideration of such approval and of forbearance by the Public Employees' Retirement System at the request of the Sponsor of the Board's right to require a waiver from retired persons of any liability for inadvertence or error as a condition of making such deductions and of benefits accruing to the Sponsor as a result of such forbearance, the Sponsor hereby agrees:						
	1. To supply to the Board statements, in such forms as the Executive Officer may prescribe, of deductions specified in authorizations received by it.						
	2. To save the State of California, Board of Administration, the Public Employees' Retirement System and its employees harmless from any liability for any errors in transmitting such dues, or charges except for liability to the Sponsor for money actually withheld but not transmitted.						
	3. To keep all authorizations received by it available for inspection by authorized representatives of the Board.						
	The Sponsor further agrees that any amounts which have been deducted and paid to the Sponsor and which are refundable under the plan because of the death of a retired person shall be refunded to the Board for distribution under the Public Employees' Retirement Law.						
	This agreement applies to authorization for deductions from retirement allowance of retirees who are members of the Direct Authorization Credit Union.						
	This agreement applies to the California Public Employees' Retirement System program.						
	By checking this box and clicking the Sign Now button, I am agreeing to conduct business electronically with the State California and the California Public Retirement System on 06/07/2011.						
	* I understand that transactions and/or signatures in records may not be denied legal effect solely because they are conducted, executed, or prepared in electronic form, and that if a law requires a record or signature to be in writing an electronic record or signature satisfies that requirement.						
	𝔍 e-Signature						
	You Are Not Required to Complete This Transaction Electronically						
	If you <u>do not</u> wish to complete this transaction electronically, please call the CalPERS Customer Contact Center at 1-888- CalPERS (1-888-225-7377) for assistance. The TTY - For Speech & Hearing Impaired number is (916) 795-3240.						
	Electronic Signature Agreement						
	You may complete this transaction electronically by selecting the "Sign Now" button which appears on your computer screen.						
	By completing this transaction electronically, you acknowledge and agree that:						
	(1) This transaction will be conducted by electronic means in accordance with the federal Electronic Signatures in Global and National Commerce Act (E-Sign), 15 U.S.C.A. sections 7001-7031 and the Uniform Electronic Transactions Act, California Civil Code sections 1633.1 to 1633.17;						
	(2) You have read and understand the terms and conditions regarding this transaction;						
	(3) You accept the terms and conditions of this Electronic Signature Agreement and the above terms and conditions regarding this transaction; and						
	(4) Completion of this transaction electronically shall have the same effect as if you signed your name in ink on a piece of paper to accomplish the transaction and CalPERS will store by electronic means an electronic record of this transaction.						
	* I have read and agree to the Electronic Signature Agreement above.						
	Sign Now						

Review the information within the Hold Harmless Agreement section and select the checkbox to the left of the statement "I understand that transactions and/or signatures in records may not be denied legal effect solely because they are conducted, executed, or prepared in electronic form, and that if a law requires a record or signature to be in writing an electronic record or signature satisfies that requirement." Review the information within the e-Signature section and select the checkbox to the left of the statement "I have read and agree to the Electronic Signature Agreement above." Select the **Sign Now** button.

The Date Hold Harmless Agreement Signed displays within the Direct Authorization Deductions section. You can view the agreement at any time by selecting the **View Hold Harmless Agreement** link.

S	kip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out May 26, 2011
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Summary Agreements	s
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	${f \mathfrak{O}}$ Direct Authorization Deductions
	Direct Authorization Information
	Agreement ID: 1000001557 Program: California Public Employees' Retirement System
	Agreement Status: Pending
	Deduction Type: Credit Union Deduction
	Does this agreement provide for continuation to No beneficiaries and/or survivors who continue
	receiving a benefit?
	Will the deductions be managed by No a Third Party Administrator (TPA)?
	Does the contract between your Organization No
	and your Carrier allow for the continuation of coverage into retirement?
	Who will submit the Direct Authorization Sponsor
	Deductions for this agreement? Date Hold Harmless Agreement Signed: 05/26/2011 View Hold Harmless Agreement
	${f \mathfrak{O}}$ Direct Authorization Payment Details
	Which organization should receive the deduction payments?:* Sponsor
	Preferred Method of Payment: Check
	Check Payable Name: Direct Authorization Organization
	Address: 49 APPLE ST SACRAMENTO,
	95814 - 0000
	𝔍 Available Actions
	Select an Available O Add Third Party Administrator
	Action:* 💿 Replace Third Party Administrator
	 Remove Third Party Administrator Terminate Agreement
	Submit

Manage Relationship with a Third Party Administrator

Add a third party administrator to an existing agreement

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Log In page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to my[CalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPERS On-Line Log out May 26, 2011 My CalPERS						
Home Profile Repo	rting Person	Information 0	ther Organizations			
My Home						
Common Tasks 🛛 🔕	💿 My Cases			View	More Actions»	
Menu 💿	Case ID	Case Title	Case Type	Program	Status	
Person Search	731879		Initiate DA Agreement		Closed	
Change Password						
Change Challenge Questions						

Select the **Profile** global navigation tab.

The Business Partner Profile page displays.

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Home Profile Repor	ting Person Information	Other Organiza	tions				
Summary Agreements	3						
Common Tasks 🛛 🔕	Summary						
Menu 🕥	Profile						
Summary							Request Update
Contacts		4499089095				s: Active	
	Federal Tax ID:	1234567-89			Name	e: Direct Autho Organizatio	orization n Credit Union
	Category:	Direct Authorizat	ion Organizati	on			
	Addresses	49 Mailing Street	Sacramento, C	A		49 Mailing S	street, Sacramento, CA
	Physical:	84567			Mailing	84567	
	Communication Inform						
		mail: robert@da	ocu.org	Primary P	Phone Numbe	r. 916-789-111	11
				,			
	Contacts Add New						View More Actions»
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	💿 Business Relationshi	DS Add New					
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	Contract/Agreement	Type Status	Date Status Changed	Effective Date	Termination Date	Related Parties	
	Direct Authorization Ag	eement Active	04/01/1978	04/01/1978		1. A.	

Select the Agreements local navigation tab.

The Agreements page displays.

SI my CalPERS Home Profile Repor Summary Agreements		velcome Ronald		Help Contact l	Js CalPERS O	n-Line Log out	May 26, 2011
Common Tasks 🛛 🔊	O Agreements Add New Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988	Dute		
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Insurance	Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insu	urance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column within the Agreement section to which you would like to add a third party administrator.

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Summary Agreements	s in the second se	
Common Tasks 🛛 🔕	*F	Required Fields
	⑦ Direct Authorization Deductions	
	Direct Authorization Information	
	Program: CalPERS	
	Deduction Type: Association Dues	here bla
	Will the deductions be managed a Third Party Administrator (TP/	
	Third Party Administrator Information	-
		eral Tax ID:
	Which organization should receive the deduction payments?:* Sponsor 	
	Save & Continue	

To add a third party administrator to an existing agreement, select the "Third Party Administrator Name" **Select** link in the Third Party Administrator Information area within the Direct Authorization Deductions section.

The Organization Search page displays.

Skip to:	Content Footer Welcome William Customize Help Contact Us CalPERS On-Line Log out June 15, 2	011
my CalPERS		
Home Profile Reporting	Person Information Other Organizations	
Organization Search		
If Exact Match for Name is lef	eft unchecked, the system will return results with a partial match.	
Name:	Exact Match	
Federal Tax ID:		
CalPERS ID:		
Search		

Enter the name of the Third Party Administrator organization in the **Name** field and then select the **Search** button.

The results of the organization search are displayed within the Search Results section.

		Content Footer V	Velcome Ronald	Customize Help	Contact Us	CalPERS On-Line	Log out	May 26, 2011
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💿 Org	anization Search							
If Exac	t Match for Name is lef	ft unchecked, the syst	em will return re	sults with a partial	match.			
	Name:	Sample TPA	Exact Mate	h				
	Federal Tax ID:							
	CalPERS ID:	· · · · · ·						
Search	1							
💿 Sea	rch Results Add New							
	Name			Mailing Address 48 CHARLES BLVD, 0		1		
0	Sample TPA 1							
\odot	Sample TPA 2			5155 CHUPCAN PLA	CE CARPINTER	IA, CA 93013-		
\odot	Sample TPA 11			444E A STREET DO	OWAGIAC, MI 4	9047-0000		
0	Sample TPA 22			458 BELMONT PLA	CE CLAYTON,	CA 94517-0000		
O	Sample TPA 111			6 N DIVISION ST LOU	UIS, MO 54756			
Select								

Select the radio button associated with the appropriate organization (**Sample TPA 11** in this example) and then the **Select** button.

The *Direct Authorization Deductions* page displays the Third Party Administrator Name, "Sample TPA 11".

my CalPERS	Skip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out May 26, 20	011
	Person Information Other Organizations	
Summary Agreements	5	
Common Tasks 🛛 🔕	*Required Fi	elds
	O Direct Authorization Deductions	
	Direct Authorization Information	
	Program: CalPERS	
	Deduction Type: Association Dues	
	Will the deductions be managed by No a Third Party Administrator (TPA)?	
	Third Party Administrator Information	
	Third Party Administrator Name:* Sample TPA 11 Select Federal Tax II):
	Which organization should receive the deduction payments?:* Sponsor Third Party Administrator 	
	Save & Continue	

Select the **Third Party Administrator** radio button in the Third Party Administrator Information area within the Direct Authorization Payment Details section to indicate that the newly added third party administrator will be the organization that will receive the deduction payments. Select the **Save & Continue** button within the Direct Authorization Deductions section.

💿 Direct Authorizatio	n Payment Details
	Which organization should receive the deduction payments?:* Sponsor Third Party Administrator
	od of Payment: Check Payable Name: Direct Authorization Organization Address: 49 APPLE ST SACRAMENTO, 95814 - 0000
• Available Actions	
Select an Available Action:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement
	Effective Date:

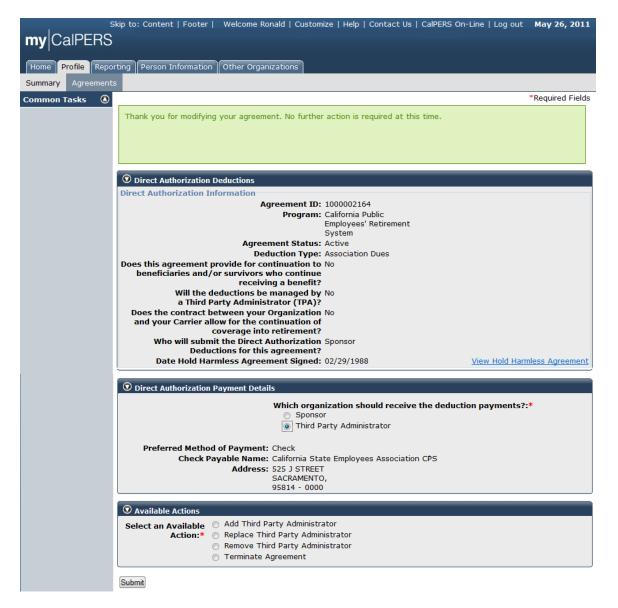
Select the **Add Third Party Administrator** radio button within the Available Actions section. The **Effective Date** field appears within the Available Actions section once one of the radio buttons is selected.

• Available Actions	
	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement
	Effective Date: p6/01/2011

Submit

Enter the effective date of the business partner relationship with your organization"s third party administrator in the **Effective Date** field, or select the calendar icon to select the date and select the **Submit** button.

The confirmation message appears stating "Thank you for modifying your agreement. No further action is required at this time." Note that the Third Party Administrator has been updated as the organization which should receive the deduction payments within the Direct Authorization Payment Details section.



Replace the third party administrator for an existing agreement

You may add, replace or remove a third party administrator. Remember that carriers or third party administrators involved in direct authorization agreements with my|CalPERS must sign hold harmless agreements for each new direct authorization agreement.

When a business partner makes modifications to a direct authorization agreement, the effective date must fall within a specific range to be enacted on the desired effective date.

Generally, for a modification to be effective for the beginning of the next calendar month, the change must be submitted prior to the end of the current business month. For example, if December 15 is the end of the business month and a modification was made on December 11, then the modification would be effective on the first of January, the following calendar month.

If the effective date does not fall into the specific date range, my|CalPERS adjusts the effective date accordingly.



Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.

Select the Business Partner radio button and then the Continue button.

The *Business Partner Login* page displays. Your organization[®]'s system access administrator must first establish your username and password and provide this

login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

myCalPERS	Help Contact Us CalPERS On-Line May 26, 20'
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPERS On-Line Log out May 26, 2011 May CalPERS									
Home Profile Repo	rting Person	Information O	ther Organizations						
My Home									
Common Tasks 🛛 🔕	💿 My Case	unioroiananananananananan S	lalaiaininininininininininininininininin		View More Acti	ons»			
Menu 🕥	Case ID	Case Title	Case Type	Progr					
Person Search	731879		Initiate DA Agreemer	t	Closed				
Change Password									
Change Challenge Questions									

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

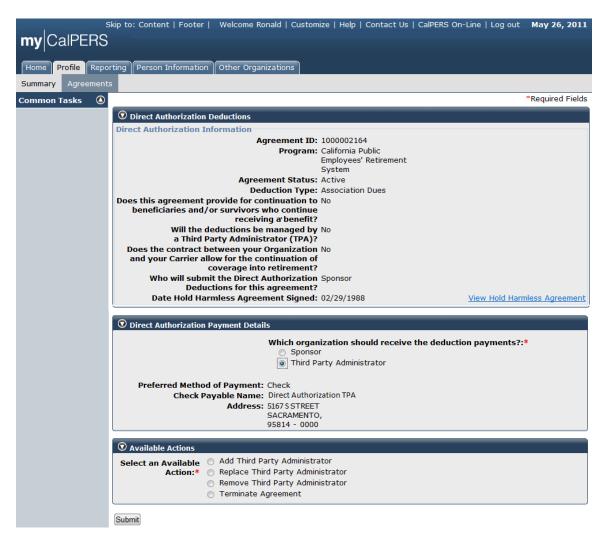
The first of the second s	kip to: Content Footer	Welcome Bobbie	e Customize	Help Cont	tact Us CalPE	RS On-Line L	.og out May 26, 2011
my CalPERS							
Home Profile Repor	rting Person Information	Other Organizat	ions				
Summary Agreements	3						
Common Tasks 🛛 🔕	Summary						
Menu 📀	Profile						
Summary							<u>Request Update</u>
Contacts	CalPERS ID:					: Active	
	Federal Tax ID:	1234567-89			Name	 Direct Autho Organization 	rization Credit Union
	Category:	Direct Authorizati	on Organizatio	on			
	Addresses	49 Mailing Street,	Sacramento, C	A		49 Mailing St	reet, Sacramento, CA
	Physical:				Mailing	84567	
	Communication Inform Preferred Communica						
		mail: robert@dad	ocu.org	Primary F	Phone Numbe	r: 916-789-111	1
							-
	Contacts Add New						View More Actions»
		ontact Type Det		Program	Name	I	Phone Number
	<u>General</u> M	ain		CalPERS	Robert Dillman		
	💿 Business Relationship	5 Add New					
	Name	CalPE	RS ID	Progra		Service	Status
	No results found.				ŀ	Provided	
	Contracts/Agreement	5					
	Contract/Agreement T	ype Status	Date Status Changed	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agre	ement Active	04/01/1978	04/01/1978			

Select the Agreements local navigation tab.

The *Agreements List* page displays. Your organization"s direct authorization agreements display under the Agreement Type column within the Agreements section. The status of each agreement, effective dates and related parties may also be found in this section under the appropriate columns. Note that there are two terminated agreements on this screen, with the agreement termination dates displayed under the Termination Date column.

SI my CalPERS Home Profile Repor Summary Agreements		elcome Ronald		Help Contact (Js CalPERS O	n-Line Log out May 26, 2011
Common Tasks 🛛 🔕	• Agreements Add New					
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Accident Insurance
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insurance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column that is associated with the appropriate direct authorization agreement within the Agreement Type section.



The Direct Authorization Deductions page displays.

Select the **Replace Third Party Administrator** radio button within the Available Actions section.

• Available Actions	
Choose One:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement
	Effective Date:

Submit

The **Effective Date** field appears within the Available Actions section once one of the radio buttons is selected.

👽 Available Actions	
Action:* (Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement
	Effective Date: 07/01/2011

Submit

Enter the date in the **Effective Date** field, or select the date by selecting the calendar icon and then select the **Submit** button.

The Direct Authorization Deductions section displays.

my CalPERS		6, 2011
Home Profile Report		
Common Tasks 🛛 🙆	*Require	ed Fields
	${f \widehat{v}}$ Direct Authorization Deductions	
	Direct Authorization Information Program: CalPERS Deduction Type: Association Dues Will the deductions be managed by N a Third Party Administrator (TPA)?	0
	Third Party Administrator Information Third Party Administrator Name:* Sample TPA 11 Select Federal Ta	ax ID:
	Which organization should receive the deduction payments?:* Sponsor Third Party Administrator 	
	Save & Continue	

Select the **Third Party Administrator** radio button and then the **Save & Continue** button within the Direct Authorization Deductions section.

The Organization Search page displays.

Skip to: (Content Footer Welcome William Customize Help Contact Us CalPERS On-Line Log out June 15, 2011
my CalPERS	
Home Profile Reporting	Person Information Other Organizations
Organization Search	
If Exact Match for Name is lef	ft unchecked, the system will return results with a partial match.
Name:	Exact Match
Federal Tax ID:	
CalPERS ID:	
Search	

Enter the name of the third party administrator organization in the **Name** field and select the **Search** button within the Organization Search section.

The page refreshes and the results ("Sample TPAs" in this example) are displayed in the Search Results section.

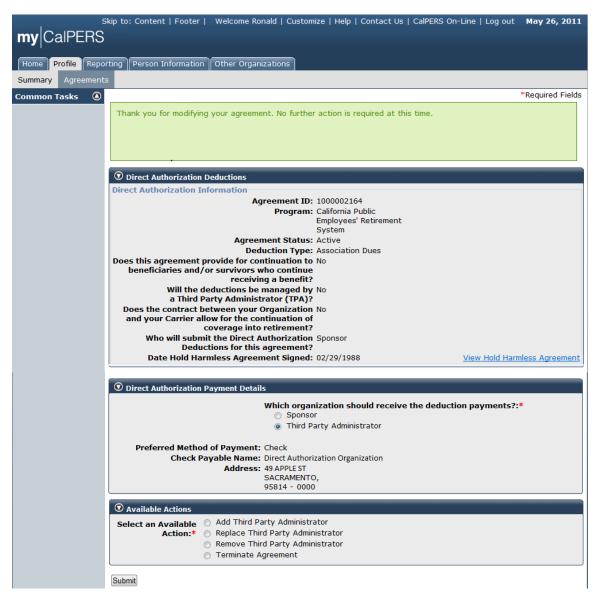
my	skip to: CalPERS	Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out	May 26, 2011
Home		Person Information Other Organizations	
	janization Search t Match for Name is lef	ft unchecked, the system will return results with a partial match.	
		Sample TPA	
	Federal Tax ID:	· · · ·	
	CalPERS ID:		
Search	١		
💿 Sea	arch Results Add New		
	<u>Name</u>	Mailing Address	
\odot	Sample TPA 1	48 CHARLES BLVD, CHICAGO, IL 60811	
\odot	Sample TPA 2	5155 CHUPCAN PLACE CARPINTERIA, CA 93013-	
\odot	Sample TPA 11	444E A STREET DOWAGIAC, MI 49047-0000	
0	Sample TPA 22	458 BELMONT PLACE CLAYTON, CA 94517-0000	
0	Sample TPA 111	6 N DIVISION ST LOUIS, MO 54756	
Select			

Select the radio button associated with the appropriate third party administrator (**Sample TPA 11** in this example) and then the **Select** button.

The Direct Authorization Deductions section displays "Sample TPA 11" in the **Third Party Administrator Name** field within the Third Party Administrator Information subsection.

The second s	Skip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out	May 26, 2011
my CalPERS		
Home Profile Repo	orting Person Information Other Organizations	
Summary Agreement	5	
Common Tasks 🛛 🔕		*Required Fields
	Direct Authorization Deductions	
	Direct Authorization Information	
	Program: CalPERS	
	Deduction Type: Association Dues Will the deductions be mana	aed by No
	a Third Party Administrator	
	Third Party Administrator Information	
	Third Party Administrator Name:* Sample TPA 11 Select F	ederal Tax ID:
	Which organization should receive the deduction payments?:*	
	Sponsor	
	Third Party Administrator	
	Save & Continue	

Select the Third Party Administrator radio button associated with the question Which organization should receive the deduction payments? and then select the **Save & Continue** button.



The Direct Authorization Deduction Payment Details page displays.

The confirmation message appears stating "Thank you for modifying your agreement. No further action is required at this time."

At the completion of this activity a direct authorization termination notification letter is sent to the sponsor and the previous third party administrator notifying them of the termination and effective date of the direct authorization agreement relationship. A contract agreement qualifications approval notice is sent to the sponsor and the new third party administrator notifying them of the direct authorization agreement approval.

When a direct authorization agreement makes a modification involving a third party administrator, my|CalPERS disables and enables deduction submission for

the previous and new third party administrator or payment recipient, updates all relationships associated with the direct authorization agreement, and reassigns pending deductions to the new third party administrator or payment recipient.

When a new third party administrator is added to a direct authorization agreement, a contract agreement qualifications approval notice is sent to the sponsor and the new third party administrator notifying them of the direct authorization agreement approval.

If the removed third party administrator was the payment recipient in a direct authorization agreement with an existing carrier, my|CalPERS then selects the carrier to receive payments.

Also, when a third party administrator is removed, a direct authorization termination notification is sent to the sponsor and the third party administrator notifying them of the termination and effective date of the direct authorization agreement relationship.

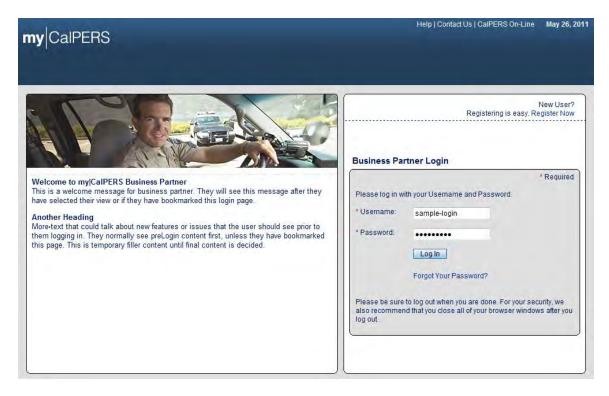
Remove a third party administrator from an existing agreement

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS		nt Footer W	/elcome Bobbie Customi	ze Help Contact Us	CalPERS On-Lin	ie Log out	May 26, 2011
Home Profile Repo	rting Person	Information 0	ther Organizations				
My Home							
Common Tasks \tag	💿 My Case	5		View	More Actions»		
Menu 👽	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge Questions							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

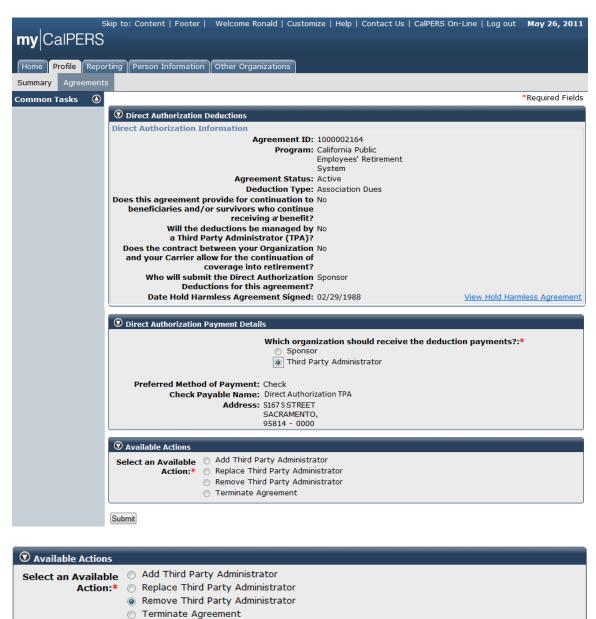
The first of the second s	kip to: Content Footer	Welcome Bobbie	e Customize	Help Cont	tact Us CalPE	RS On-Line L	og out May 26, 2011
my CalPERS							
Home Profile Repor	rting Person Information	Other Organizat	ions				
Summary Agreements	3						
Common Tasks 🛛 🔕	Summary						
Menu 📀	Profile						
Summary							Request Update
Contacts	CalPERS ID:					: Active	
	Federal Tax ID:	1234567-89			Name	 Direct Author Organization 	
	Category:	Direct Authorizati	on Organizatio	on			
	Addresses	49 Mailing Street,	Sacramento, C	4		49 Mailing Str	eet, Sacramento, CA
	Physical:				Mailing	84567	
	Communication Inform Preferred Communica						
		mail: robert@dad	icu.org	Primary F	Phone Number	r: 916-789-1111	
		_					
	Contacts Add New						View More Actions»
	/	ontact Type Det		Program	Name	Р	hone Number
	<u>General</u> M	ain	(CalPERS	Robert Dillman		
	😨 Business Relationship	S Add New					
	Name	CalPE	RS ID	Progra		Service Provided	Status
	No results found.				ŀ	rovided	
	Contracts/Agreement				~		
	Contract/Agreement T		Date Status Changed	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agre	ement Active	04/01/1978	04/01/1978		1	

Select the Agreements local navigation tab.

The *Agreements List* page displays. Your organization"s direct authorization agreements display under the Agreement Type column within the Agreements section. The status of each agreement, effective dates and related parties may also be found in this section under the appropriate columns. Note that there are two terminated agreements on this screen, with the agreement termination dates displayed under the Termination Date column.

Mome Profile Report	ting Person Information O	elcome Ronald		Help Contact (Js CalPERS O	n-Line Log out May 26, 2011
Summary Agreements Common Tasks Image: Common Tasks Image: Common Tasks	• Agreements Add New					
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Accident Insurance
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insurance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column that is associated with the appropriate direct authorization agreement within the Agreements section.



The Direct Authorization Deductions page displays.

Submit

Select the **Remove Third Party Administrator** radio button within the Available Actions section. The **Effective Date** field appears within the Available Actions section once one of the radio buttons is selected. Enter the date in the **Effective Date** field, or select the calendar icon to select the date, and then select the **Submit** button.

Effective Date: 06/01/2011

The confirmation message appears stating "Thank you for modifying your agreement. No action is required at this time. A CalPERS Contract Analyst will review the submitted information and/or documentation."

	p to: Content Footer We	lcome Ronald	Customize	Help Contact l	Js CalPERS O	n-Line Log out	May 26, 2011
my CalPERS							
Home Profile Reporti	ing Person Information Oth	ner Organizat	ons				
Summary Agreements							
Common Tasks 💿	Thank you for modifying you submitted information and/or			quired at this tim	e. A CalPERS C	Contract Analyst w	ill review the
	Agreements Add New						
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife an Insurance	d Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Ins	surance Group

At the completion of this activity a direct authorization termination notification letter is sent to the sponsor and the removed third party administrator notifying them of the third party administrator termination effective date of the direct authorization agreement relationship.

When a direct authorization agreement makes a modification involving a third party administrator, my|CalPERS disables and enables deduction submission for the previous and new third party administrator or payment recipient (if applicable), updates all relationships associated with the direct authorization agreement, and reassigns pending deductions to the new third party administrator or payment recipient (if applicable).

If applicable, when a new third party administrator is added to a direct authorization agreement, a contract agreement qualifications approval notice is sent to the sponsor and the new third party administrator notifying them of the direct authorization agreement approval.

If the removed third party administrator was the payment recipient in a direct authorization agreement with an existing carrier, my|CalPERS then selects the carrier (if applicable) to receive payments.

Also, when a third party administrator is removed, a direct authorization termination notification is sent to the sponsor and the third party administrator

notifying them of the termination and effective date of the direct authorization agreement relationship.

Carrier "Rollover" Terminate Agreement Scenario

Sponsoring business partners can change carriers one of two ways:

- 1. Terminate the existing direct authorization agreement and submit a new direct authorization agreement with the new approved carrier, or
- 2. Replace the current carrier with a carrier that the sponsoring business partner has already contracted with in another existing direct authorization agreement.

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



On the *Login* page select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

myCalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Monter Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log in
	Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the **Accept** button.

The my|CalPERS *Home* page displays.

my CalPERS		nt Footer V	Velcome Bobbie Customi:	ze Help Contact Us	CalPERS On-Lin	e Log out	May 26, 2011
Home Profile Repo	orting Person	Information O	ther Organizations				
Common Tasks 🙆	• My Cases	c		Viow	More Actions»		
Menu 👽	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

	Skip to: Content Footer W	/elcome Bobbie Customize	e Help Contact Us (CalPERS On-Line Lo	g out May 26, 2011
my CalPERS					
Home Profile Repo	rting Person Information O	ther Organizations			
Summary Agreement	S				
Common Tasks 🛛 🔕	Summary				
Menu 💿	Profile				
Summary Contacts	CalPERS ID: 269 Federal Tax ID: 123		_	tatus: Active Iame: Direct Authoriz	Request Update
		ect Authorization Organizat		Organization	ation
	Addresses 49 Physical: 845	Mailing Street, Sacramento, (567	CA Ma	49 Mailing Stre ailing: 84567	eet, Sacramento, CA
	Communication Information Preferred Communication Primary Email		Primary Phone Nu	mber: 916-789-1111	
	Contacts Add New				
		act Type Detail	Program Name	Ph	View More Actions» one Number
	General Main		CalPERS Robert Dil	lman	
	💿 Business Relationships 📕	Add New			
	Name	CalPERS ID	Program	Service Provided	Status
	No results found.				
	• Contracts/Agreements				
	Contract/Agreement Typ	Changed	Date Date	tion Related Parties	
	Direct Authorization Agreem	ent Active 04/01/1978	04/01/1978		

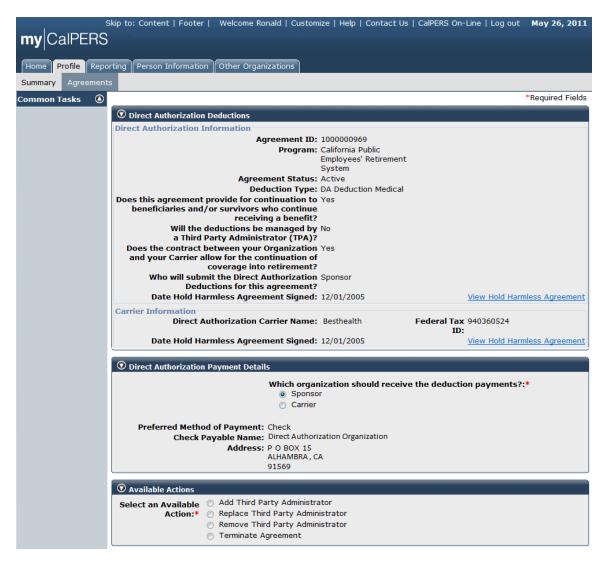
Select the Agreements local navigation tab.

The Agreements List page displays.

S my CalPERS Home Profile Report Summary Agreements	rting Person Information C			Help Contact L	Js CalPERS O	n-Line Log out	May 26, 2011
Common Tasks 🛛 🔕	• Agreements Add New						
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Insurance	l Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insu	urance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column associated with the agreement that you would like to change carriers for within the Agreements section.

The Agreement Details page displays.



Select the **Terminate Agreement** radio button within the Available Actions section.

The **Effective Date** and **Termination Reason** fields appear in the Available Actions section once the **Terminate Agreement** radio button is selected.

• Available Actions							
Select an Available Action:*							
	Effective Date: 07/01/2011						
	Termination Reason: Changing Carriers						
	New Carrier						

Submit

Enter the agreement termination effective date in the **Effective Date** field, or select the calendar icon to select the date. Select "Changing Carriers" from the **Termination Reason** dropdown. Select "New Carrier" from the **New Carrier** dropdown. Select the **Submit** button.

The *Agreements List* page displays with the confirmation message "You have made the decision to terminate your agreement. A notification will be sent to you once the termination is effective. No further action is needed on your part."

my CalPERS	skip to: Content Footer Welco		_	lp Contact Us	CalPERS On-L	ine Log out May 26, 2011
Summary Agreement	You have made a decision to ter effective. No further action is no			notification will be	e sent to you o	nce this termination is
	• Agreements Add New Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988	butt	New Carrier
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		Carrier A
	<u>SIP - 457 Agreement</u>	Active	12/28/1999	12/28/1999		
	Social Security Agreement (218)	Active	03/31/1957	03/31/1957		
	Direct Authorization Agreement	Terminated	07/01/2011	02/29/1988	07/01/2011	Old Carrier

A direct authorization termination notification letter is sent to the sponsor and the previous carrier notifying them of the termination and the termination effective date of the direct authorization agreement relationship.

For direct authorization agreements that have changed carriers, all pending deductions are rolled to the new agreement.

For direct authorization agreements that have been terminated, all pending deductions are cancelled.

Terminate an Agreement

When a direct authorization agreement is terminated, my|CalPERS disables deduction submission and relationships associated with the agreement, and creates a PeopleSoft receivable to collect remaining annual billing fees through the termination date, if a business partner is terminating their last remaining direct authorization agreement. If the business partner terminating the agreement has other existing agreements, the receivable is not created until the annual process is run.

my|CalPERS cancels future deductions if the agreement is terminated by the business partner and they have not selected a new carrier. my|CalPERS generates and sends an invoice for outstanding payments if the business partner is terminating their last remaining agreement. The invoice is not sent out if the business partner has additional existing agreements.

When a business partner terminates a direct authorization agreement, the effective date must fall within a specific range to be enacted on the desired effective date.

Generally, for a termination to be effective for the beginning of the next calendar month, the change must be submitted prior to the end of the current business month. For example, if December 15 is the end of the business month and a modification was made on December 11, then the modification would be effective on the first of January, the following calendar month.

If the effective date does not fall into the specific date range, my|CalPERS adjusts the effective date to be in accordance with the business rules.

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.

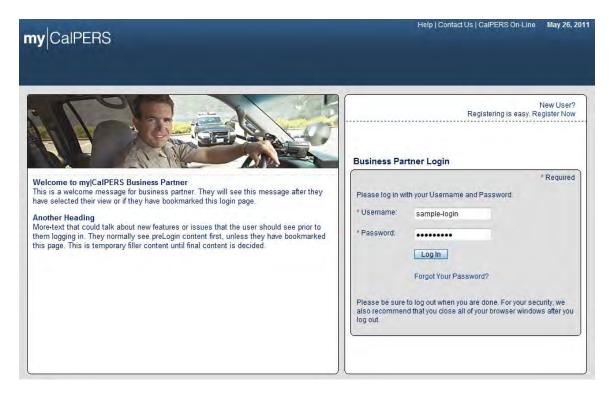
my|CalPERS Direct Authorization Vendor User Guide



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner *Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my|CalPERS Direct Authorization Vendor User Guide



Enter your username and password and select the **Log In** button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS		nt Footer M	/elcome Bobbie Custon	iize Help Cont	act Us CalPERS	On-Line Log out	May 26, 2011
Home Profile Repo	rting Person	Information O	ther Organizations				
My Home							
Common Tasks 🛛 🔕	💿 My Case	unioroiananananananananan S	lalaiaininininininininininininininininin		View More Acti	ons»	
Menu 🕥	Case ID	Case Title	Case Type	Progr			
Person Search	731879		Initiate DA Agreemer	t	Closed		
Change Password							
Change Challenge Questions							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

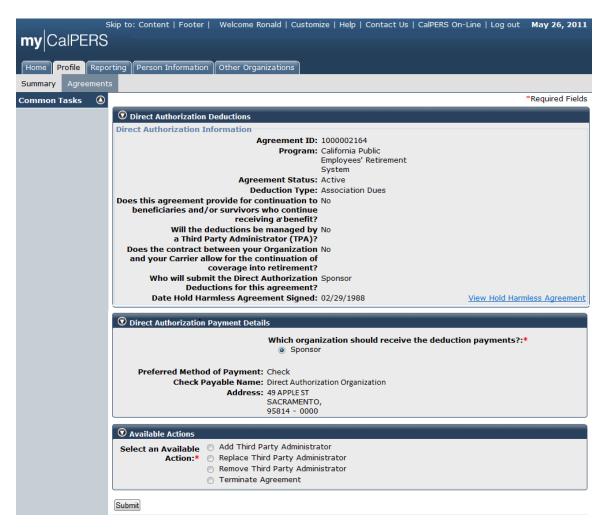
The second s	kip to: Content Footer V	Velcome Bobbie Customize	e Help Contact Us	CalPERS On-Line Log o	ut May 26, 2011
my CalPERS					
Home Profile Repo	ting Person Information C	ther Organizations			
Summary Agreements	3				
Common Tasks 🛛 🔕	Summary				
Menu 💿	Profile				
Summary					Request Update
Contacts	CalPERS ID: 44			Status: Active	
	Federal Tax ID: 12	34567-89		Name: Direct Authorization Organization Cred	
	Category: Dir	ect Authorization Organizat	ion		
	Addresses 49	Mailing Street, Sacramento, G	CA	49 Mailing Street,	Sacramento, CA
	Physical: 84	567	1	Mailing: 84567	,
	Communication Informati Preferred Communicatio				
		il: robert@daocu.org	Primary Phone N	umber: 916-789-1111	
	O Contacts Add New			v	iew More Actions»
		tact Type Detail	Program Name CalPERS Robert D		e Number
	<u>General</u> Main		CalPERS Robert D	niman	
	💿 Business Relationships	Add New			
	Name	CalPERS ID	Program	Service Provided	Status
	No results found.			Provided	
	Contracts/Agreements	Date Status	Effective Termin	nation Related	
	Contract/Agreement Typ	e Status Changed	Date Date	Parties	
	Direct Authorization Agreen	nent Active 04/01/1978	04/01/1978		

Select the Agreements local navigation tab.

The *Agreements List* page displays. Your organization's direct authorization agreements display under the Agreement Type column within the Agreements section. The status of each agreement, effective dates and related parties may also be found in this section under the appropriate columns. Note that there are two terminated agreements already on this screen, with the agreement termination dates displayed under the Termination Date column.

my CalPERS	kip to: Content Footer W			Help Contact (Js CalPERS O	n-Line Log out May 26, 2011
Common Tasks 🛛 🔕	• Agreements Add New					
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Accident Insurance
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insurance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column that is associated with the appropriate direct authorization agreement that you would like to terminate within the Agreements section.



The Direct Authorization Deductions page displays.

Select the Terminate Agreement radio button in the Available Actions section.

The **Effective Date** and **Termination Reason** fields appear in the Available Actions section once the **Terminate Agreement** radio button is selected.

• Available Actions									
Select an Available Action:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement 								
	Effective Date: 07/31/2011								
Termination Reason: Business Partner not Qualified									
Submit									

Enter the agreement termination effective date in the **Effective Date** field, or select the calendar icon to select the date, and select the reason for the

agreement termination from the **Termination Reason** dropdown ("Business Partner Not Qualified" in this example) and then select the **Submit** button.

The following are examples of additional reasons that may be selected from the **Termination Reason** dropdown:

Termination Reason: Insufficient Documentation

• Available Actions	
Select an Available Action:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement
	Effective Date: 07/31/2011

Submit

Termination Reason: Other

The **Please Explain** text field appears when Termination Reason "Other" is selected.

💿 Available Actions		
Choose One:* Terminate Agree 	ement	
Effective D	ate: 05/01/2011	
Termination Reason:		
Please Explain:	The sponsor is ending the agreement.	A V

Submit

Enter the reason for the termination ("The sponsor is ending the agreement" in this example) and then select the **Submit** button.

The *Agreements List* page displays with the confirmation message "You have made a decision to terminate your agreement. A notification will be sent to you once this termination is effective. No further action is needed on your part." Note that the termination effective date is displayed under the Termination Date column within the Agreements section.

my CalPERS	kip to: Content Footer Welco rting Person Information Other		_	lp Contact Us	CalPERS On-L	ine Log out May 26, 2011
Common Tasks 🕑	You have made a decision to ter effective. No further action is no			notification will be	e sent to you o	nce this termination is
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		New Carrier
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		Carrier A
	SIP - 457 Agreement	Active	12/28/1999	12/28/1999		
	Social Security Agreement (218)	Active	03/31/1957	03/31/1957		
	Direct Authorization Agreement	Terminated	07/01/2011	02/29/1988	07/01/2011	Old Carrier

A direct authorization termination notification letter is sent to the sponsor and the previous third party administrator notifying them of the termination and the termination effective date of the direct authorization agreement relationship. The deductions associated with the terminated direct authorization agreement are canceled.

Part 2: Direct Authorization Agreement Deduction Processing

Processing Deductions

Add a new deduction

You can search, create and modify participant deduction processing reports and deduction records.

A deduction processing report groups the details about direct authorization deductions and general information about the retirees who have authorized for deductions to be taken from their retirement benefit payment. These reports process at the end of each business month resulting in deductions from the retirees" benefit payments.

Within my|CalPERS, you can create new deduction processing reports, modify current deduction processing reports, or view historical processed reports. Only the business partner receiving the deduction payments is allowed to submit direct authorization deductions to restrict duplicate deduction submission.



Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.

Select the Business Partner radio button and then the Continue button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to my[CalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

my CalPERS			/elcome Bobbie Custon	iize Help C	ontact Us	CalPERS On-I	ine Log out	May 26, 2011
Home Profile Repo	rting Person	Information 0	ther Organizations					
My Home								
Common Tasks 🛛 🔕	💿 My Cases	5			View N	/ore Actions>		
Menu 👽	Case ID	Case Title	Case Type	Pro	ogram	Status		
Person Search	731879		Initiate DA Agreemer	t		Closed	J	
Change Password								
Change Challenge Questions								

Select the **Reporting** global navigation tab.

The Create or Edit Report section displays. Note that the most recently submitted reports display in the Direct Authorization Incoming Reports section.

My CalPERS		Welcome Mary Custo	mize Help Co	ntact Us (CalPERS On-Line Log	out May 26, 2011
Common Tasks (a) Menu (b)	Name: Direct Authorizati Organization	on CalPERS ID:	5233134842			*Required Fields
Preprocessing Area File Upload History	• Work On Existing Pay	orization Deduction Information roll Reports		t Type	Due Date Submi	t Date Test Report
	No results found.					Display
	O Direct Authorization	Incoming Reports				View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	31	31
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	3104	3104
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	1451	1451
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	457	457
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	3859	3859

To edit the report by adding deduction request records, select "Add Direct Authorization Deduction Information" from the **Method** dropdown and then select the **Continue** button within the Create or Edit Report section.

The Create Direct Authorization Report section displays. Your organization's agreements will be listed within the Direct Authorization Agreements section. The Direct Authorization Organization in this example has eight agreements.

ny CalPERS		Information	Other C	Organizations				
1anage Reports								
ommon Tasks 🔕 enu 📀	Name: Dire Orga	ct Authorizat anization	ion	CalPERS ID: !	5233134842		*Po	quired Fiel
reprocessing Area ile Upload History	😨 Create D	irect Author	ization Re	port			The second se	quired file
				ect Authorization C	rganization Deliv	ery Consideration:*	Manually enter in	data 🔻
	В	usiness Mo	onth:* 06	/2011 🔻				
		uthorization	Agroomor	te				
		ment Ded Type	uction	Program	Sponsor	Carrier	Third Party Administrator	Effectiv Date
	10000	Life 01768 Insu Dedu	rance uction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/19
	© 10000	01240 DA D Dent	eduction tal	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		09/01/19
	© 10000	Life 01250 Insu Dedu	rance uction	California Public Employees' Retirement System	Direct Authorization Organization			04/01/19
	© 10000	Life 01271 Insu Dedu	rance uction	California Public Employees' Retirement System	Direct Authorization Organization			05/01/20
	© 10000	Life 01273 Insu Dedu	rance uction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/20
	© 10000	01776 DA D Visio	eduction n	California Public Employees' Retirement System	Direct Authorization Organization			02/01/19
	© 10000	Life 01362 Insu Dedu	rance uction	California Public Employees' Retirement System	Direct Authorization Organization			08/01/20
	© 10000	01535 Asso Dues	ciation	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		07/01/19

Select "Manually enter in data" from the **Delivery Consideration** dropdown and select the appropriate business month from the **Business Month** dropdown within the Create Direct Authorization Report section. In this example, we are creating a Direct Authorization Report for the June 2011 business month for the Direct Authorization Organization. Select the radio button associated with the appropriate agreement within the Direct Authorization Agreements section (Agreement ID "1000001768" in this example).

The Deductions Information page displays.

my CalPERS		nt Footer W	elcome Mary Custon	nize Help Contact Us	CalPERS On-Lin	e Logout Ma	ay 26, 2011
Home Profile Repo	rting Person I	nformation Oth	er Organizations				
Manage Reports							
Common Tasks						*Re	quired Fields
Menu 👽	O Deduction	Information					
Preprocessing Area File Upload History	Ві	siness Month: (ganization			
		Participant ID:	 CalPERS ID Social Security Nur 	nber			
		CalPERS ID*					
	Participant	Social Security Number-4*					
	Deduc	tion Amount:*					
	💿 Direct Aut	horization Agree	ments				
	Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
	1000001768	Life Insurance Deduction	California Public Employees' Retireme System	Direct Authorization ent Organization			12/01/1991
	Save & Continu	save & Add And	other				

You can only use the persons Social Security number as the participant identifier when you are adding a new deduction for a participant. When you are updating the amount of a deduction, or deleting a deduction, you must use the CalPERS ID and the last four digits of their SSN.

If the **Social Security Number** radio button was selected, the field would display as the **Social Security Number** field, as shown in the example below. Also, the **Participant Social Security Number-4** field would not display as this would be redundant information. In this example, we selected the **CaIPERS ID** radio button. Note that the field below the radio button displays as the **CaIPERS ID** field and the **Participant Social Security Number-4** field displays.

my CalPERS		nt Footer V	Velcome Mary Customi	ze Help Contact Us	CalPERS On-Line	e Logout Ma	ay 26, 2011
Home Profile Repo	rting Person In	nformation Oth	ner Organizations				
Manage Reports							
Common Tasks 🛛 🔕						*Re	quired Fields
Menu 💿	O Deduction	Information					
Preprocessing Area File Upload History	Bu	Submitter: siness Month:		nization			
	I	Participant ID:	 CalPERS ID Social Security Num 	ber			
		CalPERS ID*					
	Participant S	Social Security Number-4*					
	Deduc	tion Amount:*					
	🛈 Direct Aut	horization Agree	ments		Administrator Date		
	Agreement ID	Deduction Type	Program	Sponsor	Carrier	Party	
	1000001768	Life Insurance Deduction	California Public Employees' Retiremen System	Direct Authorization t Organization			12/01/1991
	Save & Continu	e Save & Add Ar	nother				

Enter the individual's CalPERS ID in the **CalPERS ID** field, the last four-digits of the individual's Social Security number in the **Participant Social Security Number-4** field, and the amount of the deduction in the **Deduction Amount** field. Note that the red asterisks indicate that these are all required fields. Select the **Save & Continue** button if you are finished entering new deductions, or the **Save & Add Another** button if you want to enter more new deductions. Note that if you enter an erroneous CalPERS ID and Participant Social Security Number-4 combination, my|CalPERS displays the error message "A Participant does not exist in the system for the reported CalPERS ID and SSN combination. Verify and update your entry."

		nt Footer V	Velcome Mary Custo	mize Help Cor	ntact Us CalP	ERS On-Lin	e Logout M	ay 26, 2011
my CalPERS								
Home Profile Repo	orting Person 1	Information Ot	her Organizations					
Manage Reports								
Common Tasks 🛛 🔕							*Re	quired Fields
Menu ⑦ Preprocessing Area File Upload History	A Participan entry.	t does not exist	in the system for the	reported CalPERS	5 ID and SSN c	ombination.	. Verify and upda	ite your
	• Deduction		California Correctional	Deace Officers	Association			
	Bu	isiness Month:		Peace Officers P	ASSOCIATION			
		Participant ID:		mber				
		CalPERS ID*	2088292802					
		Social Security Number-4*						
	Deduc	tion Amount:*	29.45]				
	💿 Direct Aut	horization Agree	ments					
	Agreement ID	Deduction Type	Program	Sponsor		Carrier	Third Party Administrator	Effective Date
	1000001768	Life Insurance Deduction	California Public Employees' Retireme System					12/01/1991
	Save & Continu	e Save & Add Ar	nother					

my CalPE		Skip to: Content F				e Help (Contact Us CalPEI	RS On-Line Lo	og out May	26, 2011	
Manage Reports				J							
Common Tasks Menu	() ()	Name: Direct Autho Organization		Ca	IPERS ID: 523	3134842					
Preprocessing Are		💿 Search Direct A	uthoriza	ation Records							
File Upload History	/		CalPERS ID: Sponsor/Employer: Direct Authorization Org Error Message:								
		Search Clear									
		Direct Authoriza	ntion Re	cords Add New	1						
		Select All Delete			Nun	nber of Re	cords Submitted:	1	Number of	Errors: 0	
		<u>CalPERS ID</u>	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>	
		2028292802	1887	William Jackson	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$27.94		
		Select All Delete									

In this example, we were returned to the Search Direct Authorization Records page and after entering a new direct authorization deduction with the following information: CalPERS ID "2029292802", Participant Social Security Number-4 "1887", Participant Name "William Jackson", Transaction Type "Add", Program "CalPERS", Sponsor / Employer "Direct Authorization Organization", Deduction Type "Life Insurance Deduction" and Deduction Amount "\$27.94".

Deductions Exceed Gross error message example:

my CalPER	kip to: Content Footer Welcome Mary Customize Help Contact Us CalPERS On-Line Log out May 26, 24	011						
Home Profile Re	ng Person Information Other Organizations							
Manage Reports								
Common Tasks	lame: Direct Authorization CalPERS ID: 5233134842 Organization							
Preprocessing Area	$\widehat{m O}$ Search Direct Authorization Records							
File Upload History	CalPERS ID: Sponsor/Employer: Direct Authorization Org Error Message:							
	Search Clear O Direct Authorization Records Add New							
	Select All Delete Number of Records Submitted: 1 Number of Errors	: 1						
	<u>CalPERS ID</u> SSN-4 <u>Participant</u> Transaction _{Program} Sponsor/ Deduction Deduction <u>Error</u> Employer Type Amount <u>Mess</u>							
	2028292802 1887 William Jackson Add CalPERS CalPERS Direct Life . Deductiv Dranzation Jackson CalPERS Authorization Insurance \$1000.00 Exceed	ons						
	elect All Delete							

In this example, the information entered is the same as above with the exception of the Deduction Amount. To illustrate an example of an error message, we entered a Deduction Amount of \$10,000.00, which is higher than William Jackson's monthly retirement warrant. The "Deductions Exceed Gross" error is displayed under the Error Message column. This means that the deduction amount entered exceeds the amount of the gross monthly retirement warrant.

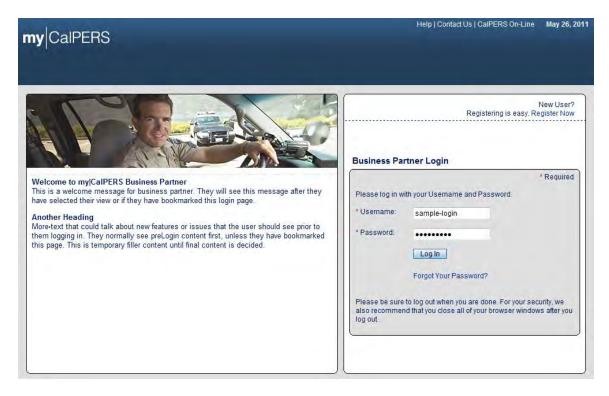
Search for deduction records

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the Business Partner radio button and then the Continue button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

myCalPER		nt Footer V	/elcome Bobbie Customize	Help Contact Us	CalPERS On-Line	Log out	May 26, 2011
Home Profile Rep	porting Persor	n Information 0	ther Organizations				
Common Tasks	🖸 🔽 My Case	25		View	More Actions»		
Menu 🤇	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge Questions							

Select the **Reporting** global navigation tab. The *Create Reports* page displays.

the second se		· Welcome Walter Cust	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011		
my CalPERS								
Home Profile Repo	rting Person Informatio	n Other Organizations						
Manage Reports								
Common Tasks								
Menu 👽	Name: Direct Authoriza Organization	tion CalPERS ID:	3696467826					
Preprocessing Area						*Required Fields		
File Upload History	💿 Create or Edit Repo	rt						
	Method:*		Continue					
	Work On Existing P	ayroll Reports Earned Period /						
	Schedule Name	Adjustment Date	Status Repor	t Type	Due Date Submi	t Date Report		
	No results found.							
						Display		
	💿 Direct Authorization					View More Actions		
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed		
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851		
	Direct Authorization	Manually enter in	04/08/2011	04/2011	4022	4022		
	Organization Direct Authorization	data Create Report	- ,,		· • • •	· • • • •		
	Organization	from Interface	05/26/2011	05/2011	3	0		

Select the link under the Submitter Name column associated with the report you"d like to search within the Direct Authorization Incoming Reports section. If the report you are looking for is not displayed within the Direct Authorization Incoming Reports section, select the **View More Actions** link in the Direct Authorization Incoming Reports title banner.

my CalPERS								
Home Profile Repo Manage Reports	Person Informat	ion Other Organiz	auons					
Common Tasks 🔕 Menu 🔉	Name: Direct Authori Organization	zation Ca	alPERS ID: 369	6467826				
Preprocessing Area	💿 Search Direct Aut	horization Records						
File Upload History		5	CalPE Sponsor/Emp Error Mes	-	AVO -	•		
	Search Clear							
	💿 Direct Authorizati	on Records Add New						
	Select All Delete		Numł	er of Reco	ords Submitted: 851		Number of	Errors:
	<u>CalPERS ID</u> S	SN-4 <u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Messa</u>
	<u>1205290569</u> 62	289 Edward Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$18.00	
	<u>7010576783</u> 68	352 James Byerly	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$98.00	
	<u>4940520803</u> 02	269 James Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.40	
	<u>4401277655</u> 07	752 Randall Smith	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$40.70	
	<u>3087109662</u> 26	580 William Crowe	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	
	<u>6087615767</u> 60)52 Jack James	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	

The Search Direct Authorization Records page displays.

You can search for deduction records within the selected report by entering the CalPERS ID in the **CalPERS ID** field or by selecting the appropriate error message from the **Error Message** dropdown. Once you have located the deduction record, you can select the link under the CalPERS ID column within the Direct Authorization Records section.



Update deduction amount

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

myCalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter the username and password and select the **Log In** button. The Conditions of Use for Business Partners (Employers) page displays.

my CalPE	Skip to: Content Footer RS	Welcome Andrea	Customize Hel	p Contact Us	CalPERS On-Line	Log out	March 15, 2011
Conditions of	Use for Business Partners (En	ployers)					
By accessing this with CalPERS.	application you acknowledge	that all informatio	on accessible to you	u will be used o	nly to assist you ir	n conducting	g official business

Accept Decline

Review the conditions of use statement and select the **Accept** button.

The my|CalPERS Home page displays.

my CalPERS		t Footer	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Li	ne Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks 🛛 🔕	😨 My Cases			View	More Actions»		
Menu 💿	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge Questions							

Select the **Reporting** global navigation tab.

		r Welcome Walter Custo	omize Help Co	ntact Us	CalPERS On-Line Log	g out May 25, 2011			
my CalPERS									
Home Profile Repo	orting Person Informatio	on Other Organizations							
Manage Reports									
Common Tasks	Name: Direct Authoriza	tion CalPERS ID:	3696467826						
Menu 🕥	Organization								
Preprocessing Area						*Required Fields			
File Upload History	👽 Create or Edit Repo	ort							
	Method:*		Continue						
	🛛 Work On Existing P								
	Schedule Name	Earned Period / Adjustment Date	Status Repor	t Type	Due Date Subm	it Date Test Report			
	No results found.								
						Display			
	Direct Authorization	n Incoming Reports				View More Actions»			
	Submitter Name	Original Delivery	Delivery Date	Business		Number of Records			
	Submitter Name	Method	Delivery Date	Month	Submitted	Confirmed			
	Direct Authorization	Manually enter in	04/08/2011	04/2011	851	851			
	Organization Direct Authorization	data Manually enter in							
	Organization	data	04/08/2011	04/2011	4022	4022			
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	3	0			

The Create Reports page displays.

Select the link under the Submitter Name column associated with the report you"d like to search within the Direct Authorization Incoming Reports section. If the report you are looking for is not displayed within the Direct Authorization Incoming Reports section, select the **View More Actions** link in the Direct Authorization Incoming Reports title banner.

my CalPERS	Skip to: Content Footer	Welcome Wal	ter Customiz	e Help (Contact Us CalPERS	On-Line Lo	ogout May	25, 201
Home Profile Repo	rting Person Information	Other Organiz	ations					
Manage Reports	•							
Common Tasks 🛛 🔕 Menu 🛛 🐨	Name: Direct Authorizatio Organization	n Ca	IPERS ID: 369	6467826				
Preprocessing Area	Search Direct Authoriz	ation Records						
File Upload History		5	CalPE Sponsor/Emp Error Mes	-	VO T	•		
	Search Clear							
	Direct Authorization R Select All Delete	Number of Records Submitted: 851					Number of	Errors:
	CalPERS ID SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> Messa
	<u>1205290569</u> 6289	Edward Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$18.00	
	<u>7010576783</u> 6852	James Byerly	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$98.00	
	<u>4940520803</u> 0269	James Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.40	
	<u>4401277655</u> 0752	Randall Smith	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$40.70	
	<u>3087109662</u> 2680	William Crowe	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	
	<u>6087615767</u> 6052	Jack James	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	

The Search Direct Authorization Records page displays.

You can search for deduction records within the selected report by entering the CalPERS ID in the CalPERS ID field or by selecting the appropriate error message from the **Error Message** dropdown. Once you have located the deduction record, select the link under the CalPERS ID column within the Direct Authorization Records section. In this example, we select CalPERS ID link "7010576783" for "James Byerly".

The *Edit Deduction Record* page displays.

my CalPEF		Content Footer W	relcome Mary Custor	nize Help Contact Us	CalPERS On-Lin	e Logout Ma	ay 26, 2011
Home Profile R	eporting Pe	rson Information Oth	er Organizations				
Manage Reports							
Common Tasks						*Re	quired Fields
Menu	💿 💿 Ded	uction Information					
Preprocessing Area File Upload History	_	Submitter: Business Month:		ganization			
· · · ·		Participant ID:	 CalPERS ID Social Security Nu 	mber			
		CalPERS ID*	7010576783				
	Partici	pant Social Security Number-4*	6852				
		eduction Amount:*	75.00]			
	💿 Dire	ct Authorization Agree	ments				
	Agreer ID	nent Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
	100000	1768 Life Insurance Deduction	California Public Employees' Retireme System	Direct Authorization ent Organization			06/01/2011
	Save & C	Continue Save & Add An	other				

Enter the updated deduction amount in the **Deduction Amount** field within the Deduction Information section and select the **Save & Continue** button.

The *Search Direct Authorization Records* page displays. The updated deduction amount of \$75.00 for "James Byerly" is displayed under the Deduction Amount column within the Direct Authorization Records section.

my CalPERS	kip to: Content Footer	Welcome Wal	ter Customiz	e Help (Contact Us CalPERS	On-Line Lo	ig out May	25, 2011
Home Profile Repo	rting Person Information	Other Organiz	ations					
Common Tasks (a) Menu (c)	Name: Direct Authorization Organization	n Ca	IPERS ID: 369	6467826				
Preprocessing Area	Search Direct Authoriz	ation Records						
File Upload History			CalPE Sponsor/Emp	RS ID:				
			Error Mes	•		•		
	Search Clear							
	O Direct Authorization Re	Add New	Numk	or of Bocc	ords Submitted: 851		Number of	Empire 0
	Select All Delete		Num	of of Rect	Jus Submitted. 651		Number of	enois. 0
	CalPERS ID SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u>1205290569</u> 6289	Edward Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$18.00	
	7010576783 6852	James Byerly	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$75.00	
	<u>4940520803</u> 0269	James Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.40	
	<u>4401277655</u> 0752	Randall Smith	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$40.70	
	<u>3087109662</u> 2680	William Crowe	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	
	<u>6087615767</u> 6052	Jack James	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	

Delete a deduction



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

my	Help Contact Us CalPERS On-Line May 26, 20
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter the username and password and then select the **Log In** button. The *Conditions of Use for Business Partners (Employers)* page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

my CalPERS		t Footer	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Li	ne Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks 🛛 🔕	😨 My Cases			View	More Actions»		
Menu 💿	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge Questions							

Select the **Reporting** global navigation tab.

The Create Reports page displays.

S my CalPERS Home Profile Report Manage Reports		Welcome Walter Custo	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011
Common Tasks 🙆 Menu 🐨	Name: Direct Authoriza Credit Union	tion Vendor CalPERS ID:	76332417%3			*Required Fields
Preprocessing Area	Create or Edit Repo	rt				
File Upload History	Method:*		Continue			
	• Work On Existing P	avroli Reports				
1	Schedule Name	Earned Deriod /	Status Report	t Type	Due Date Submi	t Date Test Report
	No results found.					Display
	Oirect Authorization					View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	4	1

Select the link under the Submitter Name column associated with the report you"d like to search within the Direct Authorization Incoming Reports section. If the report you are looking for is not displayed within the Direct Authorization Incoming Reports section, select the **View More Actions** link in the Direct Authorization Incoming Reports title banner. The deduction records in the selected report are displayed within the Direct Authorization Records section.

my CalPERS	Skip to:	Content Fo	ooter	Welcome Ma	ary Customize	e Help	Contact Us	CalPERS On	-Line Log d	out May 26, 2011
Home Profile Report	ting P	erson Informa	ation	Other Organiz	ations					
Manage Reports										
Common Tasks	Name:	Direct Autho Credit Unior		Vendor Ca	IPERS ID: 763	32417:63				
Menu 💿	🗑 50	arch Direct A		tion Pecords						
Adjustment Reports		aren bireet A	unonizo	tion Records	CalPE	RS ID:				
Preprocessing Area				5	Sponsor/Emp	loyer: D	AV Credit Unic	n 🔻		
File Upload History Retirement Contract					Error Mes	sage:			•	
Summary	Search	Clear								
	🛈 Dir	ect Authoriza	tion Re	cords Add New						
	Selec	t All Delete			Nur	nber of R	ecords Subn	nitted: 4	N	umber of Errors: 3
	<u>(</u>	CalPERS ID	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer		Deduction Amount	<u>Error</u> <u>Message</u>
		577662534 <u>3</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union		\$40.00	
		<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union		\$100.00	The Social Security Number (SSN) reported was invalid.
	V <u>5</u>	5437786976	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union		\$10000.00	Deductions Exceed Gross.
		17776670.87	8D11	Brenda Johnston	СНБ	CalPERS	Direct Authorization Credit Union		\$400.00	Please enter a valid Transaction Code.
	Select	All Delete								

To delete a deduction record, select the checkbox(es) associated with the deduction records you would like to delete, and then select the **Delete** button within the Direct Authorization Records section.

my|CalPERS Direct Authorization Vendor User Guide

my CalPERS	Skip to:	Content F	ooter	Welcome Ma	ary Customize	e Help	Contact Us	CalPERS On	·Line Log o	ut May 26, 2011
Home Profile Repor	ting P	erson Inform	ation	Other Organiz	ations					
Manage Reports										
Common Tasks 🛛 🔕	Name:	Direct Auth Credit Unio		Vendor Ca	IPERS ID: 763	32417:63				
Menu 🔽	💿 Sei			tion Records						
Adjustment Reports					CalPE	RS ID:				
Preprocessing Area File Upload History					Sponsor/Emp	loyer: D	AV Credit Unic	on 💌		
Retirement Contract					Error Mes	sage:			•	
Summary	Search	h Clear								
		ct Authoriza	ation Re	Cords Add New		nber of R	ecords Subn		Nu	Imber of Errors:
	<u> </u>	CalPERS ID	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer		Amount	<u>Error</u> <u>Message</u>
	6	<u>5776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization		\$40.00	
							Credit Union	Deduction		
	5	5 <u>618719672</u>	6016	Linda Johns	Update	CalPERS	Credit Union Direct Authorization Credit Union	Credit Union	\$100.00	The Social Security Number (SSN) reported was invalid.
		5618719672 17776670.87			Update CHG	CalPERS	Direct Authorizatior Credit Union	Credit Union Deduction Credit Union	\$100.00 \$400.00	Security Number (SSN) reported

In this example, we deleted the deduction record for "Taylor Rock" from this report, so the remaining three deduction records are displayed within the Direct Authorization Records section.

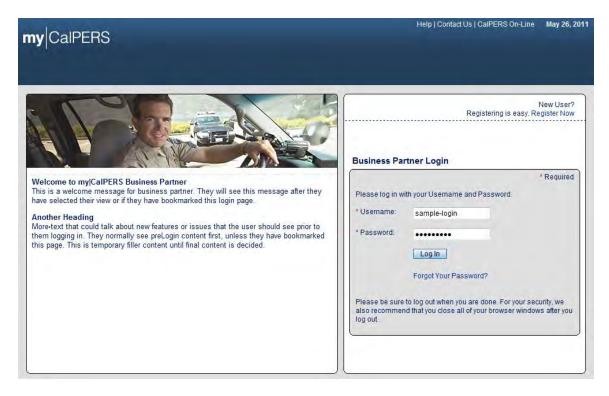
Perform a Global Rate Change

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS		nt Footer W	'elcome Bobbie Custo	mize Help	Contact Us	CalPERS On-L	ine Log out	May 26, 2011
Home Profile Repo	rting Person	Information 0	ther Organizations					
My Home								
Common Tasks 🛛 🔕	💿 My Cases	5			View	More Actions»		
Menu 🕡	Case ID	Case Title	Case Type		Program	Status		
Person Search	731879		Initiate DA Agreeme	nt		Closed		
Change Password								
Change Challenge Questions								

Select the **Reporting** global navigation tab.

The Business Partner Summary page displays.

the design of the state of the second state of the state	kip to: Content Footer	Welcome Bobbie	e Customize	Help Cont	tact Us CalPEF	RS On-Line Lo	g out May 26, 2011
my CalPERS							
Home Profile Repor	ting Person Information	Other Organizat	ions				
Summary Agreements	3						
Common Tasks 🛛 🔕	Summary						
Menu 💿	Profile						
Summary							<u>Request Update</u>
Contacts	CalPERS ID: Federal Tax ID:					: Active : Direct Authori:	ration
	rederar lax ID.	1254507-85			Name	Organization	zation
	Category:	Direct Authorizati	on Organizatio	on			
	Addresses	49 Mailing Street,	Sacramento, C	A		49 Mailing Stre	eet, Sacramento, CA
1	Physical:				Mailing	84567	
	Communication Inform Preferred Communication						
	Primary E	mail: robert@dad	cu.org	Primary I	Phone Number	: 916-789-1111	
	Contacts Add New Contact Type C	Contact Type Det	ail	Program	Name	D	View More Actions» none Number
		lain			Robert Dillman		ione Number
	👽 Business Relationship				S	ervice	
	Name	CalPE	RS ID	Progra		rovided	Status
	No results found.						
	© Contracts/Agreement	ts					
	Contract/Agreement	Type Statuc	Date Status		Termination	Related	
	Direct Authorization Agr		Changed 04/01/1978	Date 04/01/1978	Date	Parties	
)

Select the **Reporting** global navigation tab.

The *Reporting* page displays.

IY CAIPERS	ting Perso	on Inform	ation Other C	Organizations				
mmon Tasks 🙆 nu 💿	Name: Di Oi	rect Auth rganizatio		CalPERS ID: 2	2657553833		*Re	quired Fiel
reprocessing Area ile Upload History	© Create	Submit	uthorization Re tter Name: Dir 55 Month:* 06,	ect Authorization O	rganization Delive	ery Consideration:*	Global Rate Cha	nge 🔻
	💿 Direct	Authoriza	ation Agreemen	ts				
	1		Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
	◯ 1000	0001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/19
	◎ 1000	0001240	DA Deduction Dental	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		09/01/19
	◎ 1000	001250	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			04/01/19
	◎ 1000	001271	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			05/01/20
	◎ 1000	0001273	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/20
	◎ 1000	0001776	DA Deduction Vision		Direct Authorization Organization			02/01/19
	◯ 1000	0001362	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			08/01/20
	© 1000	001535	Association Dues	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		07/01/19

Select Global Rate Change from the **Delivery Consideration** dropdown and select the appropriate business month from the **Business Month** dropdown ("06/2011" in this example) within the Create Direct Authorization Report section.

CalPERS	ting	Person Inform	nation Other (Organizations				
ge Reports	5							
non Tasks 🔕	Name	Direct Auth		CalPERS ID: 2	2657553833			
		Organizatio	'n				*Re	quired Fiel
pload History	💿 cı		uthorization Re					
		Submi	tter Name: Dir	ect Authorization O	rganization Delive	ery Consideration:*	Global Rate Cha	nge 🔻
		Busine	ss Month:* 06	2011 💌				
		nost Authoria	ation Agreemen	t-				
		Agreement ID		Program	Sponsor	Carrier	Third Party	Effectiv Date
		1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization		Administrator	12/01/19
	0	1000001240	DA Deduction Dental	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		09/01/1
	٢	1000001250	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			04/01/1
	0	1000001271	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			05/01/2
	O	1000001273	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/2
	0	1000001776	DA Deduction Vision	California Public Employees' Retirement System	Direct Authorization Organization			02/01/1
	0	1000001362	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			08/01/2
	0	1000001535	Association Dues	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		07/01/19

Select the **Agreement ID** radio button for the agreement (Agreement ID "1000001250" in this example) you would like to enter a global rate change for under the Agreement ID column within the Direct Authorization Agreements section.

The Global Rate Change page displays.

my CalPERS	kip to: Content Footer Welcome Ronald Custon	nize Help Contact Us CalPERS On-	Line Log out May 26, 2011
Home Profile Report Manage Reports	ting Person Information Other Organizations		
Common Tasks (a) Menu (c)	Name: Direct Authorization CalPERS ID: 2 Organization	657553833	
Preprocessing Area File Upload History	Deduction Information Business Month: 06/2011 Deduction Type: Life Insurance Deduction Carrier: Ag	n _ Sponsor: I	California Public Employees' Retirement System Direct Authorization Organization
	Image: Change Existing Deduction Amount: \$ <t< th=""><th>New Deduction Amount</th><th>; \$ \$ \$ \$</th></t<>	New Deduction Amount	; \$ \$ \$ \$
	Create Records Clear Add More Changes		

You can enter up to four global rate changes at a time. Enter the current deduction amounts in the **Existing Deduction Amount** field(s) and enter the new deduction amounts in the corresponding **New Deduction Amount** field(s) within the Global Rate Change section.

There is no limit to the total number of global rate changes which can be entered, as you can select the **Add More Changes** button to add more global rate changes. When you have finished entering global rate changes, select the **Create Records** button.

The *Manage Reports* page displays the confirmation message "The mass change updates have been submitted and are being processed. The records will be viewable on the next business day."

5	Skip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out May 26, 2011
my CalPERS	
Home Profile Repo	rting Person Information Other Organizations
Manage Reports	
Common Tasks 🛛 🔕	Name: Direct Authorization CalPERS ID: 2657553833
Menu 💿	Organization
Preprocessing Area	The mass change updates have been submitted and are being processed. The records will be viewable on the next
File Upload History	business day.
	${f \widehat{v}}$ Search Direct Authorization Records
	CalPERS ID:
	Sponsor/Employer: DA ORG 💌
	Error Message:
	Search Clear
	Direct Authorization Records Add New Number of Records Submitted: 0 Number of Errors: 0
	Select All Delete
	CalPERS ID SSN-4 Participant Transaction Program Sponsor/ Deduction Deduction Error
	No results
	found.
	Select All Delete

Deductions Request File Submission

Submit a Deductions Request file using file upload

Direct authorization agreement deduction records can be entered manually into my|CalPERS using the online reporting method, or deduction record reports can be submitted using File Upload or File Transfer Protocol (FTP). The deduction record contains a list of the participants associated with the direct authorization deduction.

You can view existing reports listed by the earned period or adjustment date or you can create, upload, or edit direct authorization processing reports.

Extensible Markup Language (XML) direct authorization reports can be either uploaded to my|CalPERS or submitted using File Transfer Protocol (FTP). Reports submitted using FTP do not require login to my|CalPERS to submit the information.

Electronically uploaded direct authorization deduction report files are automatically checked by my|CalPERS against numerous criteria to ensure the completeness of the listed participant records. Common required information types include Business Partners (CalPERS ID), Participant (CalPERS ID) and Retirement Program ID.

If there are no errors, then all of the direct authorization deduction records are submitted to my|CalPERS automatically. If the criteria are not met, my|CalPERS indicates which deduction records have identified errors and return them to the business partner for resolution. Once errors are corrected, the record is automatically submitted for direct authorization deduction without any further manual intervention.

my|CalPERS Direct Authorization Vendor User Guide



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

The Business Partner Login page displays.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Dermame: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter the username and password and select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and select the **Accept** button.

The my|CalPERS *Home* page displays.

my CalPE		kip to: Conter	nt Footer W	/elcome Bobbie Cu	stomize Help	Contact Us	CalPERS On-L	ine Log out	May 26, 201
Home Profile My Home	Repor	ting Person	Information 0	ther Organizations					
Common Tasks	٥	💿 My Case	<i>.</i>			View	More Actions»		
Menu	\bigcirc	Case ID	S Case Title	Case Type		Program	Status		
Person Search		731879		Initiate DA Agree	ment		Closed		
Change Password									
Change Challenge Questions									

Select the **Reporting** global navigation tab.

The Manage Report page displays.

my CalPERS		r Welcome Walter Cust	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011
	orting Person Informatio	on Other Organizations				
Manage Reports						
Common Tasks	Name: Direct Authoriza	tion CalPERS ID:	: 3696467826			
Menu 💿	Organization					
Preprocessing Area						*Required Fields
File Upload History	Create or Edit Repo	ort				
	Method:*		- Continue			
	😨 Work On Existing P	ayroll Reports				
	Schedule Name	Earned Period / Adjustment Date	Status Repor	t Type	Due Date Submi	t Date Test Report
	No results found.					Display
	Direct Authorization	n Incoming Reports				View More Actions
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	3	0

my CalPERS	Skip to: Content Footer	Welcome Walter Cust	tomize Help Co	ntact Us (CalPERS On-Line Lo	g out May 25, 2011
Home Profile Repo	rting Person Information	Other Organizations				
Common Tasks	Name: Direct Authorizat	tion CalPERS ID	: 3696467826			
Menu 💿	Organization					Required Fields
Preprocessing Area	Create or Edit Repor					
File Upload History	Method:* Upload File		Continue			
	Work On Existing Pa Schedule Name	Earned Derind /	Status Repor	t Type	Due Date Subr	iit Date Test Report
	No results found.					Display
	Direct Authorization	Incoming Reports			_	View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Record Submitted	s Number of Records Confirmed
	Direct Authorization Organiation	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022

To submit a file by using the File Upload reporting method, select "Upload File" from the **Method** dropdown and select the **Continue** button within the Create or Edit Report section.

The Upload File section displays and provides a window that will allow you to browse for the file for upload.

	5	kip to: Content Footer Welcome Walter Customize Help Contact Us CalPERS On-Line Log out	May 25, 2011						
my CalPE	RS								
Home Profile	Repo	ting Person Information Other Organizations							
Manage Reports									
Common Tasks	٥	Name: Direct Authorization CalPERS ID: 3696467826							
Menu	O	Organization	*Required Fields						
Preprocessing Are	a								
File Upload Histor	у	🔍 Upload File							
	Use the Browse or Upload File buttons to upload a data file:								
		Path:* Browse							
		Upload File							

Select the **Browse** button and follow the path to the location where the file is located within your organization"s shared file directory or your individual personal computer. Once you have located the file, select the **Upload File** button.

The *File Upload History* page displays. You can display your organization's file upload history by selecting **File Upload History** from the left-side navigation Menu. You can review the File Type, Upload Date, File Status, Batch Job Status, File Name, Valid records, Error records and Total records.

my CalPE			nt Footer ١	Welcome Walte	er Customize Help	Contact Us CalPERS On-Line Li	og out	May 25	, 2011
Home Profile Manage Reports	Repor	ting Person	Information	Other Organiza	tions				
Common Tasks	٥	😨 File Uplo	oad History						
Menu	\odot	File Type	Upload Date	<u>File Status</u>	Batch Job Status	File Name	<u>Valid</u>	<u>Error</u>	<u>Total</u>
Preprocessing Are	ea	20016	05/25/2011	In Progress		20110112155528_003_20016.xml			
File Upload Histor	у					Vi	ew Prepr	ocessing	<u>Areas</u>

Select the **File Upload History** link from the left-side navigation menu. Once the file is in the process of uploading, the screen will indicate that the upload is In Progress, as shown under the File Status column within the File Upload History section.

Once my|CalPERS receives the file, the File Status changes from "In Progress" to "Accepted". Note that the Batch Job Status now shows as "In Progress". You can refresh the screen to check the status. The File Status would display "Rejected" if the same file, or same filename, were submitted, as my|CalPERS only accepts a file one time.

After the upload is complete, my|CalPERS displays the status of "Accepted" under the File Status column and indicates the number of records that were validated and the count of those that were found to have errors within the File Upload History section. In this example, we have processed 16 valid records with no error records.

my CalPERS		nt Footer \	Welcome Walte	er Customize Help	Contact Us CalPERS On-Line Lo	og out	May 25	, 2011			
Home Profile Reporting Person Information Other Organizations Manage Reports											
Common Tasks	💿 File Uplo	oad History									
Menu 💿	File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total			
Preprocessing Area	20016	05/25/2011	Accepted	Completed	20110112155528_005_20016.xml	16	0	16			
File Upload History	20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_004_20016.xml						
The opidad History	20016	05/25/2011	Rejected	Completed	20110112155528 003 20016.xml						

my|CalPERS runs Level 1 validations to check the XML file structure, and if the file did not pass the Level 1 validation, the Batch Job Status would show as "Failed", as shown below.

my CalPEF		kip to: Conte	nt Footer N	Welcome Walte	er Customize Help	Contact Us CalPERS On-Line Lo	og out	May 25	, 2011
Home Profile R Manage Reports	epor	ting Persor	Information	Other Organiza	tions				
Common Tasks	٥	🛈 File Uplo	oad History						
Menu	\odot	File Type	Upload Date	<u>File Status</u>	Batch Job Status	File Name	<u>Valid</u>	Error	<u>Total</u>
Preprocessing Area		20016	05/25/2011	Accepted	Completed	20110112155528_005_20016.xml	0	0	0
File Upload History		20016	05/25/2011	Accepted	Completed	20110112155528_007_20016.xml	0	0	0
File Opload History		20016	05/25/2011	Accepted	Failed	20110112155528_008_20016.xml	0	0	0
		20016	05/25/2011	Rejected	Completed	20110112155528_006_20016.xml			
		20016	05/25/2011	Rejected	Completed	20110112155528_004_20016.xml			

This is an example of a Level 1 error message:

Manage Reports			cahp Customize Help Contact Us CalPERS On-Line Log out May 27, 2011
Common Tasks	۲		CalPERS ID: 3696467826
Menu 💿 Preprocessing Area	Organization	*Required Fields	
File Upload Histor	ry	found starting with element 's01:Tra	rg.xml.sax.SAXParseException: cvc-complex-type.2.4.a: Invalid content was insactionCde'. One of uctionRequestV1":TransactionCode}' is expected
		👁 Upload File	
		Use the Browse or Upload File butto	ons to upload a data file:
		Path:*	
			Browse

my CalPERS	kip to: Conte	nt Footer \	Welcome Walte	er Customize Help	Contact Us CalPERS On-Line Lo	g out	May 25	, 2011
Home Profile Repor	ting Person	Information)ther Organiza	tions				
Manage Reports								
Common Tasks Menu Preprocessing Area File Upload History		rear in the future		eason: Submission Da	ate must be today or a future date a	nd cann	ot be mo	bre
	File Type	Upload Date	<u>File Status</u>	Batch Job Status	File Name	<u>Valid</u>	<u>Error</u>	<u>Total</u>
	20016	05/25/2011	Accepted	Completed	20110112155528_005_20016.xml	0	0	0
	20016	05/25/2011	In Progress		20110112155528_007_20016.xml			
	20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_006_20016.xml			
	20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_004_20016.xml			
	20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_003_20016.xml			
					Vie	ew Prepr	ocessing	<u>a Areas</u>

This file submission was rejected and the error message "The file is rejected due to the following reason: Submission Date must be today or a future date and cannot be more than one year in the future." displays on the *File Upload History* page.

Manage Deductions Request File Errors



Review deduction records in staging area

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



The Business Partner Login page displays.

Enter the username and password and then select the **Log In** button. The *Conditions of Use for Business Partners (Employers)* page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

my CalPEF		ip to: Conter	nt Footer V	Velcome Bobbie Customize	Help Contact Us	CalPERS On-Lin	e Log out	May 26, 2011
Home Profile R	eport	ing Person	Information C	ther Organizations				
Common Tasks	0	• My Case	5		View	More Actions»		
Menu	\odot	Case ID	- Case Title	Case Type	Program	Status		
Person Search		731879		Initiate DA Agreement		Closed		
Change Password								
Change Challenge Questions								

Select the **Reporting** global navigation tab.

The Manage Report page displays.

my CalPERS		r Welcome Walter Cust	:omize Help Co	ntact Us	CalPERS On-Line Log	g out May 25, 2011
Home Profile Repo Manage Reports	orting Person Informatio	Other Organizations				
Common Tasks 💧 Menu 💿	Name: Direct Authoriza Organization	tion CalPERS ID:	: 3696467826			*Required Fields
Preprocessing Area File Upload History	© Create or Edit Repo Method:*		Continue			
	Schedule Name No results found.	Farned Deriod /	Status Repor	t Туре	Due Date Subm	it Date Test Report Display
	Direct Authorization Submitter Name	Original Delivery	Delivery Date	Business Month	Number of Records Submitted	View More Actions× Number of Records Confirmed
	Direct Authorization Organization Direct Authorization	Method Manually enter in data Manually enter in	04/08/2011	04/2011 04/2011	851	851
	Organization Direct Authorization Organization	data Create Report from Interface	05/26/2011	04/2011	3	0

Select the **Preprocessing Area** link from the left-side navigation menu to review the information on the Preprocessing Area section.

The Preprocessing Area section displays. Note the Direct Authorization link under the Preprocessed Data column. The file in this example contains 4,873 records, all of which are shown as valid records under the valid column. There are no errors in this file. You can select file link for more detailed information.

my CalPE		kip to: Content Footer Welcome Walter Customize Help Contact Us Cal	PERS On-Line	Log out	May 25, 2011
Home Profile Manage Reports	Repor	ting Person Information Other Organizations			
Common Tasks	٥	💿 Preprocessing Area			
Menu	\bigcirc	Preprocessed Data	<u>Valid</u>	<u>Error</u>	Total
Preprocessing Ar	ea	Affected Subscriber List	4873	-	4873
File Upload Histor		Census	-	-	-
File Opload Histor	<u>y</u>	Direct Authorization	4873	-	4873
		Health Carrier Rate Data	-	-	-
		Health Carrier ZIP Code Plan Relationship Data	-	-	-
		Health Enrollment	-	-	-
		Health Retiree List	-	-	-
		Medical Group Assignment List	-	-	-
		Payroll Reporting	-	-	-
		Retirement Enrollment	-	-	-
			<u>Upload Data</u>	File <u>Vie</u> v	w Upload History

The additional information is displayed within the Direct Authorization Incoming Reports section.

my CalPERS		· Welcome Walter Cust	omize Help Co	ntact Us	CalPERS On-Line Log	out May 25, 2011
Home Profile Repo	rting Person Informatio	n Other Organizations				
Manage Reports						
Common Tasks 🔕 Menu 💿	Name: Direct Authoriza Organization	tion CalPERS ID:	3696467826			
Preprocessing Area						*Required Fields
File Upload History	👽 Create or Edit Repo	rt				
	Method:*		Continue			
	• Work On Existing P	ayroll Reports				
	Schedule Name	Earned Period / Adjustment Date	Status Repor	t Type	Due Date Submi	it Date Test Report
	No results found.					Display
	Direct Authorization	n Incoming Reports				View More Actions
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	4	1



Correct deduction record errors

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

The Business Partner Login page displays.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCaIPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter the username and password and then select the **Log In** button. The *Conditions of Use for Business Partners (Employers)* page displays.

Skip to: Content Footer Welcome Andrea Customize Help Contact Us CalPERS On-Line Log out March 1 my CalPERS	5, 2011
© Conditions of Use for Business Partners (Employers)	
By accessing this application you acknowledge that all information accessible to you will be used only to assist you in conducting official bu with CalPERS.	usiness

Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

my CalPERS		it Footer	Welcome Bobbie Custo	omize Help Contact Us	CalPERS On-Li	ine Log out	May 26, 2011
Home Profile Repo		Information	Other Organizations				
My Home							
Common Tasks 🛛 🔕	💿 My Cases			View	More Actions»		
Menu 👽	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreem	ent	Closed		
Change Password							
Change Challenge Questions							

Select the **Reporting** global navigation tab.

The Manage Report page displays.

my CalPERS	kip to: Content Footer	Welcome Walter Custo	omize Help Co	ntact Us I	CalPERS On-Line Log	out May 25, 2011						
Home Profile Repo	rting Person Informatio	n Other Organizations										
Manage Reports												
Common Tasks 🔕 Menu 😯	Name: Direct Authoriza Credit Union	ation CalPERS ID:	7633241792			*Required Fields						
Preprocessing Area						Required Fields						
File Upload History	🛛 Create or Edit Repo	rt										
	Method:* Continue Work On Existing Payroll Reports											
	Schedule Name	Earned Deriod /	Status Repor	t Type	Due Date Submi	t Date Test Report						
	No results found.					Display						
	Direct Authorization	1 Incoming Reports				View More Actions»						
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed						
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851						
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022						
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	3	0						

The following steps will guide you through correcting errors using the online system.

If there are errors to be corrected, select the link for the appropriate *Staging* page. The preprocessing area you navigate to will depend on the type of file you submitted. In this example, we are submitting deduction requests, so we will select the **Direct Authorization** link under the Preprocessed Data column within the Preprocessing Area section.

Selecting the **Direct Authorization** link brings us to a screen showing all of our deduction request reports. The report that we just submitted is visible on this screen. As you submit reports, there will be more and more report history. If you do not see the report you submitted on this page, you may need to select the **View More Actions** link in the Direct Authorization Incoming Reports section title banner. Select the link of the report name you want to review under the Submitter Name column within the Direct Authorization Incoming Reports section.

my CalPERS		Welcome Walter Custo	omize Help Co	ntact Us	CalPERS On-Line Log	out May 25, 2011
Common Tasks Menu Preprocessing Area	Name: Direct Authoriza Credit Union	tion CalPERS ID:	7633241792			*Required Fields
File Upload History	😨 Create or Edit Repor	t				
	Work On Existing Pa Schedule Name No results found.	Earned Period /	Status Repor	t Туре	Due Date Submi	t Date Test Report Display
	 Direct Authorization Submitter Name 	Incoming Reports Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	View More Actions» Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	3	0

The deduction report we uploaded displays. The two sections of the page are discussed in the next steps.

^{si} my∣CalPERS	kip to:	Content Fo	oter	Welcome Wal	ter Customiz	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
Home Profile Repor	ting	Person Inform	ation	Other Organiz	ations					
Manage Reports										
Common Tasks	Nam	e: Direct Auth Credit Unio		Ca	IPERS ID: 763	32417:63				
Menu 💿	💿 s	earch Direct A	uthoriza	tion Records						
Adjustment Reports Preprocessing Area						RS ID:				
File Upload History				5	Sponsor/Emp		AV Credit Unic	n 💌		
Retirement Contract					Error Mes	sage:			-	
Summary	Sear	rch Clear								
	💿 n	oirect Authoriz	ation Re	cords Add New	1					
		ect All Delete				mber of R	ecords Subn	nitted: 4	Nu	Imber of Errors: 3
		CalPERS ID	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
		<u>6776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union		\$40.00	
		<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union		\$100.00	The Social Security Number (SSN) reported was invalid.
		<u>5437786976</u>	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union		\$10000.00	Deductions Exceed Gross.
		<u>17776670.87</u>	8011	Brenda Johnston	СНС	CalPERS	Direct Authorization Credit Union		\$400.00	Please enter a valid Transaction Code.
	Selec	t All Delete								

SI my CalPERS		Content Foo		Welcome Wall Other Organiz		e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
Manage Reports				ound organiz						
Common Tasks	Name:	Direct Autho Credit Unior		Ca	IPERS ID: 763	32417:63				
Menu 💿	💿 Sea			tion Records						
Adjustment Reports					CalPE	RS ID:				
Preprocessing Area File Upload History				5	Sponsor/Emp	loyer: D	AV Credit Unic	n 💌		
Retirement Contract					Error Mes	sage:			•	
Summary	Search	Clear								
		ect Authoriza	ition Re	cords Add New] Nur	nber of R	ecords Subn	nitted: 4	Nu	imber of Errors: 3
	<u>(</u>	CalPERS ID	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer		Deduction Amount	<u>Error</u> <u>Message</u>
		776625343	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union		\$40.00	
	<u> </u>	618719672	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union		\$100.00	The Social Security Number (SSN) reported was invalid.
	<u> </u>	<u>437786976</u>	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union		\$10000.00	Deductions Exceed Gross.
	1	.7776670.87	8011	Brenda Johnston	СНБ	CalPERS	Direct Authorization Credit Union		\$400.00	Please enter a valid Transaction Code.
	Select	All Delete								

The Search Direct Authorization Records section includes search criteria. You can search the report for a record by entering a particular CalPERS ID in the **CalPERS ID** field.

If the file contains deduction reports for more than one sponsor, you can search for a partcular sponsor or employer by selecting the appropriate value from the **Sponsor/Employer** dropdown.

You also can search by error message. To search for particular records, choose the appropriate error message search criteria from the **Error Message** dropdown and select the **Search** button.

The Direct Authorization Records section shows the individual records in the report and any associated errors.

my CalPERS	kip to: C	Content Foo	oter	Welcome Walt	ter Customize	e Help	Contact Us	CalPERS On	·Line Log o	ut May 25, 2011
Home Profile Repor	ting P	erson Informa	ation	Other Organiz	ations					
Common Tasks	Name:	Direct Autho Credit Unior		Ca	IPERS ID: 763	32417:63				
Menu 💿	💿 Sea	arch Direct A	uthoriza	tion Records						
Adjustment Reports					CalPE	RS ID:				
Preprocessing Area File Upload History				5	Sponsor/Emp		AV Credit Unic	n 💌		
Retirement Contract					Error Mes	isage:			•	
Summary	Search	Clear								
	A			cords Add New						
		ect Authoriza	ition Re	COPOS AND NEW		nber of R	ecords Subn	nitted: 4	Nu	umber of Errors: 3
	<u> </u>	CalPERS ID	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u> </u>	<u>5776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union		\$40.00	
	<u> </u>	<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union		\$100.00	The Social Security Number (SSN) reported was invalid.
	<u> </u>	54 <u>37786976</u>	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union		\$10000.00	Deductions Exceed Gross.
	<u> </u>	17776670.87	8D11	Brenda Johnston	СНБ	CalPERS	Direct Authorization Credit Union		\$400.00	Please enter a valid Transaction Code.
	Select	All Delete								

To correct errors, select the appropriate **CaIPERS ID** link under the CaIPERS ID column within the Direct Authorization Records section for the record you want to correct.

The error in the second record on the page (CalPERS ID "5618719672" in this example) is due to a mismatch between the last four digits of the Social Security number in the record and the Social Security number associated with "Linda Johns". Select the CalPERS ID link for "Linda Johns".

The *Deduction Information* page for "Linda Johns" displays.

s my CalPERS	kip to: Content	t Footer We	elcome Walter Custom	ize Help Contact U	s CalPERS On	Line Log out Ma	ay 25, 2011
Home Profile Repo	rting Person I	nformation Ot	her Organizations				
Manage Reports							
Common Tasks 🛛 🔕	Name: Direc	t Authorization	CalPERS ID: 7	533241792			
Menu 💿	Credi	t Union				*Re	quired Fields
Adjustment Reports	O Deduction	Information					
Preprocessing Area		Submitter:	Direct Authorization Cre	dit Union			
File Upload History	Bu	usiness Month:	06/2011				
Retirement Contract		Participant ID:	CalPERS ID				
Summary			Social Security Nun	nber			
		CalPERS ID*	5618719618				
	Particinant	Social Security					
	Turcipunc	Number-4*					
		Name:*	Linda Johns <u>Selec</u>	t			
	Deduc	tion Amount:*	100.00				
	💿 Direct Aut	thorization Agree	ements				
	Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
		Credit Union	California Public	Direct Authoriz	ation		
	1000001110	Deduction	Employees' Retireme System	nt Credit Union			01/01/1987
	Save & Continu	Je Save & Add A	nother				

Enter the correct last four digits of "Linda Johns" Social Security number ("6011" in this example) in the **Participant Social Security Number – 4** field within the Deduction Information section and then select the **Save & Continue** button.

The Deductions Exceed Gross error message associated with the third record on the page (CalPERS ID "5437786976" in this example) indicates that there are not enough funds in the participant's retirement warrant available to cover the deduction amount.

my CalPERS	kip to:	: Content Fo	oter	Welcome Wal	ter Customiz	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011		
Home Profile Repor	ting	Person Inform	ation	Other Organiz	ations							
Manage Reports	Manage Reports											
Common Tasks 🛛 🔕	Nam	e: Direct Auth Credit Unio		¹ Ca	IPERS ID: 763	32417:63						
Menu 💿	💿 s	Search Direct A		ation Records								
Adjustment Reports					CalPE	RS ID:						
Preprocessing Area File Upload History				:	Sponsor/Emp		AV Credit Unic	on 💌				
Retirement Contract Summary	Sea	rch Clear			Error Mes	sage:			•			
	0	Direct Authoriz	ation Re	cords Add New	1							
	<u>Sel</u>	lect All Delete]		Nu	nber of R	ecords Subn	nitted: 4	N	Imber of Errors: 3		
		<u>CalPERS ID</u>	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer		Deduction Amount	<u>Error</u> <u>Message</u>		
		<u>6776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union		\$40.00			
		<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union		\$100.00	The Social Security Number (SSN) reported was invalid.		
		<u>5437786976</u>	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union		\$10000.00	Deductions Exceed Gross.		
		<u>17776670.87</u>	8011	Brenda Johnston	CHG	CalPERS	Direct Authorization Credit Union		\$400.00	Please enter a valid Transaction Code.		
	Selec	t All Delete										

Select the CalPERS ID link for "Taylor Rock".

The Deduction Information page for "Taylor Rock" displays.

	kip to: Content	: Footer We	lcome Walter Customiz	e Help Contact I	Us CalPERS On	-Line Log out M	ay 25, 2011
my CalPERS							
Home Profile Repo	rting Person I	nformation Oth	ner Organizations				
Manage Reports							
Common Tasks 🙆	Name: Direct		CalPERS ID: 763	3241792			
Menu 👽	Crear	t Union				*Re	quired Fields
Adjustment Reports	O Deduction	Information					
Preprocessing Area		Submitter:	Direct Authorization Cred	it Union			
File Upload History	Bu	isiness Month:	06/2011				
Retirement Contract		Participant ID:	CalPERS ID				
Summary		•	Social Security Number Social Security Number	er			
		CalPERS ID*	5437786976				
	Participant	Social Security	15109				
		Number-4*					
			Taylor Rock <u>Select</u>				
	Deduc	tion Amount:*	100.00				
	🔽 Direct Aut	horization Agree	ments				
	Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
		Credit Union	California Public	Direct Authori:	zation		
	1000001110	Deduction	Employees' Retirement System	Credit Union			01/01/1987
	Save & Continu	save & Add Ar	nother				

Enter the correct deduction amount ("\$100.00" in this example) in the **Deduction Amount** field within the Deduction Information section and then select the **Save & Continue** button.

my|CalPERS Direct Authorization Vendor User Guide

my CalPERS	kip to:	Content Fo	oter	Welcome Wal	ter Customiz	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
Home Profile Report	ting	Person Inform	ation	Other Organiz	ations					
Manage Reports										
Common Tasks	Name	e: Direct Auth Credit Unio		Ca	IPERS ID: 763	32417:63				
Menu 💿	💿 s	earch Direct A		ation Records						
Adjustment Reports						RS ID:				
Preprocessing Area File Upload History					Sponsor/Emp		AV Credit Unic	on 💌		
Retirement Contract					Error Mes	ssage:			•	
Summary	Sear	ch Clear								
	💿 n	irect Authoriza	ation Pe	cords Add New	1					
		ect All Delete			Nu	mber of R	ecords Subn	nitted: 4	Nu	Imber of Errors: 3
		<u>CalPERS ID</u>	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
		<u>6776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union		\$40.00	
		<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union		\$100.00	The Social Security Number (SSN) reported was invalid.
		<u>5437786976</u>	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union		\$10000.00	Deductions Exceed Gross.
		<u>17776670.87</u>	8011	Brenda Johnston	CHG	CalPERS	Direct Authorization Credit Union		\$400.00	Please enter a valid Transaction Code.
	Select	t All Delete								

The page also allows us to add deduction records. To add a record to the report, Select the **Add New** button in the Direct Authorization Records section title banner.

The Deduction Information page displays.

s my CalPERS	kip to: Content Fool	ter Welcom	e Walter Customiz	e Help Co	ontact Us	CalPERS On	-Line Log out	May 25, 2011
Home Profile Repor	ting Person Informa	tion Other O	rganizations					
Manage Reports								
Common Tasks (A) Menu (R)	Name: Direct Author Credit Union	rization	CalPERS ID: 763	3241792				*Required Fields
Adjustment Reports	💿 Deduction Inform							
Preprocessing Area	Su	bmitter: Dire	ct Authorization Cred	it Union				
File Upload History	Busines	s Month: 06/2	011					
Retirement Contract	Dartici	ipant ID: 🔍 O	alPERS ID					
Summary	Paruci		ocial Security Numb	er				
	CalF	PERS ID*						
	Participant Social							
	Nu	mber-4*						
	Deduction A	mount:*						
	💿 Direct Authorizat	tion Agreement	ts					
	Agreement [Program	Spoi	nsor	Carrier	Third Party Administra	Effective Date
	0 1000001110	Credit Union Deduction	California Public Employees' Retirer System	n a m b	t Authorizat t Union	ion		01/01/1987
	Save & Continue Sav	e & Add Another)					

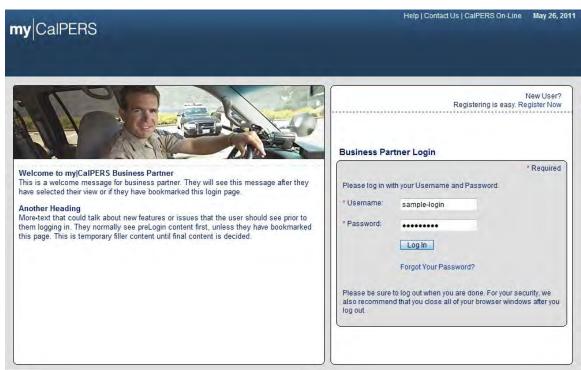
Update the information within the Deduction Information section and then select the **Save & Continue** button if you are finished adding deduction records, or the **Save & Add Another** button if you want to add more deduction records.

Delete a deduction record or report

If you want to remove a deduction record or a complete deduction report that you added in error before the cutoff date for that months processing, you can do so.



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



The Business Partner Login page displays.

Enter the username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

	S	kip to: Conte	nt Footer W	/elcome Bobbie Customize	Help Contact Us	CalPERS On-Line	Log out	May 26, 201
my CalPl								
Home Profile	Repo	rting Persor	n Information 0	ther Organizations				
My Home								
Common Tasks	٥	💿 My Case			Viow	More Actions»		
Menu	$\overline{\mathbf{O}}$	Case ID	Case Title	Case Type	Program	Status		
Person Search		731879		Initiate DA Agreement		Closed		
Change Passwo	rd							
Change Challen Questions	je							

Select the **Reporting** global navigation tab.

my CalPERS		r Welcome Walter Custo	omize Help Col	ntact Us (CalPERS On-Line Log	out May 25, 2011
Home Profile Repo	rting Person Informatio	on Other Organizations				
Manage Reports						
Common Tasks 🛛 🔕	Name: Direct Authoriz	zation CalPERS ID:	7633241792			
Menu 💿	Credit Union					
Preprocessing Area						*Required Fields
File Upload History	👽 Create or Edit Repo	ort				
<i>,</i>	Method:*		Continue			
	🛛 Work On Existing F					
	Schedule Name	Earned Period / Adjustment Date	Status Report	t Type	Due Date Submi	t Date Test Report
	No results found.					
						Display
	Direct Authorizatio					View More Actions>
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization	Manually enter in	04/08/2011	04/2011	851	851
	Organization Direct Authorization	data Manually enter in	04/08/2011	04/2011	4022	4022
	Organization Direct Authorization	data Create Report	0.,00,2011	5.,2011		
			05/26/2011	05/2011		

The Manage Report page displays.

As you submit reports, there will be more and more report history displayed within the Direct Authorization Incoming Reports section. If you do not see the report you submitted on this page, you may need to select the **View More Actions** link in the Direct Authorization Incoming Reports section title banner. Select the link of the report name you want to delete under the Submitter Name column within the Direct Authorization Incoming Reports section. The deduction report we want to delete displays within the Direct Authorization Records section.

my CalPERS	kip to: Co	ontent Fo	oter	Welcome Wal	ter Customize	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
Home Profile Repor	ting Per	rson Inform	ation	Other Organiz	ations					
Manage Reports										
Common Tasks 🛛 🔕	Name:	Direct Auth Credit Unio		Ca	IPERS ID: 763	32417:63				
Menu 💿				ation Records						
Adjustment Reports					CalPE	RS ID:				
Preprocessing Area				:	Sponsor/Emp	loyer: D	AV Credit Unic	on 💌		
File Upload History Retirement Contract					Error Mes	sage:			-	
Summary	Search	Clear								
	💿 Dire	ct Authoriz	ation Re	cords Add New						
	<u>Select</u>	All Delete]		Nu	nber of R	ecords Subn	nitted: 3	Nu	Imber of Errors:
	<u>C</u> a	alPERS ID	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u> </u>	76625343	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union		\$40.00	
	<u>56</u>	<u>18719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union		\$100.00	The Social Security Number (SSN) reported was invalid.
	<u>17</u>	<u>776670.87</u>	8011	Brenda Johnston	СНС	CalPERS	Direct Authoization Credit Union		\$400.00	Please enter a valid Transaction Code.
	Select A	Delete								

Select one or more of thecheck boxes within the Direct Authorization Records section or use the **Select All** link

The deduction record checkboxes will display as selected within the Direct Authorization Records section.

, Sl	kip to: Co	ntent Fo	oter	Welcome Wali	ter Customize	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
my CalPERS										
Home Profile Repor	ting Per	son Inform	ation	Other Organiz	ations					
Manage Reports										
Common Tasks 🔕	Name:	Direct Auth Credit Unio		Ca	IPERS ID: 763	3241763				
Menu 💿				ation Records						
Adjustment Reports					CalPE	RS ID:				
Preprocessing Area				5	Sponsor/Emp	loyer: D	AV Credit Unic	on 💌		
File Upload History Retirement Contract					Error Mes	sage:			•	
Summary	Search	Clear								
	🔍 Direc	ct Authoriz	ation Re	COrds Add New		1 (0				1 (5
		ct Authoriz All_Delete		cords Add New		nber of R	ecords Subn	nitted: 3	Nu	mber of Errors:
	Select			cords Add New Participant Name		nber of R Program	Sponcor/	Deduction		
	<u>Select</u>	All Delete	SSN-4	<u>Participant</u> <u>Name</u>	Nur Transaction Type	Program	Sponsor/ Employer Direct	Deduction Type Credit	Deduction Amount	Error
	<u>Select</u>	All_Delete	SSN-4	Participant	Nur Transaction		Sponsor/ Employer	Deduction Type Credit Union	Deduction	Error
	Select	All Delete	SSN-4 8551	<u>Participant</u> <u>Name</u> Helen	Nur Transaction Type Update	Program CalPERS	Sponsor/ Employer Direct Authoization Credit Union Direct	Deduction Type Credit Union Deduction Credit	Deduction Amount \$40.00	Error Message The Social
	Select	All Delete	SSN-4 8551	Participant Name Helen Nelson	Nur Transaction Type	Program	Sponsor/ Employer Direct Authoization Credit Union	Deduction Type Credit Union Deduction Credit	Deduction Amount	<u>Error</u> <u>Message</u>
	Select	All Delete	SSN-4 8551	Participant Name Helen Nelson Linda Johns	Nur Transaction Type Update	Program CalPERS	Sponsor/ Employer Direct Authoization Credit Union Direct Authorization Credit Union	Deduction Type Credit Union Deduction Credit Union Deduction	Deduction Amount \$40.00	Error Message The Social Security Number (SSN) reported was invalid.
	<u>Select</u> <u>Ca</u> ▼ 67	All Delete	SSN-4 8551 6016	Participant Name Helen Nelson Linda	Nur Transaction Type Update	Program CalPERS	Sponsor/ Employer Direct Authoization Credit Union Direct Authorization Credit Union	Deduction Type Credit Union Deduction Credit Union Deduction Credit Union	Deduction Amount \$40.00	Error Message

Select the **Delete** button.

All of the deduction records in the selected report have been deleted, as it now displays "No results found" within the Direct Authorization Records section.



my|CalPERS Direct Authorization Vendor User Guide

Common Tasks 🛛 🔕	Name: Direct Authorization Credit Union CalPERS ID: 76332417'63
Menu 👽	To Search Direct Authorization Records
Adjustment Reports	CalPERS ID:
Preprocessing Area	Sponsor/Employer: DAV Credit Union
File Upload History	Error Message:
Retirement Contract Summary	Search Clear
	O Direct Authorization Records Add New Select All Delete Number of Records Submitted: 0 Number of Errors: 0
	CalPERS ID SSN-4 Participant Transaction No Program Employer Type Sponsor/ Deduction Deduction Error Employer Type No results found. Select All Delete Select All Delete

my|CalPERS Reports for Direct Authorization Vendors

Part 1: Configuring Internet Explorer

Setup Internet options

General	Securit			Connection	2	ms Advar	nced
Select a	a zone to	view or cha	inge secur	ity settings	0		1
Int	ernet	Local intra	net Trust	ed sites F	Restricted		3
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Trusted	vour fi	les.	-	-		3	23
~				ebsites from security set		All websites	in E
	this z	one will use ite to the zo	the zone's	security set	tings.	All websites	
	this z his webs os://my.c	one will use ite to the zo	the zone's		tings.	*	
http Webs	this z his webs os://my.c	one will use ite to the zo	the zone's	security set	tings.	*	
http Webs *.ac *.ca	this z his websi os://my.cd ites: ites: in.psr alpers.ca	one will use ite to the zo alpers.ca.go .gov	the zone's	security set	tings.	Add	
http Webs *.ac *.ca http	this z his websi os://my.co ites: cn.psr alpers.ca o;//*,sab	one will use ite to the zo alpers.ca.go .gov anow.net	the zone's ne: pv/reports	security set	tings.	Add	
http Webs *.ac *.ca http http	this z his websi os://my.co ites: cn.psr alpers.ca o;//*,sab	one will use ite to the zo alpers.ca.go .gov anow.net 's.sabanow.	the zone's ne: pv/reports	security set	tings.	Add	
http Webs *.ac *.ca http http	this z his websi os://my.cl ites: cn.psr alpers.ca o://*.sab o://calper	one will use ite to the zo alpers.ca.go .gov anow.net rs.sabanow.	ne: ne: pv/reports	security set	gnos.c	Add	
http Webs *.ac *.ca http http	this z his websi os://my.cl ites: cn.psr alpers.ca o://*.sab o://calper	one will use ite to the zo alpers.ca.go .gov anow.net rs.sabanow.	ne: ne: pv/reports	security set	gnos.c	Add	

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

Modify Trusted Site Options

Follow the instructions below to modify the options of the Trusted Sites zone and set the "Enable XSS Filter" property to "Disable." Back on the 'Internet Options' dialog, with 'Trusted Sites' still selected, select the **Custom Level** button.

and the second second	otions					8 ×
General	Security	Privacy Con	itent Conne	ctions Pr	ograms	Advanced
			V	6)	
Inte	rnet Lo	al intranet	Trusted sites	Restric		
	Trusted	sites		-	Sites	
~	trust not t your files.	o damage yo	sites that you ur computer o nis zone.		51050	
Securi	ty level for	this zone	15.6			
	- To	tom settings. change the s	settings, click mmended set			vel.
	Enable Prot	ected Mode	requires rest	erting Later	rnet Explo	rer)
		L	Custom leve		Default le	vel
			Reset	all zones to	default le	evel
		Γ	ОК	Cance	4	Apply

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

ettings		
0) Prompt	
et Down	nloads	
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Automatic prompting for file downlo	ads
0	Disable	
	Enable	
E F	File download	
0	Disable	
	Enable	
E F	Font download	
0	Disable	
0	Enable	
0	Prompt	
-	le .NET Framework setup	
-	Disable	
1000	Enable	-
Miere	III	1 6
Takes eff	fect after you restart Internet Expl	lorer
eset custo	om settings	
eset to:		Reset
	Medium (default)	• Reset
	-	
		OK Cancel

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

ettings			
C	Disable		*
(Enable		
雪 4	Allow websites to prompt fo	r information using	scripted windo
Q	Disable		
and the second se	Enable		
图 E	nable XSS filter		
0) Disable		
	Enable		
· 图 2	cripting of Java applets		
9	Disable		
(Enable		
0.0) Prompt		
100	Authentication		_
25	ogon		
0	Anonymous logon	a formation and	+
Takes eff	fect after you restart Inter	net Explorer	
		2.240 <u>-</u>	
eset custo	om settings		
eset to:	Medium (default)	•	Reset
		ОК	Cancel

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

ettings		
	Disable	*
and a	Enable	
图,	Allow websites to prompt for informatio	n using scripted winde
	Disable	
	Enable	
and the second s	Enable XSS filter	
0	Disable	
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22.11) Prompt	
1400	Authentication	_
25	.ogon	
	Anonymous logon Automatic logon only in Intranet zor	-
4		*
*Takes ef	fect after you restart Internet Explore	r
eset custo	om settings	
eset to:	Medium (default)	▼ Reset

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



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

-	o	12.	12000	120-20-20-20	1	Link
General	Security	Privacy	Content	Connections	Programs	Advanced
(ty settings.	0	
Int	ernet L	ocal intrar	net Trust		stricted sites	
	Truste	sites			Site	-
*	trust not your file	t to damag s.	websites t ge your con s in this zon	nputer or		
Secur	ity level fo	r this zone	2			
	Ci -T		the setting	gs, click Custon Ided settings, c		level.
E	Enable Pr	otected M	ode (requir	res restarting I	nternet Exp	lorer)
			Cust	tom level	Default	level
				Reset all zone	s to default	level

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

Part 2: Generating Reports in my|CalPERS

Accessing reports in Cognos®

- 1. Log into my|CalPERS
- 2. From the *My Home* page select the up arrow to expand Common Tasks from the left navigation menu.

my CalPERS	o: Content Footer	Welcome City Cus	tomize Help Col	ntact Us CalPE	RS On-Line Lo
Home Profile Repor	ting Person Informatio	on Loan Eligibility S	earch Education]	
My Home Requests					
Common Tasks	💿 My Cases			View	Aore Actions»
Menu 😏	Case ID	Case Title	Case Type	Program	Status
Person Search	No results found.				
Organization Search					
Change Password					
Change Challenge Questions					
Home and Personal Loan					
<					>

3. Select the **Reports** link.

my CalPERS	ting) Person Information			_	RS On-Line Lo
Common Tasks Reports Document History Inquiry List Submit Inquiry Menu	My Cases Case ID No results found.	Case Title	Саѕе Туре	View I Program	More Actions» Status
Person Search Organization Search Change Password					>

4. After selecting the **Reports** link, select the **My Home** link

IBM' COGNOS' 8		Traci Veteto	Log On Log Off
My Content			
My home			
IBM Cognos conte	ent		
V Show this page in the future			Quick Tour
			IBM.

5. Select and open the **PSR_REPORTS_ENV98** folder highlighted in yellow.

6 https://internal.calpers.ca.gov/?b_action=	xts.run&m=portal/cc.xts&m_folder=i2D9F4DFB6F	C049819B8 - Windo 🗖 🗖 💌
IBM Cognos Connection	Traci Veteto Log On 🔻 🔯	Q ▼ Å ▼ å ▼ ?▼
Public Folders My Folders		
Public Folders		41 🖆 🔮 📽 🗙 🛃 🎌
	Entries:	1 - 4 🔘 KKH)
🔲 🕴 Name 🕀	Modified ≎	Actions
PSR Operational Reporting Env98	September 25, 2011 2:08:20 AM	More
E PSK Reporting Env98	September 25, 2011 5:51:21 PM	More
PSR REPORTS ENV98	September 23, 2011 1:50:19 PM	More
PSR Security Reporting Env98	September 25, 2011 2:11:58 AM	🚰 <u>More</u>
	Trusted sites Protected Mode: 0	Off 4 ↔ • • • •

This folder contains predefined reports for business partners. The list of available reports is filtered for each business partner based on programs contracted with CalPERS and the system access of the business contact who is logged in.

my|CalPERS Direct Authorization Vendor User Guide

BM Cognos Connection	Laura Log On 🔻 🚺	⊠ ▼ Å ▼ å ▼ ?
Public Folders My Folders		
<pre>blic Folders > PSR_REPORTS_ENV98</pre>		11 📫 🐮 📽 👪 🗙 🛃 🗄
	Entries:	1 - 15 💽
Name ≑	Modified ♦	Actions
Saved Reports	October 27, 2011 3:38:56 PM	More
ColPERS ID and SSN Report	October 24, 2011 12:09:06 PM	🚰 🕨 🐻 <u>More</u>
Deduction File Report	October 26, 2011 5:41:25 PM	🚰 🕨 🐻 <u>More</u>
Deduction Register Report	October 25, 2011 6:47:53 PM	🚰 🕨 🔣 <u>More</u>
Dental Memo Report	October 26, 2011 5:52:38 PM	🚰 🕨 🔣 <u>More</u>
Employer Health Event Notification Report	October 22, 2011 2:20:39 PM	🚰 🕨 🔣 <u>More</u>
Employer Retroactive Health Adjustment Report	October 22, 2011 2:20:39 PM	🚰 🕨 🐻 <u>More</u>
Health Plan Statement Employer Report	October 27, 2011 1:03:01 PM	🚰 🕨 🐻 <u>More</u>
Monthly Employer Billing Roster Report	October 27, 2011 11:28:36 AM	🚰 🕨 🐻 <u>More</u>
Operational Deduction Register Report	October 22, 2011 2:25:48 PM	😭 🕨 🐻 <u>More</u>
Service Credit Payment Scheduled Changes	October 22, 2011 2:20:35 PM	😭 🕨 🐻 <u>More</u>
🛛 🔈 Shortcut to Financial Metrics - GL Detail	September 29, 2011 10:45:31 AM	4 😭 More
🗌 🔈 Shortcut to Financial Metrics - Receivables	September 28, 2011 10:10:57 AM	4 😭 More
🛛 🔈 Shortcut to Remittance Advice Report	September 27, 2011 12:56:37 PM	1 😭 More
📃 🔈 Shortcut to State ARP Data File Error Report	September 26, 2011 10:37:47 AM	4 😭 More

6. Select Saved Reports.

Generating the Calpers ID SSN Report

In order to generate the CalPERS ID and SSN report, the business contact must have Direct Authorization access privileges assigned to their roll and be a contact for either the deduction submitting organization or the organization that receives the warrants for the deductions.

- 1. Log into my|CalPERS
- 2. Follow the steps Accessing Reports in Cognos ® section above.
- 3. Select the **CalPERS ID and SSN Report** Link. There are two methods for finding the report.
 - a. You can use the search box and the navigation buttons to locate the report. Type "CalPERS id" into the window and select the magnifying glass icon on the right.
 - b. Use the page forward buttons to scroll through the pages until you find the report.

IBM C	Cognos Connection		Laura Log On 👻 💆		<u></u> ⊴+ ≙ +	1 - ?
	Public Folders	My Folders				1
Public F	Folders > <u>PSR_REPORTS</u>	5 ENV98 > Saved Reports	a	Entries: 1	- 15	K 122 3 Hairi
E	Name #		Modified @		Actions	+
	Add Drop Change L	ist Report_103682_0	November 11, 2011 1	1:29:12 PM	More	b
	Add Drop Change L	ist Report_88784_0	October 16, 2011 1:25	5:21 AM	More	Ť
	Benefit Roll Employe	er Distribution_100376_0	November 8, 2011 3:4	43:34 AM	More	•
	Benefit Roll Employe	er Distribution_101608_0	November 9, 2011 5:0	08:28 AM	More	
	Benefit Roll Employe	er Distribution_102607_0	November 10, 2011 6	:06:40 AM	More	
	Benefit Roll Employe	er Distribution_103544_0	November 11, 2011 4	:08:16 AM	More	
	Benefit Roll Employe	er Distribution_103684_0	November 11, 2011 1	0:12:14 PM	More	
	Benefit Roll Employe	er Distribution_105630_0	November 16, 2011 1	:08:44 AM	More	
	Benefit Roll Employe	er Distribution 114558 0	November 30, 2011 5	:14:16 AM	More	
	Benefit Roll Employe	er Distribution_82642_0	September 28, 2011 4	:32:59 AM	More	
	Benefit Roll Employe	er Distribution_84066_0	October 3, 2011 5:28	57 AM	More	
	Benefit Roll Employe	er Distribution_85094_0	October 6, 2011 8:03	26 AM	More	
	Benefit Roll Employe	er Distribution_86125_0	October 11, 2011 12:	37:56 AM	More	
	Benefit Roll Employe	er Distribution_86946_0	October 12, 2011 8:2	7:03 AM	More	
	Benefit Roll Employe	er Distribution_87483_0	October 13, 2011 9:33	7:01 AM	More	

4. In this example, the report was found using the search functionality. Select the **View Output Versions of This report** icon for the report date you want to view.

ear	ch			Laura Log On * 🔯 🏠 🐂 🕯 * ? *
Seam	ch: <u>N</u>	Iame field 🗸		×
Calp	ers i	d	Search 👩 Advanced 🕸	
				Entries: 1 - 15
		> Name ê		Actions
	8	> CalPERS ID and SSN Report_100672_0 Last modified on: November 8, 2011 2:52:54 PM		More
		> CalPERS ID and SSN Report_100679_0 Last modified on: November 8, 2011 3:18:28 PM		More
	B	> CalPERS ID and SSN Report_100819_0 Last modified on: November 8, 2011 12:18:50 PM		📅 🕞 More
		> CalPERS ID and SSN Report_101108_0 Last modified on: November 8, 2011 5:09:51 PM		📅 💽 More
	围	> CalPERS ID and SSN Report_101345_0 Last modified on: November 8, 2011 5:01:45 PM		📅 👰 More
	5	> CalPERS ID and SSN Report_101588_0 Last modified on: November 8, 2011 6:41:44 PM		📅 💽 More
	围	> CalPERS ID and SSN Report_101935_0 Last modified on: November 9, 2011 4:11:48 PM		📅 👰 More
		> CalPERS ID and SSN Report_102583_0 Last modified on: November 10, 2011 5:55:39 AM		📅 🗓 More
	8	> CalPERS ID and SSN Report_102622_0 Last modified on: November 10, 2011 10:07:20 AM		🖀 🕼 More
	围	> CalPERS ID and SSN Report_102737_0 Last modified on: November 10, 2011 2:43:00 PM		📷 🕡 More
	盟	> CalPERS ID and SSN Report_102798_0 Last modified on: November 10, 2011 2:29:10 PM		🔡 🛅 More
		> CalPERS ID and SSN Report_103834_0 Last modified on: November 14, 2011 9:03:13 AM		證 👘 More
	1	••• > CalPERS ID and SSN Report_110107_0 Last modified on: November 22, 2011 8:07:44 AM		🔡 🔀 <u>More</u>
	1	> CalPERS ID and SSN Report_110456_0 Last modified on: November 22, 2011 4:18:27 PM		🖆 🖟 More
	1	*** > CalPERS ID and SSN Report_83567_0 Last modified on: September 30, 2011 9:14:44 AM		🖀 🕼 More

5. This report is only available in HTML. Select the **HTML** link.

View report output versions - CalPERS	ID and SSN Report_100672_0	Help X
Select an output version to view by clickin	ig on a Format hyperlink.	
Version:		
November 8, 2011 2:52:54 PM	•	
		Entries: 1 - 1 🚫 1 🕬 🕨
Formats	Languages 🗳	Actions
HTML	English	
Close		

Generating the Deduction Register Report

In order to generate the Deduction Register report, the business contact must have Direct Authorization access privileges assigned to their roll and be a contact for either the deduction submitting organization or the organization that receives the warrants for the deductions.

- 6. Log into my|CalPERS
- 7. Follow the steps Accessing Reports in Cognos ® section above.
- 8. Select the **Deduction Register Report** Link. There are two methods for finding the report.
 - a. You can use the search box and the navigation buttons to locate the report. Type "deduction register" into the window and select the magnifying glass icon on the right.
 - b. Use the page forward buttons to scroll through the pages until you find the report.

IBM C	ognos Connection		Laura Log On 👻 💆		D- A-	1 - ? -
6 6	Public Folders	My Folders				1
Public F	olders > <u>PSR_REPORTS</u>	ENV98 > Saved Reports	a	Entries: 1	- 15 🔘	× 🖻 हा लन्मका
E	Name @		Modified @		Actions	+
0 2	Add Drop Change L	ist Report_103682_0	November 11, 2011 1	1:29:12 PM	More	b
B	Add Drop Change L	ist Report_88784_0	October 16, 2011 1:2	5:21 AM	More	
	Benefit Roll Employe	r Distribution_100376_0	November 8, 2011 3:	43:34 AM	More	•
	Benefit Roll Employe	r Distribution_101608_0	November 9, 2011 5:	08:28 AM	More	
	Benefit Roll Employe	r Distribution_102607_0	November 10, 2011 6	:06:40 AM	More	
	Benefit Roll Employe	r Distribution_103544_0	November 11, 2011 4	:08:16 AM	More	
	Benefit Roll Employe	r Distribution_103684_0	November 11, 2011 1	0:12:14 PM	More	
	Benefit Roll Employe	r Distribution_105630_0	November 16, 2011 1	:08:44 AM	More	
	Benefit Roll Employe	r Distribution 114558 0	November 30, 2011 5	:14:16 AM	More	
1	Benefit Roll Employe	r Distribution_82642_0	September 28, 2011 4	:32:59 AM	More	
	Benefit Roll Employe	r Distribution_84066_0	October 3, 2011 5:28	57 AM	More	
	Benefit Roll Employe	r Distribution_85094_0	October 6, 2011 8:03	26 AM	More	
	Benefit Roll Employe	r Distribution_86125_0	October 11, 2011 12:	37:56 AM	More	
	Benefit Roll Employe	r Distribution_86946_0	October 12, 2011 8:2	7:03 AM	More	
	Benefit Roll Employe	r Distribution_87483_0	October 13, 2011 9:3	7:01 AM	More	

9. In this example, the report was found using the search functionality.

Search			Laura Log Or		m a	×
earch: <u>Name field</u> +						
deduction register	Search 👩	<u>Advanced</u> ≽				
			Entries: 1	- 2	0	
I Name e				Actio	ns	
Section Register Report_103682_0 Last modified on: November 14, 2011 12:53:33 PM			😭 💽 More			<u></u>
Seport View of Deduction Register Report_32191 Last modified on: October 28, 2011 11:42:03 AM				a	More.	-

10. Notice there are reports generated on different dates. Select the icon to view output versions of the report you want to view.

/ersion:			
November 14, 2011 12:53:33 PM 👻			
		Entries: 1 - 4 🔘 14 44 14	
Formats	Languages 🖬	Actions	
Belimited text (CSV) 1053662662	English	e	
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Delimited text (CSV) 1053662662	English	<u>e</u>	
Delimited text (CSV) 1053662662	English	e	

11. You will see reports for each deduction type you manage.

lect an output version to view by clicking on a Fo	mat hyperlink.		
/ersion:			
November 14, 2011 12:53:33 PM 🝷			
		Entries: 1 - 4 🔘 4 44	1-10-
Formats	Languages 🖬	Actions	
Delimited text (CSV)1053662662	English	e	
Delimited text (CSV)1055051452	English	e	
Delimited text (CSV)1053662662	English	e	
Delimited text (CSV)1053662662	English	a	

12. Select your report.

File Download						
Do you want to open or save this file?						
×	Name: qd92qwCGl84dwsqv8ljwl8CM91d99vy9y8hlydsv.xls Type: Microsoft Excel 97-2003 Worksheet, 126KB From: my.calpers.ca.gov					
Open Save Cancel						
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?						

13. You will be prompted to open or save the file.

Microsoft		×					
	The file you are trying to open, '4dC9dGvCGC82yldvwlCl4Q8wdGjjM2qM2dMwwh2w[1].xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?						
	Yes No Help						

a. If you select the **Open** button, you may see the message above. Select the **Yes** button After the file opens, you can format it and save it as a .csv file from Excel or save it as a worksheet if you prefer.

· Errore - Ganar	4	+ >	*	
File name:	qd92qwCG84dwsqv8lyw8CM9ld99vy9y8hlydsv.xls			•
Save as type.	Microsoft Excel 97-2003 Worksheet			
	Microsoft Excel 97 (2003 Worksheet			
· Hide Folders	All Files			Cancer
19 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				

b. If you select the **Save** button, you can use the **Save as Type** dropdown and save the file as an Excel worksheet or select "all files" from the dropdown and save the file with a .csv or .txt extention to make it a comma separated values or text file.