



Guide for New Business Partner Contacts

Resources for Employers

Table of Contents

- 4 **Accessing your my|CalPERS account**
- 5 Your System Access Administrator
- 6 Contacts and Users
- 6 Password Resets

- 7 **Training and Education**
- 7 Practice registering for a class
- 8 Instructor Led Classes
- 10 Online Classes and Videos

- 10 **Forms, Publications, Employer Bulletins and Circular Letters**
- 11 **Contacting CalPERS**



Welcome to CalPERS.

As a new CalPERS business partner, you have access to many helpful resources both online and in print. Use this guide to learn where to find what you need on our website and how to access training resources.

Accessing your my|CalPERS Account

You will be using my|CalPERS for the majority of your interactions with CalPERS, so it's important to learn how to access and navigate the system.

If you don't have a username and password yet, you will need to obtain them from your agency's System Access Administrator (SAA). If your agency does not currently have an SAA, a senior manager for your agency will need to email bp_inquiry@calpers.ca.gov and request a new account.

To access my|CalPERS, visit the CalPERS website at www.calpers.ca.gov and select my|CalPERS Log In. Then:

- 1 Choose the **Business Partner** radio button and select **Continue**.
- 2 Enter your Username and select **Continue**.
- 3 Enter your Password and select **Log In***.
- 4 Finally, select **Accept** to agree to the Conditions of Use for Business Partners.

* **Note:** Upon initial log in only, you will use the temporary password supplied by your SAA. You will then be prompted by the system to create a new password. Once you have logged in with your chosen password, you will be asked to establish security measures and set up a password recovery method via text message and/or email.

1

Participant
You are a participant if you are a member, retiree, community property payee, beneficiary, subscriber, dependent, conservator, or other person.

Business Partner
You are a business partner if you are a member of the State of California, a public agency, self-employed, reciprocal retirement system, health care plan, group, independent medical examiner, or other person, authorization organization or service provider.

2

Username: *

3

Enter Your Password



DNA

Password: *

4

Conditions of Use for Business Partners (Employee)

By accessing this application you acknowledge that you agree to the terms and conditions of the agreement for business with CalPERS.

Your System Access Administrator

Your SAA serves a critical role for your agency with the responsibility to maintain user access and administration of your my|CalPERS account.

Each CalPERS business partner is required to have at least one SAA. However, CalPERS recommends that your agency designate more than one SAA for situations when an employee is out of the office, or when an SAA needs their password reset. Whether you will be an SAA for your agency or not, it's important to know what job the SAA performs. The SAA is responsible for adding, deleting, and modifying your agency's contacts and users, as well as resetting their passwords. The SAA also has the ability to create a business partner relationship with a third-party administrator that does business for your agency, including payroll companies or a benefits provider.

An SAA has many responsibilities, including keeping the agency's contact information accurate, and making sure your agency's users have the appropriate level of system access. An SAA ensures that employees from your agency who conduct business with CalPERS are listed in the system for CalPERS staff to see. This allows these employees to communicate with CalPERS regarding member-specific information.

When granting system access to a contact, the SAA is responsible for assigning the specific system roles to each user. These roles determine what information the user has access to. The SAA should refer to the online document, **System Privileges for Business Partner Roles**, to determine which system access roles each user should or should not have.

Another important function of the SAA is to maintain the agency's contacts and deactivate system access for those who should no longer have it. This is especially important when an employee has left the agency.

Even if you will not be an SAA, all business partner contacts should review the online document, **System Access Administration & Establishing a Business Partner Relationship**, to understand exactly what the SAA is responsible for.

Contacts and Users

Most agencies have a mix of contacts and users.

A **contact** is any employee that your SAA has added to the contacts list in my|CalPERS. A contact will receive communication from CalPERS based on the contact type specified by the SAA. A contact may also call or write CalPERS to obtain general information about policies and procedures, and other information about CalPERS business on behalf of your agency.

A **user** is any contact that has been granted system access by your SAA. Users will receive communication from CalPERS based on their contact type. Additionally, users will have the ability to log in to my|CalPERS to conduct business for the agency. Users may also call or write CalPERS regarding member-specific information, including retirement, health, and service credit information for your agency's employees.

Password Resets

Passwords are the key to keeping your employees' information out of the hands of those who shouldn't have it.

Your password will expire every 60 days. If you forget your password or if it expires, you will be required to reset it. To reset your password you can select **Forgot your Password?** at login. You will then be prompted to provide your agency and user information. When entering this information, you will need to input your name and the organization name exactly as they appear in my|CalPERS. For example, enter Stephanie instead of Steph, or Department of Corrections, instead of Corrections Department. You will then be prompted with a few options for how you would prefer to have your password reset (i.e., email, challenge questions, or text message).

If for any reason you are not able to reset your own password using these steps, contact your SAA and they can reset it for you. If you are the only SAA for your agency, call toll-free at **888 CalPERS** (or **888-225-7377**) for assistance.

Training and Education

CalPERS offers extensive training opportunities, including online classes and webinars, as well as instructor-led classes throughout the state. You can select classes based on your agency type and role. CalPERS recommends beginning with the basics, then continuing with classes that are tailored to the specific work you will be doing (i.e., payroll, retirement, or health enrollment classes).

Begin by reviewing the online class, **my|CalPERS Overview: How to Navigate**, to familiarize yourself with my|CalPERS and the terminology.

Practice registering for a class:

- 1 Log in to my|CalPERS and go to the **Education** tab. To view the list of available classes, choose **Select a Class**.
- 2 Scroll down and select **my|CalPERS Overview: How to Navigate**.
- 3 Select **Enroll**.
- 4 Select the **Myself** radio button and enter 1 for the number of enrollments. Select **Next**.

The screenshot shows a multi-step registration process. Step 1 shows the navigation menu with 'Education' selected and the 'Select A Class' button highlighted. Step 2 shows the class details for 'my|CalPERS Overview: How to Navigate', including a description and 'Prerequisites: None'. Step 3 shows the 'Enroll' button. Step 4 shows the enrollment options: 'Myself', 'Employee(s) only', and 'Myself + Employee(s)', along with a field for 'Number of seats' set to 1.

Note: You can enroll multiple students at the same time if desired.

- 5 Enter your contact information and select **Next**.
- 6 You may add additional students or select **Next** to continue.
- 7 Review your enrollment information and select **Submit**.
- 8 You will receive an email confirmation of your enrollment. To begin your class, select **View Your Activity & History**, then select **Online Classes**. Next select the class name, **my|CalPERS Overview: How to Navigate**.
- 9 A separate window will open with the class details. Select the name of the class to launch the training. When you are done with the class, you can close the window and start looking for your next class.

Here are a few of the training options available to you:

Instructor Led Classes:

Business Rules

This three-hour class offers business rules information on the following topics:

- Membership eligibility
- Reporting deadlines and penalties
- Calculating a service retirement
- Service credit
- Employer's role in the retirement process
- Retirement contracts

my|CalPERS Course 101:

Health Enrollment Basics for Public Agencies & Schools

Learn how to perform health transactions which include new health enrollments, direct pay, COBRA, transition employees' health enrollments into retirement, and more. We will also cover how to process a permanent separation, view a health bill and enrollee roster, and access health reports.

my|CalPERS Course 103:**Retirement Enrollment Basics for Public Agencies, Schools & Non-Central State Agencies**

Learn how to perform CalPERS retirement transactions which include new retirement enrollments, permanent separations, reporting unused sick leave, retired annuitant appointments and more. We will also cover how to access and generate reports relevant to retirement enrollment.

my|CalPERS Course 104:**Payroll Contribution Reporting Basics for Public Agencies, Schools & Non-Central State Agencies**

Learn how to upload a payroll report, copy a prior posted payroll report, add new records, modify records, submit adjustments, and more. You will also learn how to access and generate reports such as the Payroll Report Summary, Payroll Record Errors Report, and the Payroll Record Exceptions Report.

my|CalPERS Course 107:**Setting Up EFT Accounts and Making Payments for Public Agencies, Schools & Non-Central State Agencies**

Learn how to set up and maintain Electronic Funds Transfer (EFT) accounts and make online and check payments to CalPERS. Included is how to run reports for receivables, payments and health transactions. You will also learn important information on billing and cut-off dates.

Although we strongly encourage you to attend these instructor-led my|CalPERS training classes, you can also download the student guides associated with each class from the CalPERS website and review them at your own pace.

To view the student guides online, go to www.calpers.ca.gov, select the **Employers** tab, and under **I Want To...** select **Find my|CalPERS Student Guides**.

Online Classes and Videos

Contracts and Membership Classes

These classes will help you understand basic business rules about your agency's retirement contract, where to locate and view your contract provisions including benefits resolutions, exclusions, and the process for contract amendments.

The membership class covers membership eligibility, exclusions to membership, timely enrollment, and information about online resources.

Payroll Classes

These classes will help you understand basic business rules about your agency's payroll reporting responsibilities including topics such as what is on a payroll report, pay rates, special compensation, and earnings.

Additional online classes are available that cover specific topics such as processing health enrollments, payroll adjustments, retirement enrollment changes, and more. Be sure to take all the classes relevant to your role at your agency.

Forms, Publications, Employer Bulletins and Circular Letters

CalPERS offers many publications which contain a wealth of information. Visit www.calpers.ca.gov, and select **View All** under the **Forms & Publications** heading.

Here you will find publications that explain the California Public Employees' Retirement Law (PERL) in an easy to understand format. Learn about CalPERS business rules by reading the **Public Agency & Schools Reference Guide** or **State Reference Guide**, depending on your agency type. Take the time to familiarize yourself with these guides.

When the need arises to refer to the laws that guide CalPERS business, the PERL is available online in a searchable PDF format. To view a copy of the PERL, in a searchable PDF format, go to **About** from the home page and select the **Laws and Regulations** link.

The CalPERS website also houses Circular Letters, which provide updates and information on changes to CalPERS policies, procedures, and programs. To find Circular Letters, select the **Employers Tab** on the home page and find Circular Letters in the **Resources** section.

The Employer Bulletin allows CalPERS to send brief, important emails to employers. To receive the Employer Bulletin, enter your email in the **Subscribe** section of the CalPERS homepage. Check the **Employer Bulletin** box, and select **Subscribe**.

Contacting CalPERS

You're ready to start doing business with CalPERS. If you still have questions or concerns, we can provide you with assistance.

You can reach us by telephone toll free at **888 CalPERS** (or **888-225-7377**).

If you have system access, you can submit a secure message to us directly from the left-side navigation panel in my|CalPERS.

You can also submit a question at www.calpers.ca.gov by selecting **Contact**, and then **Questions, Comments, & Complaints**.

400 Q Street, Sacramento, CA 95811
888 CalPERS (or 888-225-7377)
www.calpers.ca.gov



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