Business Partner Relationships

This guide will assist your agency with the process of establishing, modifying, and ending business partner relationships.

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

System Access

If you are unable to view or process these scenarios, contact your agency’s system access administrator to update your myCalPERS access.

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Introduction to Business Partner Relationships

Overview

A business partner relationship is an agreement between two agencies or between an agency and a company authorizing services to be performed on your agency’s behalf. When a business partner relationship is established, the agency or company acting on behalf of your agency, can perform services such as submitting payroll, processing retirement and health enrollments, or handling payments.

Services Provided

Business partner relationships can be established for the following services for each CalPERS contract or agreement type (Retirement, Health, and Supplemental IncomePlan-457) your agency has:

- Enrollment
- Billing
- Payroll

Notifications

CalPERS will send a letter to your agency and the agency you have a business partner relationship with when the business partner relationship:

- Has been approved by CalPERS
- Has been rejected by CalPERS
- If the begin or end dates have been modified by your agency
- Has ended
Scenario 1: Establish a Business Partner Relationship

Scenario
You will establish a Business Partner Relationship within myCalPERS.

System Logic
- If you add the business partner to myCalPERS, advise them to call the CalPERS contact center to establish this agency access.
- The Relationship Start Date can be back dated up to 60 days.
- Your agency can establish multiple relationships for the same services.
- A letter will be sent to your agency and the agency you have a business partner relationship with once CalPERS approves the business partner relationship request.

Step Actions

Step 1  Select the Profile global navigation tab.

Step 2  Select the View BP Relationships left-side navigation link.

Step 3  Within the Business Relationships section, select the Add New button.

Step 4  Within the Maintain Business Relationship Details section, select the Select link.

Step 5  Within the Organization Search section, enter the business partner name, Federal Tax ID, or CalPERS ID.

Step 6  Select the Search button.

Step 7  Is the business partner displayed in the Search Results section?
- Yes: Skip to step 15
- No: Continue to step 8
Step 8  Within the Search Results section, select the **Add New** button.

Step 9  Complete the Organization Details section.

Step 10 Complete the Address & Communication Details section.

Step 11 Complete the General Contact Information section.

Step 12 Select the **Submit** button.

Step 13 Verify the U.S. Postal Service Matches is correct.

Step 14 Select the **Confirm** button.

Step 15 Select the **Submit** button.

Step 16 Within the Search Results section, select the radio button for the appropriate business partner.

Step 17 Select the **Select** button.

Step 18 Within the Maintain Business Relationship Details section, enter the **Contact Name** and **Phone Number** for the business partner listed above. This information is needed in the event CalPERS needs to contact the agency for additional information to process the request.
Step 19  Within the Programs Supported area, select the contract(s) or agreements your agency holds with CalPERS for which the business partner will provide services.

Step 20  Under each contract select the check box for the service the business partner will provide.

Step 21  For each service enter a Relationship Start Date.

Step 22  If applicable, enter a Relationship End Date for each service.

Step 23  Select the certification checkbox at the bottom.

Step 24  Select the Establish Relationship button.

You have completed this scenario.
Scenario 2: Modify a Business Partner Relationship

**Scenario**
You will modify a business partner relationship in myCalPERS.

**System Logic**
- End dates can only be entered or updated by the CalPERS contracting agency.
- End dates may only be for current date or future dates. If the current date is used as the end date, allow 24 hours for the system to terminate the relationship.
- CalPERS will send a notification to both agencies advising the business partner relationship has ended.

**Step Actions**

**Step 1** Select the **Profile** global navigation tab.

**Step 2** Select the **View BP Relationships** left-side navigation link.

**Step 3** Within the Business Relationships section, select the name of the Business Partner Relationship associated with the service you want to terminate.

<table>
<thead>
<tr>
<th>Name</th>
<th>CalPERS ID</th>
<th>Programs</th>
<th>Services Provided</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering Services</td>
<td>0123456789</td>
<td>CalPERS - 2020</td>
<td>Payroll Services</td>
<td>Active</td>
<td>02/01/2021</td>
<td></td>
</tr>
</tbody>
</table>

**Step 4** Within the Maintain Business Relationship Details section, modify the relationship as necessary.

**Step 5** Select the **Save** button.

*You have completed this scenario.*
Scenario 3: End Date a Business Partner Relationship

Scenario

You will end date a business partner relationship in myCalPERS.

System Logic

- End dates can only be entered or updated by the CalPERS contracting agency.
- End dates may only be for current date or future dates. If the current date is used as the end date, allow 24 hours for the system to terminate the relationship.
- CalPERS will send a notification to both agencies advising the business partner relationship has ended.

Step Actions

Step 1  Select the Profile global navigation tab.
Step 2  Select the View BP Relationships left-side navigation link.
Step 3  Within the Business Relationships section, select the name of the Business Partner Relationship associated with the service you want to terminate.
Step 4  Within the Maintain Business Relationship Details section, enter the Relationship End Date.
Step 5  Select the Save button.

You have completed this scenario.
CalPERS Resources

Obtain more information by visiting the CalPERS website at www.calpers.ca.gov.

- **myCalPERS Student Guides & Resources**
  *Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides*

- **Employer Education Schedule (PDF)**
  *Pathway: CalPERS website > Employers > I Want To... : Find myCalPERS Student Guides > Employer Education Schedule*

- **Online Classes for Employers (PDF)**
  *Pathway: CalPERS website > Employers > I Want To... : Find myCalPERS Student Guides > Online Classes for Employers*
CalPERS Contacts

Email

• To contact employer educators for questions and requests, email CalPERS_Employer_Communications@CalPERS.CA.GOV
• To contact the Employer Response Team for assistance with your most critical, complex, or time-sensitive issues, email ERT@CalPERS.CA.GOV

Phone or Fax

You can reach CalPERS at 888 CalPERS (or 888-225-7377), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

• TTY: (877) 249-7442 (This number does not accept voice calls)
• CalPERS centralized fax number: (800) 959-6545
• Employer Response Team phone number: (800) 253-4594

Submit Inquiry

You can send secure messages through myCalPERS. Expand the Common Tasks left-side navigation folder and select the Submit Inquiry link to submit a question or request.