

myCalPERS Health Enrollment

Student Guide

September 26, 2020



Introduction

This guide is a resource to assist with myCalPERS health enrollment transactions.

Disclaimer

Business partner and participant information has been masked in this procedure guide.

Training Opportunities

Prior to taking a myCalPERS system training instructor-led class, new users should review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) guide and take a **Health Business Rules training class**. The health business rules training (instructor-led or online) class covers the simplified explanation of laws defined by the California Public Employees’ Retirement Law.

myCalPERS Health Aid

The [myCalPERS Health Aid: Health Event Types and Reasons for Employers \(PDF\)](#) can assist in determining which health event type, reasons, and dates to use when entering your transactions.

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Unit 1: Person Search Tool-Health Enrollment Details

In this unit, you will learn how to view health enrollment details by using the five left-side links (scenarios below) for one of your employees enrolled in health benefits.

System Logic

- Last four digits of an SSN, full SSN, employee CalPERS ID, federal or individual tax ID can be used for a person search
- View health details only for employees and retirees with your agency
- myCalPERS automatically displays information as of the current date
- In most cases, a permanent separation will cancel health benefits; however, verify the cancellation of a separated employee to ensure correct billing of premiums

Refresh the Person Search Tool

Clear the last employee’s health benefits information by selecting the **myCalPERS** logo.

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Scenario 1: Enrollment Summary

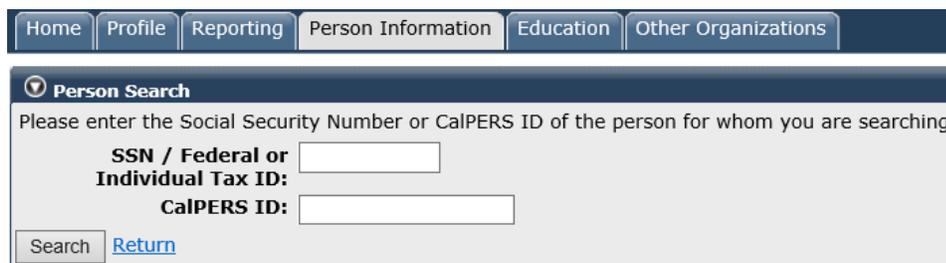
System Logic

- Provides information for subscriber health enrollment information including current and formerly covered dependents, health plan, total premium, and future health events
- When the link is unavailable for future dated enrollments or for a former subscriber, you may use the other four left-side menu links to verify enrollment information and deductions

Step Actions

Step 1 From the home page, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



Home Profile Reporting Person Information Education Other Organizations

Person Search

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

SSN / Federal or Individual Tax ID:

CalPERS ID:

Search [Return](#)

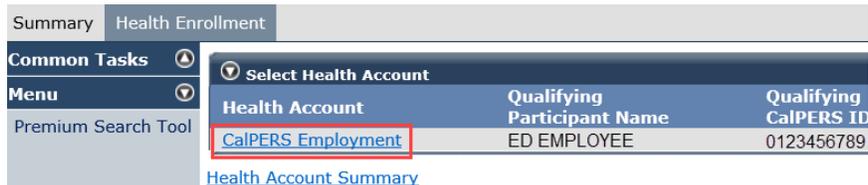
Step 3 Select the **Search** button.

Step 4 Select the **Health Enrollment** local navigation link.



Summary **Health Enrollment**

Step 5 Select the first link under the **Health Account** column.



Summary Health Enrollment

Common Tasks [▲](#)

Menu [▼](#)

Premium Search Tool

Select Health Account

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	ED EMPLOYEE	0123456789

[Health Account Summary](#)

Step 6 Review the Health Enrollment Information section to see if the subscriber is using their employer ZIP code for health plan eligibility.



Health Enrollment Information

Your health enrollment is based on the following information: **Health Enrollment Summary As Of: 12/22/2017**

Health Eligibility Information

Appointment ID: 7776555	Medical Group: 004 UPE, LOCAL 790 UNIT B C D
Employer CalPERS ID: 9876543210	Permanent Separation Date:
Employer: City of Anycity	Retirement Date:
Division CalPERS ID:	
Division:	Health Benefit Yes
Agency Type: Public Agency	Appointment
Qualifying CalPERS ID: 0123456789	Same As Health Eligibility:

Enrollment Information

Affiliated Retirement System: PERS	Health Eligibility Zip Code: 94546
Financially Responsible CalPERS ID: 0123456789	Zip Code Override Indicator: No
Payroll Office Code: 5	Override Zip Code Type:
Affiliated Association:	Region: BAR
Health Account Status: Active Employment	County: Alameda

Step 7 Review the Covered Persons Summary section to view the current and former dependents.

Step 8 Is there a **View More Actions** link?

Yes: Continue to step 9

No: Skip to step 11

Step 9 Select the **View More Actions** link to view the full list of covered and formerly covered dependents.

Covered Persons Summary							View More Actions»
Below are your covered persons for health. Select the name of a covered person to view detailed health information.							
Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision	
TADHIG LIEBAN	05/02/1958	Self	NA	Basic	No	No	
ARUTYUN LIEBAN	10/18/1965	Spouse	NA	Basic	No	No	
STULING LIEBAN	07/01/1994	Natural Born Child	NA	Basic	No	No	
DOMINETTA DUBOSKI	12/06/1995	Natural Born Child	NA	Basic	No	No	

Step 10 Select the **Enrollment Summary** left-side link to return to the previous Health Enrollment Summary page.

Common Tasks	Health Enrollment Information
<ul style="list-style-type: none"> Menu Enrollment Summary Enrollment History Deduction History Premium Search Tool Summary As-Of Date 	<p>Your health enrollment is based on the following information:</p> <p>Health Eligibility Information</p> <p>Appointment ID: 2233440</p> <p>Employer CalPERS ID: 9876543210</p> <p>Employer: City of Anycity</p>

Step 11 Review the Health Plan Summary section to confirm basic health plan information and total premium.

Health Plan Summary				
Below is your plan and premium information.				
Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	Kaiser Permanente California Bay Area (1043)	Self/B and 2+/B	01/01/2016	\$1,906.81

Step 12 Review the Future Health Events section for future effective dated transactions.

Future Health Events			
Below are your health events that are effective at a future date.			
Future Health Event Type	Future Health Event Reason	Future Effective Date	Health Notification
No results found.			

Step 13 **For state agencies:** Review the Pending Health Events section to verify a pending dental enrollment into retirement transaction.

Pending Health Events					
Below are requests that require CalPERS review.					
Name	CalPERS ID	Pending Health Event Type	Pending Health Event Reason	Received Date	Status
ZANOTELLI CASTRO-AYALA	0123456789	New Enrollment	State Retiree - Dental Enrollment	01/01/2018	Pending Analyst Review

You have completed this scenario.

Scenario 2: Enrollment History

System Logic

- Lists all health enrollment transactions in chronological order and includes rescissions, effective date, health event type, and future date enrollment/changes
- Transaction details are viewable (e.g., dates used to enter the transaction, created date, if employer or CalPERS processed, and rescission notes) by selecting the **View Health Enrollment Summary** link (see step 9)

Step Actions

Step 1 From the home page, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

Home Profile Reporting Person Information Education Other Organizations

Person Search

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

SSN / Federal or Individual Tax ID:

CalPERS ID:

Search [Return](#)

Step 3 Select the **Search** button.

Step 4 Select the **Health Enrollment** local navigation link.

Summary **Health Enrollment**

Step 5 Select the top link under the **Health Account** column.

Summary Health Enrollment

Common Tasks

Menu

Premium Search Tool

Select Health Account

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	ED EMPLOYEE	0123456789

[Health Account Summary](#)

Step 6 Select the **Enrollment History** link under the **Menu** left-side navigation.

Common Tasks

Menu

Enrollment Summary

Enrollment History

Deduction History

Premium Search Tool

Summary As-Of Date

Health Enrollment Information

Your health enrollment is based on the following information:

Health Eligibility Information

Appointment ID: 2233440

Employer CalPERS ID: 9876543210

Employer: City of Anycity

Step 7 Use the Search Criteria for Health Enrollment History section to filter your Health Enrollment History section.

Search Criteria for Health Enrollment History
Please enter search criteria to view historical health enrollment transactions.

Health Benefit Type: All
Effective Date Range: [] To: []
Include Rescissions?: Yes
Qualifying Life Events Only?: Yes

Health Enrollment History

Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status
06/01/2017	Add Dependent	Parent-Child Relationship	JUAREZ YUEH-HSIA HORSMA	Medical	Confirmed
06/01/2017	Delete Dependent	Delete Dependent- Did not certify for Parent-Child Relationship	JUAREZ YUEH-HSIA HORSMA	Medical	Confirmed
06/01/2016	Add Dependent	Parent-Child Relationship	JUAREZ YUEH-HSIA HORSMA	Medical	Confirmed
06/01/2016	Delete Dependent	Delete Dependent- Did not certify for Parent-Child Relationship	JUAREZ YUEH-HSIA HORSMA	Medical	Confirmed
06/01/2016	Delete Dependent	Delete Dependent- Did not certify for Parent-Child Relationship	JUAREZ YUEH-HSIA HORSMA	Medical	Rescinded

Step 8 Under the Status column, select a link for that transaction’s details.

Step 9 Select the **View Health Enrollment Summary** link for the health enrollment summary of the transaction as of the effective date of the transaction.

Transaction Details

Name: JUAREZ HORSMA
Health Event Type: Add Dependent
Health Event Reason: Parent-Child Relationship
Health Benefit Type: Medical
Effective Date: 06/01/2018
Event Date: 06/01/2018
Received Date: 05/15/2018
Status:

Created Date: 05/15/2018 08:39:40 AM
Change Date: 05/15/2018 08:39:40 AM
Created by User: Employer
Updated by User: Employer
Reason for Rescission:
Additional Information:

[View Health Enrollment Summary](#)

[Return](#)

You have completed this scenario.

Scenario 3: Deduction History

System Logic

- Lists each payment or credit for your current or former subscriber health benefits
- Includes the coverage month, plan name, party type, and amount

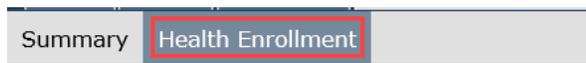
Step Actions

Step 1 From the home page, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

Step 3 Select the **Search** button.

Step 4 Select the **Health Enrollment** local navigation link.



Step 5 Select the top link under the **Health Account** column.

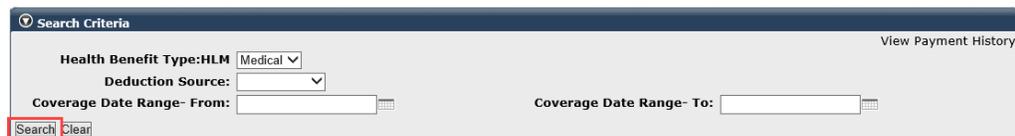


Step 6 Select the **Deduction History** link under the **Menu** left-side navigation.

Step 7 Select from the **Deduction Source** drop-down list in the Search Criteria section.

Deduction Source	Active/Retired and Retirement System
	Use each deduction source to verify:
Benefit Roll	<i>Retired CalPERS participant</i> deductions only, even though the employer share displays
PA Billing	What has been billed to your agency for your active and retired CalPERS, CalSTRS, and non-PERS participants. Use this to verify your <i>employer share</i> for your retired CalPERS and CalSTRS participants.
SCO	Active central state deductions
Non-Central	Active non-central state deductions

Step 8 Select the **Search** button to view deduction history.



You have completed this scenario.

Scenario 4: Premium Search Tool

System Logic

- Search for available health plans by eligibility ZIP code
- Compare benefits and premiums for the available plans
- Provider Directory Utility (PDU) allows you to search for health plans associated with a provider (physician or specialist). Medicare providers are not included.

Step Actions

Step 1 From the home page, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

Home Profile Reporting Person Information Education Other Organizations

Person Search

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

SSN / Federal or Individual Tax ID:

CalPERS ID:

Search [Return](#)

Step 3 Select the **Search** button.

Step 4 Select the **Health Enrollment** local navigation link.

Summary **Health Enrollment**

Step 5 Select the **Premium Search Tool** link under the **Menu** left-side navigation.

Summary Health Enrollment

Common Tasks ▲

Menu ▼

Premium Search Tool

Select Health Account

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	ED EMPLOYEE	012345678

[Health Account Summary](#)

Step 6

Optional: Use the filter(s) in the Health Premium Search Tool section.

Search for a provider (physician or specialist) by name and view which health plans they are associated. **Subscribers should contact the health plan to verify if the provider is available.**

1. Select the **Advanced Options** button.
2. Select the **Provider Directory Utility** radio button.
3. If you wish, change the mile radius from the drop-down list.
4. Enter a provider's first and/or last name. Do not press the **Enter** key.
5. From the provider drop-down list, select a provider name.
6. Select the **Search** button at bottom left of the section.
7. View No or Yes under Provider Available? column.

Available Health Plans

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

Health Plan Name	Provider Available?	Plan Type	Party Type	Gross Premium	Compare Select All
Kaiser Permanente California - Region 1	No	HMO	Self/B and 2+/B	\$1,998.07	<input checked="" type="checkbox"/>
PERS Care - Region 1	Yes	PPO	Self/B and 2+/B	\$2,946.16	<input type="checkbox"/>

Step 7

Select the **Search** button to refresh the Available Health Plans section if you changed the filters.

Step 8

Select at least one other health plan check box or the **Select All** link.

Available Health Plans

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

Health Plan Name	Plan Type	Party Type	Gross Premium	Compare Select All
Anthem Blue Cross Select HMO - Region 2	HMO	Self/B and 2+/B	\$1,700.50	<input checked="" type="checkbox"/>
Blue Shield Access+ - Region 2	HMO	Self/B and 2+/B	\$2,365.66	<input checked="" type="checkbox"/>
Health Net Salud y Mas - Region 2	HMO	Self/B and 2+/B	\$1,131.36	<input checked="" type="checkbox"/>

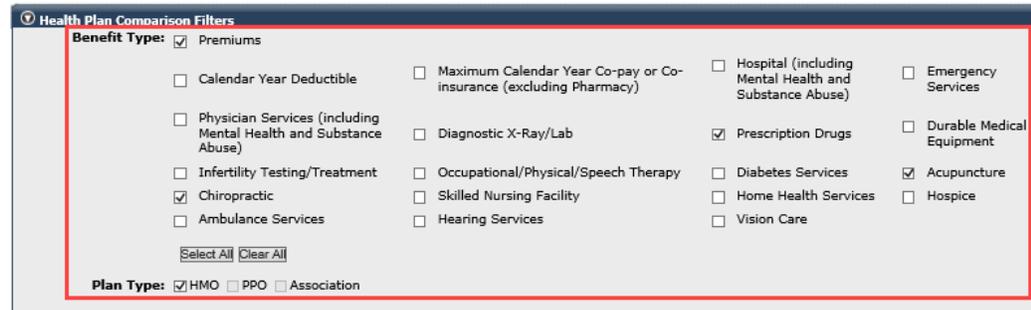
Note: The **Health Plan Name** link will display the plan's phone number.

Step 9 Within the Provider Directory Alert section, view information for a health plan or provider.



Step 10 Select the **Compare Health Plans** button at the bottom left of the page.

Step 11 Use the Health Plan Comparison Filters section to adjust your search in the Health Plan Comparison section.



	Anthem Blue Cross Select	Blue Shield Access+	Health Net Salud y Mas
-Premiums			
Gross Premium	\$1,700.50	\$2,365.66	\$1,131.36
+Calendar Year Deductible			
+Maximum Calendar Year Co-pay or Co-insurance (excluding Pharmacy)			
+Hospital (including Mental Health and Substance Abuse)			
+Emergency Services			
+Physician Services (including Mental Health and Substance Abuse)			
+Diagnostic X-Ray/Lab			
-Prescription Drugs			
Deductible	\$0	\$0	\$0
Retail Pharmacy (not to exceed 30 day supply)	<ul style="list-style-type: none"> Generic: \$5 Brand Formulary: \$20 Non-Formulary: \$50 	<ul style="list-style-type: none"> Generic: \$5 Brand Formulary: \$20 Non-Formulary: \$50 	<ul style="list-style-type: none"> Generic: \$5 Brand Formulary: \$20 Non-Formulary: \$50

Step 12 Select the **Back to Health Plan Search Results** button in the top Health Plan Search Criteria section to do another health plan comparison.



You have completed this scenario.

Scenario 5: Summary As-Of Date

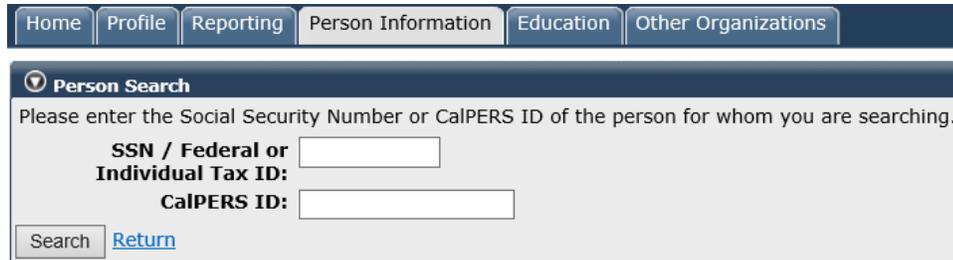
System Logic

Provides health enrollment details, such as future or past changes, by dates.

Step Actions

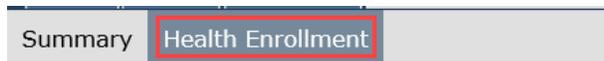
Step 1 From the home page, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.



Step 3 Select the **Search** button.

Step 4 Select the **Health Enrollment** local navigation link.



Step 5 Select the top link under the **Health Account** column.

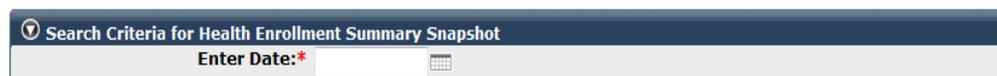


Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	ED EMPLOYEE	0123456789

Step 6 Select the **Summary As-Of Date** link under the left-side **Menu** folder.



Step 7 Complete the Search Criteria for Health Enrollment Summary Snapshot section.



Step 8 Select the **Search** button.

You have completed this scenario.

Unit 2: Health Benefits Plan Enrollment for Active Employees (HBD-12)

In this unit, you will learn how to process the Health Benefits Plan Enrollment for Active Employees (HBD-12) form through myCalPERS. Do not mail the form to CalPERS but keep a copy in the employee personnel file.

myCalPERS Health Aid-Health Event Types and Reasons for Employers

Refer to the [myCalPERS Health Aid: Health Event Types and Reasons for Employers \(PDF\)](#) for assistance on determining the health event type, reason, and event date to use when entering transactions.

Decline Coverage

If an employee declines coverage, you do not need to process anything through myCalPERS. Keep the Health Benefits Plan Enrollment for Active Employees (HBD-12) form in their personnel file as proof that the employee declined coverage.

Prepopulated HBD-12 for Employees

If your agency's health contract is in myCalPERS, the prepopulated HBD-12 is available when the employee logs into their myCalPERS member account. Start by selecting the **Search Health Plans** link within the Health folder. When you reach the Search Results (plan) page, you must select at least one other plan to view/compare. Select the **View Plan** button, then the HBD-12 (PDF) link is at the bottom of the page.

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Scenario 2: Add Dependent	21
Scenario 3: Delete Dependent	24
Scenario 4: Change Health Plan	26
Scenario 5: Cancel Coverage	28

Scenario 1: Enroll in a Health Plan

System Logic

Any PERS Employees

Appointment must be updated in myCalPERS prior to processing a health enrollment.

Non-PERS and CalSTRS Employees

- If the employee previously worked for your agency then separated, prior to processing a new health enrollment, you will add a new appointment for them and select the correct retirement system. See steps 1-8.
- If the employee has a concurrent active CalPERS appointment with your agency, contact CalPERS to add the non-PERS or CalSTRS appointment prior the health enrollment.
- Employees enrolling due to Affordable Care Act (ACA), process like a non-PERS/CalSTRS health enrollment. See note on step 24 for choosing the retirement system.

New Contracting Agency

Contract information must be in myCalPERS before you can process your health enrollments.

- Health Event Type and Reason: **New Enrollment; New contracting employee**
- Event Date: Contract effective date
- Received Date: No earlier than one month before the contract effective date

State Employees

You may need to adjust the received date for a new health enrollment transaction if the last day of the month falls into the next month pay period

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

Disabled Dependent

You are unable to enroll an overage (26 years or older) disabled dependent child in myCalPERS.

- Process the health enrollment without the overage dependent.
- Provide the employee the following forms to be completed and submitted to CalPERS within 60 days from the subscriber eligibility date, normally 60 days prior or 60 days after the dependent birthday:
 - Member Questionnaire for the CalPERS Disabled Dependent Health Benefit (HBD-98)
 - Medical Report for the CalPERS Disabled Dependent Benefit (HBD-34)
- Once both documents are received and approved by CalPERS, we will add the disabled dependent to the subscriber health enrollment.

ZIP Code for Eligibility

If employee is using their address for eligibility, ensure the physical address is in the system. If the employee is using the employer ZIP code for eligibility, the system requires a physical or mailing address.

Health Survey

Every 30 days, a five-question survey appears after completing a **New Enrollment** health event type transaction. If you take or decline the survey, the survey will be suppressed for 30 days. If the survey is ignored, it will appear when you process the next **New Enrollment** transaction.

Step Actions

For PERS Employees, New Non-PERS or CalSTRS-Skip to Step 9

Returning CalSTRS or Non-PERS Employee with a Prior Appointment with Your Agency

Step 1 Within the Appointment History section, has the new appointment been added?

Yes: Skip to step 9

No: Continue to step 2

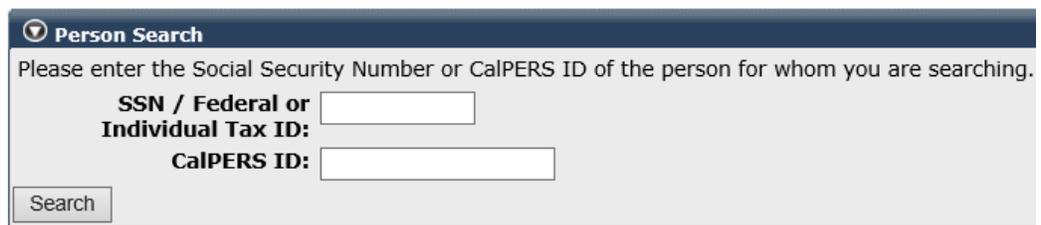
Step 2 Do you have the **Business Partner Appointment Management-Non-Pers and CalSTRS** access role to add the new appointment?

Yes: Continue to step 3

No: Contact your agency's user who processes appointments to assist you before processing the new health enrollment

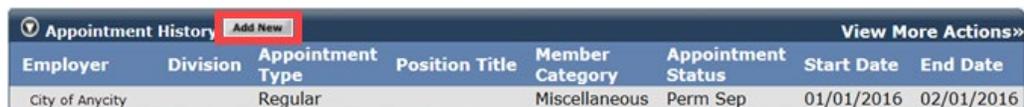
Step 3 From the home page, select the **Person Information** global navigation tab.

Step 4 Complete the Person Search section.



Step 5 Select the **Search** button.

Step 6 Within the Appointment History section, select the **Add New** button to create a new non-PERS or CalSTRS appointment.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City of Anycity		Regular		Miscellaneous	Perm Sep	01/01/2016	02/01/2016

Step 7 Complete the Appointment Details section.

Appointment Details

Program
Program: Health
Enrollment Eligibility Date: *

Retirement System:
CalPERS
CalSTRS

Position Information
Employer: MRS and
Division: Other
Original Hire Date: *

CalPERS ID (Employer): 9876543210
CalPERS ID (Division): 0

Save Clear

Step 8 Select the **Save** button.

Add New Health Enrollment Transaction

Step 9 Select the **Reporting** global navigation tab.

Step 10 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation M

Common Tasks

Menu

Organization Search
Adjustment Reports

Create or Edit Report
Name: City of Anycity CalPERS ID: 9876543210
Method: * Add or Edit Health Enrollment Calistate
Continue

Step 11 Select the **Continue** button.

Search for the Subscriber

Step 12 Complete the Person Search section.

Person Search

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

SSN / Federal or Individual Tax ID:

CalPERS ID:

Search Return

Step 13 Does the employee name display under the Search Results section?

Yes: Skip to step 16

No: Continue to step 14

Step 14 Select the **Add New** button.

Step 15 Complete the Demographics Information section.

Input Health Event Information

Step 16 Complete the Health Event Information section.

The screenshot shows a form titled "Health Event Information". It contains the following fields: "Health Event Type:" with a dropdown menu, "Health Event Reason:" with a dropdown menu, "Event Date:" with a date picker, and "Received Date:" with a date picker. A "View Effective Date" button is located at the bottom right. At the bottom of the form, there are buttons for "Save & Continue", "Cancel", "Clear", and "Return".

Step 17 Select the **View Effective Date** button at bottom right to view the effective date.

Step 18 Select the **Save & Continue** button.

Update Subscriber Details

Step 19 Complete the Maintain Address Details section if you need to update the employee's physical address or to choose the employer's ZIP code for eligibility.

The screenshot shows a form titled "Maintain Address Details". It contains the following fields: "Address Type:" with a dropdown menu (set to "Mailing Address"), "Care Of:" with a text input, "Address:" with three stacked text inputs, "Country:" with a dropdown menu (set to "United States"), "City:" with a text input, "State:" with a dropdown menu (set to "California"), and "ZIP Code:" with two text inputs separated by a hyphen. Below the form, there is a checkbox labeled "Use Employer ZIP Code for Health Eligibility:" which is currently unchecked. A note below the checkbox states: "NOTE - Overriding the current Health Eligibility Address will create a Change Eligibility ZIP transaction in conjunction with the enrollment transaction".

Select Appointment

Step 20 Does the employee have more than one active appointment with your agency?

Yes: Continue to step 21

No: Skip to step 24

Step 21 Choose the **Select Appointment** link.

The screenshot shows a form titled "Appointment Details". It displays the following information: "Employer: City of Anycity" and "CalPERS ID (Employer): 9876543210". A "Select Appointment" link is highlighted with a red box.

Step 22 Select the applicable **appointment** radio button.

The screenshot shows a table titled "Appointment History". It has a "Delete" button at the top left. The table has the following columns: "Employer", "Division", "Appointment Type", "Position Title", "Member Category", "Appointment Status", "Start Date", and "End Date". There are two rows of data. The first row has a radio button selected, and the second row has a radio button unselected. Both radio buttons are highlighted with a red box. At the bottom of the table, there are "Select" and "Delete" buttons.

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
<input checked="" type="radio"/>	City of Anycity	Regular		Safety - Police	Active	09/15/2017	
<input type="radio"/>	City of Anycity	Regular		Miscellaneous	Active	02/02/1998	

Step 23 Choose the **Select** button.

Step 24 Complete the Appointment Details section.

Appointment Details

Employer: Any City CalPERS ID: 9876543210
(Employer):

Division:

Original Hire Date:

Appointment ID:

Separation Date: Retirement Date:

Additional Details

Position Title: <input type="text"/>	Appointment Status: <input type="text"/>
CBU: <input type="text"/>	Retirement Program: <input type="text"/>
Begin Date: <input type="text"/>	End Date: <input type="text"/>
Medical Group: <input type="text"/>	Affiliated Association: <input type="text"/>

Note: For an enrollment due ACA, select the retirement system that would normally qualify for that position. The retirement system derives the medical group options. Selecting PERS does not enroll them into CalPERS membership.

Step 25 Select the **Save & Continue** button.

Step 26 Did you update the address?

Yes: Continue to step 27

No: Skip to step 30

Step 27 Select the correct **Entered Address** or **U.S. Postal Service Matches** radio button.

Confirm Address

We have validated your address against U.S. postal records and have provided an alternate choice according to these results. Please choose the address you wish to use or select the Cancel button to return to the address page to change your entry.

Entered Address: 400 P St., Sacramento, CA 95814

U.S. Postal Service Matches: 400 P ST, SACRAMENTO, CA 95814-5345

Step 28 Select the **Confirm** button.

Step 29 Select the **Save & Continue** button.

Add Dependents

Step 30 Is the employee enrolling dependents?

Yes: Continue to step 31. **Do not select the Save & Continue button.** If you did and you need to add a dependent, select the **Return** link.

No: Skip to step 46

Step 31 Select the **Add New** button.

Name	Date of Birth	Relationship	Medical
BOBBY JACKSON	03/02/1984	Self	Basic

Step 32 Is the dependent listed in the Existing Relationships Eligible for Health section?
Yes: Select the dependent’s radio button, select the **Continue** button, then skip to step 35.

Name	Date of Birth	Relationship	Medical
Jackson, Jay	07/30/2015	Child	No
Jetson, Judy	11/03/1983	Spouse	No
Jackson, Jimmy	11/17/2017	Child	No

No: Continue to step 33

Step 33 Select **Add New** button.

No results found.

Step 34 Complete the Person Details section.

Step 35 On the Demographic Information page, update the following if necessary:

- Person Details section (you may update if the dependent is not an active employee at a PERS-contracting agency)
- Address Details section: Is their address the same as the employee’s?

Yes: Skip to step 38
No: Continue to step 36

Step 36 Deselect the **Address is the same as Primary Subscriber** check box and complete the Address Details section.

Address is the same as Primary Subscriber
Address Type:* Mailing Address

Step 37 Select the **Save & Continue** button, and then select the **Confirm** button.

Step 38 Select the **Save & Continue** button.

Step 39 Is this dependent in a parent-child relationship?
Yes: Continue to step 40
No: Skip to step 45

Step 40 Select the **Maintain Certification** link.

Dependent Information

Parent-Child Relationship Information

Certification Submitted: No [Maintain Certification](#)

Benefit Type

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

Save & Continue Cancel Clear

Step 41 Select the **Certify Dependent** check box.

Step 42 Select the **disclaimer** check box.

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Lilly Lawson	06/30/2018	03/31/2019	<input checked="" type="checkbox"/> Certify Dependent

* I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any changes pertaining to this PCR. I further understand the provision of California Government Code 20085, which states in part:

Step 43 Select the **Save & Continue** button.

Step 44 Below the Dependent Information section, select the **Save & Continue** button.

Step 45 Do you have additional dependents?

Yes: Return to step 31

No: Continue to step 46

Step 46 Select the **Save & Continue** button.

Select Health Plan

Step 47 Select the **medical plan** radio button.

Medical Plan Selections

Plan Name	Party	Premium
<input checked="" type="radio"/> Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68
<input type="radio"/> Health Net SmartCare - Region 1	Self/B and 1/B	2001.04

Step 48 Enter medical provider(s) information if the employee indicated one.

Provider Information

Name	Dependent Type	Medical Provider
Jane Doe	Self	<input type="text"/>
Baby Doe	Natural Born Child	<input type="text"/>

Save & Continue Cancel Clear Return

Step 49 Select the **Save & Continue** button.

Step 50

Select one of the four options in the health transaction confirmation:

Health Transaction Confirmation

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

The print option provides details in a PDF format in a separate browser window.

Health Transaction Confirmation

The following transaction successfully processed on 05/09/2019.

CalPERS ID: 0123456789
Subscriber Name: Jane Doe

Health Event Type: New Enrollment
Health Event Reason: Late or Loss of Coverage (Emp)

Effective Date: 06/01/2019
Event Date: 05/30/2019
Received Date: 05/09/2019

Health Plan Name: Anthem Blue Cross Select

Covered Persons:

Covered Person	Relationship
Jane Doe	Self
Baby Doe	Child

You have completed this scenario.

Tip: Verify the dependent name(s). To correct a dependent's demographics for a transaction with a:

-Future effective date: Rescind the transaction and re-process the new health enrollment. You will be able to make any corrections for the dependent.

-Retroactive effective date: Contact CalPERS.

Scenario 2: Add Dependent

System Logic

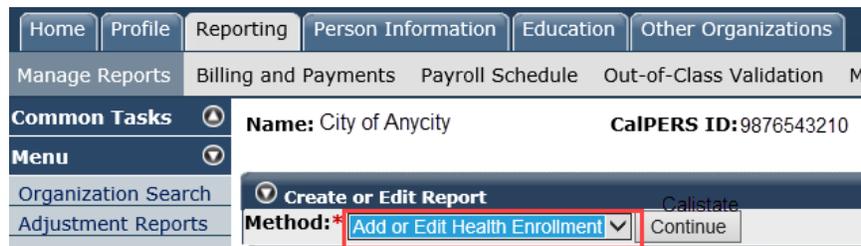
When adding multiple dependents within one health transaction, the health event reason must be the same. If not, process a separate health transaction for each unique health event reason.

Step Actions

Add Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

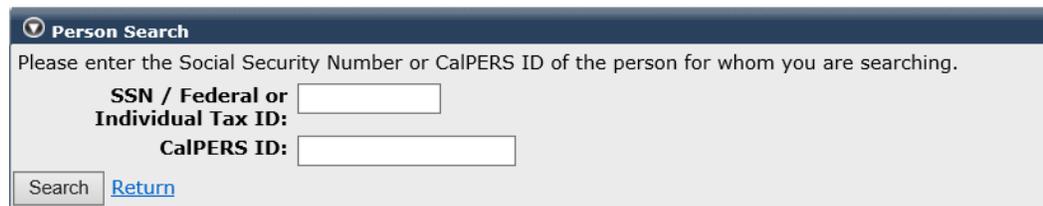


The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sections for Manage Reports, Billing and Payments, Payroll Schedule, and Out-of-Class Validation. A 'Common Tasks' section is expanded to show a 'Menu' with options like Organization Search and Adjustment Reports. The 'Create or Edit Report' section is also expanded, showing a 'Method' dropdown menu with 'Add or Edit Health Enrollment' selected. Other options in the menu include 'Callstate' and 'Continue'. The page also displays 'Name: City of Anycity' and 'CalPERS ID: 9876543210'.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.

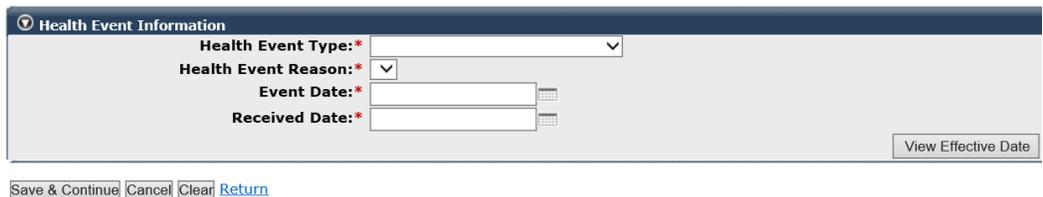


The screenshot shows the 'Person Search' form. It prompts the user to enter the Social Security Number or CalPERS ID of the person for whom they are searching. There are input fields for 'SSN / Federal or Individual Tax ID' and 'CalPERS ID'. A 'Search' button and a 'Return' link are located at the bottom of the form.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



The screenshot shows the 'Health Event Information' form. It contains several required fields: 'Health Event Type' (a dropdown menu), 'Health Event Reason' (a dropdown menu), 'Event Date' (a date picker), and 'Received Date' (a date picker). A 'View Effective Date' button is located at the bottom right. At the bottom of the form, there are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 7 Select the **View Effective Date** button at bottom right to view the effective date.

Step 8 Select the **Save & Continue** button.

Adding Dependents

Step 9 Is the dependent listed in the Existing Relationships Eligible for Health section?

Yes: Select the dependent's check box, select the **Continue** button, then skip to step 12. **Optional:** After selecting the dependent's check box, select the **Update Demographics** link correct the dependent's demographics.

No: Continue to step 10

Step 10 Within the Existing Relationships Eligible for Health section, select the **Add New** button.

Existing Relationships Eligible for Health **Add New**

Select a dependent below. If a dependent is not listed, select the **Add New** button.

Name	Date of Birth	Relationship	Medical
No results found.			

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

Step 11 Complete the Person Details section.

Step 12 On the Demographic Information page, update the following if necessary:

- Person Details section (you may update if the dependent is not an active employee at a PERS-contracting agency)
- Address Details section: Is their address the same as the employee's?

Yes: Skip to step 15

No: Continue to step 13

Step 13 Deselect the **Address is the same as Primary Subscriber** check box and complete the Address Details section.

Address Details

Address is the same as Primary Subscriber

Address Type:* Mailing Address

Step 14 Select the **Save & Continue** button, and then select the **Confirm** button.

Step 15 Select the **Save & Continue** button.

Step 16 Is the dependent in a parent-child relationship?

Yes: Continue to step 17

No: Skip to step 21

Step 17 Select the **Provide Certification** link.

Step 18 Select the **Certify Dependent** check box.

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kitty Kooper	04/01/2018	02/28/2019	<input checked="" type="checkbox"/> Certify Dependent

Step 19 Select the **disclaimer** check box.

* I recognize this affidavit is a legally binding document. I accept CalPERS of any changes pertaining to this PCR. I further understand the provisions of the California Labor Code, Section 20085, which states in part:
(a) It is unlawful for a person to do any of the following:
(1) Make, or cause to be made, any knowingly false material statement, or to otherwise provide false information, used, to obtain, receive, continue, increase, deny or reduce a benefit.
(2) Present, or cause to be presented, any knowingly false or misleading information for the purpose of supporting or opposing an application for any benefit.
I understand and agree that the information I have provided is true and correct under penalty of perjury.

Step 20 Select the **Save & Continue** button.

Step 21 Under the Dependent Information section, select the **Save & Continue** button.

Dependent Information
Parent-Child Relationship Information
Parent-Child Relationship Certification Expiration Date: 01/31/2019
Certification Submitted: Yes

[Return](#)

Step 22 If the employee provided a physician name for the dependent, then enter the physician's name in the **Provider** field.

Step 23 Do you have additional dependents to add for this health event reason?

Yes: Return to step 9

No: Continue to step 24

Step 24 Select the **Continue** button.

Step 25 Select one of the four options in the health transaction confirmation:

Health Transaction Confirmation

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

You have completed this scenario.

Scenario 3: Delete Dependent

System Logic

- When deleting multiple dependents within one health transaction, the health event reason must be the same. If not, process a separate health transaction for each health event reason.
- When deleting an ex-spouse due to divorce, allow the system to automatically delete dependents with the relationship of Step Child.

Step Actions

Add Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

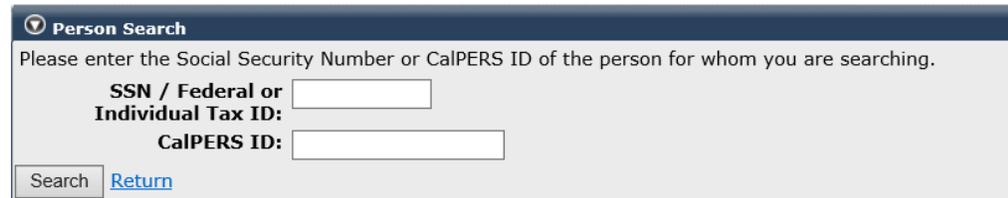


The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Under the Reporting tab, there are sub-tabs for Manage Reports, Billing and Payments, Payroll Schedule, and Out-of-Class Validation. A 'Common Tasks' section is expanded to show a 'Menu' with options for Organization Search and Adjustment Reports. Below the menu, the 'Create or Edit Report' section is visible, showing the Name as 'City of Anycity' and CalPERS ID as '9876543210'. The 'Method' dropdown menu is open, with 'Add or Edit Health Enrollment' selected and highlighted by a red box. A 'Continue' button is also visible.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.

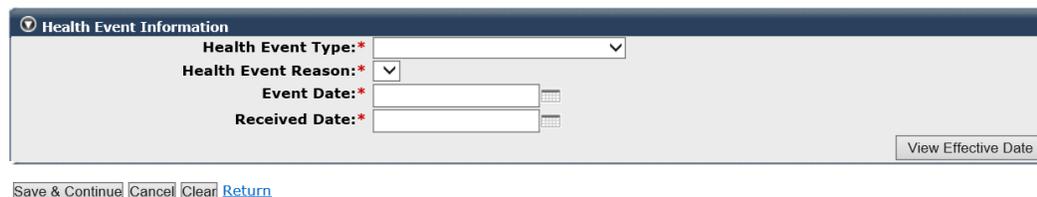


The screenshot shows the 'Person Search' form. It prompts the user to enter the Social Security Number or CalPERS ID of the person for whom they are searching. There are input fields for 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button and a 'Return' link are located at the bottom of the form.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



The screenshot shows the 'Health Event Information' form. It contains several required fields: 'Health Event Type:' (a dropdown menu), 'Health Event Reason:' (a dropdown menu), 'Event Date:' (a date field), and 'Received Date:' (a date field). A 'View Effective Date' button is located at the bottom right of the form. At the bottom of the page, there are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 7 Select the **View Effective Date** button at bottom right to view the effective.

Step 8 Select the **Save & Continue** button.

Delete Dependent(s)

Step 9 Select the check box next to the dependent being deleted.

Existing Relationships Eligible for Health				
	Name	Date of Birth	Relationship	Medical
<input type="checkbox"/>	Wilson, Willy	06/14/2001	Child	Yes
<input type="checkbox"/>	Wilson, Wanda	05/04/1979	Spouse	Yes
<input type="checkbox"/>	Wilson, Wally	03/18/2013	Child	Yes
<input type="checkbox"/>	Smith, Sam	06/02/2004	Step Child	Yes

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

Step 10 Select the **Continue** button.

Step 11 Select one of the four options in the health transaction confirmation:

Health Transaction Confirmation

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

You have completed this scenario.

Scenario 4: Change Health Plan

System Logic

Move Health Event Reason

- Prior to processing a plan change, the new address should be updated in myCalPERS.
- For state agencies, an address change in PIMS will reflect in myCalPERS in 1-2 business days.

Work ZIP Code

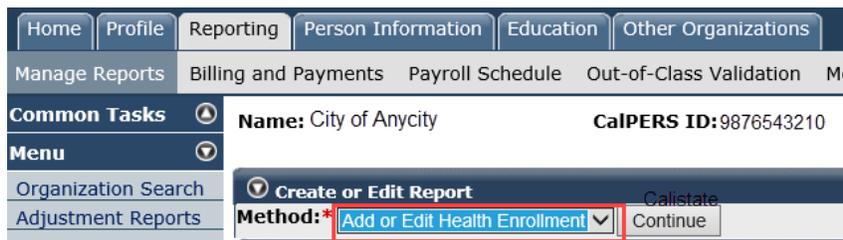
- To start using the work ZIP code for health eligibility, process an **Update Enrollment** health event type/Change Eligibility ZIP health event reason transaction prior to the plan change.
- To cancel a work ZIP code used for health eligibility, use a Cancel Eligibility ZIP reason when processing.

Step Actions

Add Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

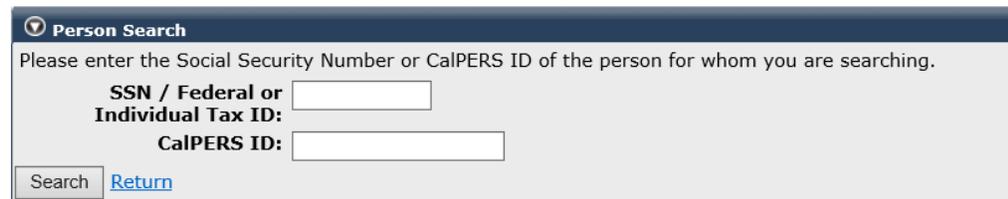


The screenshot shows a navigation menu with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below the menu, there are sections for 'Common Tasks' and 'Menu'. The 'Create or Edit Report' section is active, displaying 'Name: City of Anycity' and 'CalPERS ID: 9876543210'. The 'Method' dropdown menu is open, showing 'Add or Edit Health Enrollment' as the selected option. A 'Continue' button is visible to the right of the dropdown.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.



The screenshot shows the 'Person Search' section with the following text: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' Below this text are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. At the bottom left, there is a 'Search' button and a 'Return' link.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.

Health Event Information

Health Event Type:*

Health Event Reason:*

Event Date:*

Received Date:*

View Effective Date

Save & Continue Cancel Clear Return

Step 7 Select the **View Effective Date** button at bottom right to view the effective date.

Step 8 Select the **Save & Continue** button.

Step 9 Is this a dues-paying member of an affiliated association who is electing to enroll in an association plan?

Yes: Continue to step 10

No: Skip to step 12

Step 10 Select the member's association from the drop-down list.

Step 11 Select the **Display Plans** button.

Change Health Plan

Step 12 Select the **health plan** radio button chosen by the subscriber.

Plan Name	Party	Premium
<input type="radio"/> Anthem Blue Cross Select HMO - Region 1	Self/B and 1/B	1737.96
<input type="radio"/> Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68
<input type="radio"/> Health Net SmartCare - Region 1	Self/B and 1/B	2001.04
<input type="radio"/> Kaiser Permanente California - Region 1	Self/B and 1/B	1536.98
<input type="radio"/> PERS Care - Region 1	Self/B and 1/B	2266.28
<input type="radio"/> PERS Choice - Region 1	Self/B and 1/B	1722.36
<input type="radio"/> PERS Select - Region 1	Self/B and 1/B	1040.58

Step 13 Enter the provider information if the employee chose a provider(s).

Provider Information

Name	Dependent Type	Medical Provider
Jane Doe	Self	<input type="text"/>
Baby Doe	Natural Born Child	<input type="text"/>

Save & Continue Cancel Clear Return

Step 14 Select the **Save & Continue** button.

Step 15 Select one of the four options in the health transaction confirmation.

You have completed this scenario.

Scenario 5: Cancel Coverage

System Logic

Leave of Absence (Not FMLA or Maternity/Paternity Leave) and Permanent Separation

- If coverage should be canceled due to a leave of absence (for public agencies and schools) or a permanent separation, update the employee appointment and let the system automatically cancel the health benefits.
- For nonPERS and CalSTRS employees, view steps on updating appointments in Unit 8: Non-PERS and CalSTRS Appointment Changes for Public Agencies & Schools.

Voluntary Cancellation

If an employee is requesting to cancel with an effective date more than a month in the future, adjust the received date to the month prior to the effective date. For example,

- **Event Date:** Day of the employee request
- **Received Date:** Month prior to the effective date/01/year

Step Actions

Add Health Enrollment Transaction

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

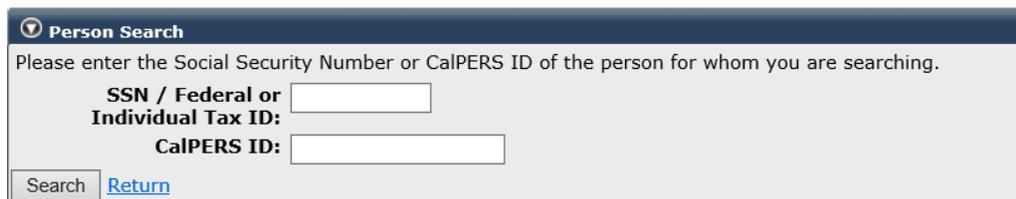
Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.



Step 3 Select the **Continue** button.

Search for the Subscriber

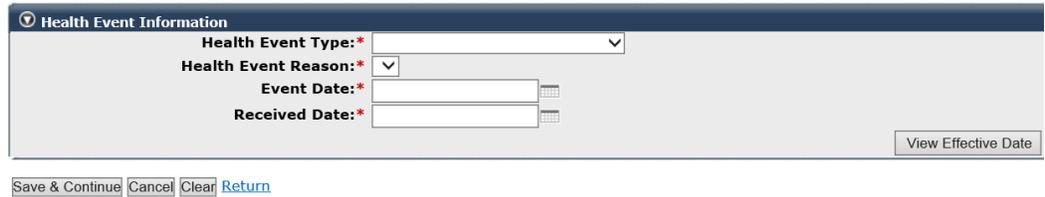
Step 4 Complete the Person Search section.



Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.

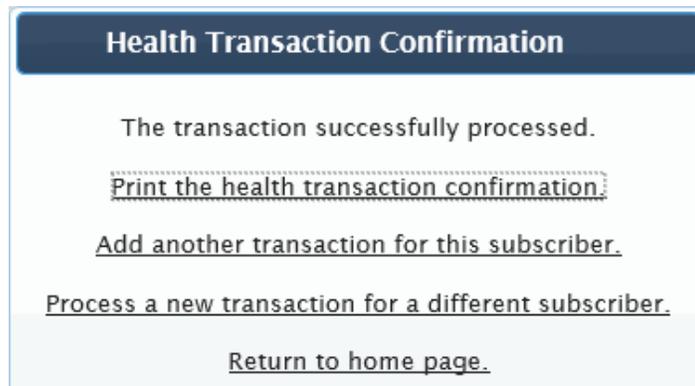


The screenshot shows a form titled "Health Event Information" with a dark blue header. Below the header, there are four fields: "Health Event Type:" with a dropdown arrow, "Health Event Reason:" with a dropdown arrow, "Event Date:" with a date picker icon, and "Received Date:" with a date picker icon. All fields have an asterisk indicating they are required. At the bottom right of the form is a button labeled "View Effective Date". Below the form, there are four buttons: "Save & Continue", "Cancel", "Clear", and "Return".

Step 7 Select the **View Effective Date** button at bottom right to view the effective date.

Step 8 Select the **Save & Continue** button.

Step 9 Select one of the four options in the health transaction confirmation:



The screenshot shows a dialog box titled "Health Transaction Confirmation" with a dark blue header. The main content area is light gray and contains the following text: "The transaction successfully processed." followed by four underlined options: "Print the health transaction confirmation.", "Add another transaction for this subscriber.", "Process a new transaction for a different subscriber.", and "Return to home page.".

You have completed this scenario.

Unit 3: Affidavit of Parent-Child Relationship (HBD-40)

In this unit, you will learn and how to recertify a parent-child relationship and how to verify a parent-child relationship expiration date. For steps on adding a parent-child dependent, see Unit 2, Scenario 2: Add Dependent.

Expiration Date

If the parent-child dependent is not recertified before the first of the month of the subscriber birthday, then the system will automatically delete the dependent from the health benefits the first of the month following the subscriber birthday.

Health Reports

- **Parent-Child Relationship Dependent With Expiring Certification Report**
- **Employer Health Enrollee Report-Ext** includes a Parent-Child Relationship Certification End Date column for all dependents in a parent-child relationship

90 Days

Recertify no earlier than 90 days before parent-child relationship certification renewal date.

30 days

- If recertification is not completed at least 30 days before the parent-child relationship certification renewal date, the system will apply a termination date.
- If you approve the employee's recertification after the system applies a termination with a future date, you can rescind the termination.
- If the termination date has recently passed and you approve the recertification, you must contact CalPERS to request a rescission.

Contents

Scenario 1: Recertify a Dependent in a Parent-Child Relationship	31
Scenario 2: View Parent-Child Relationship and Certification Expiration Date.....	33

Scenario 1: Recertify a Dependent in a Parent-Child Relationship

Step Actions

Step 1 Are you recertifying more than 30 days prior to the first of the month of the subscriber birthday (dependent hasn't been deleted)?

Yes: Skip to step 14

No: Continue to step 2

Rescind Dependent Health Deletion

Step 2 Select the **Reporting** global navigation tab.

Step 3 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

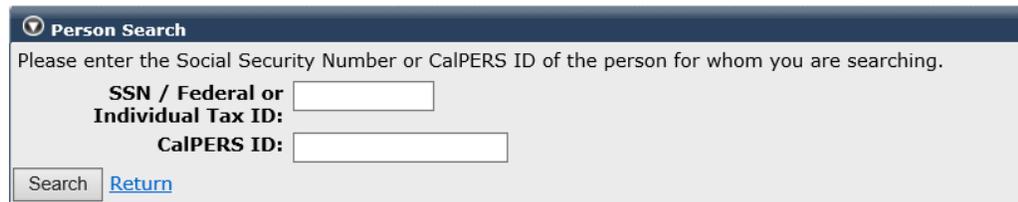


Home Profile Reporting Person Information Education Other Organizations
Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation M
Common Tasks Name: City of Anycity CalPERS ID: 9876543210
Menu
Organization Search
Adjustment Reports
Create or Edit Report
Method: Add or Edit Health Enrollment Calstate
Continue

Step 4 Select the **Continue** button.

Search for the Subscriber

Step 5 Complete the Person Search section.



Person Search
Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.
SSN / Federal or Individual Tax ID:
CalPERS ID:
Search [Return](#)

Step 6 Select the **Search** button.

Step 7 Within the Demographics Information section, select the **Rescind an Existing Transaction** link.



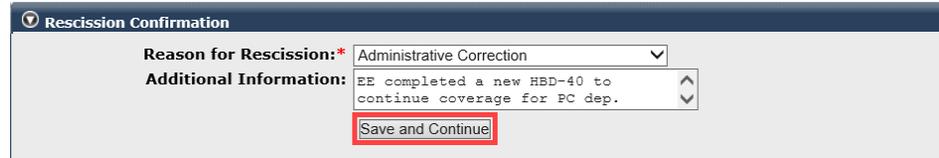
Demographics Information
CalPERS ID: 0123456789 [Select](#) [Rescind an Existing Transaction](#)
Prefix:
First Name: JEANAIS Middle Name: KEISHIRA Last Name: MC PHEE-LOWE
Suffix:
SSN: 555443333 Date of Birth: 03/22/1973 Gender: Female

Step 8 Within the Health Enrollment History section, select the radio button associated to the future health event to be rescinded.

Step 9 Select the **Rescind** button.

Step 10 Complete the Rescission Confirmation section.

Step 11 Select the **Save and Continue** button.



Rescission Confirmation

Reason for Rescission:* Administrative Correction

Additional Information: EE completed a new HBD-40 to continue coverage for PC dep.

Save and Continue

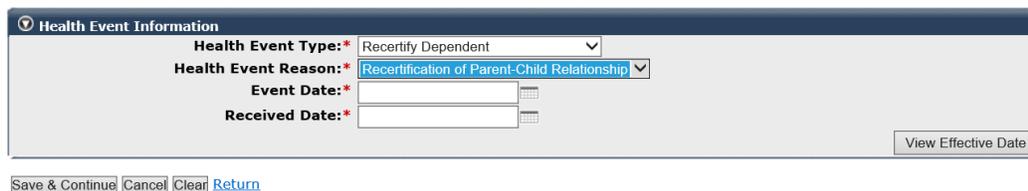
Step 12 Select the **Save & Continue** button and a transaction confirmation displays

Step 13 Select the **Add another transaction for this subscriber** link.

Recertify Parent Child Relationship

Step 14 Complete the Health Event Information section.

Event Date: 1st of the month following the subscriber's birth date.



Health Event Information

Health Event Type:* Recertify Dependent

Health Event Reason:* Recertification of Parent-Child Relationship

Event Date:*

Received Date:*

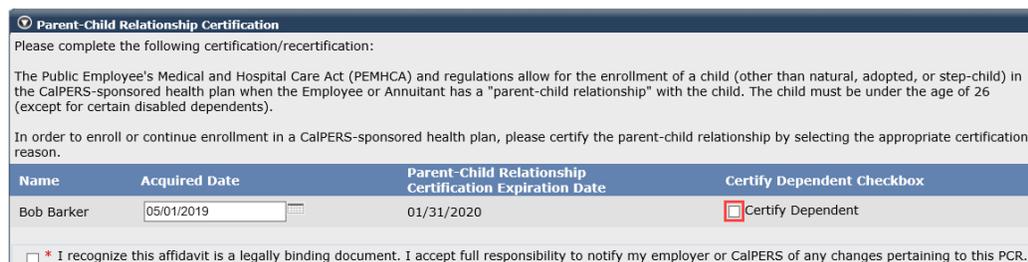
View Effective Date

Save & Continue Cancel Clear Return

Step 15 Select the **View Effective Date** button at bottom right to view the effective date.

Step 16 Select the **Save & Continue** button.

Step 17 Within the Parent-Child Relationship Certification section, select the **Certify Dependent** check box.



Parent-Child Relationship Certification

Please complete the following certification/recertification:

The Public Employee's Medical and Hospital Care Act (PEMHCA) and regulations allow for the enrollment of a child (other than natural, adopted, or step-child) in the CalPERS-sponsored health plan when the Employee or Annuitant has a "parent-child relationship" with the child. The child must be under the age of 26 (except for certain disabled dependents).

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

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Bob Barker	05/01/2019	01/31/2020	<input checked="" type="checkbox"/> Certify Dependent

* I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any changes pertaining to this PCR.

Step 18 Select the **disclaimer** check box.

Step 19 Select the **Save & Continue** button.

Step 20 Select one of the four options in the health transaction confirmation.

A transaction confirmation displays, and you have completed this scenario.

Scenario 2: View Parent-Child Relationship and Certification Expiration Date

After a recertification transaction has been processed, you can view the updated expiration date next to the Parent-Child Relationship Certification Expiration Date field for the dependent.

Step Actions

Step 1 From the home page, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

The screenshot shows a navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below the navigation bar is a 'Person Search' section with the following text: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are three input fields: 'SSN / Federal or Individual Tax ID:', 'CalPERS ID:', and a 'Search' button. A 'Return' link is also present.

Step 3 Select the **Search** button.

Step 4 Select the **Health Enrollment** local navigation link.

Step 5 Select the **CalPERS Employment** link.

The screenshot shows the 'Health Enrollment' section with a 'Common Tasks' menu. The 'Select Health Account' dropdown is open, showing a table with columns: Health Account, Qualifying Participant Name, and Qualifying CalPERS ID. The 'CalPERS Employment' link is highlighted with a red box. Below the table is a 'Health Account Summary' link.

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	ED EMPLOYEE	0123456789

Step 6 If needed, within the Covered Persons Summary section, select the **View More Actions** link to view the full list of covered and formerly covered participants.

The screenshot shows the 'Covered Persons Summary' section with a 'View More Actions' link highlighted in a red box. Below the link is a table with columns: Name, Date of Birth, Dependent Type, Certified, Medical, Dental, and Vision.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
ED EMPLOYEE	05/02/1958	Self	NA	Basic	No	No

Step 7 Select the **name** link for the dependent that has a parent-child relationship.

Step 8 Within the Covered Person Health Information section, the new Parent-Child Relationship Certification Expiration date will be displayed.

The screenshot shows the 'Health Coverage Information' section with a 'Parent-Child Relationship Certification Expiration Date' field highlighted in a red box. The date is 05/31/2018. Other fields include Medical Coverage, Dental Coverage, and Vision Coverage, each with 'Enrolled in' and 'COBRA Start/End Date' fields.

Parent-Child Relationship Certification Expiration Date: 05/31/2018	Dental Coverage: No	Vision Coverage: No
Medical Coverage: Yes	Enrolled in Dental Since:	Enrolled in Vision Since:
Enrolled in Medical Since: 06/01/2017	Dental COBRA Start Date:	Vision COBRA Start Date:
Medical Coverage Type: Basic	Dental COBRA End Date:	Vision COBRA End Date:
Medical COBRA Start Date:		
Medical COBRA End Date:		

You have completed this scenario.

Unit 4: Rescission

System Logic

A rescission is reversing a transaction to make a correction or due to a subscriber request.

System limitations: You may not process a rescission for a mandatory event or if it is after the effective date. Contact CalPERS for assistance.

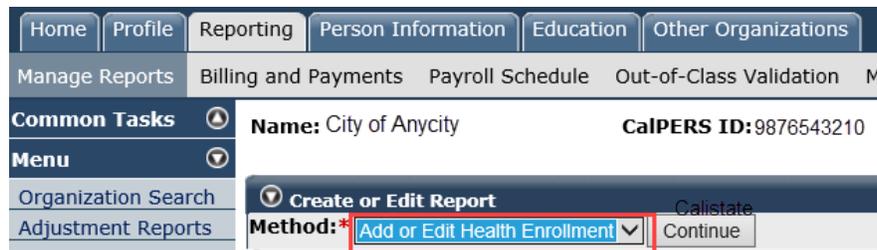
To correct a transaction, e.g., you forgot to include a dependent on a new health enrollment or you need to correct a dependent's demographics, process a rescission and then reprocess the health enrollment.

Step Actions

Edit Health Enrollment

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

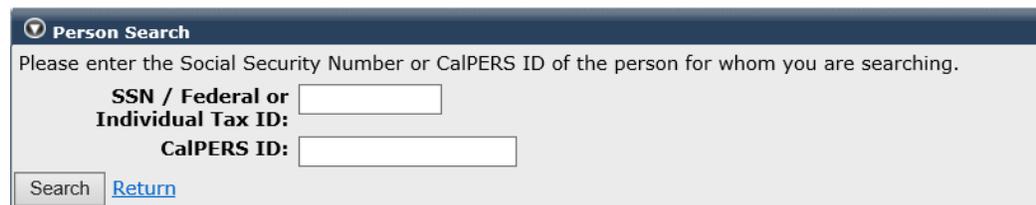


The screenshot shows a navigation menu with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below the menu, there are sections for 'Common Tasks' and 'Menu'. The 'Create or Edit Report' section is active, displaying 'Name: City of Anycity' and 'CalPERS ID: 9876543210'. A dropdown menu for 'Method' is open, with 'Add or Edit Health Enrollment' selected and highlighted by a red box. A 'Continue' button is visible to the right of the dropdown.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.



The screenshot shows the 'Person Search' form. It contains the instruction: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. Below the input fields are 'Search' and 'Return' buttons.

Step 5 Select the **Search** button.

Step 6 Within the Demographics Information section, select the **Rescind an Existing Transaction** link.

Demographics Information
CalPERS ID: 0123456789 [Select](#) [Rescind an Existing Transaction](#)
Prefix:
First Name: JEANAIS Middle Name: KEISHIRA Last Name: MC PHEE-LOWE
Suffix:
SSN: 555443333 Date of Birth: 03/22/1973 Gender: Female

Step 7 Within the Health Enrollment History section, select the radio button associated to the future health event to be rescinded.

Health Enrollment History

Effective Date	Health Event Type	Health Event Reason
<input checked="" type="radio"/> 05/01/2019	Change Health Plan	Move
<input type="radio"/> 08/01/2014	Add Dependent	Birth/placement

Step 8 Select the **Rescind** button.

Step 9 Complete the Rescission Confirmation section.

Rescission Confirmation
Reason for Rescission: * Subscriber Request
Additional Information: On 4/22/19, employee requested to rescind the plan change.

[Return](#)

Step 10 Select the **Save and Continue** button.

Step 11 From the Health Event Information section, select the **Save & Continue** button.

Step 12 Select one of the four options in the health transaction confirmation:

Health Transaction Confirmation
The transaction successfully processed.
[Print the health transaction confirmation.](#)
[Add another transaction for this subscriber.](#)
[Process a new transaction for a different subscriber.](#)
[Return to home page.](#)

You have completed this scenario.

Unit 5: Direct Payment Authorization (HBD-21)

System Logic

Delayed Retirement

A separated employee may elect direct pay while pending retirement. This happens if their retirement warrants will be delayed, and they want to show as covered. They can elect to make direct payments until they receive their first retirement warrant. Because your former employee's health benefits will cancel due to a permanent separation, process this direct pay by using Health Event Type: **New Enrollment**, Health Event Reason: **Pending Retirement**.

Leave of Absence

Public Agencies and Schools

- Most leave of absences will automatically cancel health benefits the first day of the second month after the leave begins.
- Family Medical Leave and Maternity/Paternity Leave do not change the employee's health coverage or employer deductions, even though it creates a **Change Premium Payment Method** health event type and **Chg to deduct-FMLA-Batch** health event reason.
- For cancelled health benefits, rescind the cancellation prior to processing a direct pay.

State Agencies

A leave of absence does not change the health benefits, so you will need to:

- Cancel the employee's health benefits (Health Event Reason: **Off Pay Status Cancel**), or
- Put the employee on direct pay

All Agencies-Return to Work

Update the employee's appointment to reflect the end of their leave. The system will change the subscriber from direct pay to standard deduction. If the employee didn't choose to direct pay, then process a Health Event Type: **New Enrollment**, Health Event Reason: **Return from Off Pay Status** if employee is re-enrolling.

Step Actions

Leave of Absence

- Step 1 Has the leave of absence event been added to the appointment?
- Yes:** Public agencies and schools, skip to step 9
- No:** Public agencies, schools, and non-central state agencies, continue to step 2
- Yes:** All state agencies, skip to step 21
- No:** State agencies will enter the leave in PIMS, then skip to step 21
- Note:** Non-central state agencies will do steps 2-8, then skip to step 21

Public Agencies, Schools, and Non-Central State Agencies Process the Leave of Absence

Step 2 Select the **Person Information** global navigation tab.

Step 3 Complete the Person Search.

Step 4 Select the **Search** button.

Step 5 Within the Appointment History section, select **your employer name** link that is for the employee's active appointment.



Step 6 Within the Appointment Event History section, select the **Add New** button.

Step 7 Complete the Appointment Event Details section.

Appointment Event Details

Event:* Begin Leave

Event Date:*

Leave Type:*

Save Clear

- Educational Leave
- Family Medical Leave
- Industrial Disability Leave
- Military Leave
- Maternity/Paternity Leave
- Non-Industrial DL
- Other Leave
- State Disability Leave
- Service Leave
- Sabbatical - Full Pay
- Sabbatical - Partial Pay
- Unpaid Leave
- Workers Comp

Step 8 Select the **Save** button.

Public Agencies and Schools-Rescind the Health Cancellation

Step 9 Select the **Reporting** global navigation tab.

Step 10 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation M

Common Tasks Name: City of Anycity CalPERS ID:9876543210

Menu

Organization Search

Adjustment Reports

Create or Edit Report

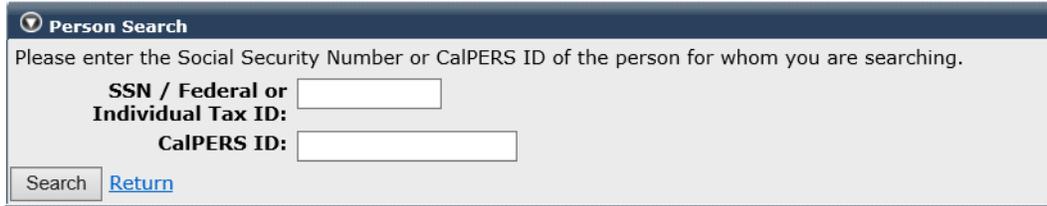
Method:* Add or Edit Health Enrollment Callstate

Continue

Step 11 Select the **Continue** button.

Search for the Subscriber

Step 12 Complete the Person Search section.



The screenshot shows a 'Person Search' form with a dark blue header. Below the header, it says 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. At the bottom left, there is a 'Search' button and a blue 'Return' link.

Step 13 Select the **Search** button.

Step 14 Within the Demographics Information section, select the **Rescind an Existing Transaction** link.

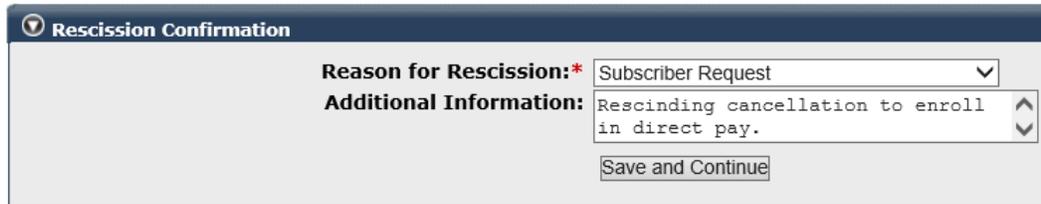


The screenshot shows a 'Demographics Information' form with a dark blue header. It displays personal information: 'CalPERS ID: 0123456789' with a blue 'Select' link; 'Prefix:'; 'First Name: JEANAIS', 'Middle Name: KEISHIRA', and 'Last Name: MC PHEE-LOWE'; 'Suffix:'; 'SSN: 555443333', 'Date of Birth: 03/22/1973', and 'Gender: Female'. A red box highlights the 'Rescind an Existing Transaction' link in the top right corner.

Step 15 Within the Health Enrollment History section, select the radio button associated to the future health event to be rescinded.

Step 16 Select the **Rescind** button.

Step 17 Complete the Rescission Confirmation section.



The screenshot shows a 'Rescission Confirmation' form with a dark blue header. It has a 'Reason for Rescission:*' dropdown menu set to 'Subscriber Request'. Below it is an 'Additional Information:' text area containing 'Rescinding cancellation to enroll in direct pay.' At the bottom right, there is a 'Save and Continue' button.

[Return](#)

Step 18 Select the **Save and Continue** button.

Step 19 From the Health Event Information section, select the **Save & Continue** button.

Step 20 Select the **Add another transaction for this subscriber** link.

Process the Direct Pay (State Employers-Continue with Step 21; Public Agencies and Schools-Skip to Step 26)

Step 21 Select the **Reporting** global navigation tab.

Step 22 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.



Common Tasks ▲
Menu ▼
Organization Search
Adjustment Reports

Name: City of Anycity CalPERS ID: 9876543210

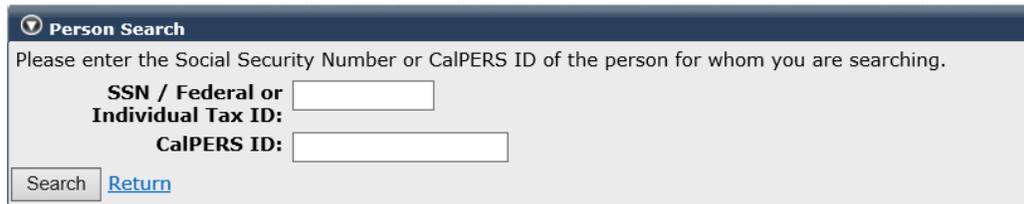
▼ Create or Edit Report

Method:* **Add or Edit Health Enrollment** ▼ Continue

Step 23 Select the **Continue** button.

Search for the Subscriber

Step 24 Complete the Person Search section.



▼ Person Search

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

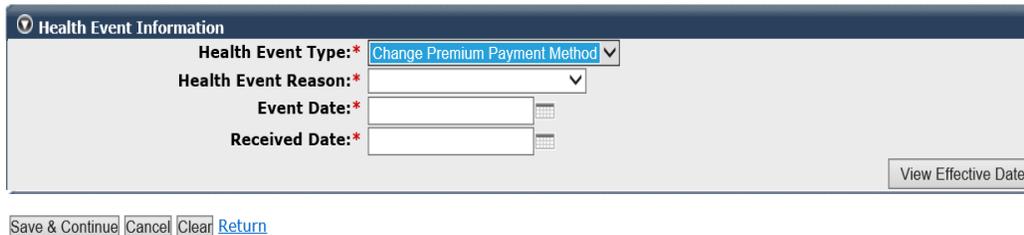
SSN / Federal or
Individual Tax ID:
CalPERS ID:

Search [Return](#)

Step 25 Select the **Search** button.

Input Health Event Information

Step 26 Complete the Health Event Information section.



▼ Health Event Information

Health Event Type:* **Change Premium Payment Method** ▼
Health Event Reason:* ▼
Event Date:*
Received Date:*

[Return](#)

Step 27 Select the **View Effective Date** button at bottom right to ensure there is no lapse in coverage.

Step 28 Select the **Save & Continue** button.

Step 29 Select one of the four options in the health transaction confirmation:

You have completed this scenario.

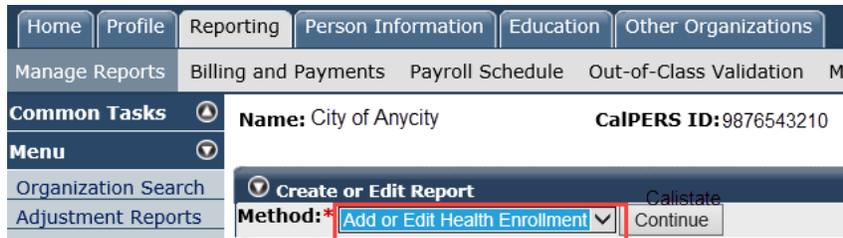
Unit 6: Group Continuation Coverage “COBRA” (HBD-85)

Step Actions

Add COBRA Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

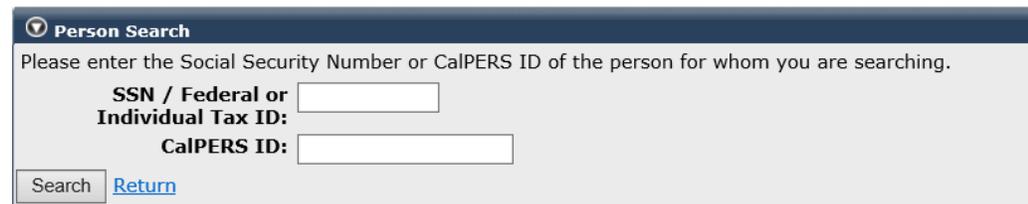


The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs for Manage Reports, Billing and Payments, Payroll Schedule, and Out-of-Class Validation. A 'Common Tasks' section is expanded to show a 'Menu' with options for Organization Search and Adjustment Reports. The 'Create or Edit Report' section is active, displaying 'Name: City of Anycity' and 'CalPERS ID: 9876543210'. The 'Method' dropdown menu is open, with 'Add or Edit Health Enrollment' selected and highlighted by a red box. A 'Continue' button is visible to the right.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.

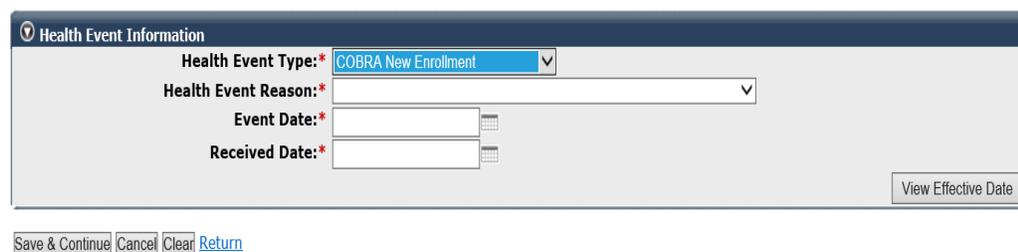


The screenshot shows the 'Person Search' form. It includes a title bar, a description: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.', and three input fields: 'SSN / Federal or Individual Tax ID:', 'CalPERS ID:', and a 'Search' button. A 'Return' link is also present.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



The screenshot shows the 'Health Event Information' form. It includes a title bar, a 'Health Event Type:' dropdown menu with 'COBRA New Enrollment' selected, a 'Health Event Reason:' dropdown menu, and two date input fields: 'Event Date:' and 'Received Date:'. A 'View Effective Date' button is located at the bottom right. At the bottom of the form are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 7 Select the **View Effective Date** button to ensure the effective date is the same date their coverage ended.

Step 8 Select the **Save & Continue** button.

Update Subscriber Details

Step 9 Complete the Maintain Address Details section if you need to update the subscriber's physical address or to choose the employer's ZIP code for eligibility if actively working.

Maintain Address Details

Address Type:* Mailing Address

Care Of:

Address:*

Country:* United States

City:*

State:* California

ZIP Code:*

Select the checkbox if subscriber requested to use their Employer ZIP code for Health Eligibility.
NOTE - Overriding the current Health Eligibility Address will create a Change Eligibility ZIP transaction in conjunction with the enrollment transaction

Use Employer ZIP Code for Health Eligibility :

Step 10 Is this subscriber a former dependent?

Yes: Continue to step 11

No: Skip to step 15

Step 11 In the Qualifying Information section, choose the **Select** link.

Qualifying Information

CalPERS ID: **Select**

SSN

First Name:*

Last Name:*

Gender:*

Date Of Birth:*

Step 12 Complete the Person Search section with the employee's information.

Step 13 Select the **Search** button.

Step 14 After the employee name displays, choose the **Select** button.

Step 15 Complete the Appointment Details section if necessary.

Step 16 Select the **Save & Continue** button.

Add Dependents

Step 17 Is the subscriber enrolling dependents?

Yes: Continue to step 18. **Do not select the Continue button.** If you did and you need to add a dependent, select the **Return** link.

No: Skip to step 33

Step 18 Select the **Add New** button.

Name	Date of Birth	Relationship	Medical
BOBBY JACKSON	03/02/1984	Self	Basic

Step 19 Is the dependent listed in the Existing Relationships Eligible for Health section?
Yes: Select the dependent's radio button, select the **Continue** button, then skip to step 22.

Name	Date of Birth	Relationship	Medical
Jackson, Jay	07/30/2015	Child	No
Jetson, Judy	11/03/1983	Spouse	No
Jackson, Jimmy	11/17/2017	Child	No

No: Continue to step 20

Step 20 Select **Add New** button.

Step 21 Complete the Person Details section.

Step 22 On the Demographic Information page, update the following if necessary:

- Person Details section (you may update if the dependent is not an active employee at a PERS-contracting agency)
- Address Details section: Is their address the same as the employee's?

Yes: Skip to step 25

No: Continue to step 23

Step 23 Deselect the **Address is the same as Primary Subscriber** check box and complete the Address Details section.

Step 24 Select the **Save & Continue** button, and then select the **Confirm** button.

Step 25 Select the **Save & Continue** button.

Step 26 Is this dependent in a parent-child relationship?

Yes: Continue to step 27

No: Skip to step 32

Step 27 Select the **Maintain Certification** link.

The screenshot shows a web interface with two main sections. The top section is titled 'Dependent Information' and contains a sub-section 'Parent-Child Relationship Information'. Below this, it says 'Certification Submitted: No' followed by a red-bordered button labeled 'Maintain Certification'. The bottom section is titled 'Benefit Type' and contains a table with three columns: 'Benefit Type', 'Enrollment', and 'Change Enrollment?'. The table has one row with 'Medical' in the first column, 'No' in the second, and a checked checkbox in the third. Below the table are three buttons: 'Save & Continue', 'Cancel', and 'Clear'.

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

Step 28 Select the **Certify Dependent** check box.

Step 29 Select the **disclaimer** check box.

Step 30 Select the **Save & Continue** button.

Step 31 Below the Dependent Information section, select the **Save & Continue** button.

Step 32 Are there additional dependents to add?

Yes: Return to step 18

No: Continue to step 33

Step 33 Select the **Save & Continue** button.

Select Health Plan

Step 34 Select the **medical plan** radio button.

The screenshot shows a table titled 'Medical Plan Selections' with four columns: 'Plan Name', 'Party', 'Premium', and 'COBRA Premium'. The first row is highlighted with a red border and has a red-bordered radio button selected. The other rows have unselected radio buttons.

Plan Name	Party	Premium	COBRA Premium
<input checked="" type="radio"/> Anthem Blue Cross Select HMO - Region 1	Self/B and 1/B	1737.96	1772.72
<input type="radio"/> Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68	2417.07
<input type="radio"/> Health Net SmartCare - Region 1	Self/B and 1/B	2001.04	2041.06
<input type="radio"/> Kaiser Permanente California - Region 1	Self/B and 1/B	1536.98	1567.72
<input type="radio"/> PERS Care - Region 1	Self/B and 1/B	2266.28	2311.61
<input type="radio"/> PERS Choice - Region 1	Self/B and 1/B	1722.36	1756.81
<input type="radio"/> PERS Select - Region 1	Self/B and 1/B	1040.58	1061.39

Step 35 Enter medical provider(s) information if the employee indicated one.

Step 36 Select the **Save & Continue** button.

Step 37 Select one of the four options in the health transaction confirmation:

You have completed this scenario.

Unit 7: Maintain Dependent Social Security Number

System Logic

The process is the same to add or correct a dependent SSN after the dependent is enrolled.

Step Actions

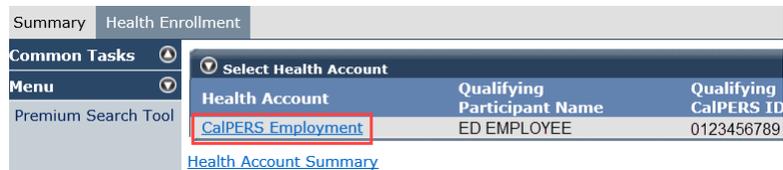
Step 1 From the home page, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

Step 3 Select the **Search** button.

Step 4 Select the **Health Enrollment** local navigation link.

Step 5 Select the first link under the Health Account column.



The screenshot shows a navigation menu with 'Summary' and 'Health Enrollment' tabs. Under 'Common Tasks', there is a 'Select Health Account' dropdown menu. This menu is open, showing a table with columns: 'Health Account', 'Qualifying Participant Name', and 'Qualifying CalPERS ID'. The first row is highlighted and has a red box around the 'CalPERS Employment' link in the 'Health Account' column. Below the table is a link for 'Health Account Summary'.

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	ED EMPLOYEE	0123456789

Step 6 Within the Covered Persons Summary section, if you see a **View More Actions** link, select it to view the full list of covered and formerly covered dependents.



The screenshot shows the 'Covered Persons Summary' section. Below the title, there is a 'View More Actions' link highlighted with a red box. Below this is a table with columns: 'Name', 'Date of Birth', 'Dependent Type', 'Certified', 'Medical', 'Dental', and 'Vision'. The first row contains the following data: ED EMPLOYEE, 05/02/1958, Self, NA, Basic, No, No.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
ED EMPLOYEE	05/02/1958	Self	NA	Basic	No	No

Step 7 Select the **name** link for the dependent you want to update.

Step 8 Select the **edit** link next to the SSN field.



The screenshot shows the 'Covered Person Information' form. The SSN field is highlighted with a red box, and the 'edit' link next to it is also highlighted with a red box. Other fields include CalPERS ID, Name, Date of Birth, Gender, Relationship, and Dependent Type.

CalPERS ID: 0123456789
Name: JANE DOE
SSN/ITIN: [edit](#)
Date of Birth: 03/31/2006
Gender: Female
Relationship: Niece
Dependent Type: Parent-Child
Same Address as Primary: Yes

Step 9 Add or correct the SSN.

Step 10 Choose a verification document type.



The screenshot shows a form for selecting a verification document type. The 'Verification Document' dropdown is open, showing options: 'No Certification', 'Social Security Card', 'Survivor Benefit', and 'IRS Federal Tax ID Number documentation'. The 'Date of Birth' field is visible. There is a 'Same Address as Primary' checkbox and a 'Save' button.

Verification Document: *
Date of Birth:
Same Address as Primary: Yes
Save

Step 11 Select the **Save** button.

You have completed this scenario.

Unit 8: Non-PERS and CalSTRS Profile and Appointment Changes for Public Agency & School Employees

System Logic

You need the **Business Partner Appointment Management – Non-Pers and CalSTRS** myCalPERS access role to update names, addresses, and process appointment changes, e.g., leave of absence, permanent separation, etc. for non-PERS and CalSTRS employees.

Contents

Scenario 1: Maintain Demographic and Address Information	46
Scenario 2: Maintain Appointment Information	47

Scenario 1: Maintain Demographic and Address Information

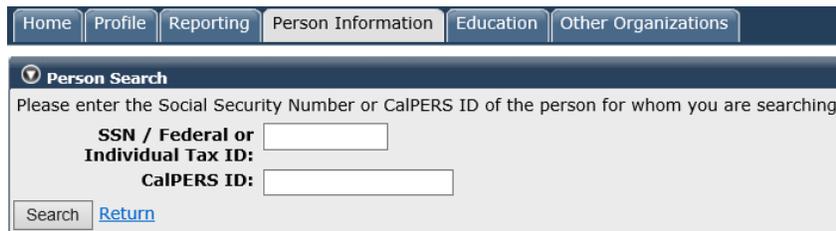
System Logic

When correcting demographic information, a verification document must be selected. To view the verification document that corresponds to which demographic field, refer to the Health Enrollment topic of the [Public Agency & Schools Health Benefits Guide \(PDF\)](#).

Step Actions

Step 1 From the home page, select the **Person Information** global navigation tab.

Step 2 Complete the **Person Search** section.



The screenshot shows a navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below the navigation bar is a section titled "Person Search". It contains the instruction: "Please enter the Social Security Number or CalPERS ID of the person for whom you are searching." There are three input fields: "SSN / Federal or Individual Tax ID:", "CalPERS ID:", and a "Search" button. A "Return" link is also present.

Step 3 Select the **Search** button.

Step 4 Within the **Summary** section, select the **Update Personal Information** link.



The screenshot shows the "Summary" section. It is divided into "Profile" and "Communication" sub-sections. The "Profile" section contains fields for SSN, Name, Date of Birth, Prior School Membership, Membership Date, Restrictions, Last Reporting Date, CalPERS ID, Optional Member, Date of Death, and Retirement Date. The "Update Personal Information" link is highlighted in red. The "Communication" section contains fields for Preferred Communication, Primary Phone Number, Primary Email Address, Mailing Address, Physical Address, and Undeliverable Date. Each of these fields has an "Update" link next to it.

Step 5 Complete the **Maintain Personal Information Details** section.

Step 6 Select the **Save** button.

Step 7 Do you want to update their communication information?

Yes: Continue to step 8.

No: Skip to step 10.

Step 8 Within the **Communication** sub-section, select the appropriate **Update** link.

Step 9 Complete the **Maintain Communication Details** section.

Step 10 Select the **Save** button.

You have completed this scenario.

Scenario 2: Maintain Appointment Information

System Logic

- Leave of absences, except for FMLA or maternity/paternity leaves, will cancel health benefits.
- A permanent separation will cancel health benefits.
- **CalSTRS-Pending Retirement** separation reason is available when permanently separating a CalSTRS employee for retirement.

Leave of Absence

The begin leave of absence event

- For **non-PERS** and **CalSTRS**, use the begin date as the last day the employee is on payroll.
- Health benefits will automatically cancel effective the first day of the second month after the event date.

The end leave of absence event

- The end date is the first day back to work.
- Active subscriber premiums will return to your agency's health premium statement if the employee was on a direct pay.
- If health benefits was left cancelled due to a leave, after updating the end leave, you will re-enroll the subscriber and dependent(s) in the same health plan they had before the leave.

Permanent Separation

- A permanent separation should be processed when an employee permanently leaves your agency, e.g., resigns, retires, etc.
- The event date is at least one day after the last day on pay status.
- Health benefits should cancel effective the first day of the second month after their last day. The system will use the day prior to the permanent separation date as the event date.

Example of a separation event date of the first of the month:

- Permanent Separation Event Date: 04/01/2020
- Health Event Date: 03/31/2020
- Health Cancellation Date: 05/01/2020

Note: It is important that you verify the health cancellation in myCalPERS. This will ensure your agency will be billed or credited properly for the separated employee's premiums.

Step Actions

Add Appointment Event

Step 1 From the home page, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate **employer** link.



Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
City of Anycity		Regular		Miscellaneous	Active	05/11/1996	

Step 5 Within the Appointment Event History section, select the **Add New** button.



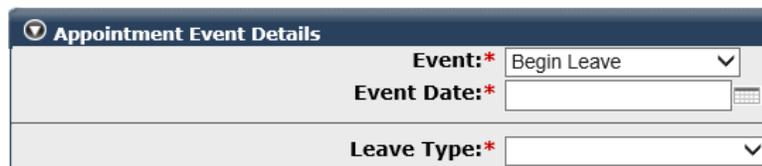
Appointment Event History **Add New** [View More Actions»](#)

View All Site Events

Event Date	Event	Event Details
<input type="radio"/> 01/01/2016	New Appointment	View Event Details

View All Site Events

Step 6 Complete the Appointment Event Details section. See three examples of different events below.



Appointment Event Details

Event:*

Event Date:*

Leave Type:*



Appointment Event Details

Event:*

Event Date:*



Appointment Event Details

Event:*

Event Date:*

Separation Reason:*

Step 7 Select the **Save** button.

You have completed this scenario.

Unit 9: Health into Retirement

Employee Continuing Health

- For a **PERS** or **CalSTRS** employee, process a permanent separation. If they are enrolled in health and their separation date and retirement date are within the same month, health will automatically continue into retirement. See Unit 8: Non-PERS and CalSTRS Appointment Changes on processing a permanent separation.
- For a **non-PERS** employee, process a permanent separation then process their health into retirement. See Scenario 2 within this unit.

Employee Not Continuing Health

- For a **PERS** or **non-PERS** employee, process the **Subscriber Request** cancellation prior to entering the permanent separation into myCalPERS. This clarifies the employee voluntarily canceled. See Unit 2, Scenario 5: Cancel All Coverage.
- For a **CalSTRS** employee, select the **CalSTRS member wishes to decline continuation of CalPERS health coverage into retirement** check box when processing a permanent separation with the separation reason of CalSTRS-Pending Retirement:

The screenshot shows a web form titled "Appointment Event Details". It contains the following fields and options:

- Event:** Permanent Separation (dropdown menu)
- Event Date:** A date input field with a calendar icon and a clear button (x).
- Separation Reason:** CalSTRS - Pending Retirement (dropdown menu)

Below these fields is a section titled "STRS Health Into Retirement". It contains the following text and a checkbox:

If STRS member doesn't want health coverage into retirement, then decline his/her retiree health coverage below.

STRS member wishes to decline continuation of CalPERS health coverage into retirement.

Note: If no selection is made above, the member will automatically continue health into retirement if he/she meets the health eligibility criteria.

At the bottom of the form are "Save" and "Clear" buttons.

Eligibility ZIP Code

If using a work ZIP code for health eligibility, this will be cancelled upon retirement to the subscriber physical address (if no physical then mailing address will be used). The retiree will receive a letter noting this change. If their physical address is outside of the health plan service area, they will receive a letter notifying them that they need to change plans.

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Scenario 1: CalSTRS Employee (Never Enrolled) Health into Retirement

System Logic

If a CalSTRS employee never had health benefits with your agency and they are electing to enroll in health benefits into retirement, follow this three-part process:

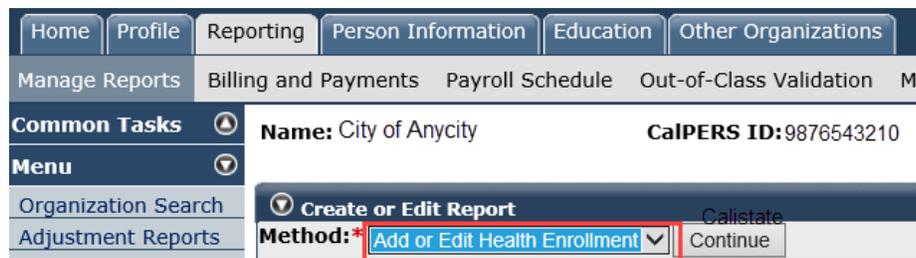
- **Part 1:** Enter the employee demographics and appointment information in myCalPERS.
- **Part 2:** Permanently separate the employee.
- **Part 3:** Contact CalPERS to provide the retirement date, health plan selection, and dependent(s) information.

Step Actions

Add New Appointment

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

Step 2 Within the Create or Edit Report section, select **Add Retirement Enrollment** from the **Method** drop-down list.

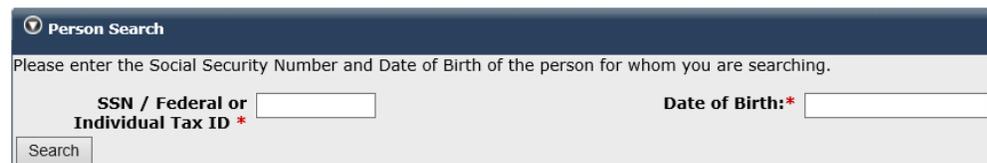


The screenshot shows the myCalPERS navigation menu with 'Reporting' selected. Below the menu, the 'Create or Edit Report' section is visible. The 'Method' dropdown menu is open, and 'Add or Edit Health Enrollment' is selected. The 'Continue' button is visible.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.



The screenshot shows the 'Person Search' section. It contains a search form with fields for 'SSN / Federal or Individual Tax ID *' and 'Date of Birth: *', and a 'Search' button.

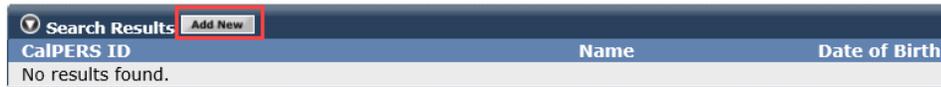
Step 5 Select the **Search** button.

Step 6 Did member details display on the Appointment Details page?

Yes: Skip to step 12

No: Continue to step 7

Step 7 Select the **Add New** button.



Step 8 Complete the Person, Address, and Communication Details sections.

Step 9 Select the radio button for correct **Entered Address** or **U.S. Postal Service Matches**.

Step 10 Select the **Confirm** button.

Step 11 Select the **Save & Continue** button.

Input Appointment Details

Step 12 Complete the Appointment Details section:

Program: Health

Enrollment Eligibility Date: Hire date for this health-eligible position

Retirement System: CalSTRS

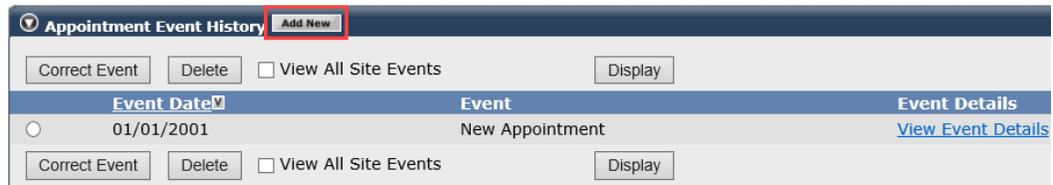
Original Hire Date: Date employee was originally hired with your agency

CBU: Employee's medical group

Step 13 Select the **Save** button.

Add a Permanent Separation Event

Step 14 Next to Appointment Event History, select the **Add New** button.



Step 15 Complete the Appointment Event Details sections:

Event: Permanent Separation

Event Date: Separation date is at least one day after with your agency

Separation Reason: CalSTRS-Pending Retirement

Step 16 Select the **Save** button.

You have completed the first two parts of this three-part scenario.

Scenario 2: Non-PERS Employee Health into Retirement

System Logic

If the employee is eligible to continue health into retirement, follow this two-part process:

- Part 1: Process a permanent separation. See Unit 8: Non-PERS and CalSTRS Appointment Changes. myCalPERS will cancel the health the first day of the second month.
- Part 2: Process a new health enrollment unless the employee and/or dependent is eligible for Medicare. Mail the HBD-30 with a copy of their Medicare information to CalPERS.

Decline Health into Retirement

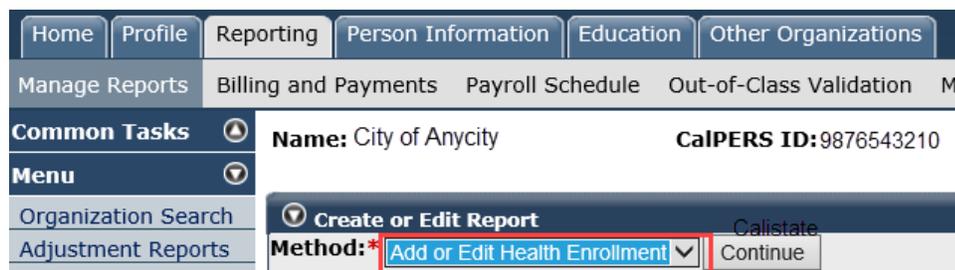
If the employee does not want health benefits to continue into retirement, process a cancellation prior to the permanent separation. This would clarify that they made a subscriber request to cancel. See Unit 2, Scenario 5: Cancel All Coverage.

Step Actions

- Step 1 Does the non-PERS employee want to continue health into retirement?
- Yes:** Process a permanent separation, then continue with step 2 below: Process Health into Retirement
- No:** Process a health cancellation
- You have completed this scenario.**
-

Process Health into Retirement

- Step 2 Select the **Reporting** global navigation tab.
-
- Step 3 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

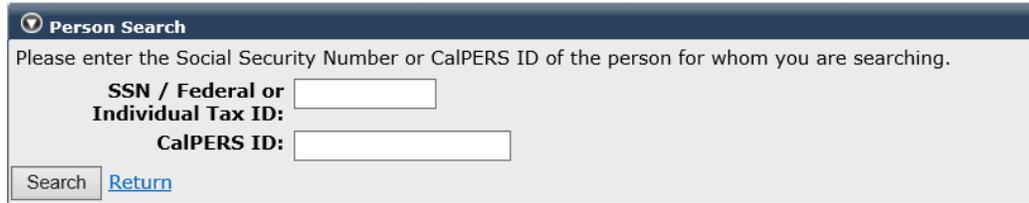


The screenshot shows the myCalPERS interface. At the top, there are navigation tabs: Home, Profile, Reporting (selected), Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, and Out-of-Class Validation. A 'Common Tasks' menu is open, showing 'Create or Edit Report' selected. In the 'Create or Edit Report' section, the 'Method' dropdown menu is open, and 'Add or Edit Health Enrollment' is selected. The 'Continue' button is visible to the right of the dropdown. The page also displays 'Name: City of Anycity' and 'CalPERS ID: 9876543210'.

-
- Step 4 Select the **Continue** button.
-

Search for the Subscriber

Step 5 Complete the Person Search section.



Person Search

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

SSN / Federal or Individual Tax ID:

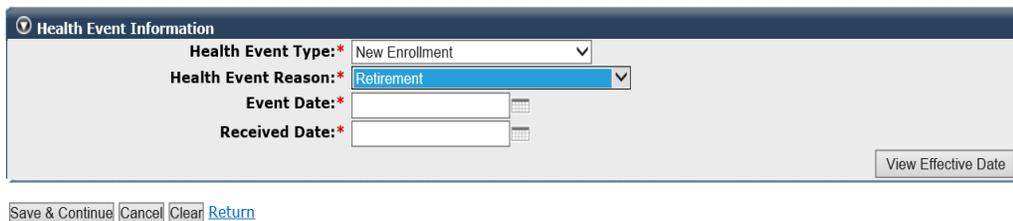
CalPERS ID:

[Return](#)

Step 6 Select the **Search** button.

Input Health Event Information

Step 7 Complete the Health Event Information section.



Health Event Information

Health Event Type: New Enrollment

Health Event Reason: Retirement

Event Date:

Received Date:

[Return](#)

Step 8 Select the **View Effective Date** button to ensure the effective date is the same as their cancellation date.

Step 9 Select the **Save & Continue** button.

Step 10 Update the Address and Communication Details sections if needed.

Step 11 In the Appointment Details section, select a medical group and if necessary, PORAC from the Affiliated Association drop-down list.



Additional Details

Position Title: CBU:

Appointment Status: Perm Sep

Retirement Program: Other

Begin Date: 02/15/2018

End Date:

Medical Group:

Affiliated Association: California Association of Highway Patrolmen (CAHP)
California Correctional Peace Officers Association (CCPOA)
Peace Officers Research Association of California (PORAC)

Step 12 Select the **Save & Continue** button.

Add Dependents

Step 13 Is the employee enrolling dependents?

Yes: Continue to step 14. **Do not select the Save & Continue button.** If you did and you need to add a dependent, select the **Return** link.

No: Skip to step 28

Step 14 Select the **Add New** button.

Name	Date of Birth	Relationship	Medical
BOBBY JACKSON	03/02/1984	Self	Basic

Step 15 In the Existing Relationships Eligible for Health section, select the dependent’s radio button, select the **Continue** button, then continue to step 16. **Optional:** After selecting the dependent’s button, select the **Update Demographics** link to correct the dependent’s demographics.

Name	Date of Birth	Relationship	Medical
<input type="radio"/> Jackson, Jav	07/30/2015	Child	No
<input type="radio"/> Jetson, Judy	11/03/1983	Spouse	No
<input type="radio"/> Jackson, Jimmy	11/17/2017	Child	No

Step 16 On the Demographic Information page, update the following if necessary:

- Person Details section (you may update if the dependent is not an active employee at a PERS-contracting agency)
- Address Details section: Is their address the same as the employee’s?

Yes: Skip to step 19

No: Continue to step 17

Step 17 Deselect the **Address is the same as Primary Subscriber** check box and complete the Address Details section.

Address is the same as Primary Subscriber
Address Type:* Mailing Address

Step 18 Select the **Save & Continue** button, and then select the **Confirm** button.

Step 19 Select the **Save & Continue** button.

Step 20 Is this dependent in a parent-child relationship?

Yes: Continue to step 21

No: Skip to step 26

Step 21 Select the **Maintain Certification** link.

Step 22 Select the **Certify Dependent** check box.

Step 23 Select the **disclaimer** check box.

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Lilly Lawson	06/30/2018	03/31/2019	<input checked="" type="checkbox"/> Certify Dependent

* I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any changes pertaining to this PCR. I further understand the provision of California Government Code 20085, which states in part:

Step 24 Select the **Save & Continue** button.

Step 25 Select the **Save & Continue** button.

Dependent Information

Parent-Child Relationship Information

Parent-Child Relationship Certification Expiration Date: 03/31/2020
Certification Submitted: Yes [Maintain Certification](#)

Step 26 Do you have additional dependents to add?

Yes: Return to step 14

No: Continue to step 27

Step 27 Select the **Save & Continue** button.

Select Health Plan

Step 28 Select the **medical plan** radio button chosen by the subscriber.

Medical Plan Selections

Plan Name	Party	Premium
<input type="radio"/> Anthem Blue Cross Select HMO - Region 1	Self/B and 1/B	1737.96
<input type="radio"/> Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68
<input type="radio"/> Health Net SmartCare - Region 1	Self/B and 1/B	2001.04
<input type="radio"/> Kaiser Permanente California - Region 1	Self/B and 1/B	1536.98
<input type="radio"/> PERS Care - Region 1	Self/B and 1/B	2266.28
<input type="radio"/> PERS Choice - Region 1	Self/B and 1/B	1722.36
<input type="radio"/> PERS Select - Region 1	Self/B and 1/B	1040.58

Step 29 Enter the provider information if the employee chose a provider(s).

Provider Information

Name	Dependent Type	Medical Provider
Jane Doe	Self	<input type="text"/>
Baby Doe	Natural Born Child	<input type="text"/>

Step 30 Select the **Save & Continue** button.

Step 31 Select one of the four options in the health transaction confirmation.

You have completed this scenario.

Scenario 3: State Dental Enrollment into Retirement

System Logic

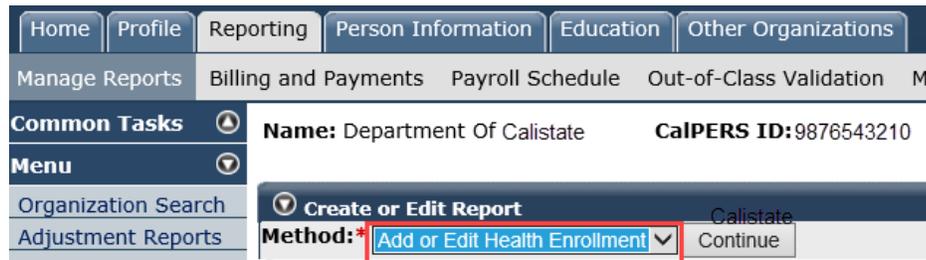
- Dental Enrollment
 - Process retiree dental prior to the employee permanent separation
 - If you are unable to process online, submit the Dental Plan Enrollment Authorization (STD-692) form to CalPERS
- You can view the state retired-dental enrollment in the Health Enrollment Summary page under the Pending Health Events section until they go on retirement roll.
- For any dental changes after retirement (i.e., adding, changing, deleting, or cancelling) the retiree should contact CalPERS or submit the changes online.

Step Actions

Add Dental Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the **Method** drop-down list.

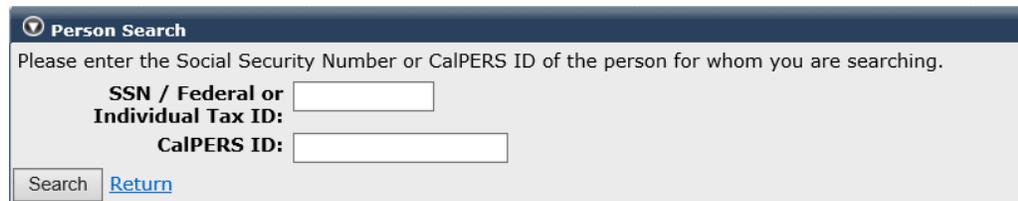


The screenshot shows a web interface with a navigation menu at the top containing 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Below the menu, there are several tabs: 'Manage Reports', 'Billing and Payments', 'Payroll Schedule', 'Out-of-Class Validation', and 'M...'. The 'Reporting' tab is active, and the 'Create or Edit Report' section is displayed. The 'Name' field is 'Department Of Calistate' and the 'CalPERS ID' is '9876543210'. The 'Method' dropdown menu is open, showing 'Add or Edit Health Enrollment' selected. A 'Continue' button is visible to the right of the dropdown.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.



The screenshot shows a 'Person Search' form with the following text: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button and a 'Return' link are located at the bottom left of the form.

Step 5 Select the **Search** button.

Step 6 Complete the Health Event Information section.

Health Event Information

Health Event Type:* New Enrollment

Health Event Reason:* State Retiree - Dental Enrollment

Event Date:*

Received Date:*

View Effective Date

Save & Continue Cancel Clear Return

Step 7 Select the **View Effective Date** button to the effective date.

Step 8 Select the **Save & Continue** button.

Step 9 In the Appointment Details section, if the subscriber will continue to be a dues-paying member of the CAHP or CCPOA association, select CAHP or CCPOA from the **Affiliated Association** drop-down list.

Step 10 Select the **Save & Continue** button.

Step 11 Is the employee enrolling dependents?

Yes: Continue to step 12. **Do not select the Save & Continue button.** If you did and you need to add a dependent, select the **Return** link.

No: Skip to step 27

Add Dependents

Step 12 Select the **Add New** button.

Covered Person List Add New

Review the covered person list. To enroll a dependent, select the Add New button. Otherwise, select the Save & Continue button

Name	Date of Birth	Relationship	Medical	Dental
Ed Employee	05/10/1984	Self	No	Yes

Save & Continue Cancel Return

Step 13 Is the dependent listed in the Existing Relationships Eligible for Health section?
Yes: Select the dependent's radio button, select the **Continue** button, then skip to step 16. **Optional:** After selecting the dependent's button, select the **Update Demographics** link to correct the dependent's demographics.

No: Continue to step 14

Step 14 Within the Existing Relationships Eligible for Health section, select the **Add New** button.

Existing Relationships Eligible for Health Add New

Select a dependent below. If a dependent is not listed, select the Add New button.

Name	Date of Birth	Relationship	Medical	Dental
------	---------------	--------------	---------	--------

Step 15 Complete the Person Details section.

Step 16 On the Demographic Information page, update the following if necessary:

- Person Details section (you may update if the dependent is not an active employee at a PERS-contracting agency)
- Address Details section: Is their address the same as the employee's?

Yes: Skip to step 19

No: Continue to step 17

Step 17 Deselect the **Address is the same as Primary Subscriber** check box and complete the Address Details section.



Address Details

Address is the same as Primary Subscriber

Address Type:* Mailing Address

Step 18 Select the **Save & Continue** button, and then select the **Confirm** button.

Step 19 Select the **Save & Continue** button.

Step 20 Is this dependent in a parent-child relationship?

Yes: Continue to step 21

No: Skip to step 26

Step 21 Select the **Maintain Certification** link.

Step 22 Select the **Certify Dependent** check box.

Step 23 Select the **disclaimer** check box.

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kevin Kooper	06/30/2018	03/31/2019	<input checked="" type="checkbox"/> Certify Dependent

* I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any changes pertaining to this PCR. I further understand the provision of California Government Code 20085, which states in part:

Step 24 Select the **Save & Continue** button.

Step 25 Select the next **Save & Continue** button.



Dependent Information

Parent-Child Relationship Information

Parent-Child Relationship Certification Expiration Date: 05/31/2020

Certification Submitted: Yes [Maintain Certification](#)

Save & Continue Cancel Clear Return

Step 26 Do you have additional dependents to add?

Yes: Return to step 12

No: Continue to step 27

Step 27 Select the **Save & Continue** button.

Select Dental Plan

Step 28 In the Dental Plan Selections section, select the **dental plan radio** button.

Dental Plan Selections			
	Plan Name	Party	Premium
<input type="radio"/>	Delta PPO Plus Premier	Self	50.83
<input type="radio"/>	Delta Preferred Opt	Self	46.45
<input type="radio"/>	DeltaCare USA	Self	19.44
<input type="radio"/>	Premier Access	Self	15.80
<input type="radio"/>	Safeguard Enhanced	Self	16.06
<input type="radio"/>	Western Dental	Self	15.77

Step 29 Enter provider(s) information if employee indicated a dentist(s).

Provider Information			
Name	Dependent Type	Medical Provider	Dental Provider
SALINA SANCHEZ	Self		<input type="text"/>
Bobby Brady	Natural Born Child		<input type="text"/>
Jan Brady	Parent-Child		<input type="text"/>

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

Step 30 Select the **Save & Continue** button.

Step 31 Select one of the four options in the health transaction confirmation:

Health Transaction Confirmation

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at www.calpers.ca.gov.

- [myCalPERS Health Billing Reconciliation \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides
- [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
- [Online Classes for Employers \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides
- [myCalPERS Health Aid Health Event Types and Reasons for Employers \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides>scroll down to the Supplemental Materials section
- [Frequently Asked Questions \(FAQ\)](#)
Pathway: CalPERS website > About > Resources: Frequently Asked Questions
- [Policies & Procedures](#)
Pathway: CalPERS website > Employers > Policies & Procedures
- [myCalPERS Technical Requirements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [Public Agency & Schools Health Benefits Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures> Reference & Health Guides
- [State Health Benefits Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures> Reference & Health Guides
- [Health Program Guide \(HBD-120\) \(PDF\)](#)
Pathway: CalPERS website > In the Search box at top right, enter "HBD-120"> select **Health Program Guide** link
- [Circular Letters](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)

- [myCalPERS Employer Reports \(Cognos\) Catalog](#)

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

- CalPERS Health Subscriber Out of Service Population – Employer
- Chancellor's Office Parent-Child Recertification Report CSU Campuses
- Dental Retirees OE Report – CalHR
- Dental Retirees OE Report – CSU
- Dependent Enrollment Report
- Employer Health Enrollee Report
- Employer Health Event Notification Report
- Employer Health Event Transaction Report

Note: The 26-year-old deletion batch runs the first three business days of the month.

- Health Plan Statement Employer Report
- Health Subscriber PA Billing Report
- Health ZIP Code Yes-No Report - HMO for Public Agency/School
- Health ZIP Code Yes-No Report - PPO for Public Agency/School
- Health ZIP Code Yes-No Report - State/CSU
- Parent-Child Relationship Dependent with Expiring Certification Report
- State Active Health Enrollment and SCO Health Deduction Discrepancy Report

Reports run via the myCalPERS pages and not the **Reports** left-side link:

- Dependent Verification End Date Employer Report
- Dependent Verification Health Event Employer Report
- Dependent Verification with Past Due or No End Dates Active Health Report
- Monthly Employer Billing Roster Report

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
- To order health publications, email [OSSD Public Agency Requests Publication Fulfillment@CalPERS.CA.GOV](mailto:OSSD_Public_Agency_Requests_Publication_Fulfillment@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, then select the **Submit Inquiry** link to submit a question or request.