

myCalPERS State-Active Health Premium Reconciliation

Student Guide

April 3, 2026

Introduction

This student guide will assist central-state agencies with reconciling health premiums.

Role & Responsibility

You should regularly research active employee health premium discrepancies between CalPERS and the State Controller's Office (SCO). It is your responsibility to monitor and maintain premium payments for your employees. CalPERS provided Circular Letter [600-025-24](#) that informed state agencies of two health reports that assist in reconciling employee health premiums. The SCO also provided [SCO Payroll Letter 18-017 \(PDF\)](#) with instructions on how to process missing or incorrect health deductions.

Importance of Reconciling

- Employees are more satisfied when health deductions are current rather than having retroactive deductions, especially when they haven't used services.
- Reconciliation is easier when it's done within shorter timeframes.
- Timely payment of premiums ensures your employees and dependents can use services.
- It mitigates risk of potential over or under payment by the state for health premiums due.

Best Practices

- Review transactions and premium deductions for transactions completed after payroll cutoff and confirm correct deductions are applied. Below is a list of some, but not all, examples of transactions you should monitor to ensure premiums are collected timely:
 - New health enrollment, add dependent, delete dependent, and plan changes
 - Rescission
 - Dependent eligibility verification
 - Late parent-child relationship recertification
 - Permanent separation
- Confirm a transferred employee's health premiums are associated with your agency and not with their former agency.
- Verify the following employees' health benefits will be on direct pay or cancelled:
 - Employee on an unpaid leave
 - Employee who is permanently separating
- Submit one of these payroll adjustment notices to the SCO promptly:
 - Standard Form 674 A/R – Payroll Adjustment Notice Accounts Receivable when health premium deductions haven't been processed by the SCO
 - Standard Form 674 – Payroll Adjustment Notice when a refund is due to the employee because of the difference in premiums and no A/R reversal is needed

Disclaimer

- Business partner and participant information has been masked in this procedure guide.
- We strive to provide accurate information within this guide; however, the Public Employees' Retirement Law is the authoritative source for CalPERS policies.

What's New

Unit 1 has updated steps for running reports using the myCalPERS Reports functionality.

System Access

If you are unable to process these scenarios, contact your agency's [system access administrator](#) to update your myCalPERS access.

Training Opportunities

We offer a [self-paced online class](#) on this topic. To access this class or our [instructor-led training schedule](#), log in to your [myCalPERS](#) business partner account, and then select the **Education** global navigation tab.

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Unit 1: Run Reports

To help you properly maintain health enrollments and health premium payments, two health reports are recommended.

- The *State Active Health Enrollment and SCO Health Deduction Discrepancy Report* identifies discrepancies between SCO and myCalPERS data.
- The *Employer Health Event Transactions Report* displays transactions that have been updated in myCalPERS. You can be proactive in tracking transactions that were updated after payroll cutoff, so you can anticipate the premiums that will be outstanding.

Refer to the [myCalPERS Reports Catalog](#) for a list of employer reports and [myCalPERS Reports \(PDF\)](#) student guide for detailed reports functionality.

In this unit, you will use myCalPERS Reports to run both reports in an Excel format.

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Scenario 1: State Active Health Enrollment and SCO Health Deduction Discrepancy Report

You will run the *State Active Health Enrollment and SCO Health Deduction Discrepancy Report* to identify premium discrepancies (unpaid, underpaid, and overpaid) for your current and former employees. Included in the report are plan codes, party rates and premium amounts according to CalPERS and SCO records.

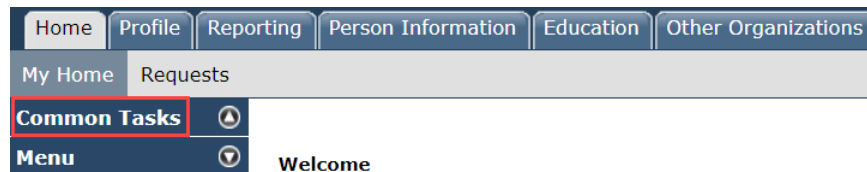
After all past discrepancies have been resolved, continue to run the report at regular intervals as some newly updated health transactions may be retroactive.

System Logic

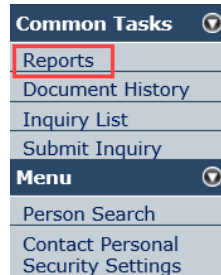
Using multiple coverage months for the criteria adds extra time to generate the report.

Step Actions (18 Steps)

Step 1 From the homepage, select the Common Tasks folder at the upper-left side.



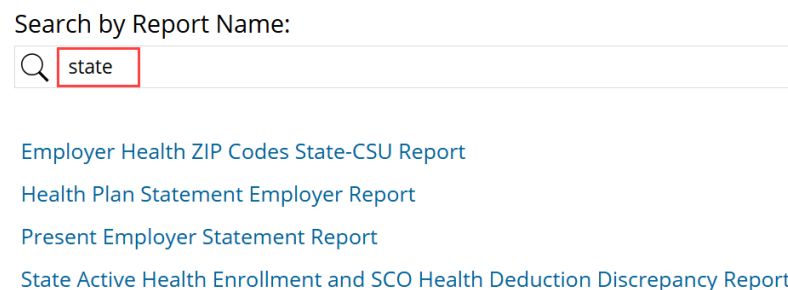
Step 2 Select the **Reports** left-side link.



Step 3 From the top navigation, select **Run Report**.



Step 4 Search by partial report name or scroll through the list.



Step 5 Select the **State Active Health Enrollment and SCO Health Deduction Discrepancy Report** link.

Step 6 Complete the required fields.

Business Partner CalPERS ID *

Subscriber CalPERS ID

Report Output Criteria *

- Premium with Discrepancies Only**
- All Premiums**

Issue Date Range or Coverage Period Range *

- Issue Date Range**
- Coverage Period Range**

- **Business Partner CalPERS ID:** You may choose a different department from the drop-down list if you process health benefits for other departments.
- **Subscriber CalPERS ID:** Enter an employee's CalPERS ID (not SSN) if you are searching for discrepancies for a single subscriber.
- **Report Output Criteria:** Leave the **Coverage Period Range** radio button selected, so that *only the employees with discrepancies* will be on the report. You have the option to select the **All Premiums** radio button to generate the list of your entire agency's active employee health enrollment roster and associated SCO payroll deductions.
- **Issue Date Range or Coverage Period Range:** We recommend leaving the **Coverage Period Range** radio button selected.

Step 7 Select the **Next** button.


Step 8 Complete the date (Coverage or Issue) range fields.

Coverage Period From Date *

Coverage Period To Date *

We recommend using the coverage period of a *three-month span or less*.

Step 9 Select the **Next** button at the bottom.

Step 10 Under the report parameters, select a run option (format) radio button.
Run Option:  **Download (.xls)** **Download (.csv)** **Online (.html)**

Note: Large reports that automatically run in the background will display a fourth run option of Save Online (.html).

Step 11 At bottom left, select the **Run Report** button.

Step 12 Did you select Online (.html) as the run option?
Yes: The report will be displayed. Continue to step 13.
No: Skip to step 14.

Step 13 Do you want to change the report parameters?
Yes: Select the **Start Over** button at the bottom, then return to step 6.
No: Continue to step 14.

Step 14 Do you want to download the report to a CSV or Excel format?
Yes: From step 8, if you selected the:

- Online (html) format, select the **Download** button at the bottom, then continue to step 15.
- Download (.xls) or (.csv) format, skip to step 16.

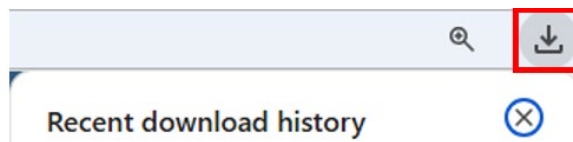
No: You have completed this scenario.

Step 15 Select either the CSV or Excel format.

Step 16 Shortly after the status changes from Running to Generated, select the **Generated** link to download the report.
Report Run Status

Report Name	State Active Health Enrollment and SCO Health Deduction Discrepancy Report
Submitted	February 06, 2026 08:59 AM
Run Option	Download (.xls)
Status	Generated
Status Last Updated	February 06, 2026 08:59:15 AM

Step 17 Select the download icon (if you use Chrome for your browser, it's at top right).



Step 18 Select the report to open it.
You have completed this scenario.

Scenario 2: Employer Health Event Transactions Report

You will run the *Employer Health Event Transactions Report* to review transactions that are updated for your employees. It's recommended to run this report monthly. When the month is complete, you can run the report to capture and verify all transactions that occurred. If an enrollment is processed after payroll cutoff, confirm the information in the report and proactively establish an accounts receivable (AR) to collect the premium that will not automatically be processed due to timing.

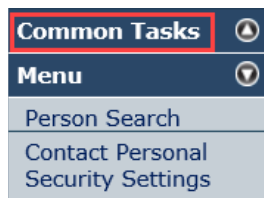
Best Practices

- Instead of waiting months to reconcile, populate the Event Create Date Range criteria with the date of payroll cutoff to the end of month.
- If retrieving next month's data, wait to run this report until after the first business day of the current month (that's when the 26-year-old deletion batch runs). For example, it's January and you want to review transactions that are effective February 1. If January 1 is a Monday holiday, run the report on Wednesday, January 3rd.

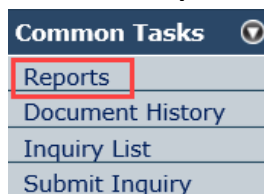
Step Actions (18 Steps)

Run Report

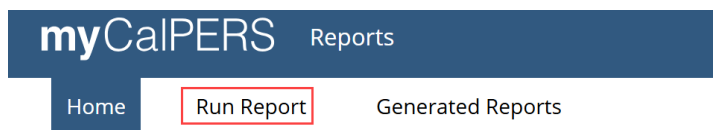
Step 1 From the homepage, select the Common Tasks folder at the upper-left side.



Step 2 Select the **Reports** left-side link.



Step 3 From the top navigation, select **Run Report**.



Step 4 Search by partial report name or scroll through the list.

Home **Run Report** Generated Reports

Search by Report Name:

[Employer Health Event Notifications Report](#)
[Employer Health Event Transactions Report](#)

Step 5 Select the **Employer Health Event Transactions Report** link.

Step 6 Enter or select at least one of the fields on this page. If the employer name doesn't prepopulate, select it from the drop-down list.

Subscriber Calpers ID:

Employer Name:

The type of user that originated the transaction.

Created By User Type:

Created by User Type: You can choose who/what updated the transactions:

- **Service:** Automatically updated by the system, e.g., 26-year-old delete – Batch, Continued Elig: Retirement – Batch, etc.
- **Internal User:** CalPERS team member
- **External Participant:** Employee or retiree
- **External Business Partner:** Employer (Employer processed the enrollment or confirmed an employee-submitted myCalPERS transaction)
- **Blank:** If this is listed, it means a transaction updated due to a data fix.

Step 7 Select the **Next** button at the bottom.


Next

Step 8

Enter either the effective date range or the create date range.

The effective date is the date on which the transaction takes effect. An effective date range can be entered to provide a report of all transactions that became effective during that time frame.

Effective From Date:


 

Effective To Date:

The event create date is the date on which the transaction was created/processed. An event create date range can be entered to provide a report of all transactions that were created during that time frame.

Event Create From Date:

Event Create To Date:

- **Effective From/To Date:** Populate the dates of when transactions became effective, e.g., 03/01/2026 for the from and to dates for March.
- **Event Create From/To Date:** Populate the dates of when transactions updated to myCalPERS. It's recommended to use the from date with the payroll cutoff date and to date with the last day of the month.

Step 9 Select the **Next** button.

Step 10 Under the report parameters, select a run option (format) radio button.

Run Option:  **Download (.xls)** **Download (.csv)** **Online (.html)**

Note: Large reports that automatically run in the background will display a fourth run option of Save Online (.html).

Step 11 At bottom left, select the **Run Report** button.

Step 12 Did you select Online (.html) as the run option?

Yes: The report will be displayed. Continue to step 13.

No: Skip to step 14.

Step 13 Do you want to change the report parameters?
Yes: Select the **Start Over** button at the bottom, then return to step 6.



No: Continue to step 14.

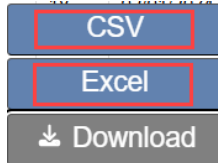
Step 14 Do you want to download the report to CSV or Excel?

Yes: From step 10, if you selected the:

- Online (.html) format, select the **Download** button at the bottom, then continue to step 15.
- Download (.xls) or (.csv) format, skip to step 16.

No: You have completed this scenario.

Step 15 Select either the CSV or Excel format.

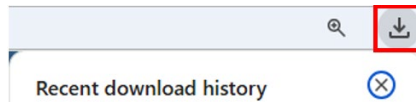


Step 16 Shortly after the status changes from Running to Generated, select the **Generated** link to download the report.

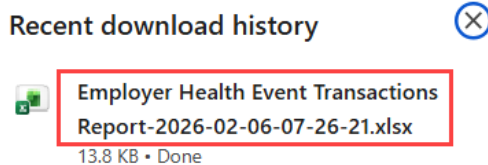
Report Run Status

Report Name	Employer Health Event Transactions Report
Submitted	February 06, 2026 07:16 AM
Run Option	Download (.xls)
Status	Generated
Status Last Updated	February 06, 2026 07:16:24 AM

Step 17 Select the download icon (if using Chrome for your browser, it is at top right).



Step 18 Select the report to open it.



You have completed this scenario.

Unit 2: Review Reports

To help you understand the reports, this unit defines each column within them.

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Scenario 1: State Active Health Enrollment and SCO Health Deduction Discrepancy Report

Review the *State Active Health Enrollment and SCO Health Deduction Discrepancy Report* to identify your active employees who are enrolled in health benefits and have premium discrepancies, so you can take action to rectify the unpaid, underpaid, or overpaid premiums.

Column Definitions

The first seven columns provide employee information that is in myCalPERS.

Subscriber CalPERS ID	Subscriber SSN (last 4)	Subscriber Name	Health Account Status	Appointment Status	Retirement System	Medical Group
0123456789	XXX-XX-4321	Faughn, Limam	Active	Perm Sep	PERS	R08-Rnk&File/Firefighters
1234567890	XXX-XX-4228	Lindman, Luminita I	Active	Active	PERS	R01-Rnk&File/Admin, Finan&Staf
1234567890	XXX-XX-4228	Lindman, Luminita I	Active	Active	PERS	R01-Rnk&File/Admin, Finan&Staf
1234567890	XXX-XX-4228	Lindman, Luminita I	Active	Active	PERS	R01-Rnk&File/Admin, Finan&Staf

Below is a description of each column:

- **Subscriber CalPERS ID:** Employee’s 10-digit unique ID number
- **Subscriber SSN (last 4):** Last four digits of their Social Security number
- **Subscriber Name:** Last name, first name, and middle initial as in myCalPERS
- **Health Account Status:** Active for active employment. If the subscriber health account status is cancelled or retired and there is an SCO deduction received for this subscriber from the selected agency, the report will populate a discrepancy line item.
- **Appointment Status:** Current employment status (Active, On Leave, or Permanent Separation)
- **Retirement System:** PERS (California Public Employees’ Retirement System), STRS (California State Teachers’ Retirement System), JRS (Judges’ Retirement System), JRS II, LRS (Legislators’ Retirement System), Affordable Care Act/None, or Other
- **Medical Group:** Collective bargaining unit

The next seven columns provide employee health benefits information that is in myCalPERS.

Health Enrollment Effective Date	Coverage Period Start Date	Coverage Period End Date	Base Plan Name	Base Plan Code	Party Type	Premium Amount
07/01/2023	01/01/2024	01/31/2024	PERS Gold California	437	Self/B and 2+/B	2,234.21
01/01/2021	11/01/2023	11/30/2023	PERS Gold California	437	Self/B	766.11
01/01/2021	12/01/2023	12/31/2023	PERS Gold California	437	Self/B	766.11
01/01/2021	01/01/2024	01/31/2024	PERS Gold California	437	Self/B	859.31

Below is a description of each column:

- **Health Enrollment Effective Date:** Effective date of their health enrollment
- **Coverage Period Start Date:** Based on the criteria you chose for the report, the first of the month with a premium discrepancy issue
- **Coverage Period End Date:** Based on the criteria you chose for the report, the end of the last month with a premium discrepancy issue
- **Base Plan Name:** Name of their health plan
- **Base Plan Code:** Three-digit plan code of their health plan
- **Party Type:** Self only, self plus one dependent, or family (self plus two or more dependents) and coverage type (B = Basic coverage/non-Medicare)
- **Premium Amount:** Total premium (sum of the employer and employee share) that should be paid

The next seven columns provide agency, issue dates, coverage period, and health plan information from the SCO.

SCO Employer	SCO - Agency Code	SCO - Issue Dates	SCO - Deduction Code	SCO - Coverage Period Start Date	SCO - Coverage Period End Date	SCO - Plan Name
	542		MED			
	541	11/01/2023	MED	11/01/2023	11/30/2023	PERS Gold California
	541	12/01/2023	MED	12/01/2023	12/31/2023	PERS Gold California
	541	01/01/2024	MED	01/01/2024	01/31/2024	PERS Gold California

Below is a description of each column:

- **SCO Employer:** Employer that paid the premium based on SCO record
- **SCO Agency Code:** Agency code of the associated agency attached to the health enrollment
- **SCO-Issue Dates:** Issue date(s) of the health deduction transaction(s). For a subscriber with multiple issue dates, multiple dates will be displayed.
- **SCO Deduction Code:** Type of deduction (MED = Medical)
- **SCO-Coverage Period Start Date:** Start date of the subscriber’s health coverage period
- **SCO-Coverage Period End Date:** End date of the subscriber’s health coverage period
- **SCO-Plan Name:** Name of their health plan shown on the SCO deduction file

The last seven columns provide employee health premium information from the SCO, the difference of what should be paid/credited, and the type of discrepancy.

SCO - Base Plan Code	SCO - Party Type	SCO - Employer Share	SCO - Employee Share	SCO - Total Premium	CalPERS and SCO Premium Difference	Discrepancy Type
		0.00	0.00	0.00	2,234.21	Premium
437	Self/B and 2+/B	1,784.00	207.89	1,991.89	(1,225.78)	Party Type, Premium
437	Self/B and 2+/B	1,784.00	207.89	1,991.89	(1,225.78)	Party Type, Premium
437	Self/B and 2+/B	2,101.00	133.21	2,234.21	(1,374.90)	Party Type, Premium

Below is a description of each column:

- **SCO-Base Plan Code:** Base plan code of the health plan
- **SCO-Party Type:** Type of coverage (B = Basic coverage/non-Medicare, M = Medicare); Self only, plus one dependent, or family (two or more dependents)
- **SCO-Employer Share:** Employer’s share of the premium
- **SCO-Employee Share:** Employee’s share of the premium
- **SCO-Total Premium:** Total premium for health coverage (sum of the employer and employee share)

Note: If no premiums are reflected in this column, then CalPERS hasn’t received the Premium Collected Report from SCO yet. Change your date criteria to a prior month or wait to rerun the report if using the same dates.

- **CalPERS and SCO Premium Difference:** Difference between the premium and what SCO paid. Amounts in parenthesis are credits.
- **Discrepancy Type:** Health account status, base plan code, party rate, and/or premium amount data differs from myCalPERS and SCO and would display as:
 - Enrollment
 - Plan Code
 - Party Type
 - Premium

You have completed this scenario.

Scenario 2: Employer Health Event Transactions Report

Review the *Employer Health Event Transactions Report* for myCalPERS transactions that were processed for your entire agency or for an individual subscriber.

Column Definitions

The first five columns provide employee demographics and status.

Subscriber CalPERS ID	Subscriber Name	Subscriber Status	Enrollee Name	Enrollee Date of Birth
0123456789	Palva, Cern	Active	Palva, Cern,	04/04/1967
0123456789	Palva, Cern	Active	Palva, Paula,	03/03/1968
1234567890	Lange, Leo	Active	Lange, Leo,	07/07/1986
1234567890	Lange, Leo	Active	Lange, Leo,	07/07/1986

Below is a description of each column:

- **Subscriber CalPERS ID:** Employee's 10-digit unique ID number
- **Subscriber Name:** Last name, first name, and middle initial as in myCalPERS
- **Subscriber Status:** Active for active employment and Retired for your retirees
- **Enrollee Name:** Subscriber or dependent names
- **Enrollee Date of Birth:** Employee or retiree birth date

The next five columns provide employee email, SSN, position number, retirement system and dependent type.

Subscriber Email	Subscriber SSN	External Position Number	Retirement System	Dependent Type
cpalva@agency.ca.gov	xxx-xx-2199	065	PERS	Self
cpalva@agency.ca.gov	xxx-xx-2199	065	PERS	Spouse
	xxx-xx-9117	312	PERS	Self
	xxx-xx-9117	312	PERS	Self

Below is a description of each column:

- **Subscriber Email:** Subscriber email in myCalPERS
- **Subscriber SSN:** Last four digits of subscriber Social Security number
- **External Position Number:** 4th, 5th, and 6th digits of a subscriber's 13-digit external position number that are for the unit within the division
- **Retirement System:** PERS (California Public Employees' Retirement System), STRS (California State Teachers' Retirement System), JRS (Judges' Retirement System), etc.
- **Dependent Type:** Relationship with the subscriber (Self, Spouse, Child, Domestic Partner, etc.)

The next five columns provide employee medical group and health transaction information.

Medical Group	Effective Date	Health Event Reason	Health Event Type	Event Create Date
R08-Rnk&File/Firefighters	05/01/2024	Recalculation Event - Batch	Update Enrollment	02/28/2024
R08-Rnk&File/Firefighters	05/01/2024	Verification of Dependent	Verify Dependent	02/28/2024
R08-Rnk&File/Firefighters	03/01/2024	Establish Medical Group	Update Enrollment	02/27/2024
R08-Rnk&File/Firefighters	03/01/2024	Time Base & Tenure	New Enrollment	02/27/2024

Below is a description of each column:

- **Medical Group:** State employee’s bargaining unit
- **Effective Date:** Date transaction is effective
- **Health Event Reason:** Reason for the transaction
- **Health Event Type:** High-level health event category for the health event reason
- **Event Create Date:** Date the transaction was processed or updated to myCalPERS

The next five columns provide the user type, transaction status, plan name/code, and ZIP code.

Created by User	Event Status	Plan Name	Plan Code	Health Eligibility Zip Code
Service	Confirmed	Kaiser Permanente California	056	95747
External Business Partner	Confirmed			95747
External Business Partner	Confirmed			90623
External Business Partner	Confirmed	Anthem Blue Cross Select HMO California	181	90623

Below is a description of each column:

- **Created by User:** Who/what updated the transaction
 - External Business Partner (Employer processed or confirmed an employee-submitted transaction)
 - External Participant (Employee submitted the transaction online that automatically updated)
 - Internal User (CalPERS employee processed)
 - Service (Automatically batch processed)
 - Blank (No user, transaction was due to a data fix)
- **Event Status:** Status of the transaction (Confirmed, Rescinded, Reapplied, or Pending Analyst Review)
- **Plan Name:** Health plan in which the subscriber is enrolled
- **Plan Code:** Three-digit number that represents the subscriber’s health plan
- **Health Eligibility Zip Code:** Residential or work ZIP code used for health eligibility

The last six columns provide the county, party rate, and premium information.

Participant County	Health Benefit Type	Party Rate	Employee Premium Share	Employer Premium Share	Total Premium
Placer	Medical		2,506.79	0.00	2,506.79
Placer					
Orange					
Orange	Medical	Self/B	925.57	0.00	925.57

Below is a description of each column:

- **Participant County:** Subscriber’s residential or mailing address county
- **Health Benefit Type:** Medical
- **Party Rate:** Self = One party, Self and 1 = Two party, or Self and 2+ = Three party (two or more dependents) and their coverage type (B = Basic, M = Medicare)
- **Employee Premium Share:** Employee’s share of their premium
- **Employer Premium Share:** State’s contribution toward the health premium
- **Total Premium:** Employee share plus the state contribution equals the total premium

You have completed this scenario.

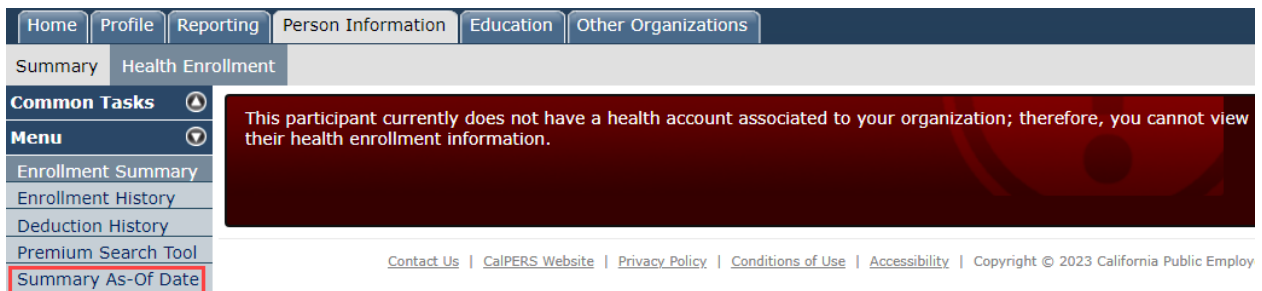
Unit 3: Verify Data

Use myCalPERS to verify the data on the *State Active Health Enrollment and SCO Health Deduction Discrepancy Report*. For each employee with a premium discrepancy, review their health enrollment summary, transaction history, and deductions.

For those on a leave of absence or permanently separated, confirm the appointment event dates are correct.

System Logic for the Person Search Tool

- You may access health details only for those who work(ed) for your agency.
- myCalPERS automatically displays information as of the current date. A warning message displays when you're accessing a future new health enrollment or a retroactive cancelled enrollee. To review their Health Enrollment Summary page, use the **Summary As-Of Date** left-side link, and then enter a date of when they had/will have health benefits with your agency.



- In most cases, a permanent separation will cancel health benefits; however, verify the cancellation of a separated employee to ensure the premiums cease.
- To clear the previous subscriber's health benefits information, select the myCalPERS logo at the upper-left side.

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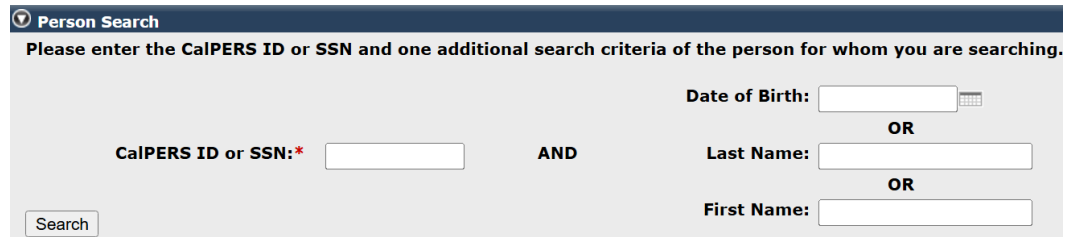
Scenario 1: Enrollment Summary

You will review subscriber health enrollment information which includes current and formerly covered dependents, health plan, total premium, and future health events.

Step Actions (13 Steps)

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

Step 2 Enter the employee's CalPERS ID or SSN and populate one field on the right.



Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

Date of Birth:

OR


CalPERS ID or SSN:* AND Last Name:

OR

First Name:

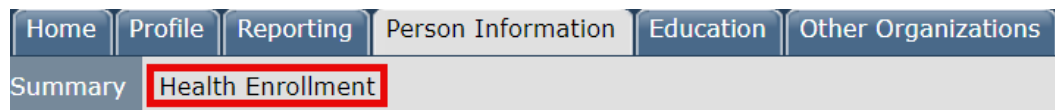
Step 3 Select the **Search** button at the bottom-left side.

Step 4 At the bottom of the page, review their appointment status.

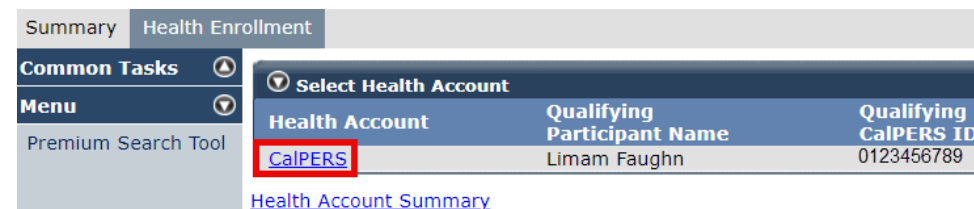


Appt ID	Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
98765432	State of California	Department Name	Regular	FIRE FIGHTER I	Peace Officers - Fire Fighters	Active	03/11/2024	
98765432	State of California	Department Name	Regular	FIRE FIGHTER I	Peace Officers - Fire Fighters	Perm Sep	06/19/2023	12/04/2023

Step 5 Select the **Health Enrollment** local navigation link.



Step 6 Under the Health Account column, select the first link (CalPERS, CalPERS Employment, or CalPERS Retiree).



Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS	Limam Faughn	0123456789

[Health Account Summary](#)

Step 7 Did "This Participant currently does not have a health account associated to your organization; therefore, you cannot view their health enrollment information." display?

Yes: Select the **Enrollment History** link and review the enrollment history.

No: Skip to step 10.

Step 8

From the Health Enrollment History section, under the Status column, select a **Confirmed** link that is *not* for the Cancel Coverage transaction.

Health Enrollment History								
Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status	Appointment ID	Create Date	Change Date
02/01/2024	Cancel Coverage	Perm Sep: Batch Cancel	Limam Faughn	Medical	Confirmed	93528486	11/28/2023 08:19:56 PM	11/28/2023 08:19:56 PM
07/01/2023	New Enrollment	Time Base & Tenure	Georgeta Victoria Levin	Medical	Confirmed	93528486	07/03/2023 03:55:59 PM	07/03/2023 03:55:59 PM
07/01/2023	New Enrollment	Time Base & Tenure	Khadeaja Ninke McCarthy	Medical	Confirmed	93528486	07/03/2023 03:55:59 PM	07/03/2023 03:55:59 PM
07/01/2023	New Enrollment	Time Base & Tenure	Limam Faughn	Medical	Confirmed	93528486	07/03/2023 03:55:58 PM	07/03/2023 03:55:58 PM

Step 9

From the Transaction Details section, select the **View Health Enrollment Summary** link.

Transaction Details									
Subscriber Name: Limam Faughn Subscriber CalPERS ID: 0123456789 Subscriber Date of Birth: 11/11/1961 Subscriber Coverage Type: Basic Health Event Type: New Enrollment Health Event Reason: 100 - Time Base & Tenure Health Benefit Type: Medical Health Plan Name: PERS Gold California (4373) Party Type: Self/B and 2+ /B Effective Date: 07/01/2023 Event Date: 06/19/2023 Received Date: 06/19/2023 Status: Confirmed Appointment ID: 93528486	Created Date: 07/03/2023 03:55:59 PM Change Date: 07/03/2023 03:55:59 PM Created by User: Employer Updated by User: Employer Reason for Rescission: Additional Information: Financial Impacts Suspended: No								
Dependent List <table border="1"> <thead> <tr> <th>Dependent Name</th> <th>Dependent CalPERS ID</th> <th>Dependent Date of Birth</th> <th>Dependent Coverage Type</th> </tr> </thead> <tbody> <tr> <td>Georgeta Victoria Levin</td> <td>1234567890</td> <td>10/02/2005</td> <td>Basic</td> </tr> </tbody> </table>		Dependent Name	Dependent CalPERS ID	Dependent Date of Birth	Dependent Coverage Type	Georgeta Victoria Levin	1234567890	10/02/2005	Basic
Dependent Name	Dependent CalPERS ID	Dependent Date of Birth	Dependent Coverage Type						
Georgeta Victoria Levin	1234567890	10/02/2005	Basic						
View Health Enrollment Summary									

Step 10

Review the Health Enrollment Information section.

Step 11

Review the Covered Persons Summary section for a list of covered (Basic under the Medical column) and former (No under the Medical column) dependents.

Covered Persons Summary					
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	
Limam Faughn	11/11/1961	Self	NA	Basic	
Khadeaja McCarthy	03/06/1961	Spouse	No	Basic	
Georgeta Levin	10/02/2005	Parent-Child	Yes	Basic	
Liber Llanamo	12/13/1984	Natural Born Child	No	No	

Note: Each name is a link to their Covered Persons Health Information page.

Step 12

If there is a **View More Actions** link in the Covered Persons Summary section, you can select it to display the full list of dependents.

Covered Persons Summary						
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

[View More Actions](#)

Step 13

Review the Health Plan Summary section.

Health Plan Summary				
Below is your plan and premium information.				
Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	PERS Gold California (4373)	Self/B and 2+ /B	07/01/2023	\$1,991.89

You have completed this scenario.

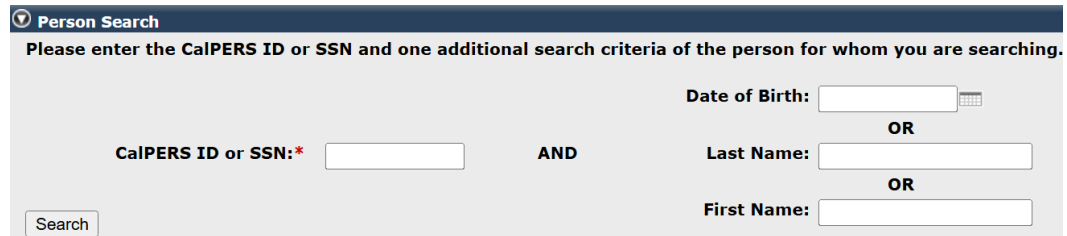
Scenario 2: Enrollment History

You will review all health enrollment transactions and rescissions in chronological order. Access transaction details such as effective dates, health event types, and future enrollment changes.

Step Actions (12 Steps)

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

Step 2 Enter the employee's CalPERS ID or SSN and populate one field on the right.



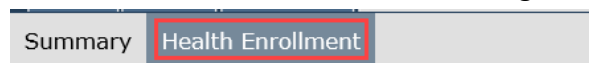
Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND Date of Birth:

Last Name: OR
First Name:

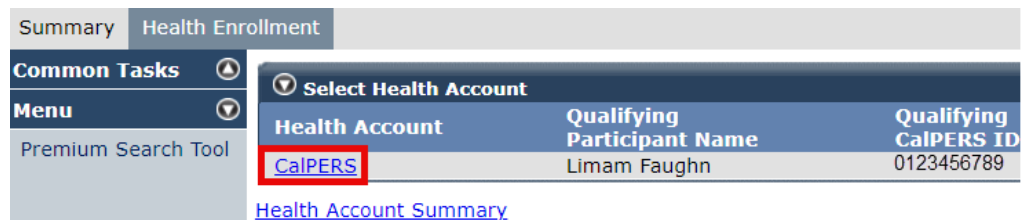
Step 3 Select the **Search** button.

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



Summary **Health Enrollment**

Step 5 Under the Health Account column, select the first link (CalPERS, CalPERS Employment, or CalPERS Retiree).



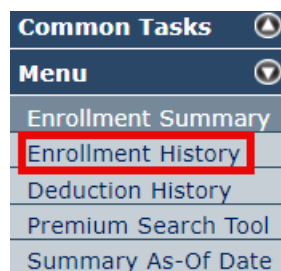
Summary Health Enrollment

Common Tasks
Menu

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS	Limam Faughn	0123456789

[Health Account Summary](#)

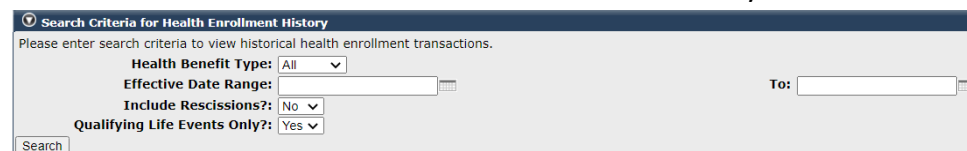
Step 6 Select the **Enrollment History** link under the Menu left-side navigation.



Common Tasks
Menu

Enrollment Summary
Enrollment History
Deduction History
Premium Search Tool
Summary As-Of Date

Step 7 Do you want to filter your search to review specific transactions like a rescission?
Yes: Use the Search Criteria for 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?: No
Qualifying Life Events Only?: Yes

No: Skip to step 9.

Step 8 Select the **Search** button.

Step 9

From the Health Enrollment History section, under the Status column, select a **Confirmed** link for the transaction below the Cancel Coverage transaction.

Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status	Appointment ID	Create Date	Change Date
02/01/2024	Cancel Coverage	Perm Sep: Batch Cancel	Limam Faughn	Medical	Confirmed	93528486	11/28/2023 08:19:56 PM	11/28/2023 08:19:56 PM
07/01/2023	New Enrollment	Time Base & Tenure	Georgeta Victoria Levlin	Medical	Confirmed	93528486	07/03/2023 03:55:59 PM	07/03/2023 03:55:59 PM
07/01/2023	New Enrollment	Time Base & Tenure	Khadeaja Ninke McCarthy	Medical	Confirmed	93528486	07/03/2023 03:55:59 PM	07/03/2023 03:55:59 PM
07/01/2023	New Enrollment	Time Base & Tenure	Limam Faughn	Medical	Confirmed	93528486	07/03/2023 03:55:58 PM	07/03/2023 03:55:58 PM

Note: Rescissions only display if you selected Yes in the Include Rescissions? drop-down field on step 7.

Step 10

Review the transaction details (dates used to enter the transaction, created date, if your agency or CalPERS processed, and possible notes on rescissions).

Step 11

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

Transaction Details

Subscriber Name: Limam Faughn	Created Date: 07/03/2023 03:55:58 PM
Subscriber CalPERS ID: 0123456789	Change Date: 07/03/2023 03:55:58 PM
Subscriber Date of Birth: 11/11/1961	Created by User: Employer
Subscriber Coverage Type: Basic	Updated by User: Employer
Health Event Type: New Enrollment	Reason for Rescission:
Health Event Reason: 100 - Time Base & Tenure	Additional Information:
Health Benefit Type: Medical	Financial Impacts Suspended: No
Health Plan Name: PERS Gold California (4373)	
Party Type: Self/B and 2+ /B	
Effective Date: 07/01/2023	
Event Date: 06/19/2023	
Received Date: 06/19/2023	
Status: Confirmed	
Appointment ID: 93528486	

Dependent List

Dependent Name	Dependent CalPERS ID	Dependent Date of Birth	Dependent Coverage Type
Khadeaja Ninke McCarthy	1234567890	03/06/1961	Basic
Georgeta Victoria Levlin	2345678901	10/02/2005	Basic

[View Health Enrollment Summary](#)

Step 12

Review the health information based on the effective date of the transaction.

Health Enrollment Information

Your health enrollment is based on the following information: **Health Enrollment Summary As Of:** [07/01/2023](#)

Health Eligibility Information

Appointment ID: 93528486	Medical Group: R08-Rnk&File/Firefighters
Employer CalPERS ID: 9876543210	Permanent Separation Date:
Employer: State of California	Retirement Date:
Division CalPERS ID: 8765432109	
Division: Department Name	
Agency Type: State of California	Health Benefit Appointment Yes Same As Health Eligibility:
Qualifying CalPERS ID: 0123456789	

Enrollment Information

Affiliated Retirement System: PERS	Health Eligibility Zip Code: 94509
Financially Responsible CalPERS ID: 0123456789	Zip Code Override Indicator: No
Payroll Office Code: 0	Override Zip Code Type:
Affiliated Association:	Region: RG1
Health Account Status: Active Employment	County: Contra Costa

Covered Persons Summary

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
Limam Faughn	11/11/1961	Self	NA	Basic	No	No
Khadeaja McCarthy	03/06/1961	Spouse	No	Basic	No	No
Georgeta Levlin	10/02/2005	Parent-Child	No	Basic	No	No

Health Plan Summary

Below is your plan and premium information.

Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	PERS Gold California (4373)	Self/B and 2+ /B	07/01/2023	\$1,991.89

You have completed this scenario.

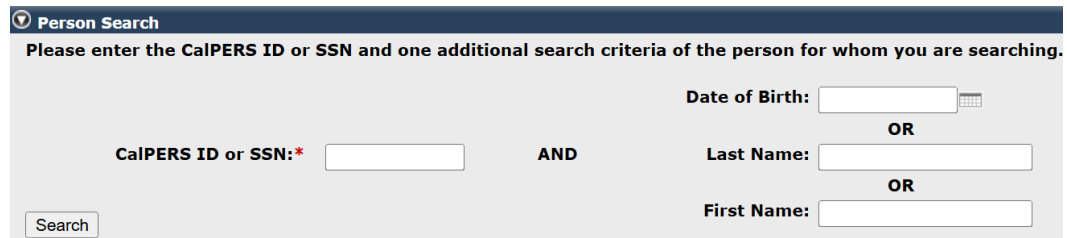
Scenario 3: Deduction History

You will review an employee's (or former employee) history of premium payments and credits. This includes the coverage month, plan name, party type, and participant/employer share.

Step Actions (9 Steps)

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

Step 2 Enter the employee's CalPERS ID or SSN and populate one field on the right.



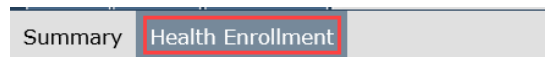
Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND Date of Birth:

Last Name: OR First Name:

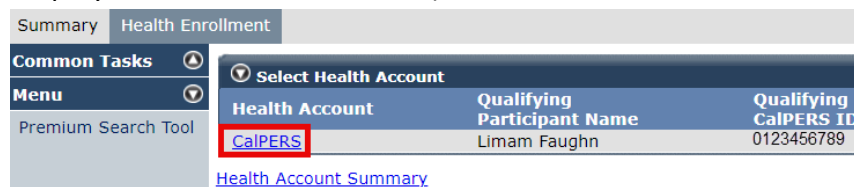
Step 3 Select the **Search** button at the bottom-left side.

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



Summary **Health Enrollment**

Step 5 Under the Health Account column, select the first link (CalPERS, CalPERS Employment, or CalPERS Retiree).

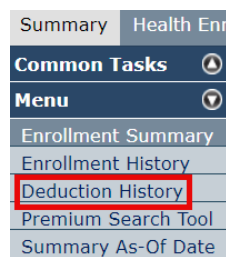


Summary Health Enrollment

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS	Limam Faughn	0123456789

[Health Account Summary](#)

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



Summary Health Enr

Common Tasks

Menu

Enrollment Summary

Enrollment History

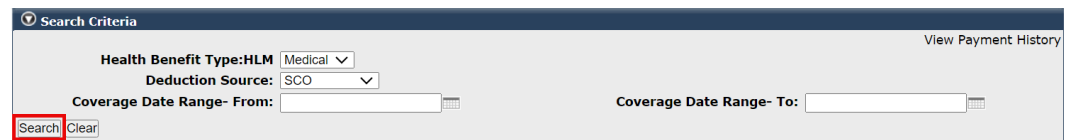
Deduction History

Premium Search Tool

Summary As-Of Date

Step 7 From the Deduction Source drop-down list, select SCO for central-state deductions.

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



Search Criteria View Payment History

Health Benefit Type:HLM

Deduction Source:

Coverage Date Range- From: Coverage Date Range- To:

Step 9

Review the Deduction History section to verify the premiums paid for the coverage months. Ensure the plan, plan code, and party type are correct.

If a coverage month is not displayed, then SCO has not paid premiums for that month.

Deduction History							
Coverage Month	Status	Employer CalPERS ID	Plan Name	Party Type	Plan Code	Participant Share	Employer Share
December 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	\$1,991.89	\$0.00
November 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	\$1,991.89	\$0.00
October 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	\$1,991.89	\$0.00
September 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	\$1,991.89	\$0.00
August 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	\$1,991.89	\$0.00
July 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	\$1,991.89	\$0.00

Note: Employees with a consolidated benefits (CoBen) allowance have their full premium displayed under the Participant Share column.

You have completed this scenario.

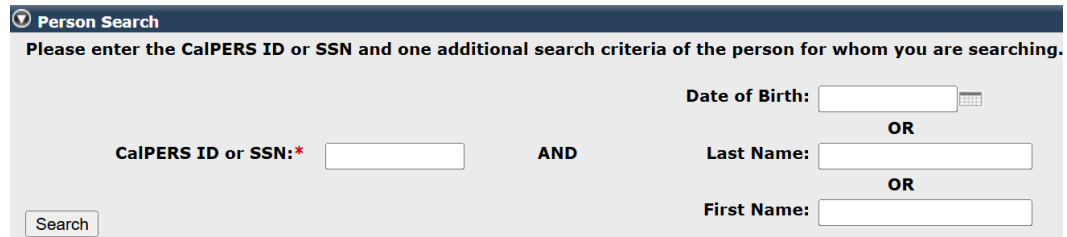
Scenario 4: Summary As-Of Date

You will verify health enrollment details on a former employee's health summary page. The former employee's health benefits were retroactively cancelled.

Step Actions (9 Steps)

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

Step 2 Enter the employee's CalPERS ID or SSN and populate one field on the right.



Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND

Date of Birth:

OR

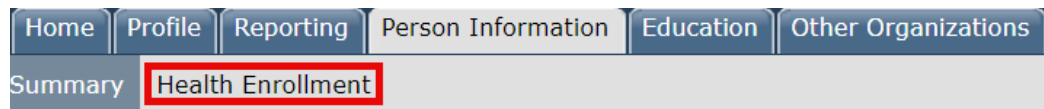
Last Name:

OR

First Name:

Step 3 Select the **Search** button.

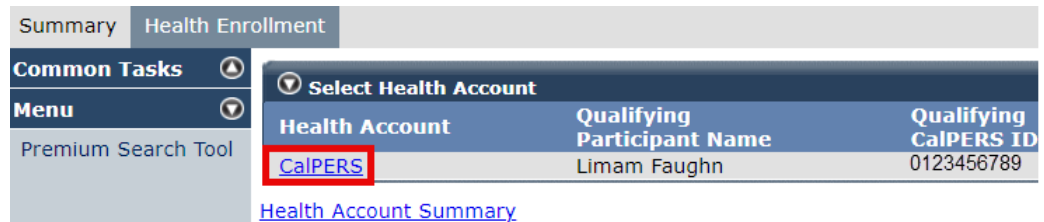
Step 4 Select the **Health Enrollment** local navigation link.



Home | Profile | Reporting | Person Information | Education | Other Organizations

Summary | **Health Enrollment**

Step 5 Under the Health Account column, select the first link (CalPERS, CalPERS Employment, or CalPERS Retiree).



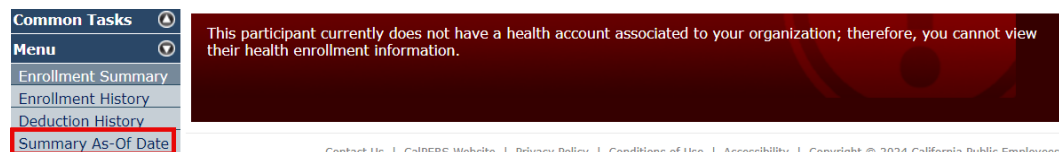
Summary | Health Enrollment

Common Tasks
Menu
Premium Search Tool

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS	Limam Faughn	0123456789

[Health Account Summary](#)

Step 6 Select the **Summary As-Of Date** link under the left-side Menu folder. This employee's health benefits have been canceled, so their Enrollment Summary page did not automatically display.



Common Tasks
Menu
Enrollment Summary
Enrollment History
Deduction History
Summary As-Of Date

This participant currently does not have a health account associated to your organization; therefore, you cannot view their health enrollment information.

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Step 7 Enter a date when the enrollee had health coverage with your agency or the date for which you want to review the status (the health plan, covered dependents, etc. as of the entered date).

Search Criteria for Health Enrollment Summary Snapshot
 Enter Date: *

Step 8 Select the **Search** button.

Step 9 Review the enrollment summary information based on the as-of date entered. Refer to scenario 1 for details.

Health Account Summary
 Health Account: CalPERS Employment
 Qualifying CalPERS ID: 0123456789
 Qualifying Participant Name: Limam Faughn
 Health Account Status: Active Employment

Health Enrollment Information
 Your health enrollment is based on the following information:
 Health Enrollment Summary As Of: 01/01/2024
Health Eligibility Information
 Appointment ID: 93528486
 Employer CalPERS ID: 9876543210
 Employer: State of California
 Division CalPERS ID: 8765432190
 Division: Department Name
 Agency Type: State of California
 Qualifying CalPERS ID: 0123456789
 Medical Group: R08-Rnk&File/Firefighters
 Permanent Separation Date: 12/04/2023
 Retirement Date:
 Health Benefit Appointment Yes
 Same As Health Eligibility:

Enrollment Information
 Affiliated Retirement System: PERS
 Financially Responsible CalPERS ID: 0123456789
 Payroll Office Code: 0
 Affiliated Association:
 Health Account Status: Active Employment
 Health Eligibility Zip Code: 94509
 Zip Code Override Indicator: No
 Override Zip Code Type:
 Region: RG1
 County: Contra Costa

Covered Persons Summary
 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
Limam Faughn	11/11/1961	Self	NA	Basic	No	No
Khadeaja McCarthy	03/06/1961	Spouse	No	Basic	No	No
Georgeta Levlín	10/02/2005	Parent-Child	No	Basic	No	No

Health Plan Summary
 Below is your plan and premium information.

Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	PERS Gold California (4373)	Self/B and 2+/B	07/01/2023	\$2,234.21

Health Deduction Information
 Below are your monthly health deductions.

Month	Medical Deduction	Dental Deduction	Vision Deduction	Medicare Reimbursement	Prepaid Amount	Participant Share Payment Type
January 2024	\$2,234.21	\$0.00	\$0.00	\$0.00	\$0.00	Medical - Employer

You have completed this scenario.

Unit 4: Proceed to Corrective Steps

State Controller's Office (SCO)

If myCalPERS has accurate information and the correct premium needs to be collected:

- Follow the instructions on the [SCO Payroll Letter #18-017- Form STD. 674 A/R Processing For Missing Health Deductions \(PDF\)](#). This provides information on how to complete the STD. 674 A/R to set up an accounts receivable (AR).
- Refer to the [Payroll Procedures Manual Section H Deductions \(PDF\)](#), Section H 722: Retroactivity on information with this process.
- Submit an STD. 674 A/R or STD. 674 (if necessary) via ConnectHR for the associated pay periods through the ConnectHR dropdown: Benefits – STD. 674 A/R Benefits Accounts Receivable.

For additional guidance, contact the SCO's Statewide Customer Contact Center at 916-372-7200 and follow the prompts. Leave a detailed voicemail if prompted.

CalPERS

If myCalPERS has incorrect information, contact CalPERS to:

- Update the employee's health information.
- Rescind a mandatory transaction or a transaction with a past effective date.
- Associate your agency to your employee's health benefits. If an employee transferred from another state agency, their health may be attached to their former agency.

For additional guidance, contact the CalPERS Employer Contact Center at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

CalPERS Resources

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

- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > Employer Education > Business Rules & myCalPERS Classes
- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > Employer Education > (On the right side under Resources) myCalPERS Student Guides & Resources
- [Policies & Procedures](#)
Pathway: CalPERS website > Employers > Policies & Procedures
- [State Health Benefits Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Health Benefits Guide (PDF)
- [Health Program Guide \(HBD-120\) \(PDF\) \(Member publication\)](#)
Pathway: CalPERS website > In the search box at top right, enter HBD-120 > CalPERS Health Program Guide
- [System Enhancements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Enhancements
- [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 Reports Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Reports Catalog
 - Run these from the **Reports** left-side link under the Common Tasks folder:
 - 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 – Ext
 - Employer Health Event Notification Report
 - Employer Health Event Transaction Report (**Note:** The 26-year-old deletion batch runs the first business day of the month.)

- Health Plan Statement Employer Report
- 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
- Run these reports from myCalPERS pages (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
- [Self-Paced Online Classes](#) (log in to myCalPERS, select the **Education** global navigation tab)
 - Business Rules
 - Health Plan Options
 - Health Benefits Officer Roles & Responsibilities
 - Health Eligibility Requirements
 - Health Enrollment
 - myCalPERS
 - New Enrollment
 - Change Plan
 - Cancellation
 - Rescission
 - Add a Dependent
 - Delete Dependent
 - COBRA Enrollment for Deleted Dependents
 - COBRA Enrollment for Employees
 - Set Up Direct Pay
 - Reconcile State-Active Premiums (central-state agencies)

SCO and CalHR Resources

SCO

- [SCO Payroll Letter #18-017- Form STD. 674 A/R Processing For Missing Health Deductions \(PDF\)](#)
- [Payroll Procedures Manual Section H Deductions \(PDF\): H 722](#)
- [ConnectHR CS Directory Documents and Processing Needs \(PDF\)](#)

CalHR

- Benefits Administration Manual – CalHR
 - **Pathway:** benefits.calhr.ca.gov > State HR Professionals > Benefits Administration Manual
 - BAM – Consolidated Benefits (CoBen)
 - BAM – Deduction Codes

Note: The Deduction Codes and Consolidated Benefits (CoBen) pages may require a password. If you don't have the password, please contact your supervisor.

CalPERS and SCO Contacts

CalPERS

Email

- To contact [employer educators](#) for questions and requests, email calpers_employer_communications@calpers.ca.gov.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email ert@calpers.ca.gov.

Phone or Fax

Contact 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

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.

State Controller's Office

Phone

Contact the SCO's Statewide Customer Contact Center at 916-372-7200 and follow the prompts. Leave a detailed voicemail if prompted.