my|CalPERS System Access Administration

Student Guide

August 17, 2018

System Access Administration

This guide will assist System Access Administrators with their responsibilities.

Disclaimer

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

Training Opportunities

Prior to taking a my|CalPERS System Training instructor-led class, new contacts should review the Introduction to my|CalPERS for Business Partners (PDF) guide.

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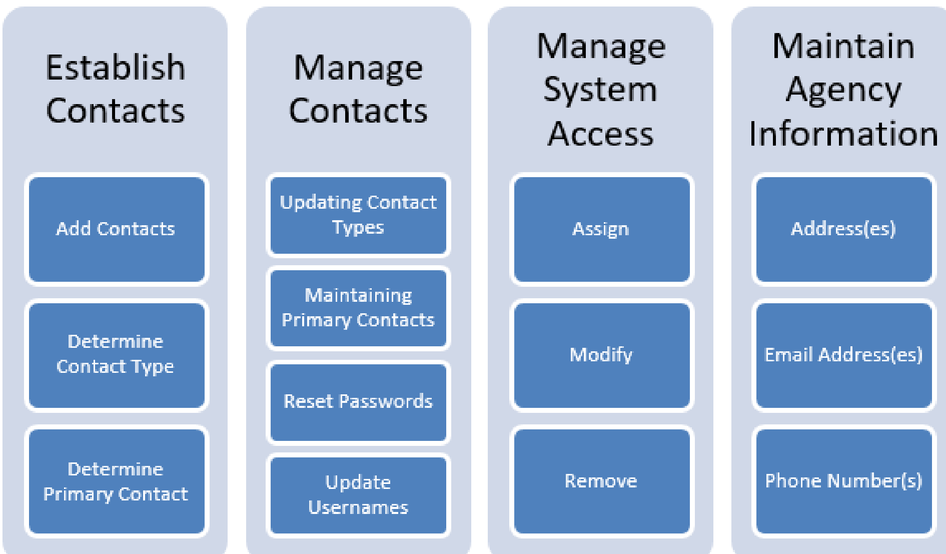
Introduction to System Access Administration

To conduct business using my|CalPERS, your organization must designate at least one System Access Administrator (SAA) to manage system access for your agency.

It is important to ensure each person with system access has their own log-in credentials. Sharing usernames and passwords violates CalPERS security policy outlined in the conditions of use.

The SAA serves a critical role for your agency. The chart below outlines the various roles and responsibilities associated with being a SAA.



If the SAA is unavailable (e.g., left your agency, on vacation, etc.), call CalPERS at **888 CalPERS** (or **888**-225-7377) for assistance.

What to Know Before You Begin

System Access Administrators page defines the role of an SAA and how to manage my|CalPERS system access.

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > System Access Administrators

my|CalPERS System Privileges for Business Partner Roles (PDF) document defines all system access roles and the associated transactions that can be performed when assigned a specific user role.

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > System Access Administrators > Assign System Access and System Role Privileges: my|CalPERS System Privileges for Business Partner Roles

Unit 1: Add New Contacts

A contact is someone who represents your agency and has been added to your agency's Contacts list in my|CalPERS by your SAA or CalPERS agent.

Contact with System Access	Contact Without System Access
Listed in my|CalPERS as a contact	Listed in my|CalPERS as a contact
Has access to my|CalPERS	Does not have access to my|CalPERS
Can process transactions and run reports in my|CalPERS	Cannot process transactions and run reports in my|CalPERS
Can contact CalPERS to request member or agency-specific information	Can contact CalPERS to request general information

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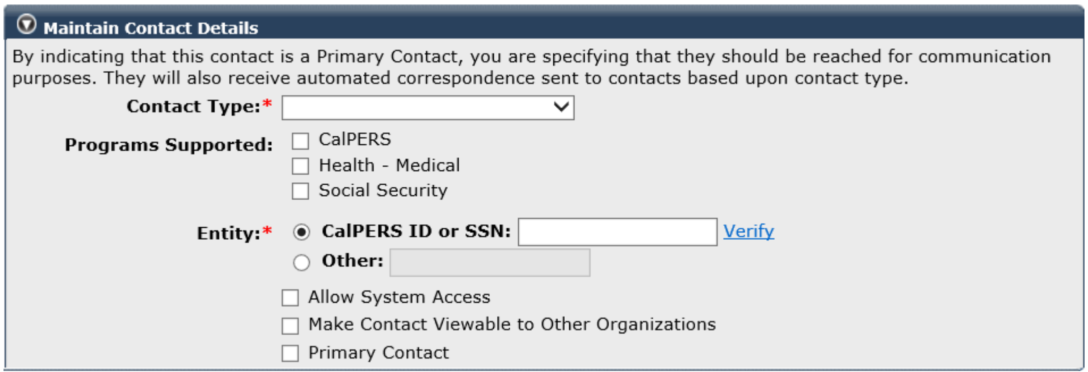
Definitions

When a contact is added to my|CalPERS, the SAA completes the Maintain Contact Details section. This section defines:

- The contact type for each contact
- If they will have access to my|CalPERS
- If their contact information will be viewable to other organizations
- If they are a primary contact



Contact Type

A Contact type identifies the duties, position titles, and/or program areas relating to a contact. Each contact is identified by at least one Contact type. If a contact serves multiple functions, it is appropriate to add the contact multiple times for each Contact type they require. They should only be assigned one username.

Primary Contact

A primary contact is a person the SAA designates to receive direct communication (e.g., letters, invoices, system message notifications, etc.) from CalPERS related to their assigned Contact type. When a primary contact for a contact type isn't elected, CalPERS will send the communication to the General primary contact. If a General primary contact isn't elected, CalPERS will send the communication via mail to your agency.

It is recommended that a primary contact be selected for each Contact type applicable to the agency to ensure that communications are being received in a timely manner. A person can be assigned to one or more Contact types if needed. Primary contacts are not required to have system access.

Make Contact Viewable to Other Organizations

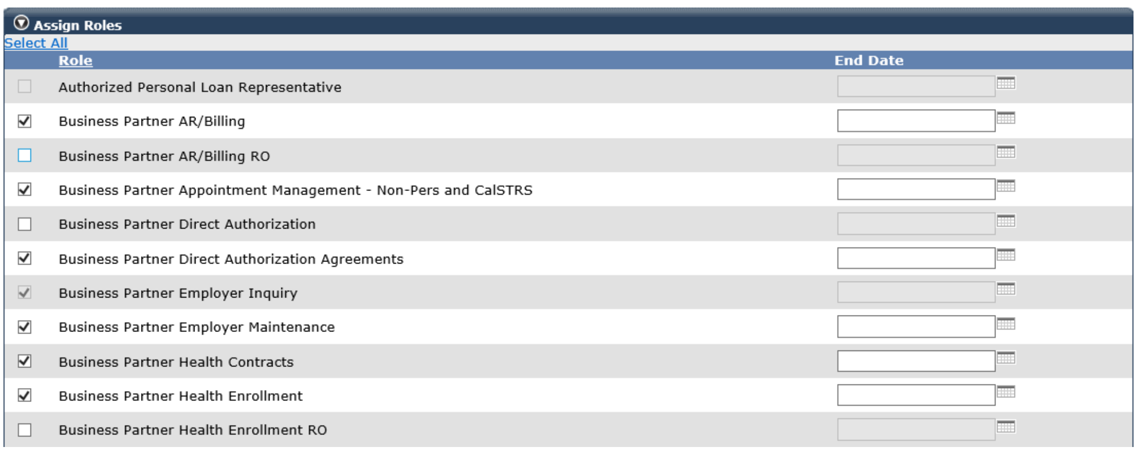
This feature allows agencies to share contact information of specific contacts with other CalPERS agencies via the **Other Organizations** global navigation tab.

Allow System Access

A contact may be granted system access by the SAA, allowing them the ability to log in to my|CalPERS to conduct business for your agency. They may also call or write CalPERS regarding business partner or member-specific information, including retirement, health, payroll, service credit, and contracts.

The access to information and ability to process transactions is based on the user roles assigned to the contact. The roles should be assigned based on the duties the contact will be performing for your agency. To determine the roles that should be assigned, review the [my|CalPERS System Privileges for Business Partner Roles] on the CalPERS website.

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > System Access Administrators > Assign System Access and System Role Privileges: my|CalPERS System Privileges for Business Partner Roles



Assign Roles

Select All

	Role	End Date
☐	Authorized Personal Loan Representative	
☑	Business Partner AR/Billing	
☐	Business Partner AR/Billing RO	
☑	Business Partner Appointment Management - Non-Pers and CalSTRS	
☐	Business Partner Direct Authorization	
☑	Business Partner Direct Authorization Agreements	
☑	Business Partner Employer Inquiry	
☑	Business Partner Employer Maintenance	
☑	Business Partner Health Contracts	
☑	Business Partner Health Enrollment	
☐	Business Partner Health Enrollment RO	

Note: All agency contacts with my|CalPERS system access are automatically assigned the Business Partner Employer Inquiry role. Only user roles specific to your agency's contracts are available for selection.

Read Only (RO) User Roles

The Read Only (RO) roles grants limited access to view information and run some reports in my|CalPERS. An SAA should assign RO roles to a contact whose duties do not require them to update information and/or process transactions. Non-RO system privileges included the RO role privileges.

End Dates

The optional **End Date** field allows for a user to be granted a user role for a known period of time. If an end date is entered for a user role, the role will be granted immediately and will continue until the specified end date. If the end date field is left blank, the user will continue to have access under the user role until an end date is entered, or their account is deactivated or locked. To review the history of a user's system access, see Unit 2, Scenario 14.

Scenario 1: Add a Contact with System Access

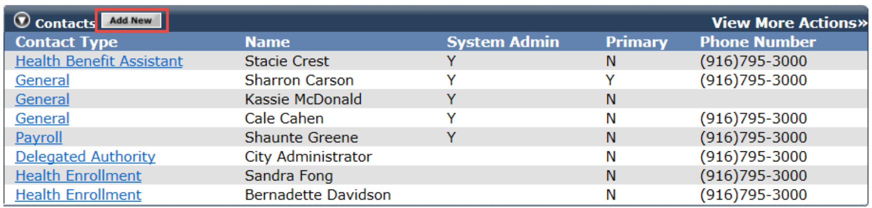
System Logic

- Usernames must consist of 6-35 characters with no spaces and must start with a letter. Acceptable characters are letters, numbers, and the following special characters: at sign (@), period (.), underscore (_), and hyphen (-).
- When assigning user roles, the **End Date** field is optional. If an end date is entered, the role will be granted until the date entered.

Step Actions

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

Step 2 — Within the Contacts section, select the **Add New** button.



Contacts Add New — View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Health Benefit Assistant	Stacie Crest	Y	N	(916)795-3000
General	Sharron Carson	Y	Y	(916)795-3000
General	Kassie McDonald	Y	N	
General	Cale Cahen	Y	N	(916)795-3000
Payroll	Shaunte Greene	Y	N	(916)795-3000
Delegated Authority	City Administrator		N	(916)795-3000
Health Enrollment	Sandra Fong		N	(916)795-3000
Health Enrollment	Bernadette Davidson		N	(916)795-3000

Step 3 — Within the Maintain Contact Details, section select a **Contact Type**.

Step 4 — Select the **Programs Supported** checkbox(es).

Step 5 — Enter the new contact's CalPERS ID or Social Security number in the appropriate field.

Step 6 — Select the **Verify** link.

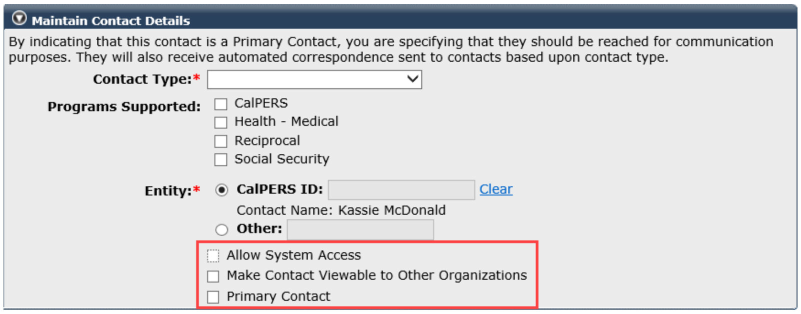
If the contact is…	Then…
Found in my|CalPERS	Skip to step 10
Not found in my|CalPERS	Continue to step 7

Step 7 — Select the **Add Person** link.

Step 8 — Complete the Person Details section.

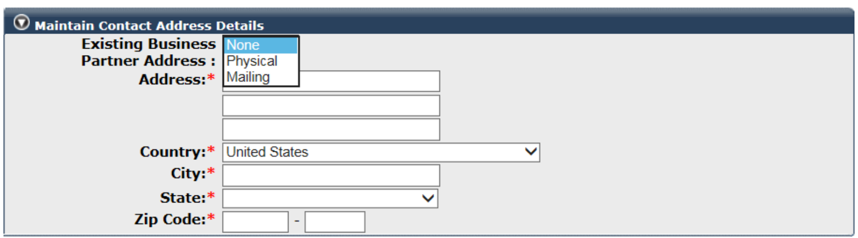
Step 9 — Select the **Save** button.

Step 10 If applicable, select the **Allow System Access**, **Make Contact Viewable to Other Organizations** and/or **Primary Contact** checkbox(es).



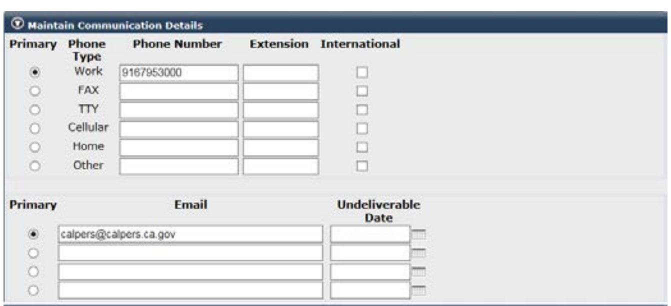
Step 11 Within the Maintain Preferred Communication Details section, select the **Preferred Communication** method from the drop-down list.

Step 12 Within the Maintain Contact Address Details section, select from the **Existing Business Partner Address** drop-down list.



Step 13 Enter the contact's phone number(s) and email address(es).

Step 14 Select the **Primary** radio button for one phone number and email address.



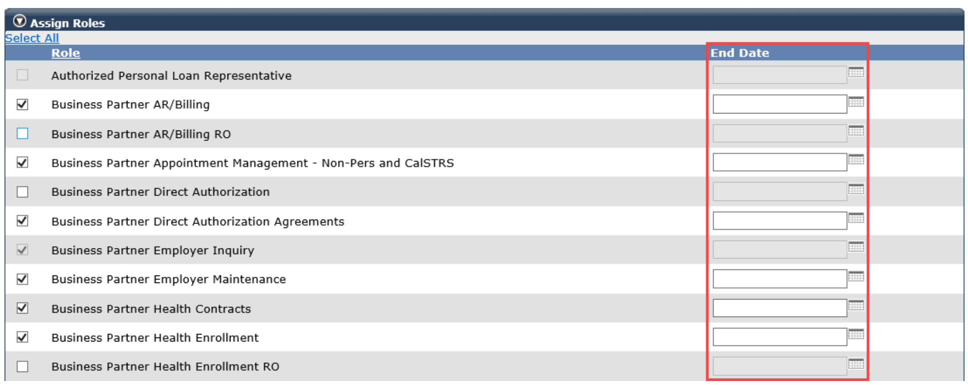
Step 15 Select the **Save** button.

Step 16	Within the Assigned Username section, enter a username for this contact.
Step 17	Within the Assign Roles section, select the checkboxes for the appropriate roles that apply to the contact.

Step 18 Do the selected user roles need to have an assigned end date?

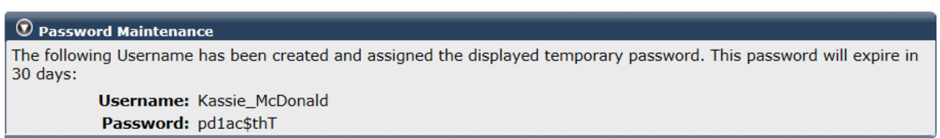
If …	Then…
Yes	Continue to step 19
No	Skip to step 20

Step 19 Within the **End Date** fields, enter the necessary end date.



Step 20	Select the **Save** button.

Step 21 Provide the username and temporary password to the contact.



Step 22 Select the **Continue** button.

You have completed this scenario.

Scenario 2: Add a Contact Without System Access

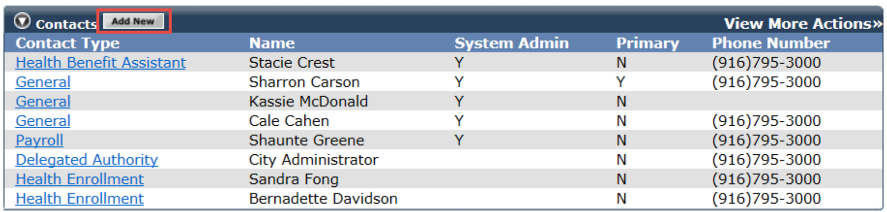
System Logic

Contacts without system access cannot access the my|CalPERS system or obtain agency-specific information from the CalPERS contact center.

Step Actions

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

Step 2 Within the Contacts section, select the **Add New** button.

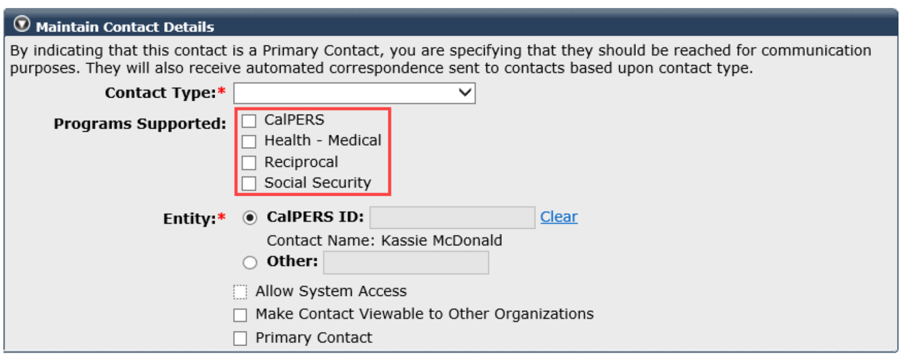


Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Health Benefit Assistant	Stacie Crest	Y	N	(916)795-3000
General	Sharron Carson	Y	Y	(916)795-3000
General	Kassie McDonald	Y	N	
General	Cale Cahen	Y	N	(916)795-3000
Payroll	Shaunte Greene	Y	N	(916)795-3000
Delegated Authority	City Administrator		N	(916)795-3000
Health Enrollment	Sandra Fong		N	(916)795-3000
Health Enrollment	Bernadette Davidson		N	(916)795-3000

Step 3 Within the Maintain Contact Details section, select a **Contact Type**.

Step 4 Select the **Programs Supported** checkbox(es).



Step 5 Enter the new contact's CalPERS ID or Social Security number in the appropriate field.

Step 6 Select the **Verify** link.

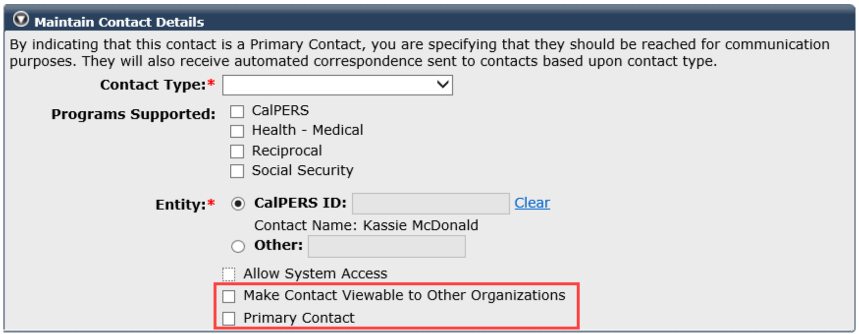
If the contact is…	Then…
Found in my|CalPERS	Skip to step 10
Not found in my|CalPERS	Continue to step 7

Step 7 Select the **Add Person** link.

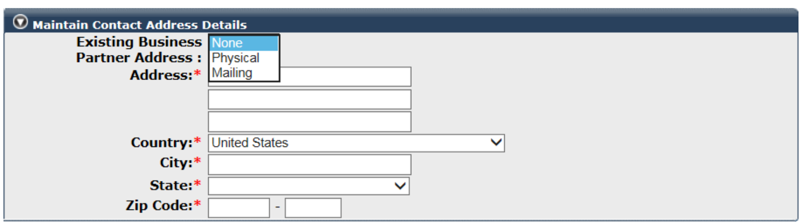
Step 8 Complete the Person Details section.

Step 9 Select the **Save** button.

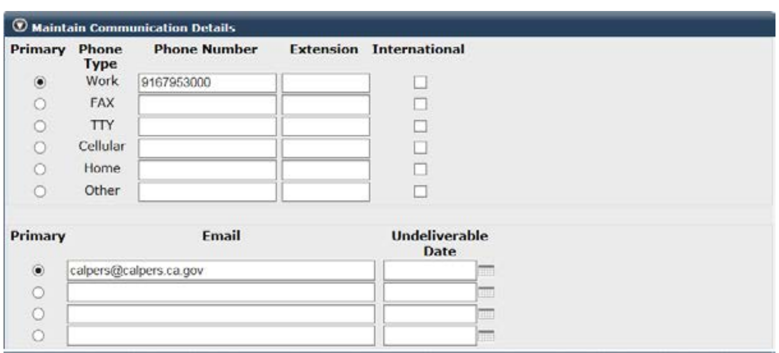
Step 10	If applicable, select the **Make Contact Viewable to Other Organizations** and/or **Primary Contact** checkbox(es).



Step 11	Within the Maintain Preferred Communication Details section, select the **Preferred Communication** method from the drop-down list.
Step 12	Within the Maintain Contact Address Details section, select from the **Existing Business Partner Address** drop-down list.



Step 13	Enter the contact's phone number(s) and email address(es).
Step 14	Select the **Primary** radio button for one phone number and email address.



Step 15	Select the **Save** button. **You have completed this scenario.**

Unit 2: Maintain Existing Contacts

As the SAA, you may need to modify system access due to personnel changes. It is important to maintain your contacts to ensure that the accuracy and security of information is delivered to and from CalPERS. When your agency contacts are kept up to date, it prevents unauthorized access to agency and employee information within my|CalPERS.

The table below explains the different scenarios within this unit, along with when and/or why you would perform the action.

Action	When/Why
Grant system access	• Allows you to grant system access to a contact who currently cannot access my|CalPERS
Revoke system access	• A contact with system access that no longer needs access to my|CalPERS • Contact will remain active under your agency • Prevent the contact from accessing the site (my|CalPERS)
Update system access	• Allows you to add or remove user roles as duties change • Allows an end date to be added, updated, or removed from a user role
Add additional System Access Administrator	• Each agency should have two or more SAAs • Allows you to designate a contact as a SAA
Elect a new primary contact	• Each contact type in use should have a primary contact elected • Allows the SAA to select a new primary contact due to changes in duties or personnel
Update contact type	• The SAA can change due to changes in duties or personnel
Update the preferred method of communication	• Allows a contact's contact information to be shared with other organizations
Unlock system access	• System access can become locked due to five consecutive password attempts, incorrect answers to security questions, by the SAA locking the account, or for other security reasons • Unlocking will allow the contact to access my|CalPERS • You may need to reset the contact's password

Reset password	• Passwords expire every 60 calendar days • Contacts may need their password reset if it has expired, after having their system access unlocked or when returning to work
Update username	• Only the SAA and CalPERS can make changes to a contact's username • Usernames are commonly changed due to name changes or for security measures
Deactivate account	• You must deactivate contacts once they depart your agency, go on a leave of absence, or when they should no longer be a contact under your agency • Deactivation removes the contact from your agency's active contact list and removes system access • If the contact was a primary contact, a new primary contact must be elected
Reactivate account	• You can reactive returning staff without having to add them as a contact • Reactivation changes the contact from inactive to active • If system access is being granted, the same user roles and username will be assigned to the contact – Review the current user roles – Reset the contact's password
Delete contact	• Should only be used when a contact was added in error • Do not use when a contact departs your agency or goes on a leave of absence • This feature permanently deletes them as a contact with your agency

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Scenario 1: Grant System Access

Scenario

You will grant system access to an existing contact.

System Logic

- Usernames must consist of 6-35 characters with no spaces and must start with a letter. Acceptable characters are letters, number, and the following special characters: at sign (@), period (.), underscore (_), and hyphen (-).
- When assigning user roles, the **End Date** field is optional. If an end date is entered, the role will be granted until the date entered.

Step Actions

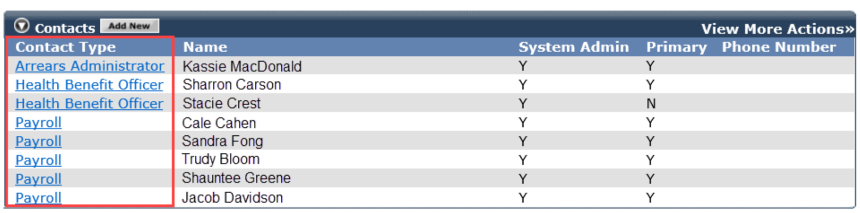
Step 1 — Select the **Profile** global navigation tab.

Step 2 — Within the Contacts section, locate the contact.

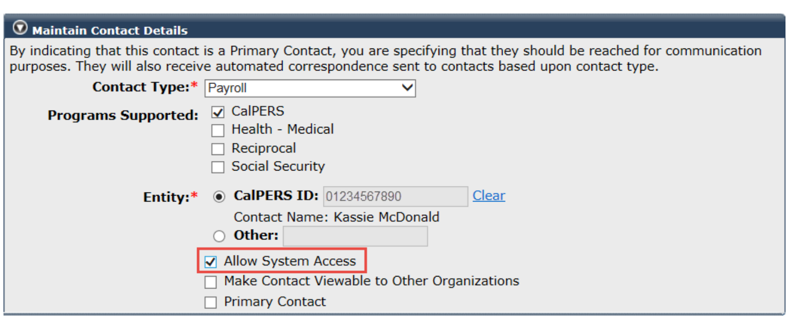
If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 — Select the **View More Actions** link.

Step 4 — Select the **Contact Type** link of the contact.



Step 5 — Within the Maintain Contact Details section, check the **Allow System Access** checkbox.



Step 6 Within the Maintain Contact Details section, select the **System Access** link.

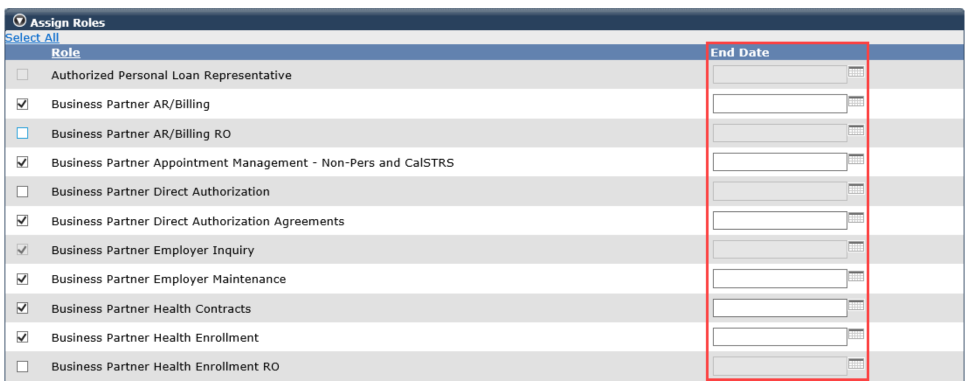
Step 7 Within the Assigned Username section, enter a username for this contact.

Step 8 Within the Assign Roles section, select the appropriate checkbox(es) to assign access to the contact.

Step 9 Do the selected user roles need to have an assigned end date?

If …	Then…
Yes	Continue to step 10
No	Skip to step 11

Step 10 Within the **End Date** fields, enter the necessary end date.



Step 11 Select the **Save** button.

Step 12 Provide the username and temporary password to the contact.

Step 13 Select the **Continue** button.

You have completed this scenario.

Scenario 2: Revoke System Access

System Logic

- Revoking system access is used when a contact no longer needs access to my|CalPERS.
- The contact will remain an active contact under your agency.
- If the contact's system access and contact status need to be deactivated, see Unit 2, Scenario 11.

Step Actions

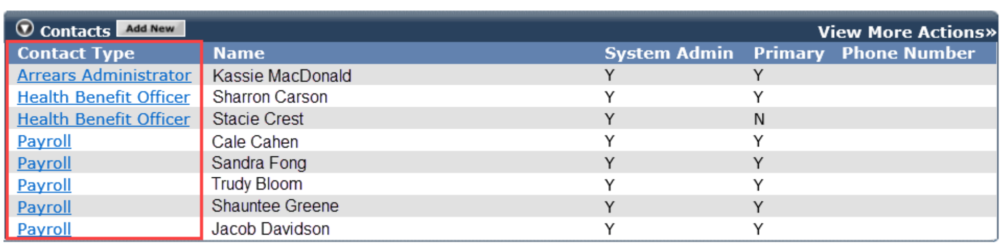
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the contact.

If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 Select the **View More Actions** link.

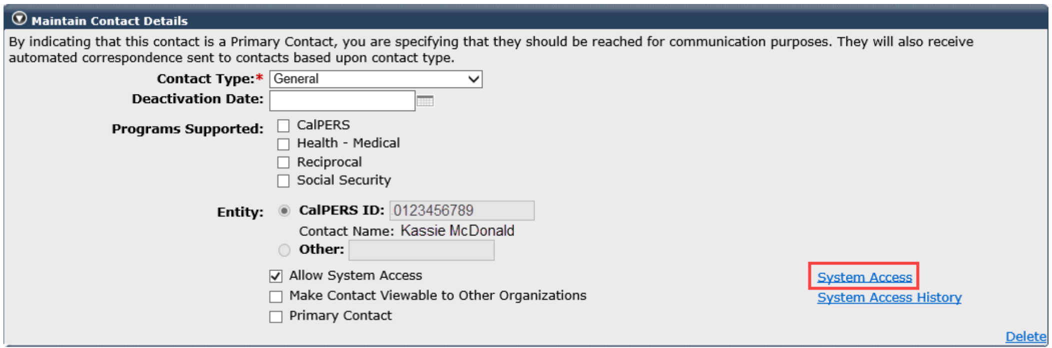
Step 4 Select the **Contact Type** link of the contact.



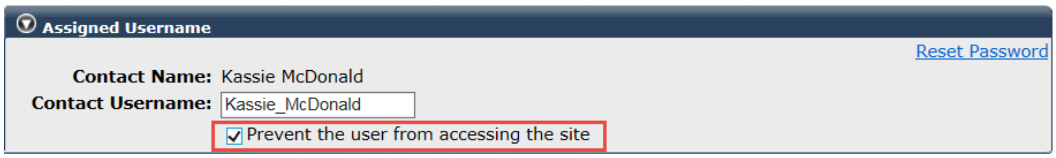
Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 Within the Maintain Contact Details section, select the **System Access** link.



Step 6 Within the Assigned Username section, you will select the **Prevent the user from accessing the site** checkbox.



Step 7 Select the **Save** button.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 3: Update System Access

System Logic

When updating user roles, the **End Date** field is optional. If an end date is entered, the role will be granted until the date entered.

Step Actions

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

Step 2 Within the Contacts section, locate the contact.

If the contact is...	Then...
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.

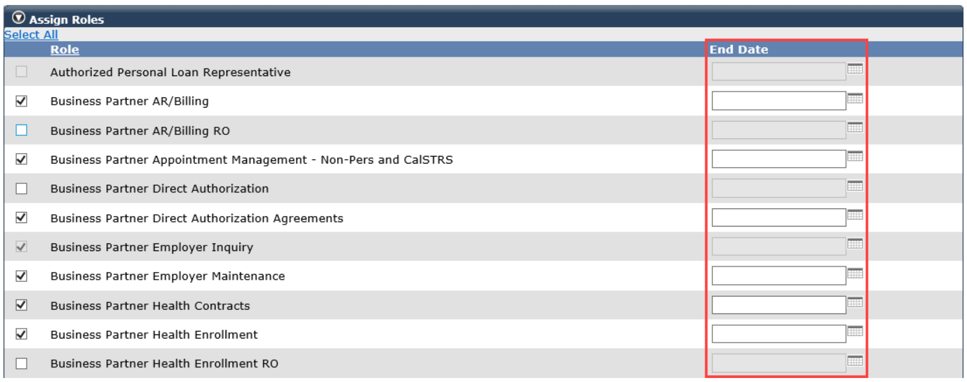
Step 5 Within the Maintain Contact Details section, select the **System Access** link.

Step 6 Within the Assign Roles section, select and/or deselect the appropriate checkbox(es).

Step 7 Do the user roles need to have an end date updated?

If …	Then…
Yes	Continue to step 8
No	Skip to step 9

Step 8 Within the **End Date** fields, update end date.



Step 9 Select the **Save** button.

Step 10 Select the **Save** button.

You have completed this scenario.

Scenario 4: Add Additional System Access Administrator

System Logic

When assigning user roles, the **End Date** field is optional. If an end date is entered, the role will be granted until the date entered.

Step Actions

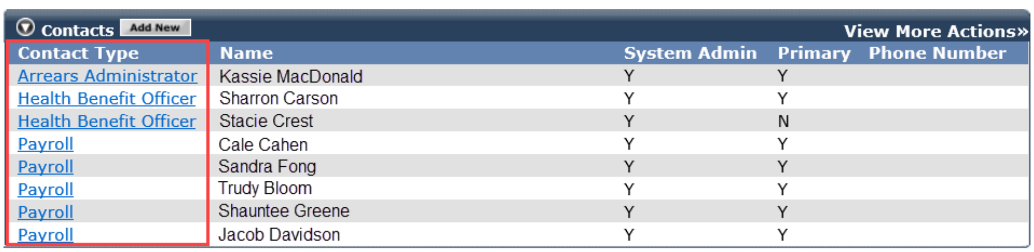
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the contact.

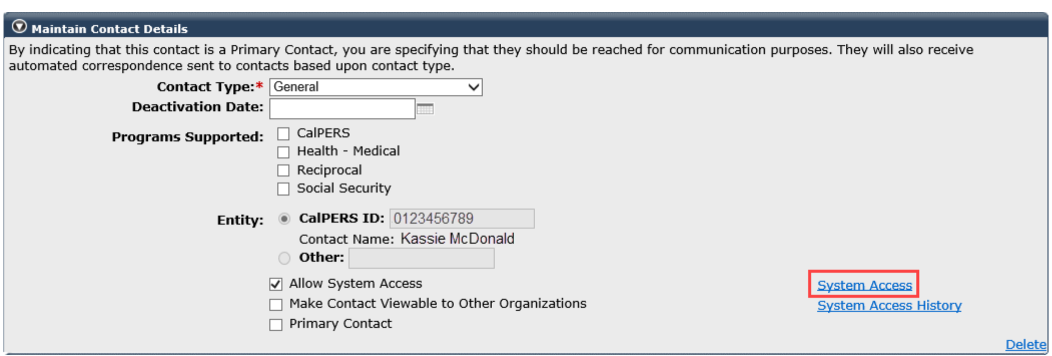
If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 Select the **View More Actions** link.

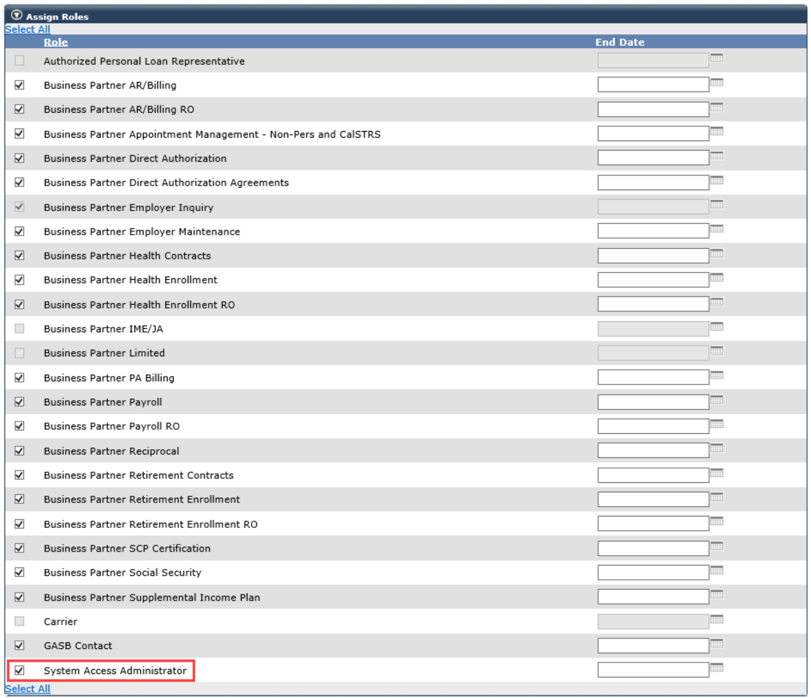
Step 4 Select the **Contact Type** link of the contact.



Step 5 Within the Maintain Contact Details section, select the **System Access** link.



Step 6 Within the Assign Roles section, select the **System Access Administrator** checkbox.



Step 7 Does the System Access Administrator user role need an end date?

If …	Then…
Yes	Continue to step 8
No	Skip to step 9

Step 8 Within the **End Date** fields, enter the necessary end date.

Step 9 Select the **Save** button.

Step 10 Select the **Save** button.

You have completed this scenario.

Scenario 5: Elect a New Primary Contact

System Logic

- Only one contact can be assigned as the primary contact for each contact type.
- If there is an existing primary contact once a new primary contact is elected, the system will remove the primary contact status from the previous contact.
- Primary contacts are not required to have system access.

Step Actions

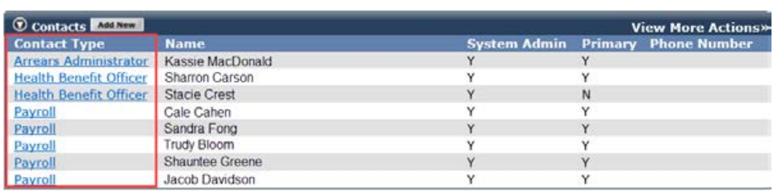
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the contact.

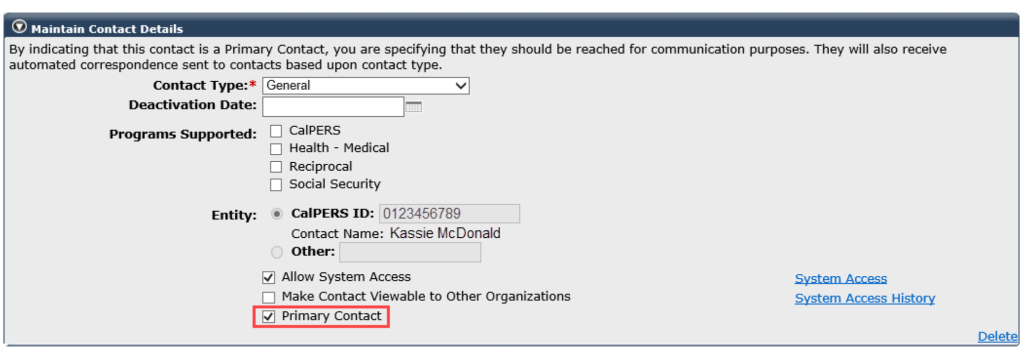
If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.



Step 5 Within the Maintain Contact Details section, check the **Primary Contact** checkbox.



Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 6: Update Contact Type

Step Actions

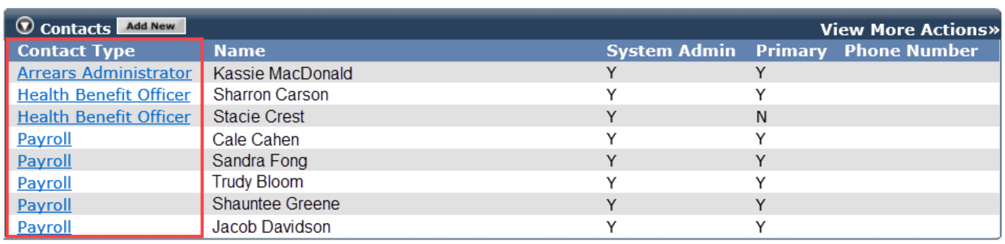
Step 1 — Select the **Profile** global navigation tab.

Step 2 — Within the Contacts section, locate the contact.

If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

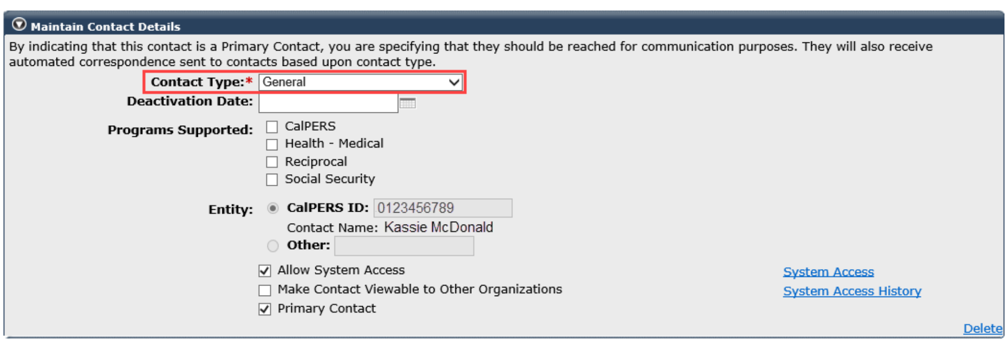
Step 3 — Select the **View More Actions** link.

Step 4 — Select the **Contact Type** link of the contact.


Contacts Add New — View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 — Within the Maintain Contact Details section, select from the **Contact Type** drop-down list.



Step 6 — Select the **Save** button.

You have completed this scenario.

Scenario 7: Update the Preferred Method of Communication

System Logic

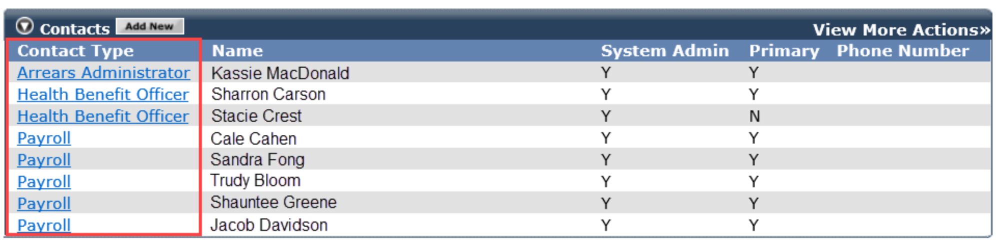
The selected preferred method of communication is used when CalPERS contacts a primary contact for your agency.

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	Within the Contacts section, locate the contact.

If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3	Select the **View More Actions** link.
Step 4	Select the **Contact Type** link of the contact.



Step 5	Within the Maintain Preferred Communication Details section, select the appropriate **Preferred Communication** method from the drop-down list.

Step 6	Select the **Save** button.
	You have completed this scenario.

Scenario 8: Unlock System Access

System Logic

- A contact's account may be locked:
  - Due to six consecutive, unsuccessful password attempts. See Unit 2 Scenario 9 to reset their password to unlock their account.
  - If the contact incorrectly answers their challenge questions when attempting to reset their password.
- Once an account is unlocked it will be restored to its previous status. The contact's system access will be the same as it was prior to their account being locked.

Step Actions

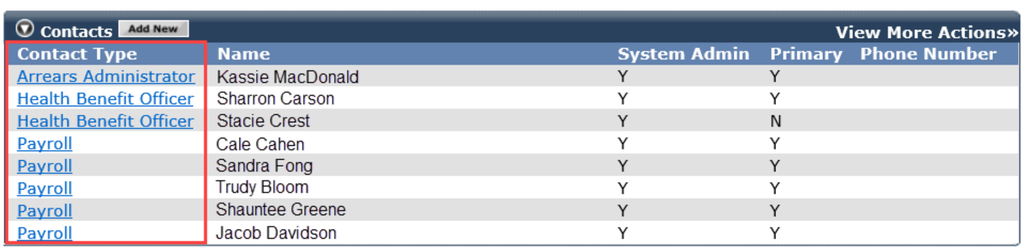
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the contact.

If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

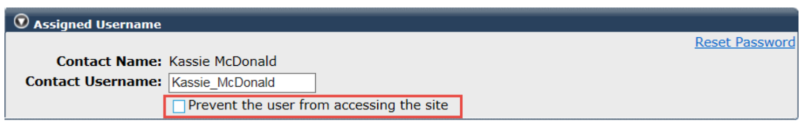
Step 3 Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.



Step 5 Within the Maintain Contact Details section, select the **System Access** link.

Step 6 Within the Assigned Username section, you will deselect the **Prevent the user from accessing the site** checkbox.



Step 7 Select the **Save** button.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 9: Reset Password

Step Actions

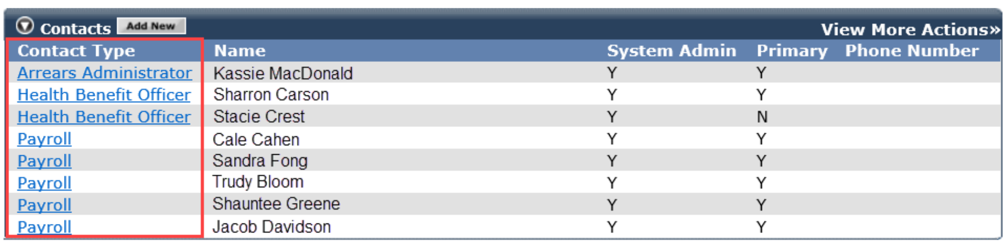
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the contact.

If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 Select the **View More Actions** link.

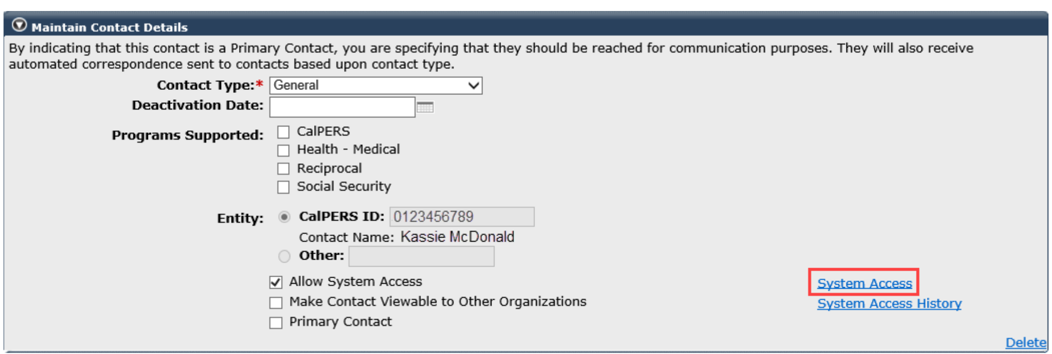
Step 4 Select the **Contact Type** link of the contact.



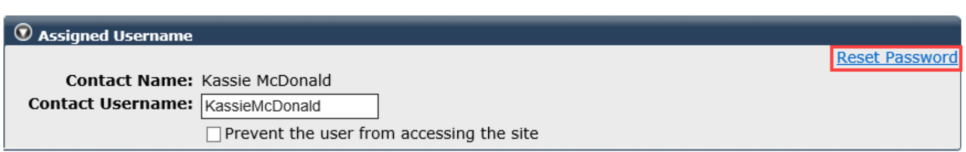
Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 Within the Maintain Contact Details section, select the **System Access** link.



Step 6 Within the Assign Username section, select the **Reset Password** link.



Step 7 Provide the contact with their temporary password.

Step 8 Select the **Continue** button.

You have completed this scenario.

Scenario 10: Update Username

System Logic

Username's consist of 6-35 characters without spaces and must start with a letter. Acceptable characters are letters, numbers, and the following special characters: at sign (@), period (.), underscore (_), and hyphen (-).

Step Actions

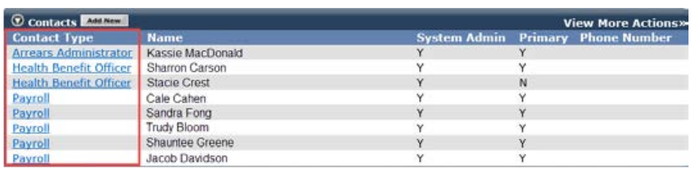
Step 1	Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the contact.

If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.



Step 5 Within the Maintain Contact Details section, select the **System Access** link.

Step 6 Within the Assigned username section, enter a new username in the Contact Username field.

Step 7 Select the **Save** button.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 11: Deactivate Account

System Logic

- By deactivating an account, the contact will not be able to log into my|CalPERS and will no longer be listed as an active contact.
- If the contact is listed under multiple contact types and has system access, you must deactivate the contact under all contact types.
- If the contact is a primary contact, you should elect a new primary contact prior to deactivation. See Unit 2, Scenario 5.
- If the current date is used as the deactivation date, the contacts access will deactivate at midnight. If a future date is used, the system will deactivate their access effective the date entered.

Step Actions

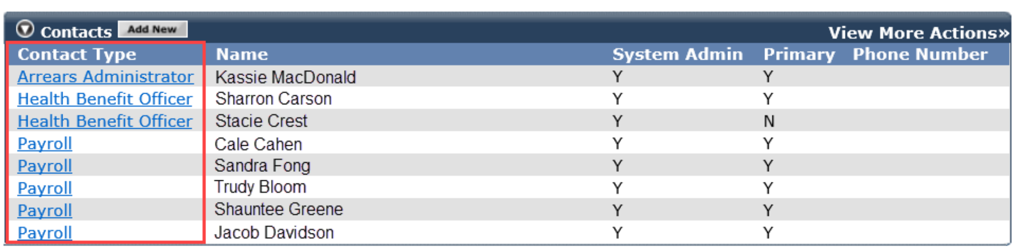
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the contact.

If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 Select the **View More Actions** link.

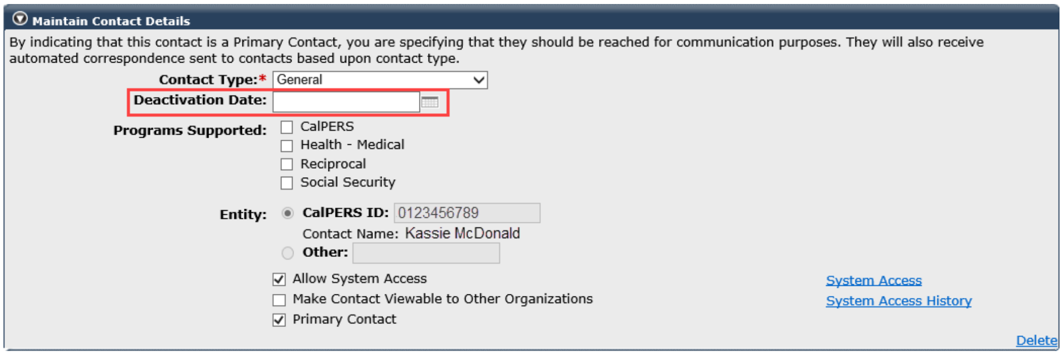
Step 4 Select the **Contact Type** link of the contact.



Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 Within the Maintain Contact Details section, enter the **Deactivation Date** for the contact.



Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 12: Reactivate Account

System Logic

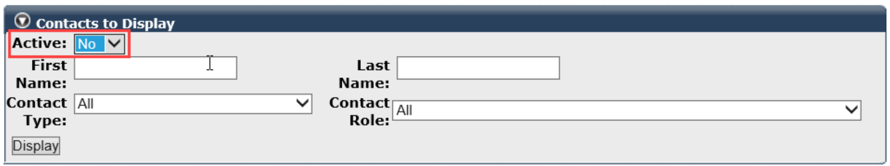
- When reactivating an account and granting system access, system access will be restored as it previously was, including end dates.

Step Actions

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

Step 2 In the Contacts section, select the **View More Actions** link.

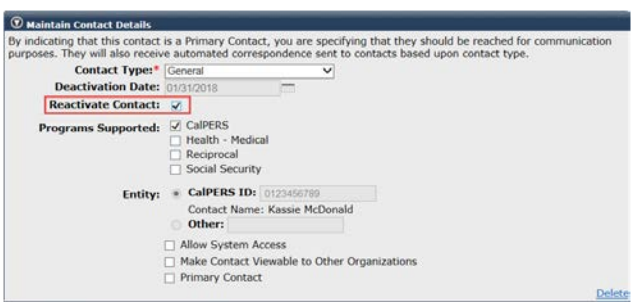
Step 3 Within the Contacts to Display section, select “No” from the **Active** drop-down list.



Step 4 Select the **Display** button.

Step 5 Within the Contacts section, select the **Contact Type** link for the contact.

Step 6 Select the **Reactivate Contact** checkbox.



Step 7 Does the contact need system access?

If…	Then…
Yes	Continue to step 8
No	Skip to step 18

Step 8 Select the **Allow System Access** checkbox.

Step 9 Did the contact have system access prior to being deactivated?

If…	Then…
Yes	Skip to step 12
No	Continue to step 17

Step 10 Select the **System Access** link.

Step 11 Within the Assigned Username section, enter a username for this contact.

Step 12 Within the Assign Roles section, review the assigned roles.

Step 13 Does the contact need their access updated?

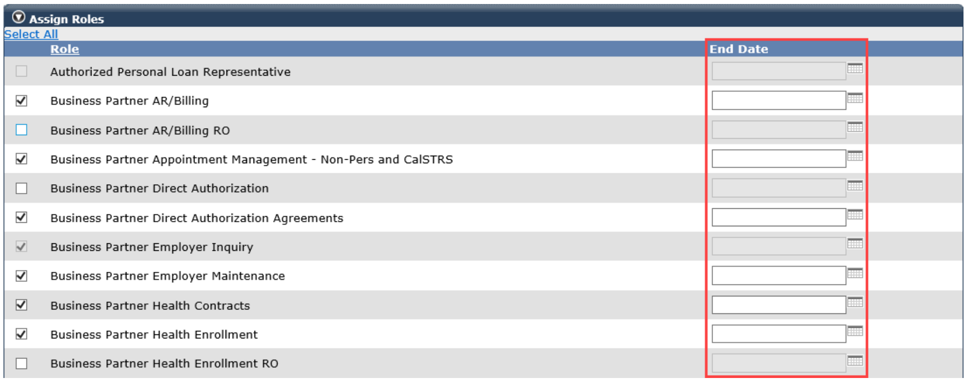
If…	Then…
Yes	Continue to step 14
No	Skip to step 18

Step 14 Within the Assign Roles section, select and/or deselect the appropriate checkbox(es).

Step 15 Do the user roles need to have an end date updated?

If …	Then…
Yes	Continue to step 16
No	Skip to step 17

Step 16 Within the **End Date** fields, update end date.



Step 17 Select the **Save** button.

Step 18 Within the Maintain Contact Details section, update the appropriate checkboxes.

Step 19 Select the **Save** button.

Step 20 Does the contact need their password reset?

If…	Then…
Yes	Return to Unit 2 Scenario 9
No	**You have completed this scenario**

Scenario 13: Delete Contact

System Logic

- Once a contact's account is deleted, all history of their access is removed from the system.
- Deletions should only be used when a contact is created in error.

Step Actions

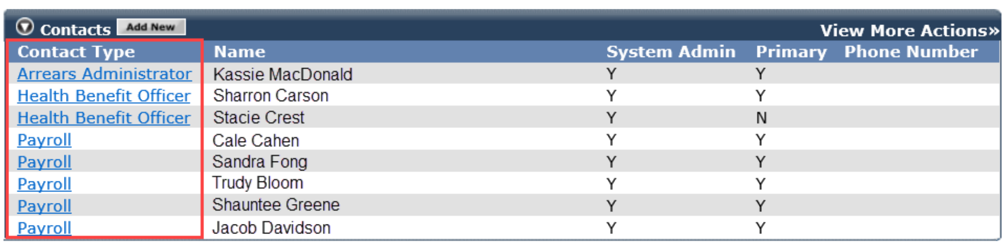
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the contact.

If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.


Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 Within the Maintain Contact Details section, select the **Delete** link.

Step 6 Within the Message from webpage dialogue box, select the **OK** button.

You have completed this scenario.

Scenario 14: Review System Access History

System Logic

- System Access History section displays the history of the contact's system access, including creation, deactivation, and reactivation
- Assigned Role History section displays the history of the contact's user roles.

Step Actions

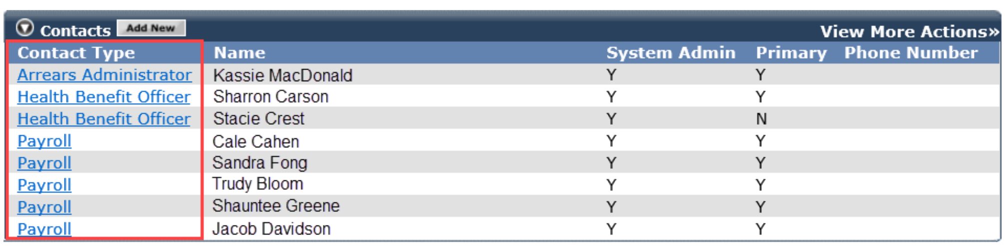
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the contact.

If the contact is…	Then…
Listed	Skip to step 4
Not listed	Continue to step 3

Step 3 Select the **View More Actions** link.

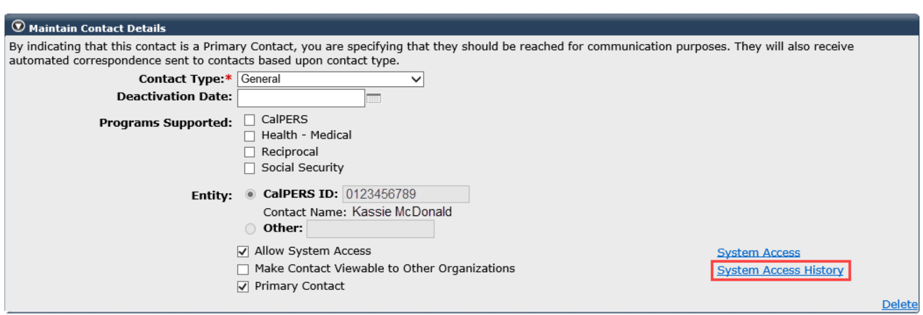
Step 4 Select the **Contact Type** link of the contact.



Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 Within the Maintain Contact Details section, select the **System Access History** link.



Step 6 Review the System Access History and Assign Role Access History sections.

You have completed this scenario.

Unit 3: Maintain Agency Information

To ensure all communication from CalPERS is received, it is important that your agency's contact information in my|CalPERS is current. This includes agency addresses, contact numbers, and email addresses.

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Scenario 1: Update Agency Address

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	Within the Summary section, select either the **Physical** or **Mailing** link.

Step 3	Update/correct the information contained in the Maintain Address Details section.
Step 4	Select the **Save** button.
Step 5	Review the U.S. Postal Service Matches.

If it is	Then…
Correct	Skip to step 7
Incorrect	Continue to step 6

Step 6	Select the **Entered Address** radio button.
Step 7	Select the **Confirm** button.
Step 8	Review the U.S. Postal Service Matches.

If it is	Then…
Correct	Select the **Confirm** button and skip to step 9
Incorrect	Return to step 6

Step 9	Select the **Save** button.
	You have completed this scenario.

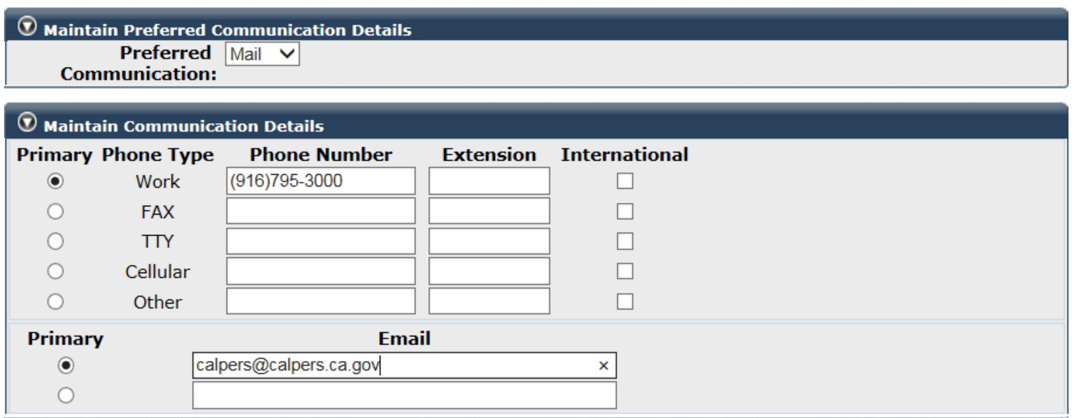
Scenario 2: Update Agency Phone Number and Email Address

System Logic

A primary phone number and email address should be selected for your agency. The selected primary contact information will display on your agency's profile page.

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	Within the Summary section, select the **Communication Information** link.
Step 3	Within the Maintain Preferred Communication Details and Maintain Communication Details sections, update the necessary communication information for your agency.



Step 4	Select the **Primary** radio button for one phone number and email address.
Step 5	Select the **Save** button. **You have completed this scenario.**

CalPERS Resources and Contacts

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CalPERS Resources

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

Resources Links

- my|CalPERS Student Guides
  Pathway: CalPERS website > Employers > I Want To…: Find my|CalPERS Student Guides
- Online Classes for Employers (PDF)
  Pathway: CalPERS website > Employers > I Want To… : Find my|CalPERS Student Guides > Online Classes for Employers
- Employer Education Schedule (PDF)
  Pathway: CalPERS website > Employers > I Want To… : Find my|CalPERS Student Guides > Employer Education Schedule
- my|CalPERS Employer Reports (Cognos)
  Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > my|CalPERS Employer Reports (Cognos)
  – Business Partner my|CalPERS User Access Report

CalPERS Contacts

Contact CalPERS via 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

Contact CalPERS by 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 my|CalPERS. Expand the **Common Tasks** left-side navigation folder, and select the **Submit Injury** link to submit a question or request.