

# my|CalPERS System Access Administration

Student Guide

**January 18, 2018**



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# System Access Administration

## Introduction

To conduct business through my|CalPERS, your organization must designate a System Access Administrator (SAA) to manage my|CalPERS system access privileges for all users in your agency. The SAA is the main point of contact and provides my|CalPERS access to users through the system administrator pages. The SAA assigns users unique usernames, resets passwords, assigns and manages system access roles, and deactivates access rights to the my|CalPERS system. It is important that each person who accesses the system have their own log-in credentials.

## Disclaimer

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

## Business Rules

This student guide does not include business rules. Attend a business rules training class or review business rules online training for the simplified explanation of laws defined by California Public Employees' Retirement Law (PERL).

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# Introduction to System Access Administration

## What to Know Before You Begin

### [System Access Administrators page](#)

System Access Administrators page serves as one-stop shop webpage that 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](#)

my|CalPERS System Privileges for Business Partner Roles is a resource tool which 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

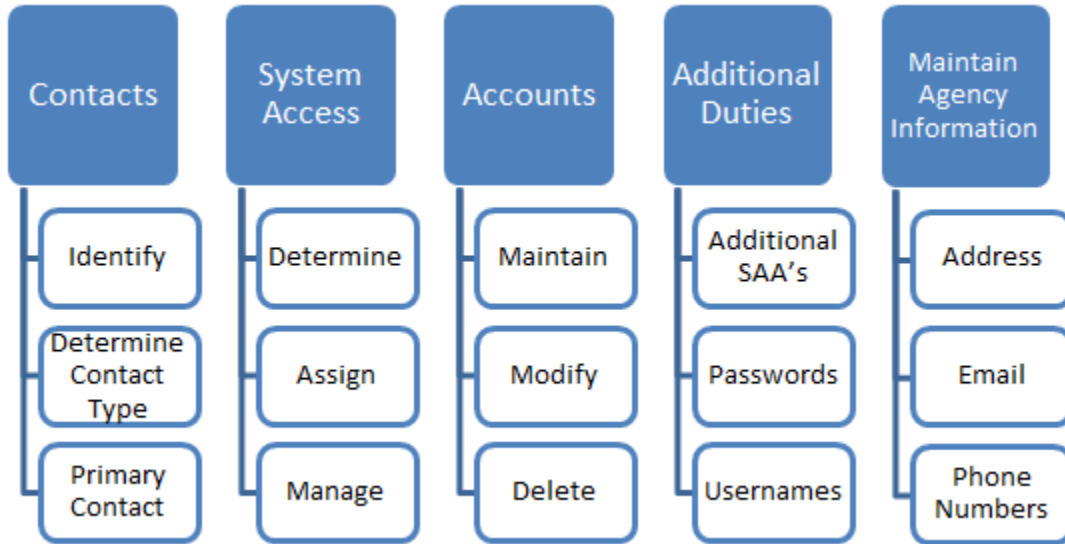
### [Guide for New Business Partner Contacts](#)

Guide for New Business Partner Contacts is a tool for new CalPERS business partner contacts, which provides information on system access and available resources.

**Pathway:** CalPERS website > Search box: New Business Partner Contacts > Guide for New Business Partner Contacts

## System Access Administrator Roles and Responsibilities

A System Access Administrator (SAA) serves a critical role for your agency. The chart below outlines the various roles and responsibilities associated with this role.



CalPERS recommends each agency establish more than one SAA for situations when an SAA may be out of the office or needs their own account maintained. See Unit 2 Scenario 5 to add an additional 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.

# Unit 1: New Contacts

## 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. Each contact listed for an agency is required to have a Contact Type assigned to them. Being listed as a contact for an agency does not grant an individual the user role(s) needed to view agency information, process transactions and/or run reports.

## Users

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

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# Definitions

## Contact Types

A Contact Type identifies the duties, position titles, and/or program areas relating to a contact. Each contact is identified by one Contact Type. If a contact serves multiple functions and should be designated as a primary contact for each of those functions, it is appropriate to add the contact multiple times, each time with a different Contact Type.

**Maintain Contact Details**  
By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:\*** [Dropdown menu open showing list of roles]

**Programs Supported:** [Input field]

**Entity:\*** [Input field] [Verify](#)

**Maintain Preferred Communication:** [Input field]

**Maintain Contact Address:** [Input field]

**Existing Business:** [Input field]

Other Organizations

Human Resources Benefit Officer

Human Resources Personnel

Local Administrator

Payroll

Replacement Benefit Fund Admin

System Support

## Primary Contact

A primary contact is a person who the SAA designates to receive direct communication from CalPERS related to their assigned Contact Type. 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.

**Maintain Contact Details**  
By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:\*** [Dropdown menu]

**Programs Supported:**  CalPERS  
 Health - Medical  
 Reciprocal  
 Social Security

**Entity:\***  **CalPERS ID or SSN:** [Input field] [Verify](#)  
 **Other:** [Input field]

Allow System Access  
 Make Contact Viewable to Other Organizations  
 **Primary Contact**

## Definitions, Continued

### Make Contact Viewable to Other Organizations

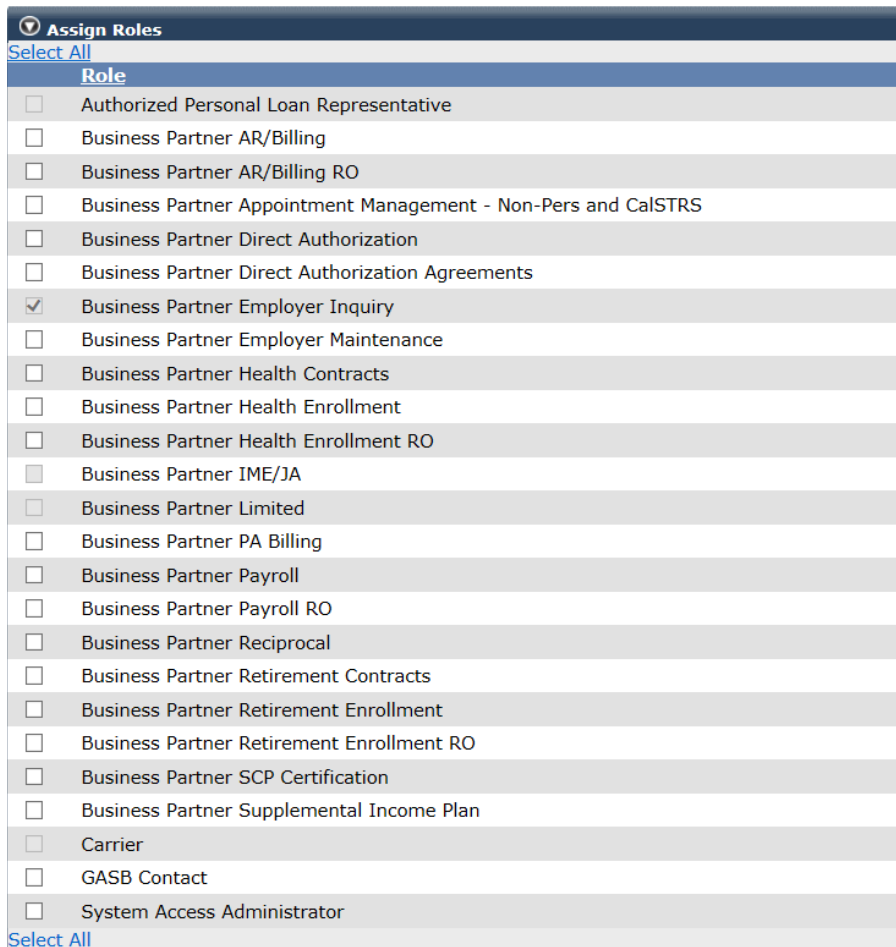
This feature allows agencies to share contact information of specific contacts with other CalPERS agencies via the **Other Organizations** tab.

### System Access

Roles should be assigned based on the duties the business partner 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

**Note:** All agency contacts with my|CalPERS system access are automatically assigned the Business Partner Employer Inquiry role.



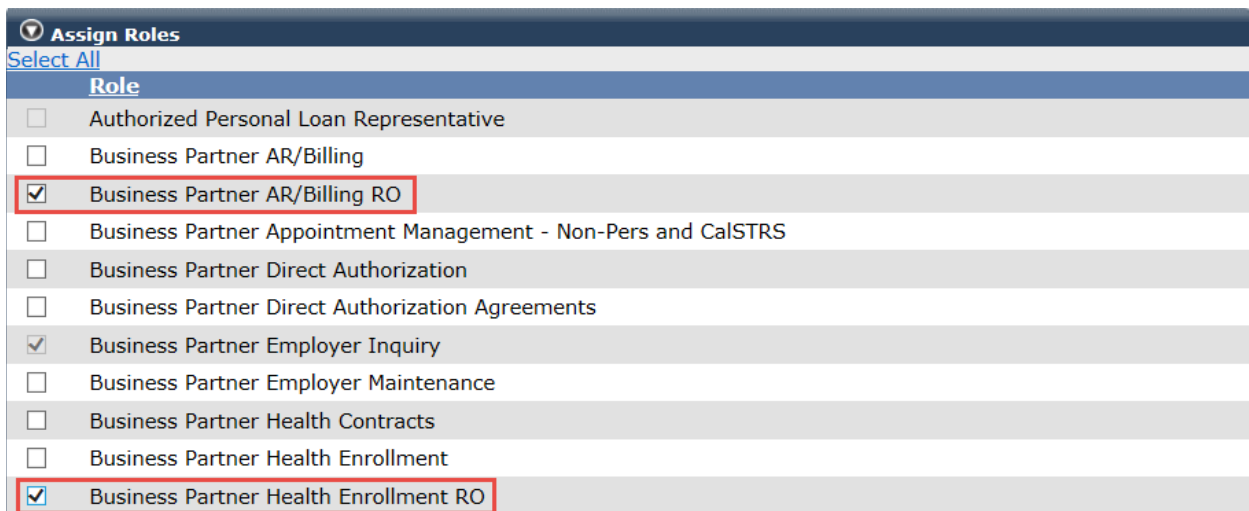
Assign Roles	
<a href="#">Select All</a>	
Role	
<input type="checkbox"/> Authorized Personal Loan Representative	
<input type="checkbox"/> Business Partner AR/Billing	
<input type="checkbox"/> Business Partner AR/Billing RO	
<input type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	
<input type="checkbox"/> Business Partner Direct Authorization	
<input type="checkbox"/> Business Partner Direct Authorization Agreements	
<input checked="" type="checkbox"/> Business Partner Employer Inquiry	
<input type="checkbox"/> Business Partner Employer Maintenance	
<input type="checkbox"/> Business Partner Health Contracts	
<input type="checkbox"/> Business Partner Health Enrollment	
<input type="checkbox"/> Business Partner Health Enrollment RO	
<input type="checkbox"/> Business Partner IME/JA	
<input type="checkbox"/> Business Partner Limited	
<input type="checkbox"/> Business Partner PA Billing	
<input type="checkbox"/> Business Partner Payroll	
<input type="checkbox"/> Business Partner Payroll RO	
<input type="checkbox"/> Business Partner Reciprocal	
<input type="checkbox"/> Business Partner Retirement Contracts	
<input type="checkbox"/> Business Partner Retirement Enrollment	
<input type="checkbox"/> Business Partner Retirement Enrollment RO	
<input type="checkbox"/> Business Partner SCP Certification	
<input type="checkbox"/> Business Partner Supplemental Income Plan	
<input type="checkbox"/> Carrier	
<input type="checkbox"/> GASB Contact	
<input type="checkbox"/> System Access Administrator	
<a href="#">Select All</a>	



## Definitions, Continued

### Read Only (RO) User Roles

The Read Only (RO) roles provide limited access to view information in my|CalPERS, including running reports. An SAA should assign RO roles to a user whose duties do not require them to change or modify information.



Assign Roles	
<a href="#">Select All</a>	
Role	
<input type="checkbox"/> Authorized Personal Loan Representative	
<input type="checkbox"/> Business Partner AR/Billing	
<input checked="" type="checkbox"/> Business Partner AR/Billing RO	
<input type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	
<input type="checkbox"/> Business Partner Direct Authorization	
<input type="checkbox"/> Business Partner Direct Authorization Agreements	
<input checked="" type="checkbox"/> Business Partner Employer Inquiry	
<input type="checkbox"/> Business Partner Employer Maintenance	
<input type="checkbox"/> Business Partner Health Contracts	
<input type="checkbox"/> Business Partner Health Enrollment	
<input checked="" type="checkbox"/> Business Partner Health Enrollment RO	

**Example:** The Business Partner Retirement Enrollment role allows the user to initiate and maintain the appointments of their employees. In contrast, the Business Partner Retirement Enrollment RO role only allows the user to view the appointment history of their employees.

The system privileges granted under a RO role are included in the non-Read Only role system privileges. If a user is granted both a Read Only and non-RO role, they will have the privileges provided under the non-Read Only role.

# Scenario 1: Add a Contact Without System Access

## Scenario

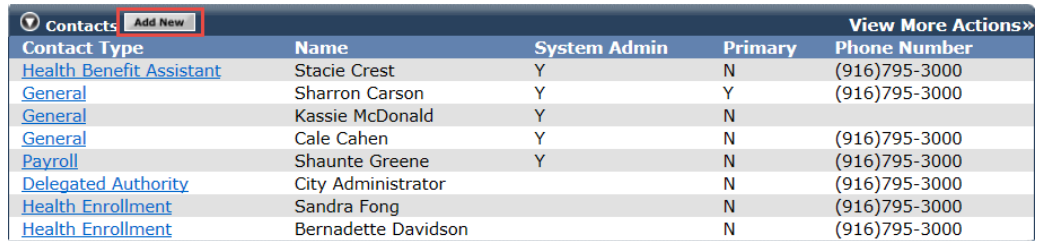
You will add the new contact to my|CalPERS without granting system access.

## Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

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



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

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

---

Step 4 Check the **Programs Supported**.

---

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**.

---

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.

**Maintain Contact Address Details**

Existing Business Partner Address :  
Address:\*  
Country:\* United States  
City:\*  
State:\*  
Zip Code:\*

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.

**Maintain Communication Details**

Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Work	9167953000		<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Home			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	calpers@calpers.ca.gov	
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		

Step 15 Select the **Save** button

**You have completed this scenario.**

---

## Scenario 2: Add a Contact with System Access

### Scenario

You will add a new contact for your agency, grant system access, and assign user roles.

### System Logic

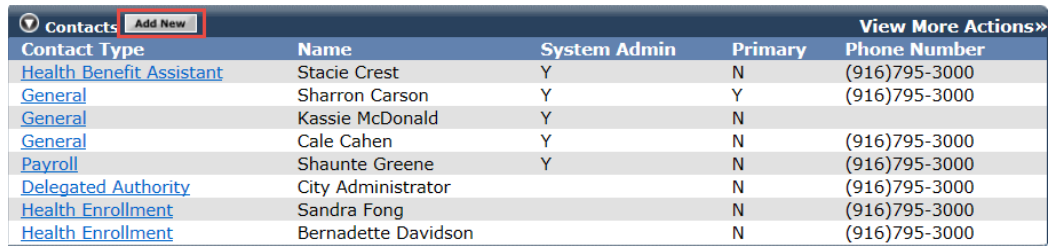
Username's must consist of 6-35 characters with no spaces and must start with a letter. Acceptable characters are letters, number, and the following special characters: at sign (@), period (.), underscore (\_), and hyphen (-).

### Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

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



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

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

---

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**.

---

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.

**Maintain Contact Address Details**

Existing Business Partner Address : **None**  
Physical  
Mailing

Address:\*

Country:\* United States

City:\*

State:\*

Zip Code:\* -

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.

**Maintain Communication Details**

Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Work	9167953000		<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Home			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	calpers@calpers.ca.gov	
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		

Step 15 Select the **Save** button

---

Step 16 Within the Assigned Username section, enter a username for this user.

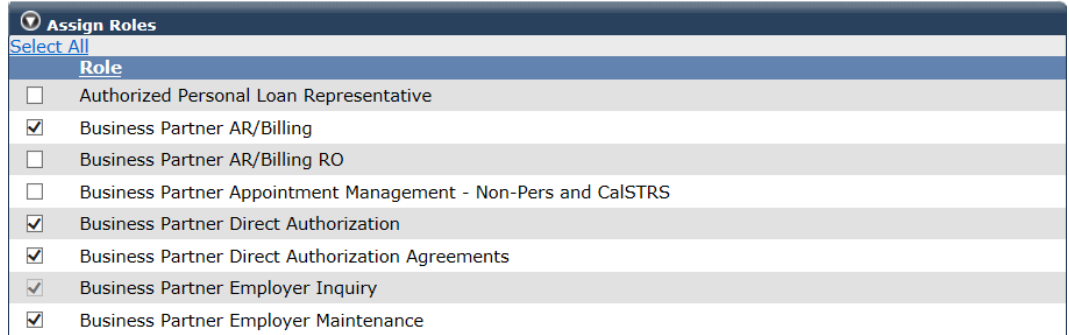


**Assigned Username** [Reset Password](#)

**Contact Name:** Kassie McDonald

**Contact Username:**

Prevent the user from accessing the site



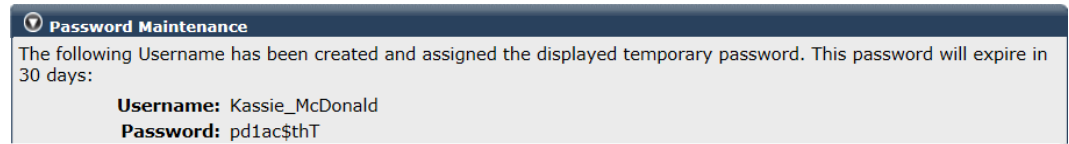
**Assign Roles** [Select All](#)

Role	
<input type="checkbox"/>	Authorized Personal Loan Representative
<input checked="" type="checkbox"/>	Business Partner AR/Billing
<input type="checkbox"/>	Business Partner AR/Billing RO
<input type="checkbox"/>	Business Partner Appointment Management - Non-Pers and CalSTRS
<input checked="" type="checkbox"/>	Business Partner Direct Authorization
<input checked="" type="checkbox"/>	Business Partner Direct Authorization Agreements
<input checked="" type="checkbox"/>	Business Partner Employer Inquiry
<input checked="" type="checkbox"/>	Business Partner Employer Maintenance

Step 17 Within the Assign Roles section, select the checkboxes for the appropriate roles that apply to the contact.

Step 18 Select the **Save** button.

Step 19 Provide the contact with their username and temporary password.



**Password Maintenance**

The following Username has been created and assigned the displayed temporary password. This password will expire in 30 days:

**Username:** Kassie\_McDonald

**Password:** pd1ac\$thT

Step 20 Select the **Continue** button.

**You have completed this scenario.**

## Unit 2: Maintain Existing Contacts

### Introduction

The SAA may need to modify system access due to personnel changes. It is important to update all contacts to ensure that the information delivered to CalPERS is accurate and secure. When your agency's contacts are kept up to date, your agency prevents unauthorized access to the agency's and employees' information within my|CalPERS.

The chart below contains the actions an SAA can perform:

Deactivate an Account	Reactivate an Account	Lock System Access	Unlock System Access	Delete an Account
<ul style="list-style-type: none"><li>• Removes system access</li><li>• Changes contact status to inactive</li></ul>	<ul style="list-style-type: none"><li>• Changes contact status to active</li><li>• System access can be reestablished</li></ul>	<ul style="list-style-type: none"><li>• Locks system access</li><li>• Maintains active contact status</li></ul>	<ul style="list-style-type: none"><li>• Reestablishes system access</li></ul>	<ul style="list-style-type: none"><li>• Used only when created in error</li><li>• Permanently deletes the contact</li></ul>

### my|CalPERS System Privileges for Business Partner Roles

**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

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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 (-).

## Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

Step 3 Select the **Contact Type** link of the user.

---

Step 4 Within the Maintain Contact Details section, check the **System Access** button.

**Maintain Contact Details**

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:**\* Payroll

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**\*  **CalPERS ID:** 01234567890 [Clear](#)

Contact Name: Kassie McDonald

**Other:** \_\_\_\_\_

- Allow System Access**
- Make Contact Viewable to Other Organizations
- Primary Contact

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

---

Step 6 Within the Assigned Username section, enter a username for this user.

The screenshot shows two sections of a user management interface. The top section, titled 'Assigned Username', displays the contact name 'Kassie McDonald' and a text input field for the 'Contact Username' containing 'Kassie\_McDonald'. There is a 'Reset Password' link in the top right and a checkbox for 'Prevent the user from accessing the site' which is currently unchecked. The bottom section, titled 'Assign Roles', features a 'Select All' link and a table of roles with checkboxes. The roles and their selection status are as follows:

Role	Selected
Authorized Personal Loan Representative	<input type="checkbox"/>
Business Partner AR/Billing	<input checked="" type="checkbox"/>
Business Partner AR/Billing RO	<input type="checkbox"/>
Business Partner Appointment Management - Non-Pers and CalSTRS	<input type="checkbox"/>
Business Partner Direct Authorization	<input checked="" type="checkbox"/>
Business Partner Direct Authorization Agreements	<input checked="" type="checkbox"/>
Business Partner Employer Inquiry	<input checked="" type="checkbox"/>
Business Partner Employer Maintenance	<input checked="" type="checkbox"/>

---

Step 7 Within the Assign Roles section, select the appropriate checkbox(es) to assign access to the contact.

---

Step 8 Select the **Save** button.

---

Step 9 Provide the username and temporary password to the contact.

**You have completed this scenario.**

---

## Scenario 2: Reset a User's Password

### Scenario

You will reset a user's password and provide them with a temporary password.

### Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

Step 3 Select the **Contact Type** link of the user.

---

Step 4 Within the Maintain Contact Details section, select the **System Access** link.

**Maintain Contact Details**

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:** \* General

**Deactivation Date:** [Date Picker]

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**  **CalPERS ID:** 01234567890  
Contact Name: Kassie McDonald  
 **Other:** [Text Field]

Allow System Access System Access

Make Contact Viewable to Other Organizations

Primary Contact

[Delete](#)

Step 5 Within the Assign Username section, select the **Reset Password** link.

---

Step 6 Provide the contact with their temporary password.

---

Step 7 Select the **Continue** button.

**You have completed this scenario.**

---

## Scenario 3: Change a Username

### Scenario

You will change a user's 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 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

Step 3 Select the **Contact Type** link of the user.

---

Step 4 Within the Maintain Contact Details section, select the **System Access** link.

**Maintain Contact Details**

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:**\* General

**Deactivation Date:** [Calendar icon]

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**

- CalPERS ID:** 01234567890  
Contact Name: Kassie McDonald
- Other:** [Text field]

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[Delete](#)

Step 5      Within the Assigned Username section, enter a new username in the Contact Username field.



The screenshot shows a user management interface with a dark blue header bar containing a dropdown arrow and the text "Assigned Username". In the top right corner of the header, there is a blue link labeled "Reset Password". Below the header, the "Contact Name" is displayed as "Kassie McDonald". The "Contact Username" field is an empty text input box. Below this field is a checkbox labeled "Prevent the user from accessing the site", which is currently unchecked.

---

Step 6      Select the **Save** button.

---

Step 7      Select the **Save** button.

**You have completed this scenario.**

---

## Scenario 4: Update a User's System Access

### Scenario

You will update a user's system access.

### Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

Step 2 Within the **Contacts** section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

Step 3 Select the **Contact Type** link of the user.

---

Step 4 Within the Maintain Contact Details section, select the **System Access** link.

**Maintain Contact Details**

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:** \* General

**Deactivation Date:** [Calendar icon]

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**

- CalPERS ID:** 01234567890  
Contact Name: Kassie McDonald
- Other:** [Text field]

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[Delete](#)

Step 5

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

The screenshot shows a web interface titled "Assign Roles". At the top left, there is a dropdown arrow and the text "Assign Roles". Below this is a link "Select All" in blue. The main area is a table with a header "Role" in blue. The table contains 25 rows, each with a checkbox and a role name. The roles and their checkbox states are: Authorized Personal Loan Representative (unchecked), Business Partner AR/Billing (unchecked), Business Partner AR/Billing RO (unchecked), Business Partner Appointment Management - Non-Pers and CalSTRS (unchecked), Business Partner Direct Authorization (checked), Business Partner Direct Authorization Agreements (unchecked), Business Partner Employer Inquiry (checked), Business Partner Employer Maintenance (checked), Business Partner Health Contracts (checked), Business Partner Health Enrollment (checked), Business Partner Health Enrollment RO (unchecked), Business Partner IME/JA (unchecked), Business Partner Limited (unchecked), Business Partner PA Billing (unchecked), Business Partner Payroll (checked), Business Partner Payroll RO (unchecked), Business Partner Reciprocal (unchecked), Business Partner Retirement Contracts (checked), Business Partner Retirement Enrollment (checked), Business Partner Retirement Enrollment RO (unchecked), Business Partner SCP Certification (unchecked), Business Partner Supplemental Income Plan (unchecked), Carrier (unchecked), GASB Contact (unchecked), and System Access Administrator (unchecked). At the bottom of the table is another link "Select All" in purple. Below the table is a "Save" button.

Role
<input type="checkbox"/> Authorized Personal Loan Representative
<input type="checkbox"/> Business Partner AR/Billing
<input type="checkbox"/> Business Partner AR/Billing RO
<input type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS
<input checked="" type="checkbox"/> Business Partner Direct Authorization
<input type="checkbox"/> Business Partner Direct Authorization Agreements
<input checked="" type="checkbox"/> Business Partner Employer Inquiry
<input checked="" type="checkbox"/> Business Partner Employer Maintenance
<input checked="" type="checkbox"/> Business Partner Health Contracts
<input checked="" type="checkbox"/> Business Partner Health Enrollment
<input type="checkbox"/> Business Partner Health Enrollment RO
<input type="checkbox"/> Business Partner IME/JA
<input type="checkbox"/> Business Partner Limited
<input type="checkbox"/> Business Partner PA Billing
<input checked="" type="checkbox"/> Business Partner Payroll
<input type="checkbox"/> Business Partner Payroll RO
<input type="checkbox"/> Business Partner Reciprocal
<input checked="" type="checkbox"/> Business Partner Retirement Contracts
<input checked="" type="checkbox"/> Business Partner Retirement Enrollment
<input type="checkbox"/> Business Partner Retirement Enrollment RO
<input type="checkbox"/> Business Partner SCP Certification
<input type="checkbox"/> Business Partner Supplemental Income Plan
<input type="checkbox"/> Carrier
<input type="checkbox"/> GASB Contact
<input type="checkbox"/> System Access Administrator

[Select All](#)

---

Step 6 Select the **Save** button.

---

Step 7 Select the **Save** button.

**You have completed this scenario.**

---

# Scenario 5: Add an Additional System Access Administrator

## Scenario

You will grant a user the SAA user role.

## Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

Step 3 Select the **Contact Type** link of the user.

---

Step 4 Within the Maintain Contact Details section, select the **System Access** link.

**Maintain Contact Details**

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:** \* General

**Deactivation Date:** [Date Picker]

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**

- CalPERS ID:** 01234567890  
Contact Name: Kassie McDonald
- Other:** [Text Field]

Allow System Access System Access

Make Contact Viewable to Other Organizations

Primary Contact

[Delete](#)



Step 5

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

The screenshot shows a web interface titled "Assign Roles". At the top left, there is a "Select All" link. Below it is a table with a header "Role". The table contains 27 rows, each with a checkbox and a role name. The "System Access Administrator" role is checked and highlighted with a red box. At the bottom of the table, there is another "Select All" link and a "Save" button.

Role
<input type="checkbox"/> Authorized Personal Loan Representative
<input type="checkbox"/> Business Partner AR/Billing
<input type="checkbox"/> Business Partner AR/Billing RO
<input type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS
<input checked="" type="checkbox"/> Business Partner Direct Authorization
<input type="checkbox"/> Business Partner Direct Authorization Agreements
<input checked="" type="checkbox"/> Business Partner Employer Inquiry
<input checked="" type="checkbox"/> Business Partner Employer Maintenance
<input checked="" type="checkbox"/> Business Partner Health Contracts
<input checked="" type="checkbox"/> Business Partner Health Enrollment
<input type="checkbox"/> Business Partner Health Enrollment RO
<input type="checkbox"/> Business Partner IME/JA
<input type="checkbox"/> Business Partner Limited
<input type="checkbox"/> Business Partner PA Billing
<input checked="" type="checkbox"/> Business Partner Payroll
<input type="checkbox"/> Business Partner Payroll RO
<input checked="" type="checkbox"/> Business Partner Reciprocal
<input checked="" type="checkbox"/> Business Partner Retirement Contracts
<input checked="" type="checkbox"/> Business Partner Retirement Enrollment
<input type="checkbox"/> Business Partner Retirement Enrollment RO
<input type="checkbox"/> Business Partner SCP Certification
<input type="checkbox"/> Business Partner Supplemental Income Plan
<input type="checkbox"/> Carrier
<input type="checkbox"/> GASB Contact
<input checked="" type="checkbox"/> System Access Administrator

Step 6

Select the **Save** button.

Step 7

Select the **Save** button.

**You have completed this scenario.**

## Scenario 6: Elect a New Primary Contact

### Scenario

You will assign a new primary contact.

### Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

---

Step 3 Select the **Contact Type** link of the user.

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

---

## Scenario 6: Elect a New Primary Contact, Continued

Step 4 Within the Maintain Contact Details section, check the **Primary Contact** checkbox.



**Maintain Contact Details**

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:**\* General

**Deactivation Date:** [Calendar icon]

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**

- CalPERS ID:** 0123456789  
Contact Name: Kassie McDonald
- Other:** [Text field]

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations

**Primary Contact**

[Delete](#)

Step 5 Select the **Save** button.

**You have completed this scenario.**

# Scenario 7: Change a Contact Type

## Scenario

You will modify a user's Contact Type.

## Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

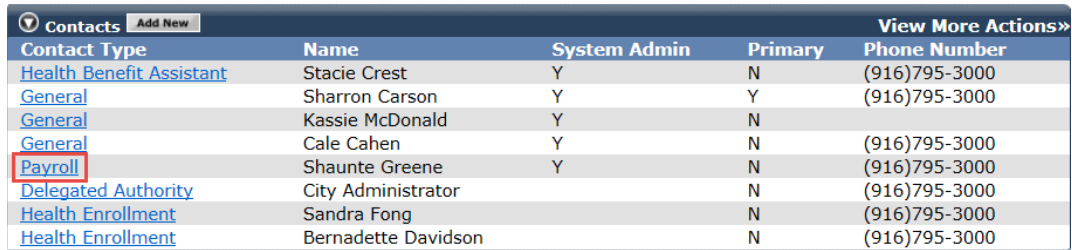
---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

---

Step 3 Select the **Contact Type** link of the user.



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

---

Step 4 Within the Maintain Contact Details section, select from the **Contact Type** drop-down list.

---

Step 5 Select the **Save** button.

**You have completed this scenario.**

---

## Scenario 8: Change the Preferred Method of Communication

### Scenario

You will change a user's preferred method of communication.

### Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

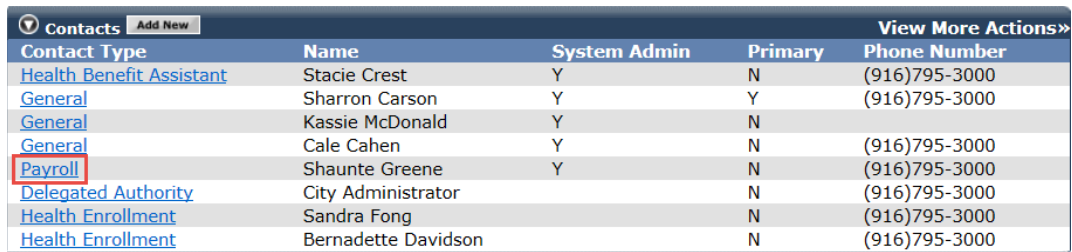
---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

---

Step 3 Select the **Contact Type** link of the user.



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

---

Step 4 Within the Maintain Preferred Communication Details section, select the appropriate **Preferred Communication** method from the drop-down list.



Maintain Preferred Communication Details

Preferred Communication:

---

Step 5 Select the **Save** button.

**You have completed this scenario.**

---

## Scenario 9: Deactivate a Contact's Account

### Scenario

You will deactivate a contact's my|CalPERS account.

### Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

---

Step 3 Select the **Contact Type** link of the user.

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

---

Step 4 Within the Maintain Contact Details section, enter the **Deactivation Date** for the user.

**Maintain Contact Details**

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:**\* General

**Deactivation Date:** 12062017

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**

- CalPERS ID:** 2701928128
- Other:**

Contact Name: Kassie McDonald

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations

Primary Contact

[Delete](#)

Step 5 Select the **Save** button.

**You have completed this scenario.**

# Scenario 10: Reactivate a Contact's Account

## Scenario

You will reactivate a contact's account and grant system access.

## System Logic

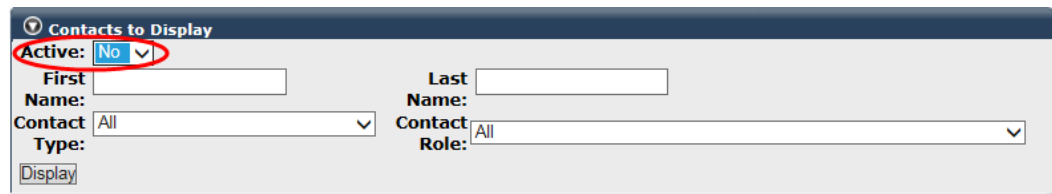
When reactivating an account and granting system access, system access will be restored as it previously was. Review the existing access by selecting the **System Access** link once the **Allow System Access** box is checked.

## Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

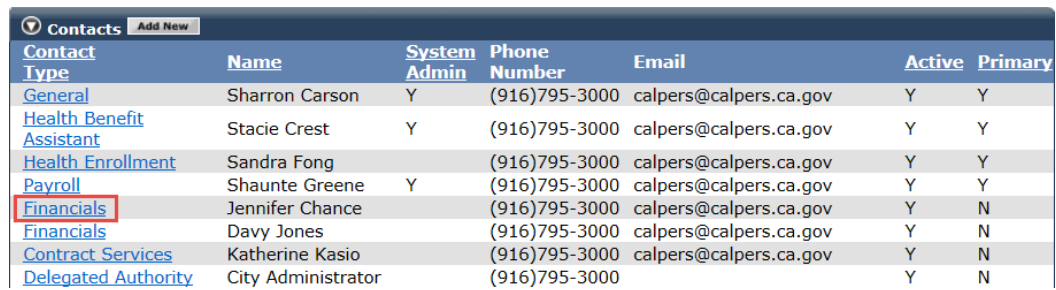
Step 2 In the Contacts section, select the **View More Actions** link.

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.



Contact Type	Name	System Admin	Phone Number	Email	Active	Primary
<a href="#">General</a>	Sharron Carson	Y	(916)795-3000	calpers@calpers.ca.gov	Y	Y
<a href="#">Health Benefit Assistant</a>	Stacie Crest	Y	(916)795-3000	calpers@calpers.ca.gov	Y	Y
<a href="#">Health Enrollment</a>	Sandra Fong		(916)795-3000	calpers@calpers.ca.gov	Y	Y
<a href="#">Payroll</a>	Shaunte Greene	Y	(916)795-3000	calpers@calpers.ca.gov	Y	Y
<b><a href="#">Financials</a></b>	Jennifer Chance		(916)795-3000	calpers@calpers.ca.gov	Y	N
<a href="#">Financials</a>	Davy Jones		(916)795-3000	calpers@calpers.ca.gov	Y	N
<a href="#">Contract Services</a>	Katherine Kasio		(916)795-3000	calpers@calpers.ca.gov	Y	N
<a href="#">Delegated Authority</a>	City Administrator		(916)795-3000		Y	N



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

**Maintain Contact Details**  
By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:** \* General

**Deactivation Date:** 12/06/2017

**Reactivate Contact:**

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**

- CalPERS ID:** 2701928128  
Contact Name: Kassie McDonald
- Other:** \_\_\_\_\_

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations

Primary Contact

[Delete](#)

Step 7 Does the contact need system access?

If...	Then...
Yes	Continue to step 8
No	Skip to step 15

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

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

If...	Then...
Yes	Skip to step 12
No	Continue to step 10

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

---

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



**Assigned Username** [Reset Password](#)

**Contact Name:** Kassie McDonald

**Contact Username:**

Prevent the user from accessing the site

Step 12 Does the user need their access updated?

If...	Then...
Yes	Continue to step 13
No	Skip to step 15

Step 13 Within the Assign Roles section, select and/or deselect the appropriate checkbox(es).



**Assign Roles** [Select All](#)

<input type="checkbox"/>	Role
<input type="checkbox"/>	Authorized Personal Loan Representative
<input checked="" type="checkbox"/>	Business Partner AR/Billing
<input checked="" type="checkbox"/>	Business Partner AR/Billing RO
<input checked="" type="checkbox"/>	Business Partner Appointment Management - Non-Pers and CalSTRS
<input checked="" type="checkbox"/>	Business Partner Direct Authorization
<input checked="" type="checkbox"/>	Business Partner Direct Authorization Agreements
<input checked="" type="checkbox"/>	Business Partner Employer Inquiry
<input checked="" type="checkbox"/>	Business Partner Employer Maintenance
<input checked="" type="checkbox"/>	Business Partner Health Contracts
<input checked="" type="checkbox"/>	Business Partner Health Enrollment
<input checked="" type="checkbox"/>	Business Partner Health Enrollment RO
<input type="checkbox"/>	Business Partner IME/JA
<input type="checkbox"/>	Business Partner Limited
<input checked="" type="checkbox"/>	Business Partner PA Billing
<input checked="" type="checkbox"/>	Business Partner Payroll

Step 14 Select the **Save** button.

---

Step 15 Within the Maintain Contact Details section update the appropriate checkboxes.

---

Step 16 Select the **Save** button.

---

Step 17 Does the user need their password reset?

<b>If...</b>	<b>Then...</b>
Yes	Return to Unit 2 Scenario 2
No	You have completed this scenario

**You have completed this scenario.**

---

# Scenario 11: Lock a User's System Access

## Scenario

You will lock a user's my|CalPERS system access.

## System Logic

Locked users will not have my CalPERS access, but will remain as an active contact.

## Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

Step 3 Select the **Contact Type** link of the user.

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

Step 4 Within the Maintain Contact Details section, select the **System Access** link.

**Maintain Contact Details**

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:**\*

**Deactivation Date:**

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**

- CalPERS ID:**
- Other:**

Allow System Access

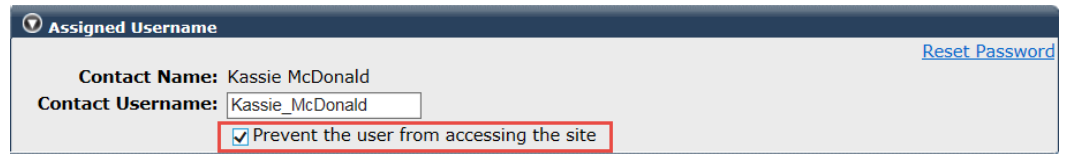
Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[Delete](#)

Step 5      Within the Assigned Username section, you will select the **Prevent the user from accessing the site** checkbox.



Assigned Username [Reset Password](#)

Contact Name: Kassie McDonald

Contact Username:

Prevent the user from accessing the site

---

Step 6      Select the **Save** button.

---

Step 7      Select the **Save** button.

**You have completed this scenario.**

---

## Scenario 12: Unlock a User's System Access

### Scenario

You will unlock a user's my|CalPERS system access.

### System Logic

Once an account is unlocked it will be restored to its previous status. In result, the user's system access will be the same as it was prior to their account being locked.

A user's account may also be locked due to six consecutive, unsuccessful password attempts. See Unit 2 Scenario 2 to reset their password to unlock their account.

### Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

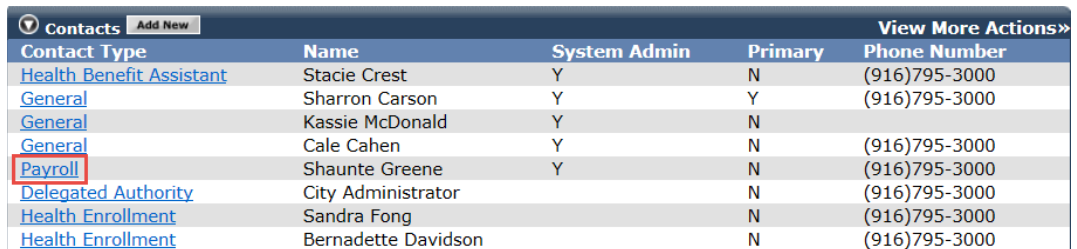
---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

---

Step 3 Select the **Contact Type** link of the user.



Contact Type	Name	System Admin	Primary	View More Actions» Phone Number
<a href="#">Health Benefit Assistant</a>	Stacie Crest	Y	N	(916)795-3000
<a href="#">General</a>	Sharron Carson	Y	Y	(916)795-3000
<a href="#">General</a>	Kassie McDonald	Y	N	
<a href="#">General</a>	Cale Cahen	Y	N	(916)795-3000
<b>Payroll</b>	Shaunte Greene	Y	N	(916)795-3000
<a href="#">Delegated Authority</a>	City Administrator		N	(916)795-3000
<a href="#">Health Enrollment</a>	Sandra Fong		N	(916)795-3000
<a href="#">Health Enrollment</a>	Bernadette Davidson		N	(916)795-3000

---

Step 4 Within the Maintain Contact Details section, select the **System Access** link.

**Maintain Contact Details**

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

**Contact Type:** \* General

**Deactivation Date:** [Calendar icon]

**Programs Supported:**

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

**Entity:**  **CalPERS ID:** 01234567890  
Contact Name: Kassie McDonald

**Other:** [Text field]

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations

Primary Contact

[Delete](#)

Step 5 Within the Assigned Username section, you will deselect the **Prevent the user from accessing the site** checkbox.

**Assigned Username** [Reset Password](#)

**Contact Name:** Kassie McDonald

**Contact Username:** Kassie\_McDonald

Prevent the user from accessing the site

Step 6 Select the **Save** button.

Step 7 Select the **Save** button.

**You have completed this scenario.**

## Scenario 13: Delete a Contact

### Scenario

You will delete a contact that was created in error.

### System Logic

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

### Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

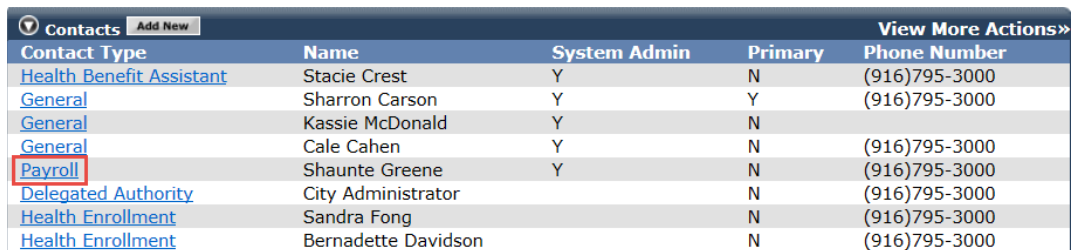
---

Step 2 Within the Contacts section, locate the user.

If the contact is...	Then...
Listed	Continue to step 3
Not listed	Select the <b>View More Actions</b> link and continue to step 3

---

Step 3 Select the **Contact Type** link of the user.



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

---

Step 4 Within the Maintain Contact Details section, select the **Delete** link.

---

Step 5 Within the Message from webpage dialogue box, select the **OK** button.

**You have completed this scenario.**

---



## Unit 3: Maintain Agency Information

### Introduction

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

### Contents

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<a href="#">Scenario 2: Update Agency Phone Number and Email Address</a>	42

# Scenario 1: Update Agency Address

## Scenario

You will update your agency's physical and mailing addresses.

## Step Actions

Step 1 From the my|CalPERS Home page, select the **Profile** global navigation tab.

---

Step 2 Within the Summary section, select either the **Physical** or **Mailing** link.

The screenshot shows the 'Summary' section of the Profile page. It includes fields for CalPERS ID, Federal Tax ID, Category, County, Division Of, Merged Agency, Status, Name, Regional Office, Governing Body, and Transit Workers. Below this is the 'Addresses' section with 'Physical' and 'Mailing' links, each followed by the address '400 P ST SACRAMENTO, CA 95814-5345' and 'Undeliverable: No'. The 'Communication Information' section shows 'Preferred Communication: Mail' and 'Primary Phone Number: (916) 795-3000'.

Step 3 Update/correct the information contained in the Maintain Address Details section.

The screenshot shows the 'Maintain Address Details' form. It includes a note: 'All address changes are effective immediately.' The form fields are: Address Type: Mailing Address; Start Date: 12/06/2017; Address: 400 P ST; Country: United States; City: SACRAMENTO; State: California; County: Sacramento; Zip Code: 95814 - 5345.

Step 4 Select the **Save** button.

---

Step 5 Review the U.S. Postal Service Matches.

If it is	Then...
Correct	Select the <b>Confirm</b> button and skip to step 9
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 <b>Confirm</b> 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

### Scenario

You will update your agency's phone numbers and email addresses.

### Step Actions

Step 1 From the my|CalPERS Home page, 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 section, update the necessary communication information for your agency.

Maintain Preferred Communication Details				
Preferred Communication:		Mail		

Maintain Communication Details				
Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Work	(916)795-3000		<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary	Email
<input checked="" type="radio"/>	calpers@calpers.ca.gov
<input type="radio"/>	

Step 4 Select the **Save** button.

**You have completed this scenario.**

---

# CalPERS Resources and Contacts

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# CalPERS Resources

## Introduction

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at [www.calpers.ca.gov](http://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](#)  
**Pathway:** CalPERS website > Employers > I Want To... : Find my|CalPERS Student Guides > Online Classes for Employers
- [Employer Education Schedule](#)  
**Pathway:** CalPERS website > Employers > I Want To... : Find my|CalPERS Student Guides > Employer Education Schedule
- [my|CalPERS Technical Requirements](#)  
**Pathway:** CalPERS website > Employers > my|CalPERS Technical Requirements
- [CalPERS Public Agency & Schools Reference Guide](#)  
**Pathway:** CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Reference Guide
- [Circular Letters - CalPERS](#)  
**Pathway:** CalPERS website > Employers > Policies & Procedures > Circular Letters
- [California Public Employees' Retirement Law \(PERL\) - CalPERS](#)  
**Pathway:** CalPERS website > About > Laws & Regulations > California Public Employees' Retirement Law (PERL)

## CalPERS Contacts

### Contact CalPERS via Email

- To contact [training staff and CalPERS subject matter experts](#) for questions and inquiries, email [CalPERS\\_Employer\\_Communications@CalPERS.CA.GOV](mailto: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](mailto: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.