

my|CalPERS System Access Administration

Student Guide

July 18, 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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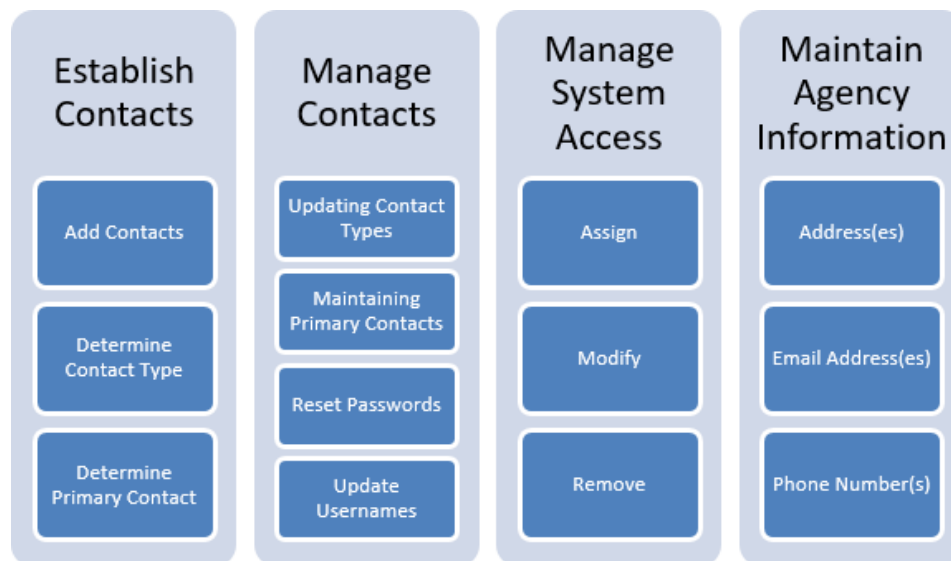
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Introduction to System Access Administration

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

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:*

Programs Supported:

- CalPERS
- Health - Medical
- Social Security

Entity:*

- CalPERS ID or SSN:** [Verify](#)
- Other:**

Allow System Access

Make Contact Viewable to Other Organizations

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. 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	
<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

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

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.

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 (-).

Step Actions

Step 1 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
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).

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: *

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity: *

CalPERS ID: [Clear](#)

Contact Name: Kassie McDonald

Other:

Allow System Access

Make Contact Viewable to Other Organizations

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** (dropdown menu open showing Physical, Mailing)

Address: *

Country: * United States (dropdown menu)

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="checkbox"/>
<input type="radio"/>		<input type="checkbox"/>
<input type="radio"/>		<input type="checkbox"/>

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 Select the **Save** button.

Step 19 Provide the username and temporary password to the contact.



Step 20 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.

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).

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: *

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity: *

CalPERS ID: [Clear](#)

Contact Name: Kassie McDonald

Other:

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

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).

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: *

Programs Supported: CalPERS
 Health - Medical
 Reciprocal
 Social Security

Entity: * CalPERS ID: [Clear](#)
Contact Name: Kassie McDonald
 Other:

Allow System Access
 Make Contact Viewable to Other Organizations
 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: *
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"/>		

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	<ul style="list-style-type: none"> Allows you to grant system access to a contact who currently cannot access my CalPERS
Revoke system access	<ul style="list-style-type: none"> A contact with system access no longer need access to my CalPERS Contact will remain active under your agency
Update system access	<ul style="list-style-type: none"> Allows you to add or remove user roles as duties change
Add additional System Access Administrator	<ul style="list-style-type: none"> Each agency should have two or more SAAs Allows you to designate a contact as a SAA
Elect a new primary contact	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> The SAA can change due to changes in duties or personnel
Update the preferred method of communication	<ul style="list-style-type: none"> Allows a contact's contact information to be shared with other organizations
Unlock system access	<ul style="list-style-type: none"> System access can become locked due to five consecutive password attempts, incorrect answers to security questions 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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
Reactivate account	<ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> – Review the current user roles – Reset the contact's password
Delete contact	<ul style="list-style-type: none"> • 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 (-).

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.

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, check the **Allow System Access** 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: * 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 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.

The screenshot shows two sections of a web application. The top section is titled "Assigned Username" and contains the following information: "Contact Name: Kassie McDonald" with a "Reset Password" link to its right; "Contact Username: Kassie_McDonald" in a text input field; and a checkbox labeled "Prevent the user from accessing the site" which is currently unchecked. The bottom section is titled "Assign Roles" and features a "Select All" link. Below this is a table of roles with checkboxes:

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

Step 9 Select the **Save** button.

Step 10 Provide the username and temporary password to the contact.

Step 11 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.
- They will still remain an active contact under your agency.
- The contact will remain a contact for 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.

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.

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:

Contact Name: Kassie McDonald

Other:

Allow System Access

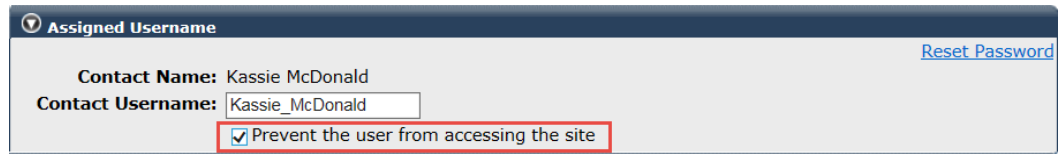
Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[Delete](#)

Step 6 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 7 Select the **Save** button.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 3: Update 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, 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: []

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity: CalPERS ID: 01234567890
Contact Name: Kassie McDonald

Other: []

Allow System Access
 Make Contact Viewable to Other Organizations
 Primary Contact

[System Access](#)

[Delete](#)

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

Assign Roles

[Select All](#)

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

Step 7 Select the **Save** button.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 4: Add Additional System Access Administrator

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.

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.

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 [System Access](#)

Make Contact Viewable to Other Organizations

Primary Contact

[Delete](#)

Step 6

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

The screenshot shows a web interface titled "Assign Roles" with a "Select All" link. Below the title is a table with a "Role" header. 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. Other checked roles include "Business Partner Employer Inquiry", "Business Partner Employer Maintenance", "Business Partner PA Billing", "Business Partner Payroll", "Business Partner Retirement Enrollment", and "GASB Contact".

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 checked="" 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 checked="" 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 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 Social Security
<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 7

Select the **Save** button.

Step 8

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

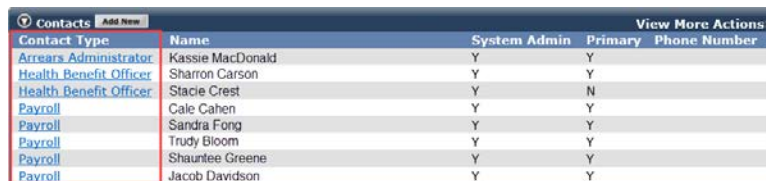
Step 1 Select the **Profile** global navigation tab.

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.



Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharon 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, 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:

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity: CalPERS ID: 0123456789
 Contact Name: Kassie McDonald
 Other:

Allow System Access
 Make Contact Viewable to Other Organizations
 Primary Contact

[System Access](#) [Delete](#)

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.



The screenshot shows a table with the following data:

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.



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



Maintain Preferred Comm Details

Preferred Communication:

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 2 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.



The screenshot shows a table with the following data:

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.

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

Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[Delete](#)

Step 6 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 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

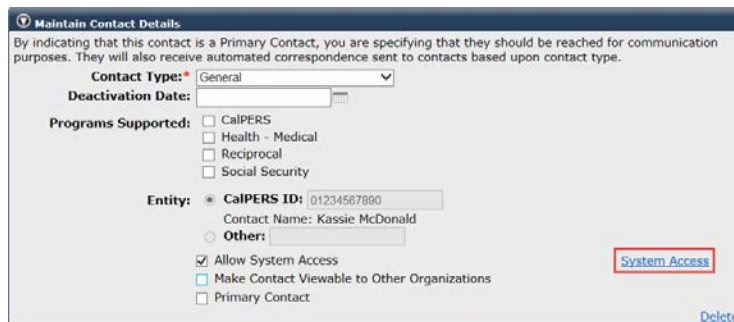
Step 3 Select the **View More Actions** link.

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



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.



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:
- Contact Name:
- Other:

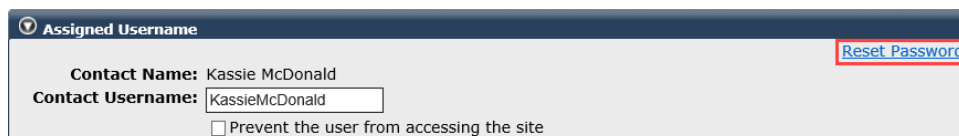
Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations

Primary Contact

[Delete](#)

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



Assigned Username

Contact Name:

Contact Username:

Prevent the user from accessing the site

[Reset Password](#)

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

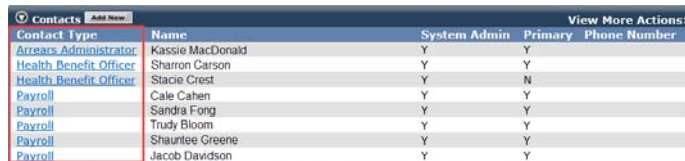
Step 1 Select the **Profile** global navigation tab.

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.



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.



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: 01234567890
- Other:

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[Delete](#)

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



Assigned Username

Contact Name: Kassie McDonald

Contact Username:

Prevent the user from accessing the site

[Reset Password](#)

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.



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.

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:* Arrears Administrator

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Social Security

Entity:

- CalPERS ID:** 0123456789
- Other:**

Contact Name: Kassie McDonald

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations

Primary Contact

[Delete](#)

Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 12: Reactivate Account

System Logic

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.

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 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 15

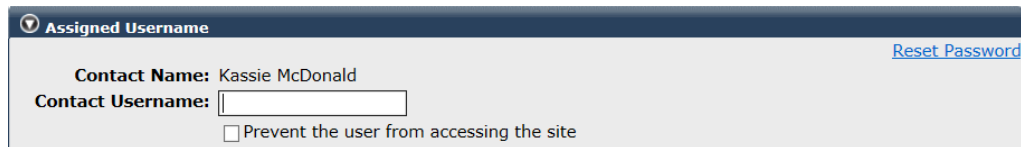
Step 8 Select the **Allow System Access** checkbox.

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

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

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

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



Assigned Username [Reset Password](#)

Contact Name: Kassie McDonald

Contact Username:

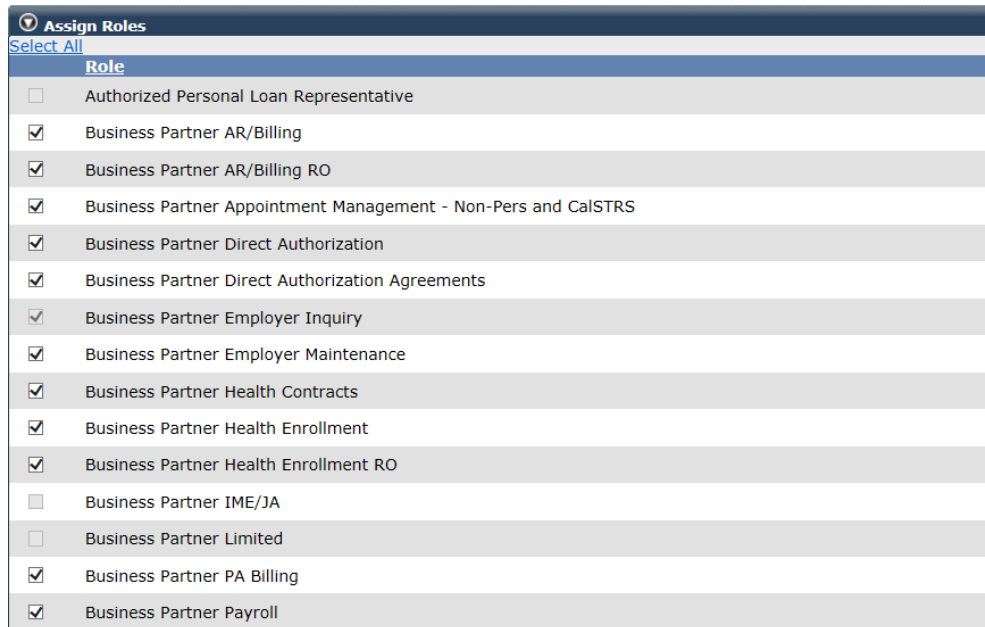
Prevent the user from accessing the site

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 16

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



Assign Roles [Select All](#)

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 15 Select the **Save** button.

Step 16 Within the Maintain Contact Details section, update the appropriate checkboxes.

Step 17 Select the **Save** button.

Step 18 Does the contact need their password reset?

If...	Then...
Yes	Return to Unit 2 Scenario 3
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

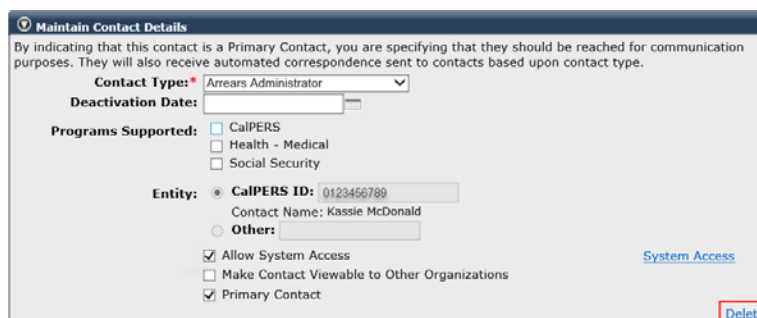
Step 3 Select the **View More Actions** link.

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



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.



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: * Arrears Administrator

Deactivation Date: []

Programs Supported:

- CalPERS
- Health - Medical
- Social Security

Entity:

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

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

Delete

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

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 2: Update Agency Phone Number and Email Address	35

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.

The screenshot shows a 'Summary' section with a 'Profile' sub-section. It contains the following information:

- CalPERS ID:** 0123456789
- Federal Tax ID:** 00-0000000
- Category:** Public Agency
- County:** Alameda
- Division Of:**
- Merged Agency:** No
- Status:** Active
- Name:**
- Regional Office:** Walnut Creek Regional Office
- Governing Body:**
- Transit Workers:** No

Below this is an 'Addresses' section with two entries:

- Physical:** 400 P ST, SACRAMENTO, CA 95814-5345
- Mailing:** 400 P ST, SACRAMENTO, CA 95814-5345

Both address entries have 'Undeliverable: No' listed below them.

At the bottom is a 'Communication Information' section with:

- Preferred Communication:** Mail
- Primary Email:**
- Primary Phone Number:** (916) 795-3000

A 'Request Update' link is visible in the top right corner of the profile section.

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.

The screenshot shows two stacked form panels. The top panel is titled 'Maintain Preferred Communication Details' and has a 'Preferred Communication:' dropdown menu set to 'Mail'. The bottom panel is titled 'Maintain Communication Details' and contains a table for phone numbers and an email field.

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"/>

Below the table is an email field with a 'Primary' radio button selected and the email address 'calpers@calpers.ca.gov' entered. There is also an empty email field below it.

-
- 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](http://www.calpers.ca.gov) 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

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.