

Scenario 1: Add a Contact Without System Access

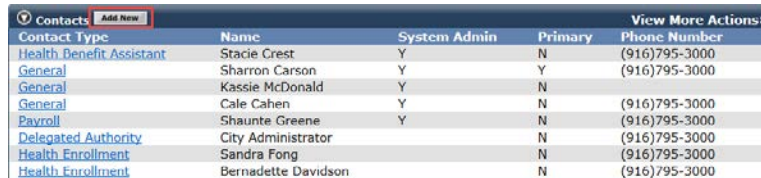
System Logic

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

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

Step 6 Select the **Verify** link.

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

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

Step 8 Complete the Person Details section.

Step 9 Select the **Save** button.

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

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

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

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"/>		

Step 15 Select the **Save** button.

You have completed this scenario.

Scenario 2: Add a Contact with System Access

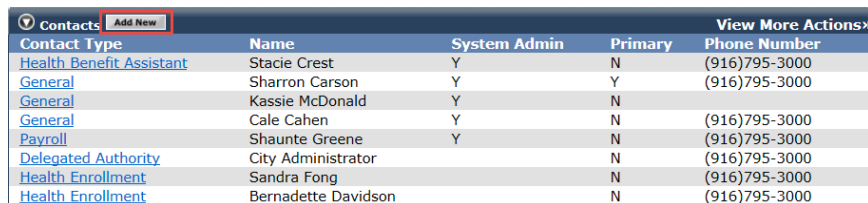
System Logic

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 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.

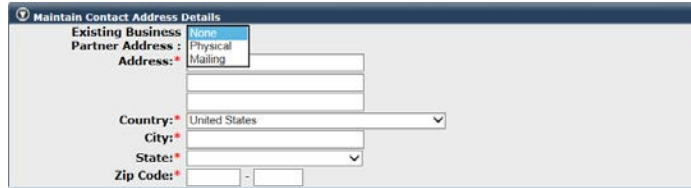
Step 8 Complete the Person Details section.

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** checkbo(es)..

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

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



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

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



Step 15 Select the **Save** button.

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



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.



Step 20 Select the **Continue** button.

You have completed this scenario.

Unit 2: Maintain Existing Contacts

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 contacts are kept up to date, your agency prevents unauthorized access to the agency and employee information within my|CalPERS.

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

Username 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 user.

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 user.

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](#)
- 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 user.

The screenshot shows two sections of a user management interface. The top section, titled 'Assigned Username', 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, titled 'Assign Roles', has 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 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.

You have completed this scenario.

Scenario 2: Revoke System Access

System Logic

- Revoking system access is used when a user no longer need access to my|CalPERS.
- The user will remain an active contact for your agency. If the user'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 user.

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 user.

Step 5 Within the Maintain Contact Details section, uncheck 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: *

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity:

- CalPERS ID:**
- Contact Name:**
- Other:**

Allow System Access
 Make Contact Viewable to Other Organizations
 Primary Contact

[Delete](#)

Step 6 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 user.

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 user.

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 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 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 type="checkbox"/>	System Access Administrator
Select All	

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 user.

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 user.

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

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". The main area is a table with a header "Role" and a list of roles, each with a checkbox. The "System Access Administrator" role is checked and its checkbox is highlighted with a red box. At the bottom of the list, there is another link "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 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

Scenario

You will assign 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 for the contact type, the system will remove their primary contact status once a new primary contact is elected.

Step Actions

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

Step 2 Within the Contacts section, locate the user.

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 user.



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 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
 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: Change Contact Type

Step Actions

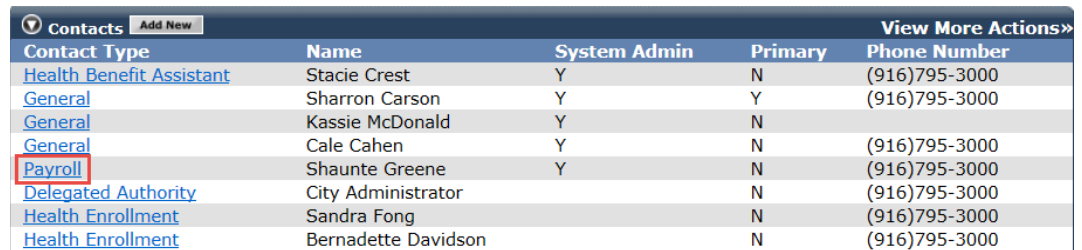
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the user.

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 user.



The screenshot shows a table with the following columns: Contact Type, Name, System Admin, Primary, and Phone Number. The 'Payroll' contact type is highlighted with a red box.

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 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: Change 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 user.

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 user.

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

Maintain Preferred Commu	Details
Preferred Communication:	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #e0e0e0; padding: 2px;">Mail</div> <div style="padding: 2px;">Email</div> </div>

Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 8: Unlock System Access

System Logic

- Once an account is unlocked it will be restored to its previous status. 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

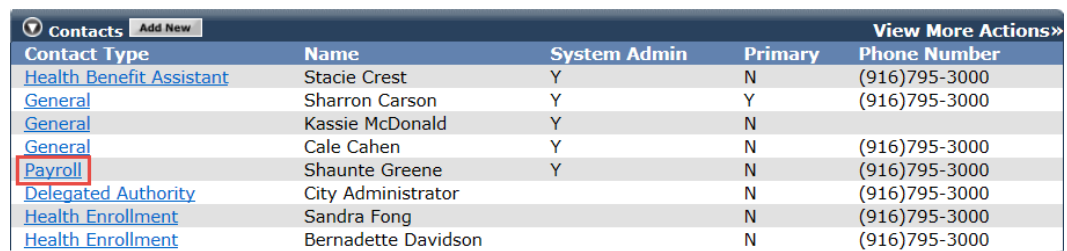
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the user.

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 user.



The screenshot shows a table with the following columns: Contact Type, Name, System Admin, Primary, and Phone Number. The 'Payroll' contact type is highlighted with a red box.

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 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 [System Access](#)

Make Contact Viewable to Other Organizations

Primary Contact

[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

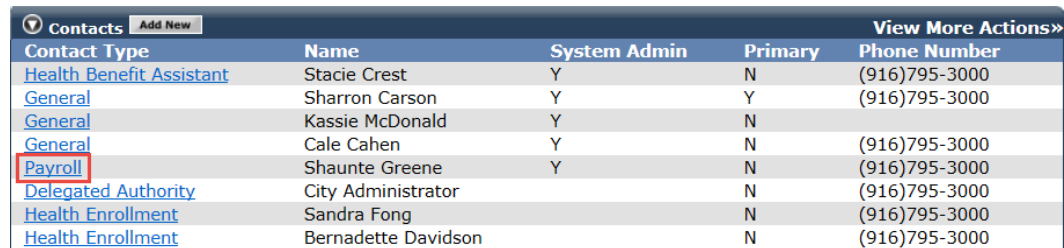
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the user.

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

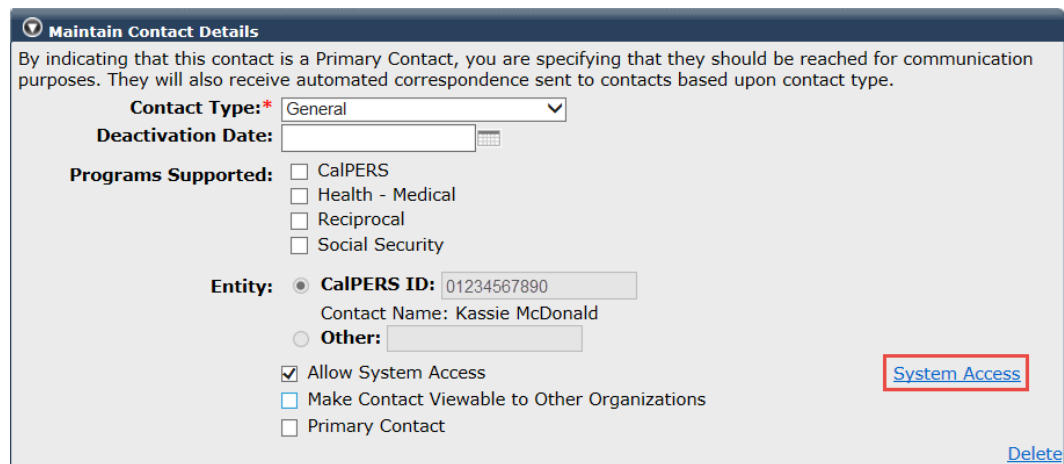
Step 3 Select the **View More Actions** link.

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



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 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 Username section, select the **Reset Password** link.

Step 7 Provide the contact with their temporary password.

Step 8 Select the **Continue** button.

You have completed this scenario.

Scenario 10: Change 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

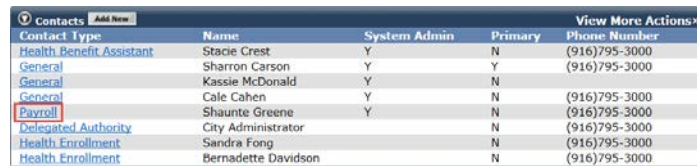
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the user.

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 user.



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 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

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:

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 user will not be able to log into my|CalPERS and will no longer be listed as an active contact.
- 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 users' 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 user.

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

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

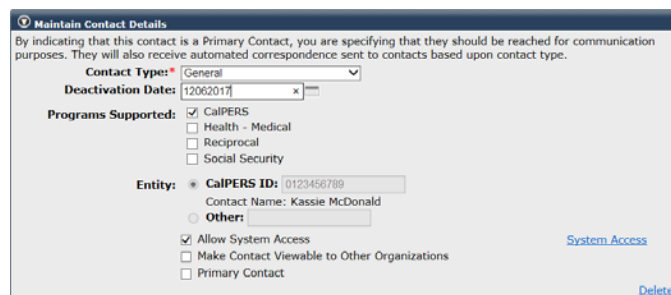
Step 4 Select the **Contact Type** link of the user.



A screenshot of a web application showing a table of contacts. The table has columns for Contact Type, Name, System Admin, Primary, and Phone Number. The 'View More Actions' link is visible in the top right corner. The 'Payroll' contact type is highlighted in red.

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



A screenshot of the 'Maintain Contact Details' form. The form includes a 'Contact Type' dropdown menu set to 'General', a 'Deactivation Date' text box containing '12/06/2017', and a 'Programs Supported' section with checkboxes for 'CalPERS', 'Health - Medical', 'Reciprocal', and 'Social Security'. The 'Entity' section has radio buttons for 'CalPERS ID' (selected) and 'Other'. There are also checkboxes for 'Allow System Access', 'Make Contact Viewable to Other Organizations', and 'Primary Contact'. A 'System Access' link and a 'Delete' button are visible at the bottom right.

Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 12: Reactivate Account

System Logic

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

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	Phone Number	Email	Active	Primary
General	Sharron Carson	Y	(916)795-3000	calpers@calpers.ca.gov	Y	Y
Health Benefit Assistant	Stacie Crest	Y	(916)795-3000	calpers@calpers.ca.gov	Y	Y
Health Enrollment	Sandra Fong		(916)795-3000	calpers@calpers.ca.gov	Y	Y
Payroll	Shaunte Greene	Y	(916)795-3000	calpers@calpers.ca.gov	Y	Y
Financials	Jennifer Chance		(916)795-3000	calpers@calpers.ca.gov	Y	N
Financials	Davy Jones		(916)795-3000	calpers@calpers.ca.gov	Y	N
Contract Services	Katherine Kasio		(916)795-3000	calpers@calpers.ca.gov	Y	N
Delegated Authority	City Administrator		(916)795-3000		Y	N

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 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.

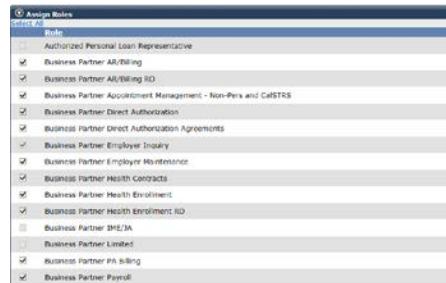
Step 11 Within the Assigned Username section, enter a username for this user.



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).



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?

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 user is created in error.

Step Actions

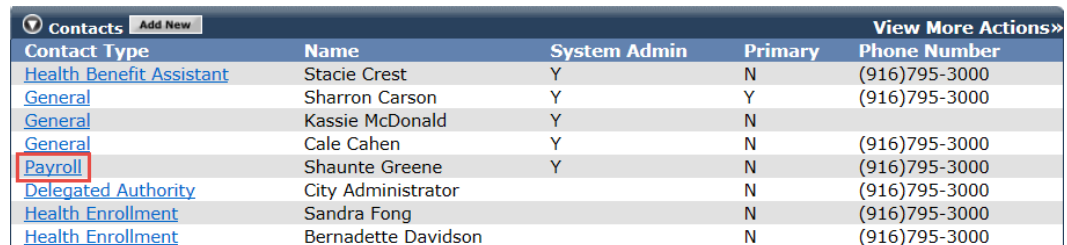
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, locate the user.

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 user.



The screenshot shows a table with the following data:

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	(916)795-3000
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 5 Within the Maintain Contact Details section, select the **Delete** link.

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

You have completed this scenario.

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.

Contents

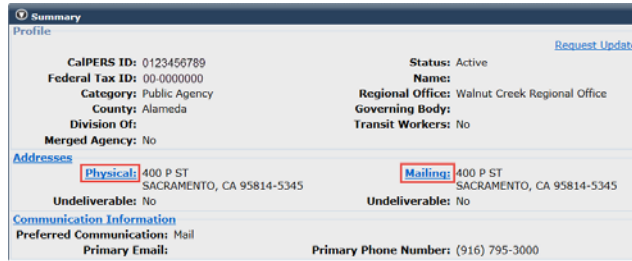
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Scenario 2: Update Agency Phone Number and Email Address	33

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' page with a 'Profile' section containing 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 the profile information 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, there is a 'Communication Information' section with 'Preferred Communication: Mail' and 'Primary Email:' followed by a 'Primary Phone Number: (916) 795-3000'.

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

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 section, 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 contains a 'Preferred Communication:' dropdown menu with 'Mail' selected. The bottom panel is titled 'Maintain Communication Details' and contains a table for phone information and an email section.

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**

calpers@calpers.ca.gov x

- Step 4 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](#)
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 \(PERL\)](#)
Pathway: CalPERS website > About > Laws & Regulations > California Public Employees' Retirement Law (PERL)

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.