Online classes provide a convenient, self-directed, and self-paced training experience. You can enroll through the Education tab in my|CalPERS. Log in as a business partner to register. If you don’t have my|CalPERS access, contact your agency’s system access administrator (SAA).

my|CalPERS Training

**Retirement Enrollment**
- Add a New Appointment
- Correcting Appointment & Demographic Information
- Correcting Unused Sick Leave Balances
- Enrolling a Retired Annuitant
- Permanent Separation
- Process a Leave of Absence
- Searching for a Participant
- Upload & Submit a Retirement Enrollment
- Verification of Membership Eligibility

**Health**
- Add a New COBRA Enrollment
- Change/Cancel Health Plans & Delete Dependent
- Dental Enrollment Into Retirement
- Exporting the Health Billing Roster
- New, Add a Dependent & Rescind a Health Enrollment
- Non-CalPERS Enrollment
- Set Up Direct Pay
- Upload & Submit a Health Enrollment File

**System Access Administration**
- Add & Maintain a Business Partner Contact
- Managing Your Agency’s Access & Communication Information
- Reset Password & Change Username

**Overview**
- How to Navigate
- Log In & Reset Your Password
- Upload & View Documents

**Payroll**
- Adjustment Reports
- Copy Forward an Earned Period Report
- How to Reverse a Payroll Record
- Manage Records in a Payroll Report
- Reporting & Adjusting Special Compensation
- Reporting Earnings Over the Compensation Limit
- Request Extension for an Earned Period Report
- Search & Reverse Posted Payroll Records
- Simplified Payroll Adjustment Process
- Upload & Submit a Report
- View Service & Transaction History

**Payments**
- Add a Payment Account
- Paying a Receivable
- Payment Through Employer Reporting
- Projected Contributions
- View Billing & Payment Summary
- View Health Statements & Billing Roster
- View Payment History
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my|CalPERS Training, continued

Contracts
• Adding a Position Title
• Contract Amendments
• How to Request a Valuation
• Navigate Your Retirement Contract Benefits
• Public Agency Golden Handshake
• Schools Golden Handshake
• Submitting Tax-Deferred EPMC Resolution

Other Topics
• Audits: Business Partner Review Functionality
• Out-of-Class: Reporting
• Reports: Generate & Manage Cognos Reports
• Retirement Appointment Reconciliation

Business Rules

Payroll Reporting
• Special Compensation for Public Agencies & Schools
• The Importance of Accurately Reporting Payroll

Health
• Contracting Agency Health Billing (public agency & schools only)
• Health Benefits Into Retirement
• Health Benefits Officer
• Health Eligibility Requirements
• Health Enrollment
• Health Plan Options
• Retiree Dental & Vision Coverage (state only)
• Survivor Health Benefits

About CalPERS
• CalPERS 101: More Than Just a Retirement System
• Retirement Contracts for Public Agencies & Schools

Membership
• Qualifications for California State Universities
• Qualifications for Public Agencies
• Qualifications for Schools
• Qualifications for State Agencies