my|CalPERS Quick Reference Guide for Employers

The my|CalPERS Quick Reference Guide provides employers the steps to easily perform common my|CalPERS functions.

General:

Print Options

- Ctrl+P
- Right mouse click and select Print...
- Select File then select Print...

Refresh Options

- Select Home
- Select my|CalPERS

Password:

Unlock an Account Options

An account will be locked after five unsuccessful login attempts within 24 hours; however:

- The account will be automatically unlocked after 24 hours
- Contact your System Access Administrator
- Call CalPERS at **888 CalPERS** (or **888**-225-7377)

Change a Password

- Without being logged in or after it has expired:
  1. Enter username then select Continue
  2. Select Forgot your Password?
- With being logged in:
  1. Select Contact Personal Security Settings
  2. Select Edit password

Employee Query:

View Employee Appointment Information

1. Select Person Information
2. Enter the SSN or CalPERS ID Search

View Employee Health Account Summary Information

1. Select Person Information
2. Enter the SSN or CalPERS ID Search
3. Select Health Enrollment
4. Select CalPERS Employment

Select the title of each section to open the corresponding online student guide.

Demographic and Address Changes:

1. Select Person Information
2. Enter the SSN or CalPERS ID, Search
3. Update options:
   - Select Update Personal Information to update SSN, name, gender & date of birth
   - Select the appropriate Update link to update contact information

Retirement/Membership:

Process a Retirement/ Membership Transaction

1. Select Reporting
2. Select Add Retirement Enrollment from the dropdown list
3. Select Continue

Add an Additional Appointment

1. Select Person Information
2. Enter the SSN or CalPERS ID Search
3. Select Add New

Add a New Appointment Event

1. Select Person Information
2. Enter the SSN or CalPERS ID Search
3. Select the employer name
4. Select Add New

Payroll:

Start a New Earned Period Report

1. Select Reporting
2. Select Copy Prior Posted Payroll Report from the dropdown list
3. Select Continue

Payroll Adjustment:

Start a New Payroll Adjustment Report

1. Select Reporting
2. Select **Adjustment Reports**
3. Select Manually Enter Payroll Records from the dropdown list
4. Select Continue

Add a New Payroll or Adjustment Record

1. Enter the employee's SSN or CalPERS ID
2. Select Add New
3. Select Display

Public Agencies and Schools Health & State Agencies Health:

Process a Health Transaction

1. Select Reporting
2. Select Add or Edit Health Enrollment from the dropdown list
3. Select Continue
4. Select Add New
5. Select Select
6. Enter the employee's SSN or CalPERS ID
7. Select Search
8. Select Select

View Health Billing Roster

1. Select Reporting
2. Select Billing and Payments
3. Select View Invoice History
4. Select **Receivable ID**
5. Select View Billing Roster

Cognos Reports:

Run a Report without Options

1. Select Common Tasks at upper left
2. Select Reports
3. Select My home
4. Select PSR_REPORTS_ENV98 (link, not folder)
5. Locate & select the **report name**
6. Enter the criteria
7. Select Finish at bottom left

Create a Folder

1. Select
2. Enter a name for the folder
3. Select either Select another location... or Select My Folders
4. Select Finish

Save a Report to a Folder

1. Locate the report
2. Select
3. Select advanced options.
4. Select Run in the background:
5. Select Edit the options...
6. Select Select another location...
7. Select OK
8. Select Run

System Access Administration:

Add a Contact

1. Select Profile
2. Select Add New within the Contacts Section
3. Enter the contact's SSN or CalPERS ID
4. Select Verify
5. Select the Contact Type
6. Select the ☐ if applicable:
   - Allow System Access
   - Make Contact Viewable to Other Organizations
   - Primary Contact
7. Select Mail or Email
8. Select Physical or Mailing
9. Provide contact phone number(s) and/or email address
10. Select ○ for a primary phone number and email address
11. Select Save

Grant System Access to an Existing Contact

1. Locate the contact
2. Select the Contact Type for the contact
3. Select ☑ Allow System Access
4. Select System Access
5. Complete the **Contact Username:***
6. Check the ☐ for each appropriate User Role
7. Select Save

Electronic Funds Transfer (EFT):

Set Up an EFT – Debit Account

1. Select Profile
2. Select Receivables
3. Select Payment Accounts
4. Select Add New
5. Complete all fields
6. Select Save & Continue

Pay a Single Receivable by EFT – Debit

1. Select Profile
2. Select Receivables
3. Select ☐ for a receivable
4. Select Make Payment at bottom left
5. Select Make a Payment at bottom left
6. Complete payment information

Instructor-led training registration and online classes are available via the myICalPERS **Education** tab. If you do not have access to myICalPERS, please contact your System Access Administrator (SAA).

