my|CalPERS System Access Administration & Establish a Business Partner Relationship

Student Guide

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System Access Administration & Establish a Business Partner Relationship

Overview

Course Objectives

The purpose of this guide is to assist a my|CalPERS system access administrator in adding new users, updating system access, disabling user accounts, and establishing business partner relationships.

The soft copy of this guide is easily accessible on the CalPERS website. Simply navigate to the my|CalPERS Student Guides page by using this **Pathway**: CalPERS website > Employers > I Want To…:Find my|CalPERS Student Guides

Disclaimer: No actual employer or member information was compromised in the making of this my|CalPERS student guide.

Contents

This supplemental guide contains the following topics:

Introduction to System Access Administration

System Access Administrator

A System Access Administrator (SAA) serves a critical role for your agency, with the responsibility to maintain access their agency's my|CalPERS account.

SAA responsibilities include:

- Maintain agency contacts, contact types, primary contacts and system privileges/user roles
- Maintain accurate agency contact information
- Deactivate and reactivate user accounts
- Identify additional SAA's for your agency
- Reset user passwords and update usernames
- Create business partner relationships

CalPERS recommends that each agency establish more than one SAA for situations when an SAA may be out of the office or needs their own account maintained. If the SAA is unavailable (e.g., left your agency, on vacation, etc.), call CalPERS toll-free at **888 CalPERS** (or **888**-225-7377) for assistance.

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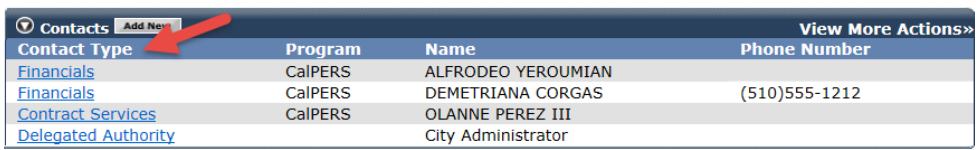
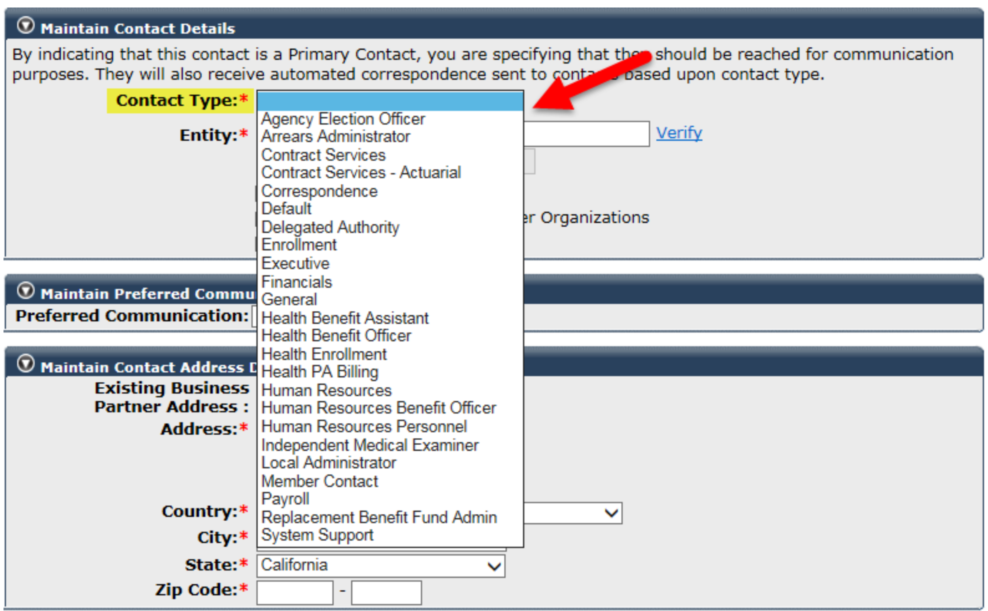
Contact

A contact is someone who represents your agency that the SAA has added to your agency's Contacts list in my|CalPERS. Each contact listed for an agency is required to have a Contact Type assigned to them. Being listed as a contact for an agency does not grant an individual the user role(s) needed to view agency information, process transactions and/or run reports.

Contact Types

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





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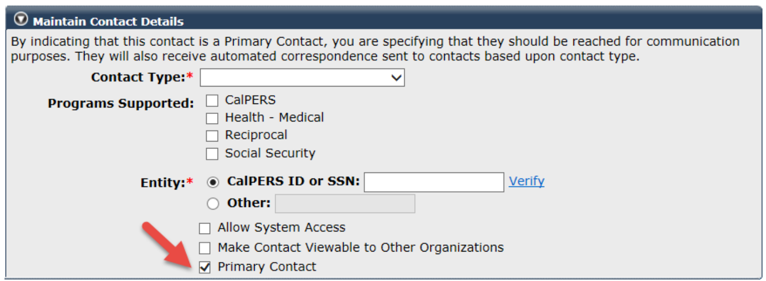
Primary Contact

A primary contact is a person who has been designated and will receive direct communication from CalPERS related to their assigned contact type. Each agency should establish one primary contact for each contact type applicable to their agency. An agency cannot have individuals assigned to a contact type without electing one of those as the primary contact. So if there is only one individual assigned to a contact type, that contact must be the primary contact.



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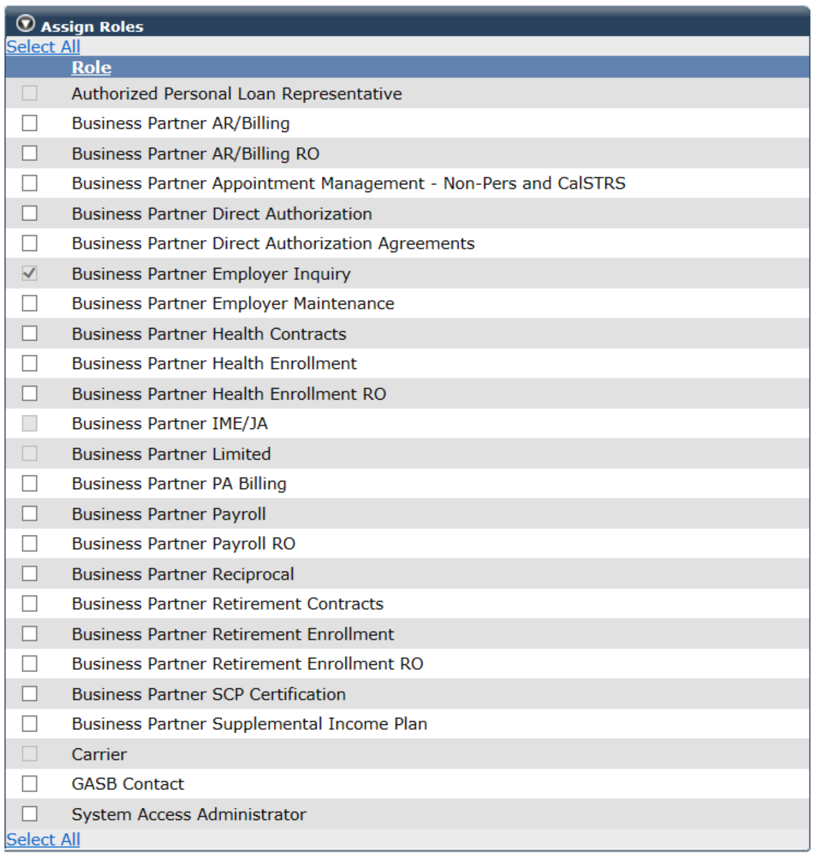
Assigning System Privileges

Roles should be assigned based on the duties the business partner contact will be performing for your agency. To determine the roles that should be assigned, review the my|CalPERS System Privileges for Business Partner Roles on the CalPERS website.

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > System Access Administrators > Resources: my|CalPERS System Privileges for Business Partner Roles

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



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Read Only (RO) User Roles

Read Only (RO) roles allow an SAA to grant system access that allows the user to only view information (including running reports) in my|CalPERS, but does not allow the user to modify or change the information.

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

The system privileges granted under a Read Only role are included in the non-Read Only role system privileges.

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Maintaining Accounts

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

The list below contains the actions an SAA can perform to maintain the proper system access for their agency's users.

SAA Action	Result
Admin Lock	• Removes system access without changing the active status of a contact • Used for temporarily removing system access
Admin Unlock	• Reestablishes system access for the user
Deactivate a Contact	• Removes system access and changes contact status to inactive • Used for permanent removal of a user's system access
Reactive a Contact	• Reestablishes system access of a deactivated contact • Changes the status of the contact to active
Delete a Contact	• Deletes a contact from the employer • Should only be used when a contact was created in error

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Passwords

Passwords are the key to keeping your employees' information out of the hands of those who shouldn't have it. A contact is required to change their password every 60 days. After 45 days, a warning message will appear informing the contact to change their password. After five unsuccessful password attempts, a user's account will automatically lock.

Users and SAAs can change or reset their passwords by:

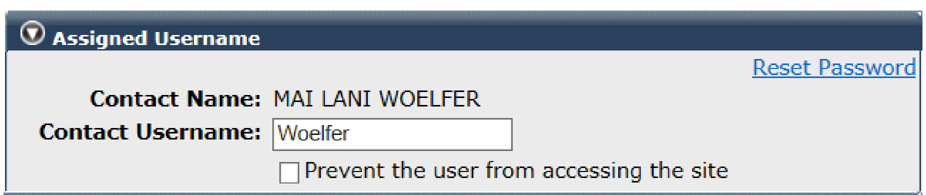
- Selecting the **Forgot your Password?** link at login. Users will then be prompted to provide their agency and user information as it appears in the my|CalPERS system
- Selecting the **Contact Personal Security Settings** link on the left-side navigation (see Reset Your Own Password in the Appendix)
- Contacting CalPERS at **888 CalPERS** (or **888**-225-7377)

An SAA can reset passwords for users other than themselves by:

- Selecting the specific user from your agency's Contact List followed by the **System Access** link
- Contacting CalPERS at **888 CalPERS** (or **888**-225-7377)

Usernames

When a user is granted system access, the SAA creates a unique username for the user. Only the SAA has the ability to view or modify a user's username, other than their own.



Username criteria:

- Must consist of 6-35 characters with no spaces
- Valid characters are numbers, letters, and the following special characters: at sign (@), period (.), underscore (_), and hyphen (-)
- Usernames must also start with a letter and are not case sensitive

An SAA should contact another SAA within their agency for assistance with their own username. If no other SAAs are available, contact CalPERS toll-free at **888 CalPERS** (or **888**-225-7377).

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Business Relationships

A Business Relationship can be established between two agencies, or an agency and a company. The outside agency or company then acts on behalf of their agency when conducting business with CalPERS. Your agency defines which agency or company has permission to perform business functions with CalPERS on your behalf.

Example: City of Sacramento wants to authorize the company “Automatic Payroll Systems Inc” to start reporting their payroll on their behalf.

Your agency can establish more than one business relationship established. The business relationships can be with one or multiple agencies or companies. Within my|CalPERS a business relationship is termed Business Partner Relationship.

When business partner relationships are established, the following programs or business functions can be performed:

- Payroll Contributions
- Retirement Enrollments
- Health Enrollments
- SIP 457 Plan Contributions
- Billing (making payments)

A Business Relationship is established for each business function that will be performed, even if same agency or company is performing multiple functions. If your agency wants to establish business relationships to report payroll contributions, retirement enrollments, and billing on behalf of your agency, you would need to establish a separate business relationship for each.

Once the business relationship has been submitted, the approval can take up to 10 business days. Business Partners can submit their request via my|CalPERS (see Unit 2) or by calling CalPERS toll-free at **888 CalPERS** (or **888**-225-7377).

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Unit 1: System Access Administration

Overview

Introduction The SAA is responsible for managing my|CalPERS system access for users.

Unit Objectives

In this unit you will learn:

- Add a contact and grant system access
- Reset a password and change a username
- Update system access and add an additional SAA
- Lock and unlock a user's system access
- Deactivate and reactive a user's system access
- Delete users

Contents

This unit contains the following:

Scenario 1: Add a Contact and Grant System Access

Introduction

If an organization determines that a new contact needs specific my|CalPERS system access, the System Access Administrator (SAA) will add them as a contact, grant system access, and assign user roles.

my|CalPERS System Privileges for Business Partner Roles
Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > System Access Administrators > Resources: my|CalPERS System Privileges for Business Partner Roles

Scenario: Your agency has determined they need to add a new contact with system access to my|CalPERS. As the SAA, you will add them as a new contact, create a username, grant system access, assign user roles, and designate them as a primary contact.

Step-by-step

Add a new contact and grant them my|CalPERS system access by following the steps below.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td colspan="3">Add a New Contact</td></tr>
<tr><td>1</td><td>Select the Profile global navigation tab.</td><td>Business Partner Summary page displays.</td></tr>
<tr><td>2</td><td>Within the Contacts section, select the Add New button.</td><td>See Figure 1-1. Contacts section</td></tr>
<tr><td>3</td><td>Within the Maintain Contact Details section, select:

• A Contact Type
• The Programs Supported</td><td>See Figure 1-2. Maintain Contact Details section</td></tr>
<tr><td>4</td><td>Enter the new contact’s CalPERS ID or social security number in the Person CalPERS ID field and select the Verify link.

<table><tr><th>If the contact is...</th><th>Then ...</th></tr><tr><td>Found in my|CalPERS</td><td>Go to step 8</td></tr><tr><td>Not found in my|CalPERS</td><td>Go to step 5</td></tr></table></td><td>See Figure 1-2. Maintain Contact Details section</td></tr>
</table>

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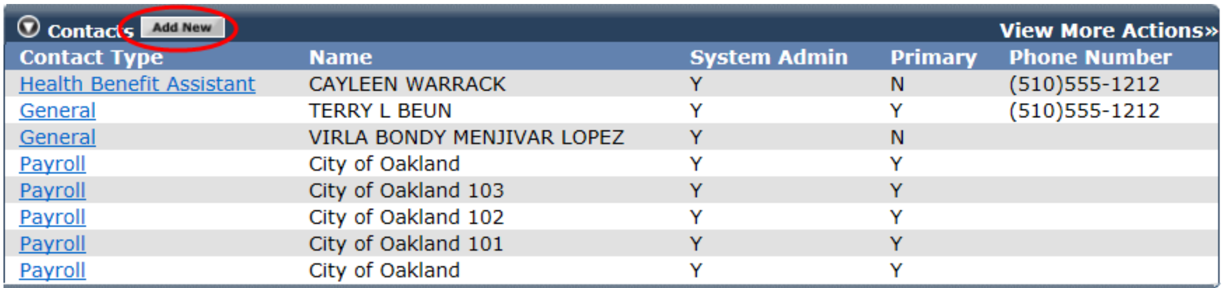
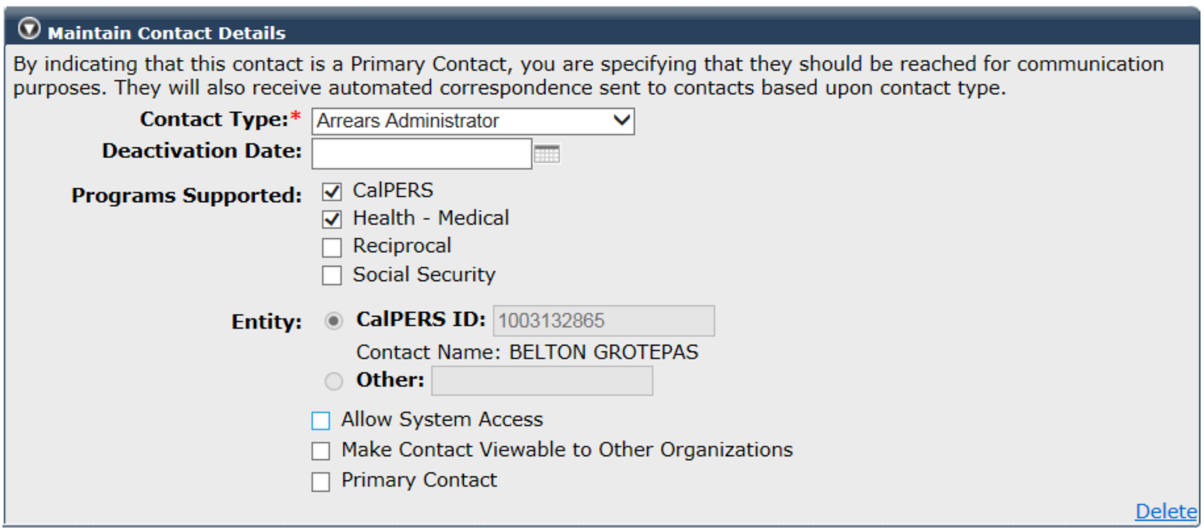
Figure 1-1. Contacts section


Contacts Add New — View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Health Benefit Assistant	CAYLEEN WARRACK	Y	N	(510)555-1212
General	TERRY L BEUN	Y	Y	(510)555-1212
General	VIRLA BONDY MENJIVAR LOPEZ	Y	N	
Payroll	City of Oakland	Y	Y	
Payroll	City of Oakland 103	Y	Y	
Payroll	City of Oakland 102	Y	Y	
Payroll	City of Oakland 101	Y	Y	
Payroll	City of Oakland	Y	Y	

Figure 1-2. Maintain Contact Details section


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:
- [x] CalPERS
- [x] Health - Medical
- [ ] Reciprocal
- [ ] Social Security

Entity: (•) **CalPERS ID:** 1003132865
Contact Name: BELTON GROTEPAS
( ) **Other:**

- [ ] Allow System Access
- [ ] Make Contact Viewable to Other Organizations
- [ ] Primary Contact

Delete

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<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>5</td><td>Within the Maintain Contact Details section, select the Add Person link.</td><td></td></tr>
<tr><td>6</td><td>Complete only the Person Details section.</td><td></td></tr>
<tr><td>7</td><td>Select the Save button.</td><td>See Figure 1-3. Maintain Contact Details section</td></tr>
<tr><td>8</td><td>Select the appropriate checkboxes of the following options:
• Allow System Access
• Make Contact Viewable to Other Organizations
• Primary Contact*</td><td>See Figure 1-3. Maintain Contact Details section</td></tr>
<tr><td colspan="3">Add Communication and Address Details</td></tr>
<tr><td>9</td><td>Within the Maintain Preferred Communication Details section, select the Preferred Communication method from the drop-down list.</td><td></td></tr>
<tr><td>10</td><td>Within the Maintain Contact Address Details section, select “Physical,” or “Mailing” from the Existing Business Partner Address drop-down list.</td><td>The employer’s address will populate.

See Figure 1-4. Maintain Contact Address Details section</td></tr>
<tr><td>11</td><td>Enter the contact’s phone number(s) and email address(es).</td><td>See Figure 1-5. Maintain Communication Details section</td></tr>
<tr><td>12</td><td>Select the Primary radio button for one of each for one phone number and one email address.</td><td>See Figure 1-5. Maintain Communication Details section</td></tr>
<tr><td>13</td><td>Select the Save button.

<table><tr><th>If the…</th><th>Then ...</th></tr><tr><td>Allow System Access checkbox was checked</td><td>Go to step 14</td></tr><tr><td>Allow System Access checkbox was unchecked</td><td>You have completed this scenario</td></tr></table></td><td>Access Details page displays.</td></tr>
</table>

Primary Contact

When Primary Contact is checked, a Preferred Communication method must be selected in order for that contact to receive communications from CalPERS. See Step 9 above for selecting a Preferred Communications method.

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Figure 1-3. Maintain Contact Details section

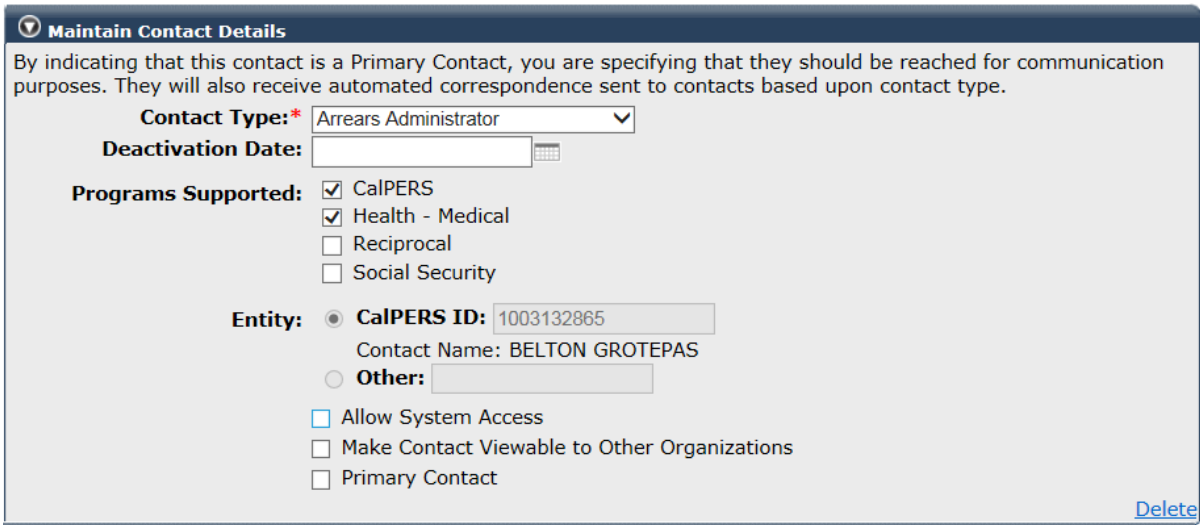

Figure 1-4. Maintain Contact Address Details section

Figure 1-5. Maintain Communication Details section

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Step	Action	Result
	Create Username and Assign Roles	
14	Within the Assigned Username section enter a username for this user.	**See Figure 1-6.** Assigned Username and Assign Roles sections
15	Within the Assign Roles section, select the appropriate checkbox(es).	**See Figure 1-6** Assigned Username and Assign Roles sections
16	Select the **Save** button.	**See Figure 1-7** Password Maintenance section
17	Within the Password Maintenance section, capture the temporary password for the user.	
18	Select the **Continue** button. **Note**: This does not send the temporary password to the new user. You must provide it to them.	**See Figure 1-8.** Contacts section
	You have completed this scenario.	

Important Information to Provide the New User

Upon initial log in, the new user will need to establish the following for their account:

- New password
- Security icon
- Security message
- Security questions and answers

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Figure 1-6. Assigned Username and Assign Roles sections

Assigned Username

Reset Password

Contact Name: MAI LANI WOELFER

Contact Username: Woelfer

☐ Prevent the user from accessing the site

Assign Roles

Select All

	Role
☐	Authorized Personal Loan Representative
☐	Business Partner AR/Billing
☐	Business Partner AR/Billing RO
☐	Business Partner Appointment Management - Non-Pers and CalSTRS
☐	Business Partner Direct Authorization
☐	Business Partner Direct Authorization Agreements
☑	Business Partner Employer Inquiry

Figure 1-7. Password Maintenance section

Password Maintenance

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

Username: Dale_G_Wheatcraft

Password: au1sg_bhR

Figure 1-8. Contacts section

Contacts Add New — View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	DALE G MALLAVII WHEATCRAFT	Y	N	(510)555-1212
Health Benefit Assistant	CAYLEEN WARRACK	Y	N	(510)555-1212
General	TERRY L BEUN	Y	Y	(510)555-1212
General	VIRLA BONDY MENJIVAR LOPEZ	Y	N	
Payroll	City of Oakland	Y	Y	
Payroll	City of Oakland 102	Y	Y	
Payroll	City of Oakland 101	Y	Y	
Payroll	City of Oakland	Y	Y	

Scenario 2: Reset a User’s Password

Introduction

If a user forgets their my|CalPERS password or it expires, a System Access Administrator (SAA) can reset their password for them. When a SAA resets a password via my|CalPERS, it is not automatically sent to the user.

A user can also reset their own password by following the Reset Your Own Password process located in the Appendix.

Scenario: A my|CalPERS user is requesting to have their password reset.

Step-by-step

Reset a user’s password by following the steps below.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>From the My Home page, select the Profile global navigation tab.</td><td>Business Partner Summary page displays.</td></tr>
<tr><td>2</td><td>Within the Contacts section, locate the user.
<table><tr><th>If the user is…</th><th>Then ...</th></tr><tr><td>Listed</td><td>Go to step 3</td></tr><tr><td>Not listed</td><td>Select the View More Actions link</td></tr></table></td><td></td></tr>
<tr><td>3</td><td>Select the Contact Type link of the user whose password will be reset.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>4</td><td>Within the Maintain Contact Details section, select the System Access link.</td><td>See Figure 1-9. Maintain Contact Details section

Access Details page displays.</td></tr>
<tr><td>5</td><td>Within the Assign Username section, select the Reset Password link at the top right corner.</td><td>See Figure 1-10. Assigned Username sectiony</td></tr>
<tr><td>6</td><td>Within the Password Maintenance section, capture the temporary password for the user.</td><td>See Figure 1-11. Password Maintenance section</td></tr>
<tr><td>7</td><td>Select the Continue button.

Note: This does not send the temporary password to the new user. You must provide it to them.</td><td>Business Partner Contact List page displays.</td></tr>
<tr><td></td><td>You have completed this scenario.</td><td></td></tr>
</table>

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Figure 1-9. Maintain Contact Details section

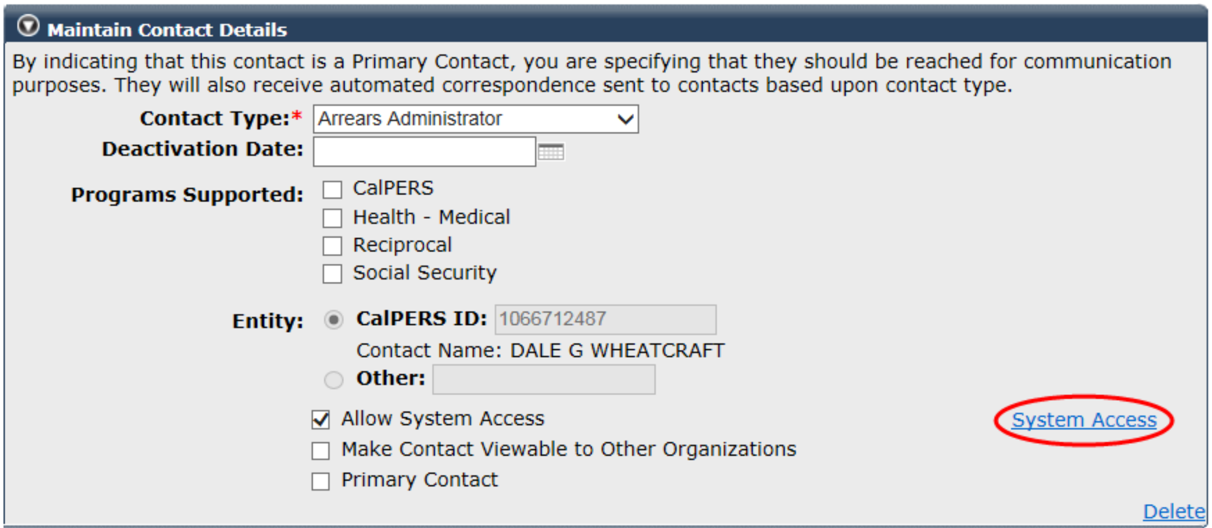


Figure 1-10. Assigned Username section

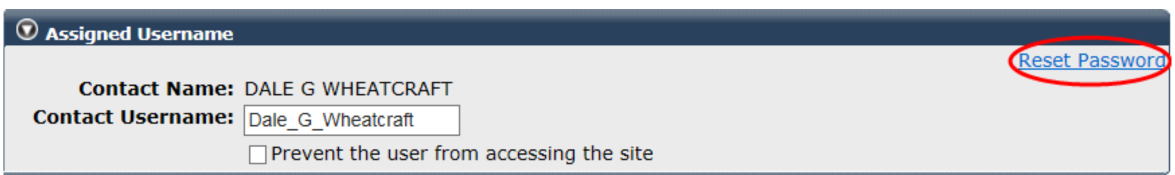
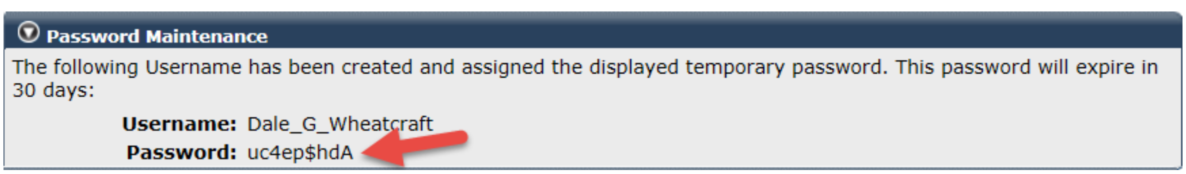


Figure 1-11. Password Maintenance section



Scenario 3: Change a Username

Introduction

An SAA at any time can change a user's username other than their own. If a SAA needs to change their username, they should contact another SAA at their agency or CalPERS.

Scenario: A my|CalPERS user is requesting to have their username changed.

Step-by-step

Change a username by following the steps below.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>From the My Home page, select the Profile global navigation tab.</td><td>Business Partner Summary page displays.</td></tr>
<tr><td>2</td><td>Within the Contacts section, locate the user.
<table>
<tr><th>If the user…</th><th>Then ...</th></tr>
<tr><td>Is listed</td><td>Go to step 3</td></tr>
<tr><td>Is not listed</td><td>Select the View More Actions link</td></tr>
</table></td><td></td></tr>
<tr><td>3</td><td>Select the Contact Type link of the user whose username will be changed.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>4</td><td>Within the Maintain Contact Details section, select the System Access link.</td><td>See Figure 1-12. Maintain Contact Details section

Access Details page displays.</td></tr>
<tr><td>5</td><td>Within the Assigned Username section, enter a new username in the Contact Username field.</td><td>See Figure 1-13. Assigned Username section</td></tr>
<tr><td>6</td><td>Select the Save button.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>7</td><td>Select the Save button.</td><td>Business Partner Contact List page displays.</td></tr>
<tr><td></td><td>You have completed this scenario.</td><td></td></tr>
</table>

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Scenario 3: Change a Username, Continued

Figure 1-12. Maintain Contact Details section

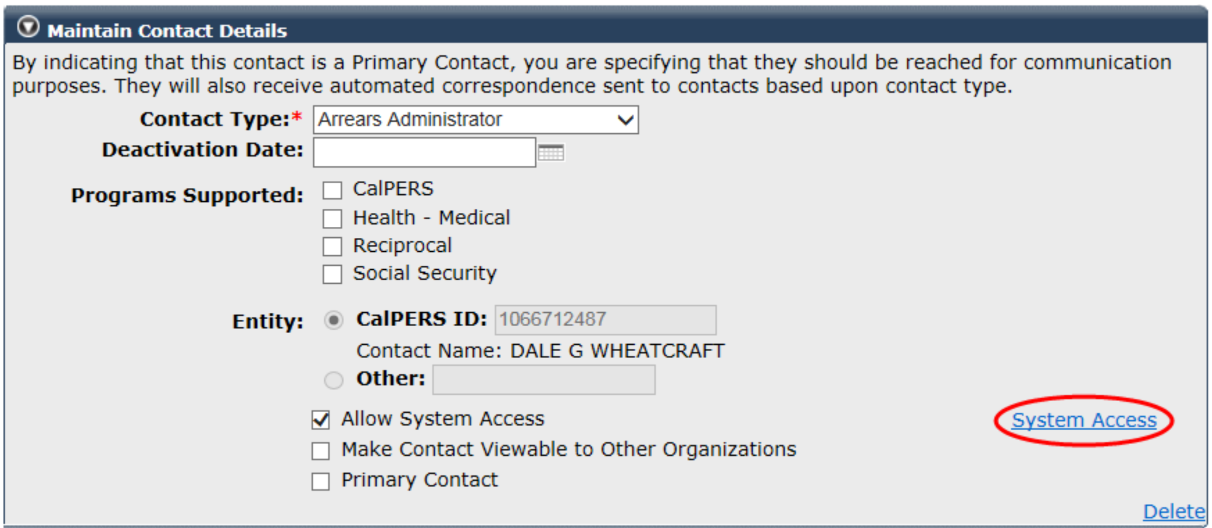
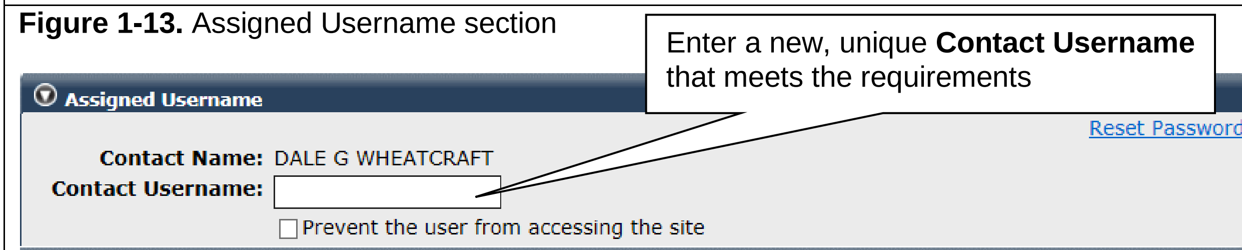


Figure 1-13. Assigned Username section



Username Criteria

Below is a list of the requirements for a my|CalPERS username:

- 6-35 characters consisting of numbers, letters, and/or special characters
  - Special characters: at signs (@), periods (.), underscores (_), hyphens (-)
- No spaces
- Must start with a letter
- Are not case-sensitive

Usernames may be changed as long as the username does not already exist in the system

Scenario 4: Update a User's System Access

Introduction

A user's system access can be changed at any time to correspond to changes in their job duties. As System Access Administrator (SAA), it is your responsibility to maintain the system access of your agency's users.

Note: See unit 1, scenario 1, for more information on assigning user roles.

Scenario: A user's job duties have changed which require additional system access roles.

Step-by-step

Update a user's system access by following the steps below.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>From the My Home page, select the Profile global navigation tab.</td><td>Business Partner Summary page displays.</td></tr>
<tr><td>2</td><td>Within the Contacts section, locate the user.
<table><tr><th>If the user…</th><th>Then ...</th></tr><tr><td>Is listed</td><td>Go to step 3</td></tr><tr><td>Is not listed</td><td>Select the View More Actions link</td></tr></table></td><td></td></tr>
<tr><td>3</td><td>Select the Contact Type link of the user whose system access will be changed.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>4</td><td>Within the Maintain Contact Details section, select the System Access link.</td><td>Figure 1-14. Maintain Contact Details section

Access Details page displays.</td></tr>
<tr><td>5</td><td>Within the Assign Roles section, select and/or deselect the appropriate checkbox(es), as necessary.</td><td>See Figure 1-15. Assign Roles section</td></tr>
<tr><td>6</td><td>Select the Save button.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>7</td><td>Select the Save button.</td><td>Business Partner Contact List page displays.</td></tr>
<tr><td></td><td>You have completed this scenario.</td><td></td></tr>
</table>

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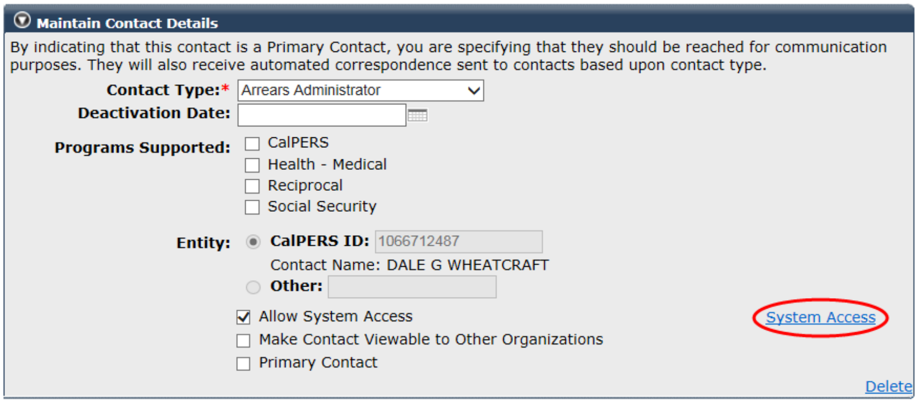
Figure 1-14. Maintain Contact Details section


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 ☐ Reciprocal ☐ Social Security

Entity: ◉ **CalPERS ID:** 1066712487

Contact Name: DALE G WHEATCRAFT

○ **Other:**

☑ Allow System Access

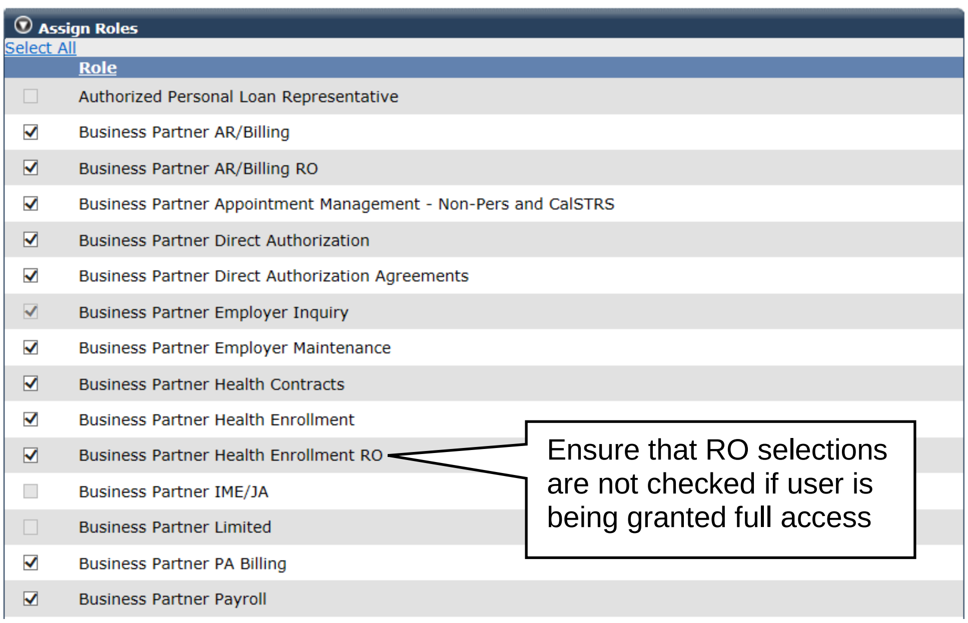
☐ Make Contact Viewable to Other Organizations

☐ Primary Contact

System Access

Delete

Figure 1-15. Assign Roles section


Assign Roles

Select All

	Role
☐	Authorized Personal Loan Representative
☑	Business Partner AR/Billing
☑	Business Partner AR/Billing RO
☑	Business Partner Appointment Management - Non-Pers and CalSTRS
☑	Business Partner Direct Authorization
☑	Business Partner Direct Authorization Agreements
☑	Business Partner Employer Inquiry
☑	Business Partner Employer Maintenance
☑	Business Partner Health Contracts
☑	Business Partner Health Enrollment
☑	Business Partner Health Enrollment RO
☐	Business Partner IME/JA
☐	Business Partner Limited
☑	Business Partner PA Billing
☑	Business Partner Payroll

Important! If the user is already logged in to my|CalPERS, they must log out and then log back in to my|CalPERS before the new system access roles take effect.

Scenario 5: Add an Additional System Access Administrator

Introduction

It is recommended that each agency should have more than one System Access Administrator (SAA).

Note: See unit 1, scenario 1, for more information on assigning user roles.

Scenario: Your agency has decided to add an additional SAA. You will grant the System Access Administrator system access role to an existing user so they can be your backup.

Step-by-step

Grant the system access administrator role to an existing user by following the steps below.

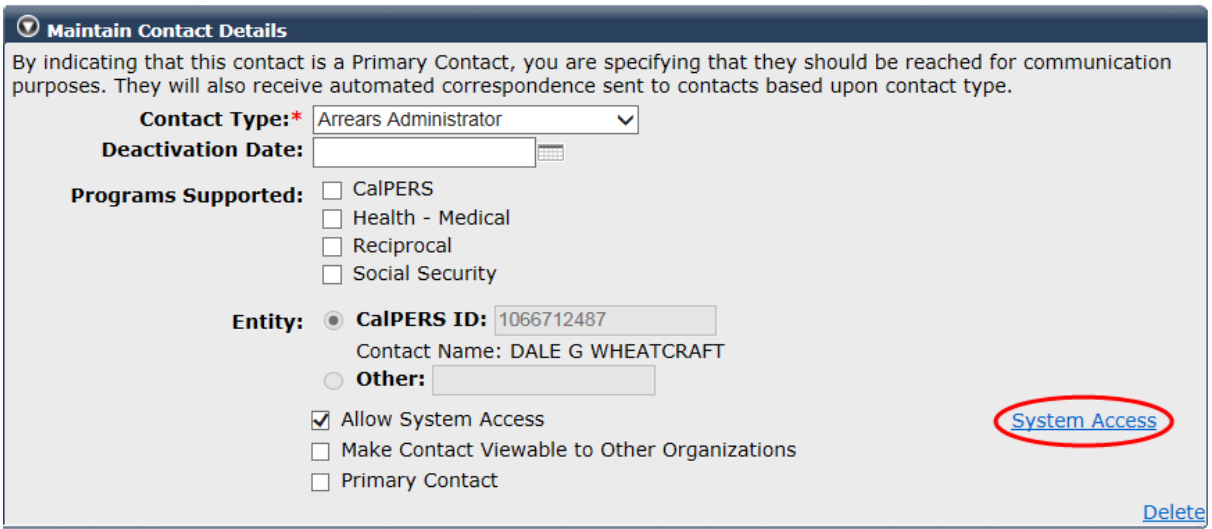
<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>From the My Home page, select the Profile global navigation tab.</td><td>Business Partner Summary page displays.</td></tr>
<tr><td>2</td><td>Within the Contacts section, locate the user.
<table><tr><th>If the user…</th><th>Then ...</th></tr><tr><td>Is listed</td><td>Go to step 3</td></tr><tr><td>Is not listed</td><td>Select the View More Actions link</td></tr></table></td><td></td></tr>
<tr><td>3</td><td>Select the Contact Type link of the user whose system access will be changed.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>4</td><td>Within the Maintain Contact Details section, select the System Access link.</td><td>See Figure 1-16. Maintain Contact Details section

Access Details page displays.</td></tr>
</table>

Continued on next page

Scenario 5: Add an Additional System Access Administrator, Continued

Figure 1-16. Maintain Contact Details section



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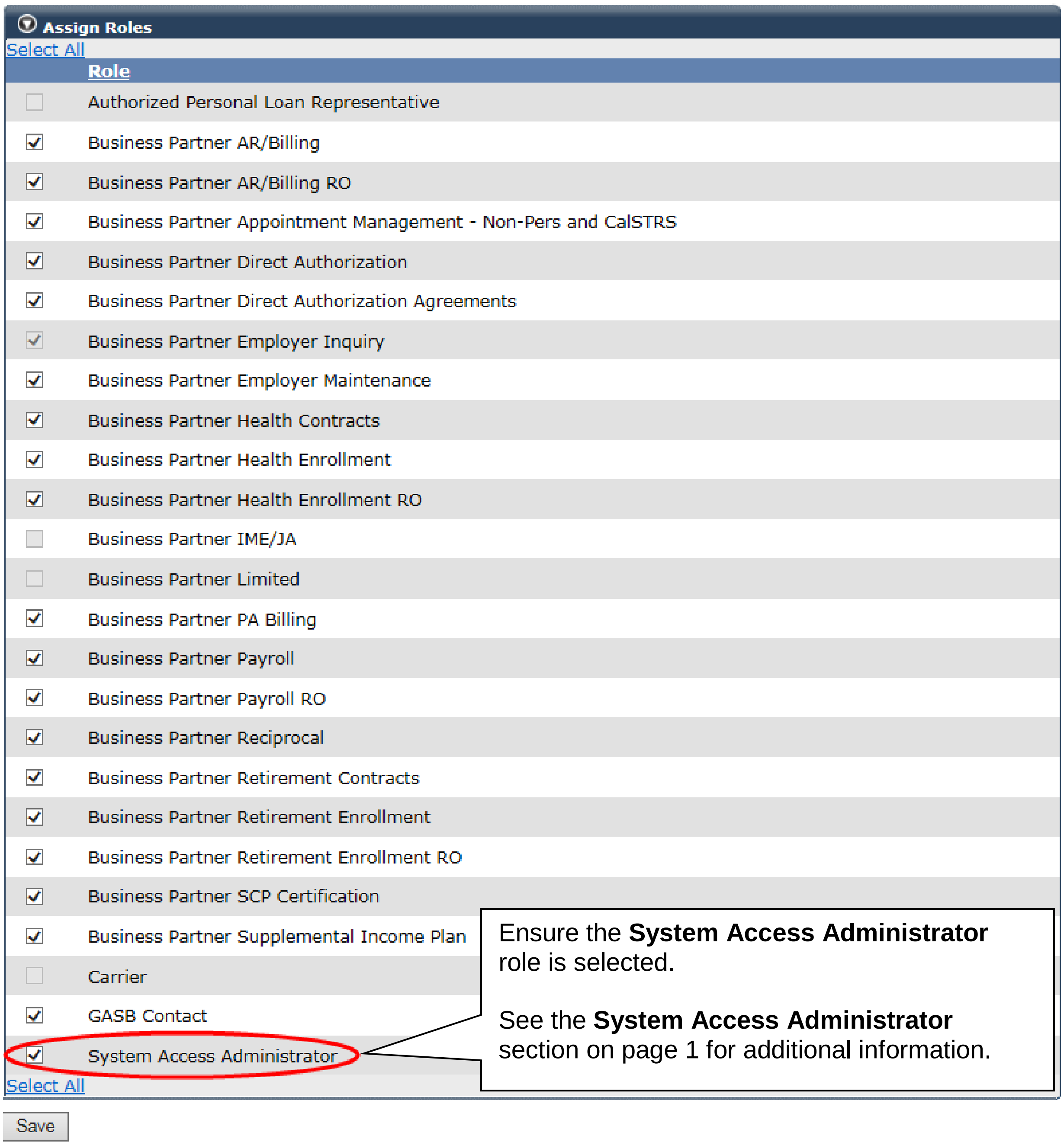
Scenario 5: Add an Additional System Access Administrator, Continued

Step	Action	Result
5	Within the Assign roles section, select the **System Access Administrator** checkbox.	**See Figure 1-17.** Assign Roles section
6	Select the **Save** button.	Business Partner Contact Detail page displays.
7	Select the **Save** button.	Business Partner Contact List page displays.
	You have completed this scenario.	

Important! If the user is already logged in to my|CalPERS, the new system access administrator must log out and then log back in to my|CalPERS before the new SAA role takes effect.

Continued on next page

Figure 1-17. Assign Roles section



Scenario 6: Lock a User’s System Access

Introduction

When a user no longer needs access to my|CalPERS, it is the SAA’s responsibility to lock their account. When system access is locked, the user will still remain as an active contact for your agency.

Note: See Unit 1, scenario 8 to deactivate a user’s account upon separation.

Scenario: A user is going to temporarily be away from their job. You will lock their account so they cannot log into my|CalPERS.

Step-by-step

Lock or unlock a user’s system access by following the steps below.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>From the My Home page, select the Profile global navigation tab.</td><td>Business Partner Summary page displays.</td></tr>
<tr><td>2</td><td>Within the Contacts section, locate the user.
<table>
<tr><th>If the user…</th><th>Then ...</th></tr>
<tr><td>Is listed</td><td>Go to step 3</td></tr>
<tr><td>Is not listed</td><td>Select the View More Actions link</td></tr>
</table></td><td>See Figure 1-18. Contact section</td></tr>
<tr><td>3</td><td>Select the Contact Type link of the user whose account will be locked.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>4</td><td>Within the Maintain Contact Details section, select the System Access link.</td><td>See Figure 1-19. Maintain Contact Details section</td></tr>
<tr><td>5</td><td>Within the Assigned Username section, you will select the Prevent the user from accessing the site checkbox.</td><td>See Figure 1-20. Assigned Username section</td></tr>
<tr><td>6</td><td>Select the Save button.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>7</td><td>Select the Save button.</td><td>Business Partner Contact List page displays.</td></tr>
<tr><td></td><td>You have completed this scenario.</td><td></td></tr>
</table>

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Scenario 6: Lock a User's System Access, Continued

Figure 1-18. Contacts section

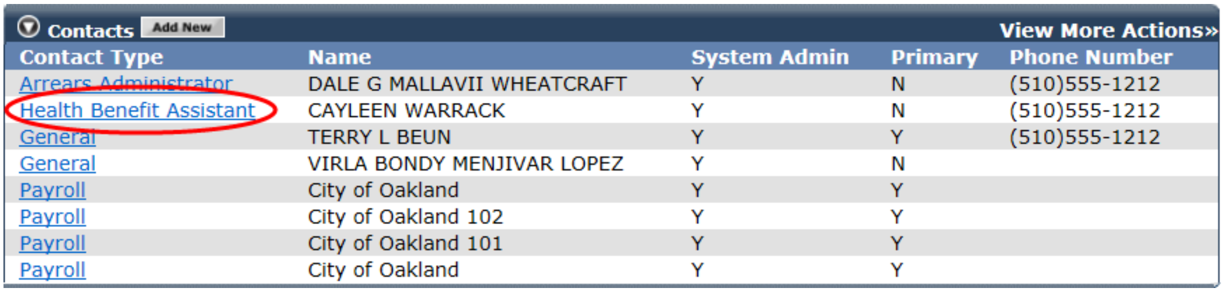


Figure 1-19. Maintain Contact Details section

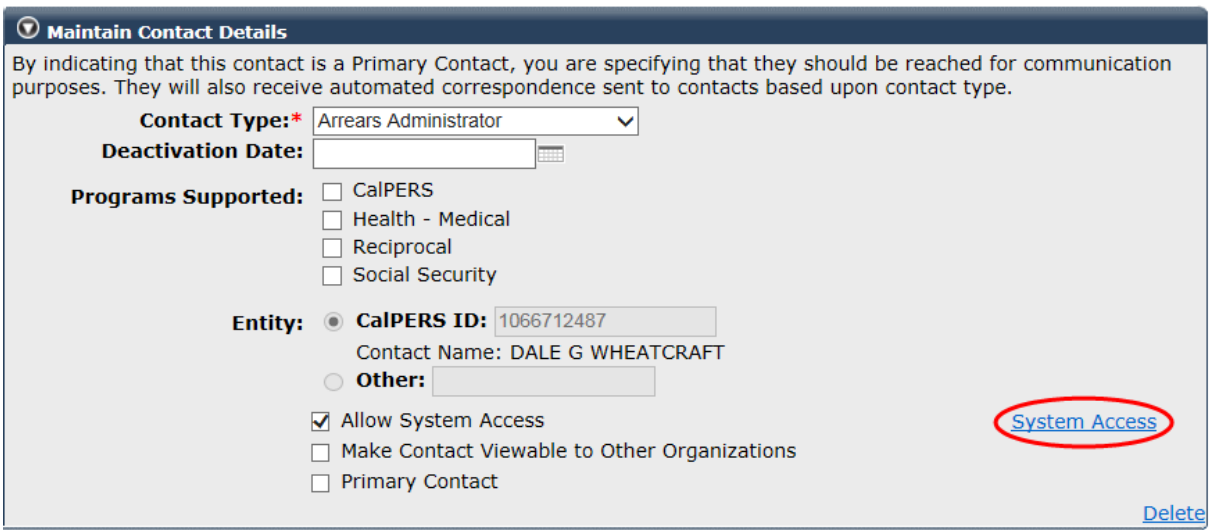
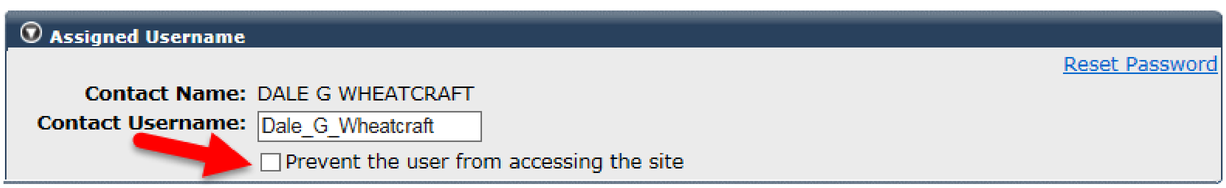


Figure 1-20. Assigned Username section



Scenario 7: Unlock a User's System Access

Introduction

When a user needs access to my|CalPERS after their account was locked, it is the SAA's responsibility to unlock their account. Once an account is unlocked it will be restored to its previous status. In other words, their system access will be the same as it was prior to their account being locked.

Note: A user's account may also be locked due to five consecutive, unsuccessful password attempts.

Scenario: A user, whose account was locked by their SAA because they were on a leave of absence, has returned to work. You will unlock their account so they can log into my|CalPERS.

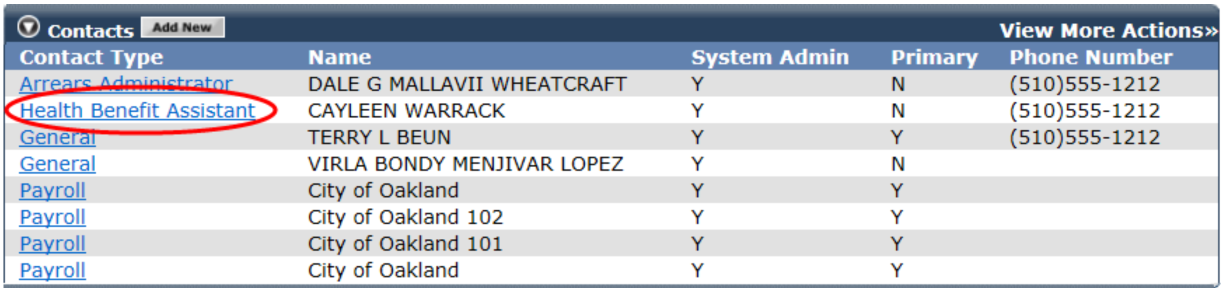
Step-by-step

Lock or unlock a user's system access by following the steps below.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>From the My Home page, select the Profile global navigation tab.</td><td>Business Partner Summary page displays.</td></tr>
<tr><td>2</td><td>Within the Contacts section, locate the user.
<table><tr><th>If the user…</th><th>Then ...</th></tr><tr><td>Is listed</td><td>Go to step 3</td></tr><tr><td>Is not listed</td><td>Select the View More Actions link</td></tr></table></td><td></td></tr>
<tr><td>3</td><td>Select the Contact Type link of the user whose account will be unlocked.</td><td>See Figure 1-21. Contacts section</td></tr>
<tr><td>4</td><td>Within the Maintain Contact Details section, select the System Access link.</td><td>See Figure 1-22. Maintain Contact Details section</td></tr>
<tr><td>5</td><td>Within the Assigned Username section, you will deselect the Prevent the user from accessing the site checkbox.</td><td>See Figure 1-23. Assigned Username section</td></tr>
<tr><td>6</td><td>Select the Save button.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>7</td><td>Select the Save button.</td><td>Business Partner Contact List page displays.</td></tr>
<tr><td></td><td>You have completed this scenario.</td><td></td></tr>
</table>

Continued on next page

Figure 1-21. Contacts section



Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	DALE G MALLAVII WHEATCRAFT	Y	N	(510)555-1212
Health Benefit Assistant	CAYLEEN WARRACK	Y	N	(510)555-1212
General	TERRY L BEUN	Y	Y	(510)555-1212
General	VIRLA BONDY MENJIVAR LOPEZ	Y	N	
Payroll	City of Oakland	Y	Y	
Payroll	City of Oakland 102	Y	Y	
Payroll	City of Oakland 101	Y	Y	
Payroll	City of Oakland	Y	Y	

Figure 1-22. Maintain Contact Details section

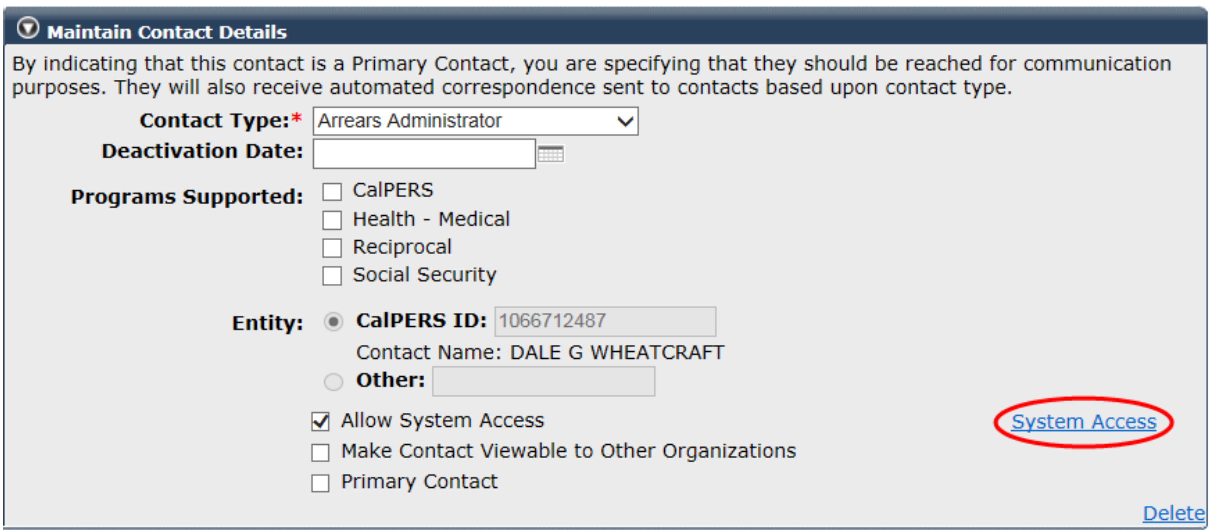
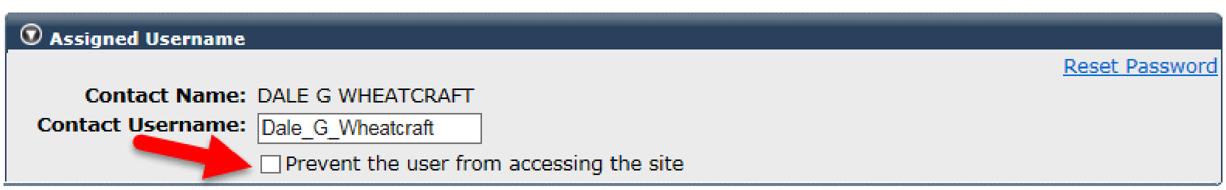


Figure 1-23. Assigned Username section



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Scenario 8: Deactivate a Contact’s Account

Introduction

As an SAA, it is your responsibility to deactivate individuals once they should no longer be a contact, including my|CalPERS system access. This process is typical upon the contact’s permanent separation from your agency or when they go on a leave of absence.

Note: Reestablishing system access is shown in unit 1, scenario 9.

Scenario: An employee permanently separated from your agency and no longer needs to be listed as contact or have my|CalPERS system access. You will deactivate their my|CalPERS account.

Step-by-step

Deactivate a user’s my|CalPERS system access by following the steps below.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>From the My Home page, select the Profile global navigation tab.</td><td>Business Partner Summary page displays.</td></tr>
<tr><td>2</td><td>Within the Contacts section, locate the user.
<table><tr><th>If the user…</th><th>Then ...</th></tr><tr><td>Is listed</td><td>Go to step 3</td></tr><tr><td>Is not listed</td><td>Select the View More Actions link</td></tr></table></td><td>See Figure 1-24. Contacts section</td></tr>
<tr><td>3</td><td>Select the Contact Type link of the user whose account will be deactivated.</td><td>Business Partner Contact Detail page displays.</td></tr>
<tr><td>4</td><td>Within the Maintain Contact Details section, enter the Deactivation Date for the user.</td><td>See Figure 1-25. Maintain Contact Details section</td></tr>
<tr><td>5</td><td>Select the Save button.</td><td>See Figure 1-26. Business Partner Contact List page.

Contacts Active status will change from “Y” to “N.”</td></tr>
<tr><td></td><td>You have completed this scenario.</td><td></td></tr>
</table>

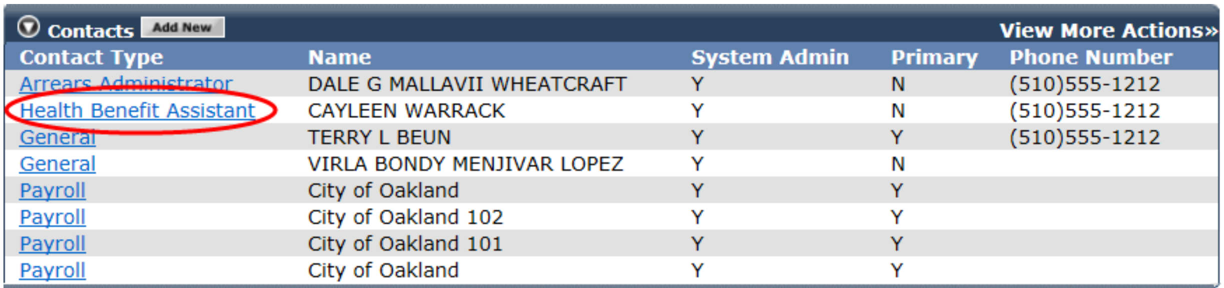
Important

System access will be revoked within 24 hours from the date indicated for the user. The Active status will be updated to **“N”** (No), meaning the user no longer is a contact for your agency.

Continued on next page

Scenario 8: Deactivate a Contact's Account, Continued

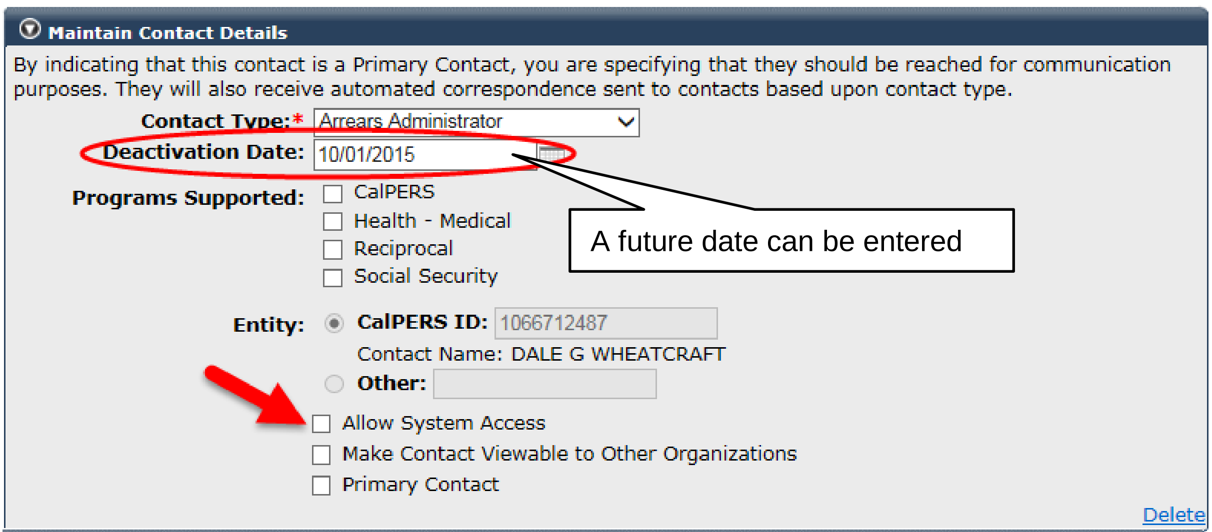
Figure 1-24. Contacts section



Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	DALE G MALLAVII WHEATCRAFT	Y	N	(510)555-1212
Health Benefit Assistant	CAYLEEN WARRACK	Y	N	(510)555-1212
General	TERRY L BEUN	Y	Y	(510)555-1212
General	VIRLA BONDY MENJIVAR LOPEZ	Y	N	
Payroll	City of Oakland	Y	Y	
Payroll	City of Oakland 102	Y	Y	
Payroll	City of Oakland 101	Y	Y	
Payroll	City of Oakland	Y	Y	

Figure 1-25. Maintain Contact Details section



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: 10/01/2015

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

A future date can be entered

Entity: CalPERS ID: 1066712487

Contact Name: DALE G WHEATCRAFT

Other:

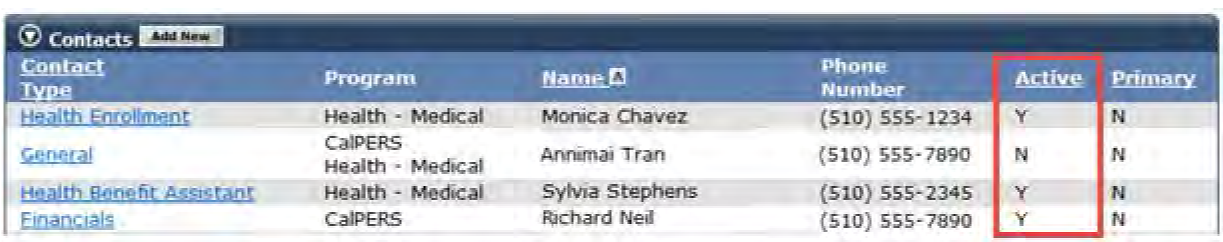
Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

Delete

Figure 1-26. Active status updated



Contacts Add New

Contact Type	Program	Name	Phone Number	Active	Primary
Health Enrollment	Health - Medical	Monica Chavez	(510) 555-1234	Y	N
General	CalPERS Health - Medical	Annimai Tran	(510) 555-7890	N	N
Health Benefit Assistant	Health - Medical	Sylvia Stephens	(510) 555-2345	Y	N
Financials	CalPERS	Richard Neil	(510) 555-7890	Y	N

Scenario 9: Reactivate a Contact's Account

Introduction

After deactivating a user's system access, the SAA has the ability to reactivate the account. This will change the contact's status from inactive to active. Their my|CalPERS system access can also be reactivated in this process. This may be due to the employee changing jobs or returning to a similar position.

Scenario: A former employee of your agency has returned and needs to have their my|CalPERS account reactivated. The contact will also need to have my|CalPERS system access restored.

Step-by-step

Reactivate a former user's my|CalPERS system access by following the steps below.

Step	Action	Result
1	From the My Home page, select the **Profile** global navigation tab.	Business Partner Summary page displays.
2	In the Contacts section, select the **View More Actions** link.	Business Partner Contact List page displays.
3	Within the Contacts to Display section, select/enter the following: • **"No"** from the **Active** drop-down list • First and/or last name (optional)	**See Figure 1-27.** Contacts to Display section
4	Select the **Display** button.	Contacts section Displays.
5	Within the Contacts section, select the **Contact Type** link for the appropriate former user.	**See Figure 1-28.** Contacts section Business Partner Contact Detail page displays.

Continued on next page

Figure 1-27. Contacts to Display section

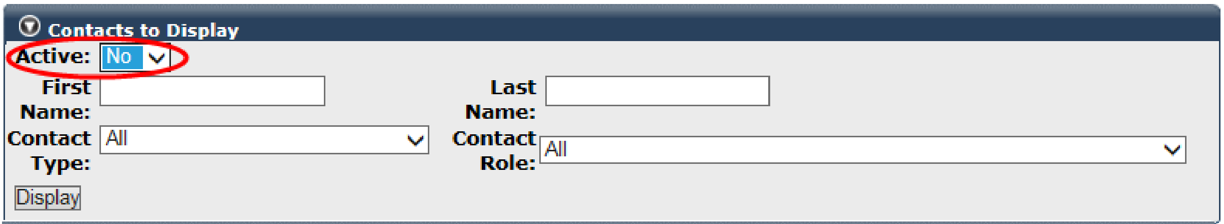
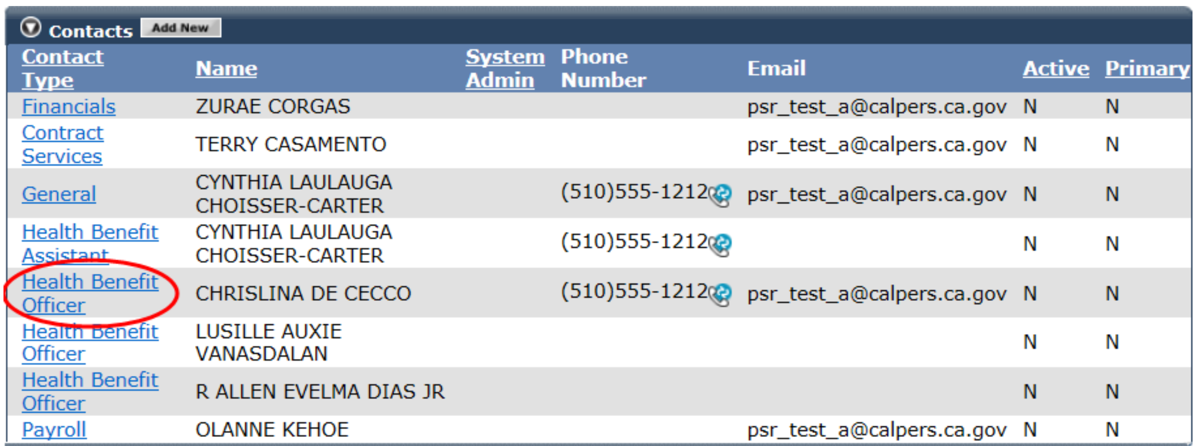


Figure 1-28. Contacts section



Contact Type	Name	System Admin	Phone Number	Email	Active	Primary
Financials	ZURAE CORGAS			psr_test_a@calpers.ca.gov	N	N
Contract Services	TERRY CASAMENTO			psr_test_a@calpers.ca.gov	N	N
General	CYNTHIA LAULAUGA CHOISSER-CARTER		(510)555-1212	psr_test_a@calpers.ca.gov	N	N
Health Benefit Assistant	CYNTHIA LAULAUGA CHOISSER-CARTER		(510)555-1212		N	N
Health Benefit Officer	CHRISLINA DE CECCO		(510)555-1212	psr_test_a@calpers.ca.gov	N	N
Health Benefit Officer	LUSILLE AUXIE VANASDALAN				N	N
Health Benefit Officer	R ALLEN EVELMA DIAS JR				N	N
Payroll	OLANNE KEHOE			psr_test_a@calpers.ca.gov	N	N

Continued on next page

Step	Action	Result
6	Select the **Reactivate Contact** checkbox.	**See Figure 1-29.** Maintain Contact Details section
7	Does the contact need system access? <table><tr><th>If ...</th><th>Then ...</th></tr><tr><td>Yes</td><td>Continue to step 7</td></tr><tr><td>No</td><td>Skip to step 14</td></tr></table>	**See Figure 1-29.** Maintain Contact Details section
8	Select the **Allow System Access** checkbox.	The **System Access** link displays.
9	Did the user have system access prior to being deactivated? <table><tr><th>If ...</th><th>Then ...</th></tr><tr><td>Yes</td><td>Skip to step 11</td></tr><tr><td>No</td><td>Continue to step 9</td></tr></table>	
10	Select the **System Access** link	**See Figure 1-29.** Maintain Contact Details section
11	Within the Assigned Username section enter a username for this user.	**See Figure 1-30.** Assigned Username section
12	Does the user need their access updated? <table><tr><th>If ...</th><th>Then ...</th></tr><tr><td>Yes</td><td>Continue to step 12</td></tr><tr><td>No</td><td>Skip to step 14</td></tr></table>	
13	Within the Assign Roles section, select and/or deselect the appropriate checkbox(es).	**See Figure 1-31.** Assigned Roles section Access Details page displays.

my|CalPERS System Privileges for Business Partner Roles

For a description and details for each business partner role, refer to the my|CalPERS System Privileges for Business Partner Roles.

Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > System Access Administrators > Resources: my|CalPERS System Privileges for Business Partner Roles

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Scenario 9: Reactivate a Contact's Account, Continued

Figure 1-29. Maintain Contact Details section

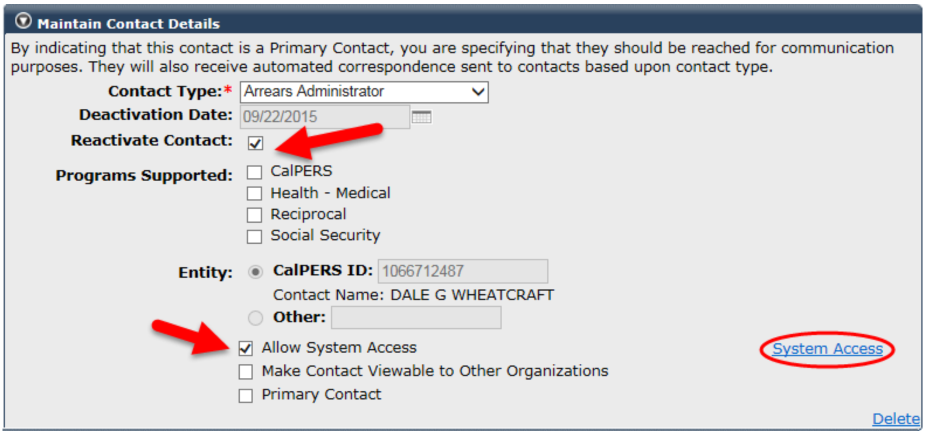
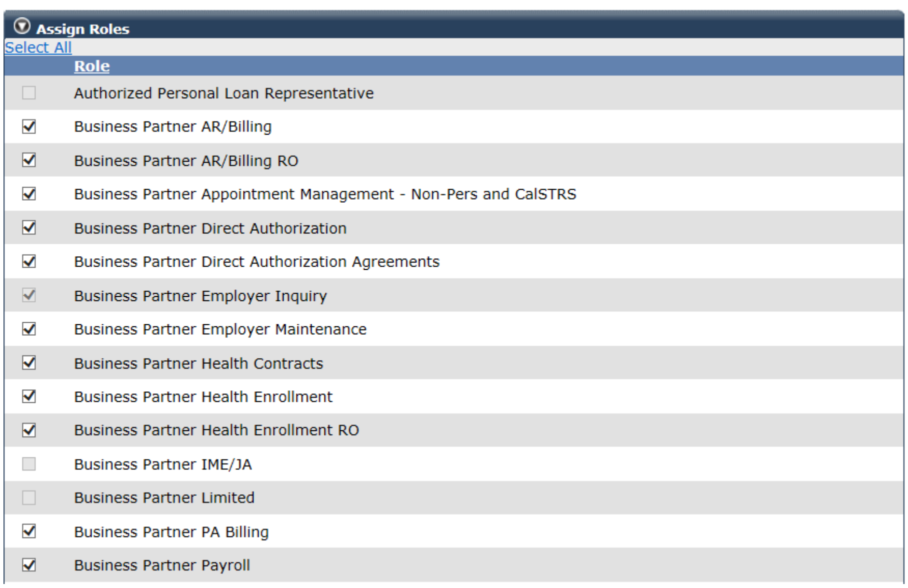


Figure 1-30. Assigned Username section

Figure 1-31. Assigned Roles section



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<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>14</td><td>Select the Save button.</td><td></td></tr>
<tr><td>15</td><td>Select the appropriate checkboxes of the following options:

• Make Contact Viewable to Other Organizations
• Primary Contact</td><td></td></tr>
<tr><td>16</td><td>Select the Save button.</td><td>See Figure 1-32. Contacts section displays</td></tr>
<tr><td>17</td><td>Does the user need their password reset?
<table><tr><th>If ...</th><th>Then ...</th></tr><tr><td>Yes</td><td>See unit 1, scenario 2</td></tr><tr><td>No</td><td>You have completed this scenario.</td></tr></table></td><td></td></tr>
<tr><td></td><td>You have completed this scenario.</td><td></td></tr>
</table>

Continued on next page

Scenario 9: Reactivate a Contact's Account, Continued

Figure 1-32. Contacts section

Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	DALE G MALLAVII WHEATCRAFT	Y	N	(510)555-1212
Health Benefit Assistant	CAYLEEN WARRACK	Y	N	(510)555-1212
General	TERRY L BEUN	Y	Y	(510)555-1212
General	VIRLA BONDY MENJIVAR LOPEZ	Y	N	
Payroll	City of Oakland	Y	Y	
Payroll	City of Oakland 102	Y	Y	
Payroll	City of Oakland 101	Y	Y	
Payroll	City of Oakland	Y	Y	

Scenario 10: Delete a Contact

Introduction

A contact should only be deleted when they were created in error. Once a contact is deleted, they cannot be reactivated.

If the contact no longer needs access to my|CalPERS, their account should be locked, see unit 1, scenario 6. If they should no longer be listed as a contact and should no longer have my|CalPERS system access, see unit 1, scenario 8.

Scenario: An SAA erroneously added a contact and granted my|CalPERS system access. As the SAA you will delete this contact in my|CalPERS.

Step-by-step

Delete a contact by following the steps below.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1</td><td>From the My Home page, select the Profile global navigation tab.</td><td>Business Partner Summary page displays.</td></tr>
<tr><td>2</td><td>Within the Contacts section, locate the user.
<table><tr><th>If the user…</th><th>Then ...</th></tr><tr><td>Is listed</td><td>Go to step 3</td></tr><tr><td>Is not listed</td><td>Select the View More Actions link</td></tr></table></td><td>Business Partner Contact List page displays.</td></tr>
<tr><td>3</td><td>Select the Contact Type link of the user whose needs to be deleted.</td><td>See Figure 1-33. Contacts section</td></tr>
<tr><td>4</td><td>Within the Maintain Contact Details section, select the Delete link at the bottom right.</td><td>See Figure 1-34. Maintain Contact Details section

Message from webpage dialogue box displays.</td></tr>
<tr><td>5</td><td>Within the Message from webpage dialogue box, select the OK button.</td><td>See Figure 1-35. Message from webpage dialogue box

Business Partner Contact List page displays.</td></tr>
<tr><td></td><td>You have completed this scenario.</td><td></td></tr>
</table>

Continued on next page

Scenario 10: Delete a Contact, Continued

Figure 1-33. Contacts section

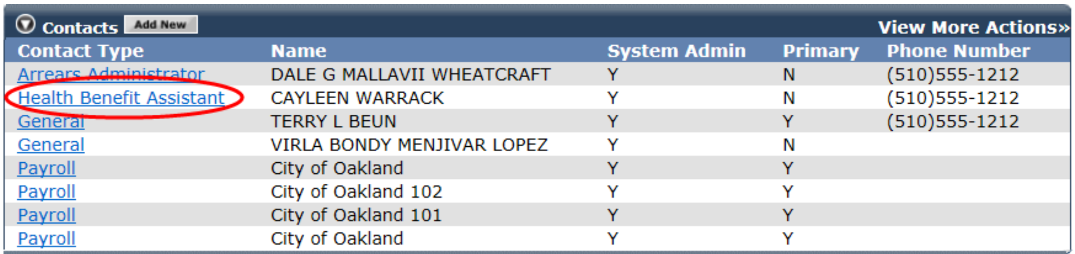


Figure 1-34. Maintain Contact Details section

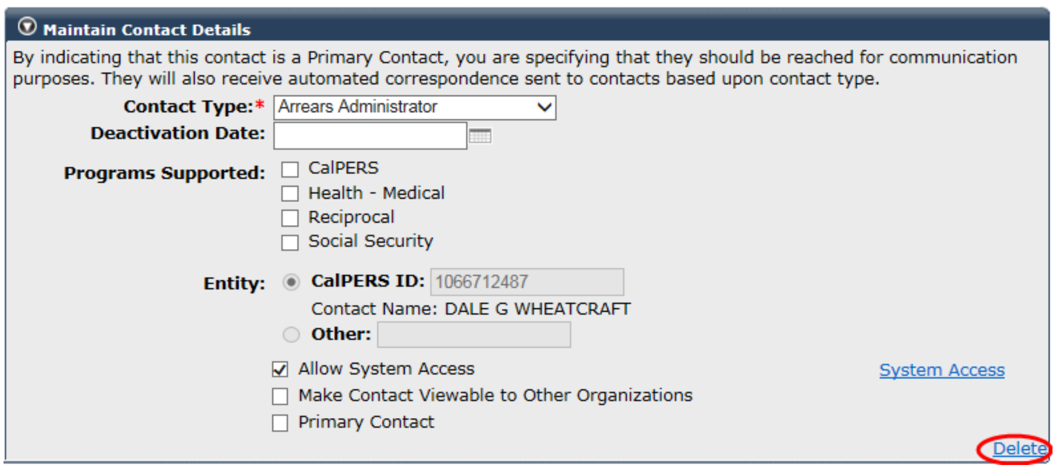
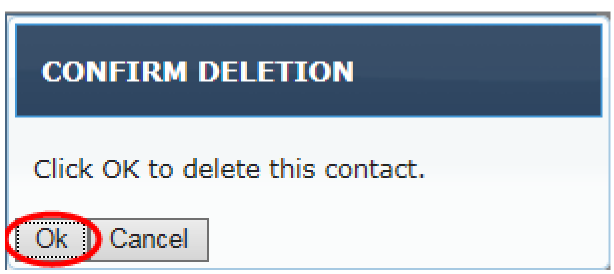


Figure 1-35. Message from webpage dialogue box



If a Contact Was Deleted in Error

Contacts that were deleted in error will need to be added as a new contact, and if needed, granted system access. See unit 1, scenario 3 for the process of adding new contacts with system access.

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Unit 2: Establish a Business Partner Relationship

Overview

Introduction

An employer may establish a Business Partner Relationship (i.e., another company or CalPERS agency) to process their transactions on their behalf. By establishing a Business Partner Relationship, you are granting that company or agency permission to conduct business directly with CalPERS on behalf of your agency.

Once the Business Partner Relationship is established in my|CalPERS, their main contact and System Access Administrator (SAA) are also entered into the system. Their SAA can then add additional my|CalPERS users to process and/or view information on behalf of your agency.

Within this unit, the terms business partner, business partner relationship and business relationship may be used interchangeably.

Objectives

After completing this unit, you will be able to establish a business partner relationship.

Contents

This unit contains the following:

Scenario 1: Establish a Business Partner Relationship

Introduction

The System Access Administrator (SAA) can establish a my|CalPERS relationship between their agency and a third party (i.e., another company or CalPERS agency) for the following programs or business functions:

- Payroll Contributions
- Retirement Enrollments
- Health Enrollments
- SIP 457 Plan Contributions
- Billing (making payments)

Note: The business partner you are establishing the relationship with must already be in the my|CalPERS system in order for you to establish the relationship. If a business partner is not in my|CalPERS, they should contact CalPERS toll-free at **888 CalPERS** (or **888**-225-7377) and request to have their company or agency added to the my|CalPERS system.

Scenario: Your agency has hired Automatic Payroll Services Inc. to manage your agency's payroll within my|CalPERS. As the SAA, you will establish a business partner relationship with Automatic Payroll Services Inc. within my|CalPERS.

Step-by-step

Establish a business partner relationship by following the steps below.

Step	Action	Result
1	From the my|CalPERS My Home page select the **Profile** global navigation tab.	**See Figure 2-1.** Business Partner Summary page
2	Select the **Relationships** left-side navigation link.	**See Figure 2-1.** Business Partner Summary page
3	Select the **Download Request New Business Partner Relationship Form** link. Print, complete, and then upload the form.	**See Figure 2-2**. Business Relationships to Display and Business Relationships sections

Continued on next page

Figure 2-1. Business Partner Summary page

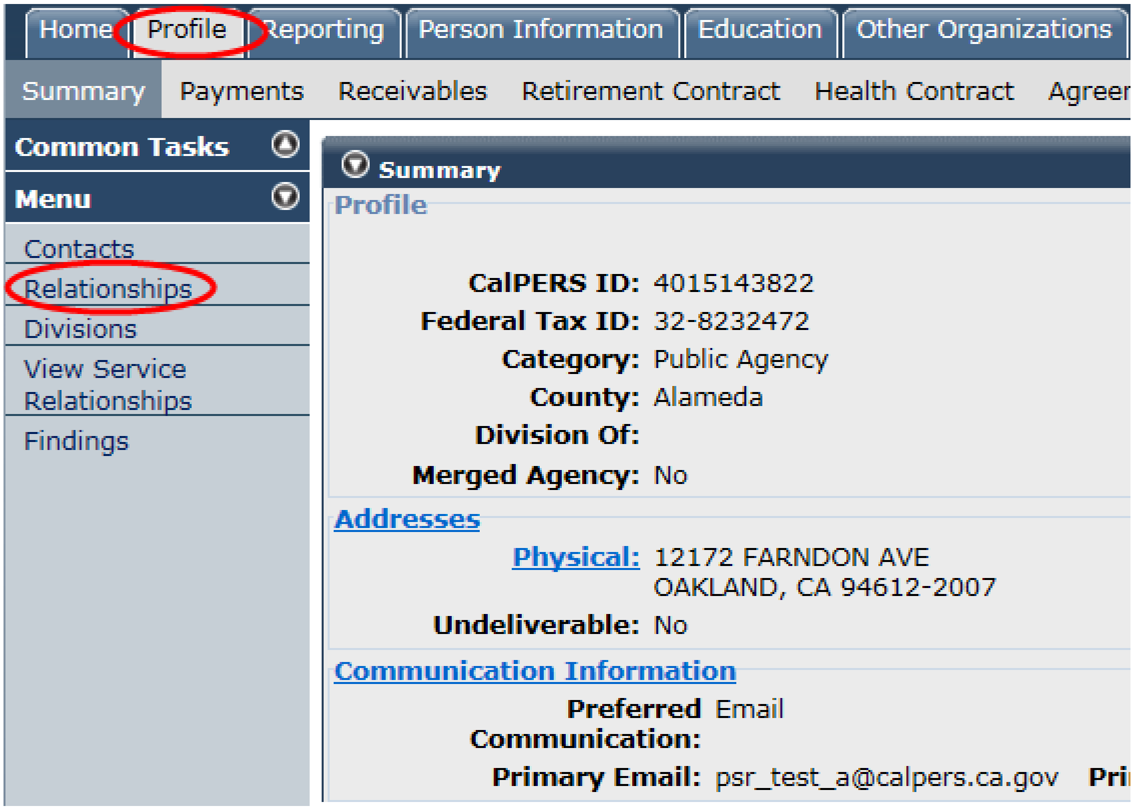


Figure 2-2. Business Relationships to Display section

Continued on next page

Step	Action	Result
	Submit the Request New Business Partner Relationship Form	
4	Within the Business Relationships section, select the **Add New** button.	**See Figure 2-3.** Business Relationship section Maintain Business Relationship section displays.
5	Within the Maintain Business Relationship Details section, select the **Select** link for the **Business Partner Name**.	**See Figure 2-4.** Maintain Business Relationship Details section Organization Search section displays.
6	Within the Organization Search section, perform a search for the business partner by entering their **name**, **Federal Tax ID**, or **CalPERS ID** in the appropriate field, then select the **Search** button.	**See Figure 2-5.** Organization Search section Search Results section displays.
7	Select the radio button associated to the business partner's name, and then select the **Select** button.	**See Figure 2-6.** Search Results section Maintain Business Relationships Details section displays.
8	Within the Maintain Business Relationship Details section, enter or select the following: • Relationship State Date • Relationship End Date (optional) • Programs Supported • Service Provided	**Figure 2-7.** Maintain Business Relationships Details section

Important! If your agency wishes to hire one company or agency for multiple services, a business partner relationship must be set up for each service.

Continued on next page

Scenario 1: Establish a Business Partner Relationship, Continued

Figure 2-3. Business Relationships section

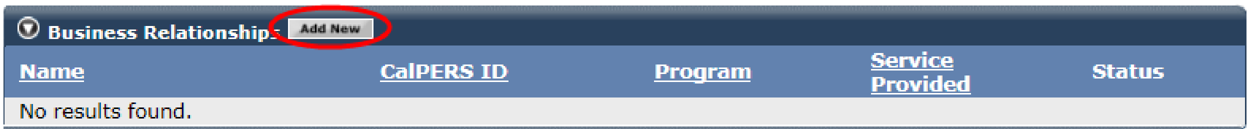


Figure 2-4. Maintain Business Relationship Details section

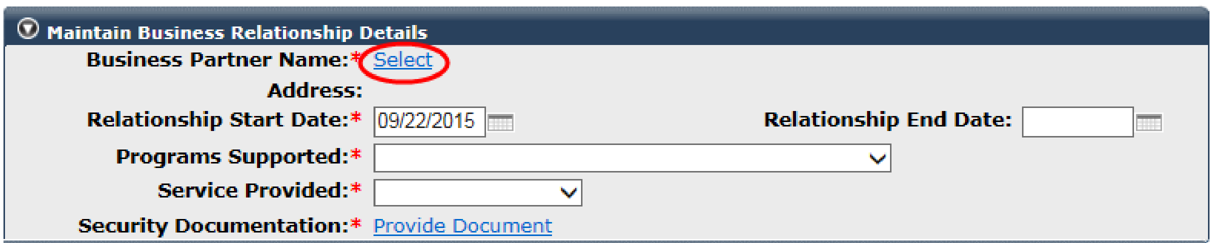


Figure 2-5. Organization Search section

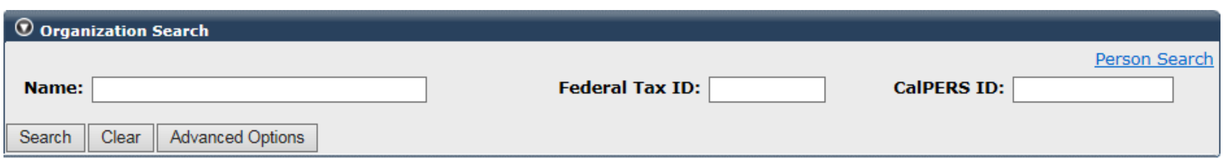


Figure 2-6. Search Results section

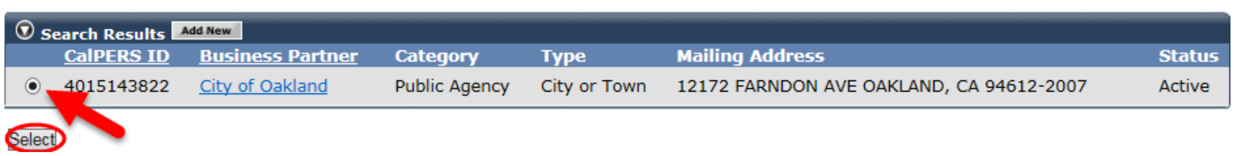


Figure 2-7 Maintain Business Relationship Details section

Continued on next page

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>9</td><td>Select the Provide Document link.</td><td>Figure 2-8. Submit Documentation section displays.</td></tr>
<tr><td>10</td><td>How will your agency submit the Request New Business Partner Relationship form?

<table>
<tr><th>If by...</th><th>Then select from the Submission Method dropdown list...</th></tr>
<tr><td>Mail</td><td>Mail and skip to step 13</td></tr>
<tr><td>Fax</td><td>Fax and skip to step 13</td></tr>
<tr><td>Upload</td><td>Upload and continue to step 11</td></tr>
</table></td><td>See Figure 2-8. Submit Documentation section</td></tr>
<tr><td>11</td><td>Select the Browse button.</td><td>See Figure 2-8. Submit Documentation section</td></tr>
<tr><td>12</td><td>Locate your completed Request New Business Partner Relationship form and select the Open button.</td><td></td></tr>
<tr><td>13</td><td>Select the Submit button.</td><td>See Figure 2-9. Maintain Business Relationships Details section displays</td></tr>
<tr><td>14</td><td>Select the Submit button.</td><td>The Business Relationship section will display a Status of Temporary.</td></tr>
<tr><td colspan="3">Check the Status of a Business Partner Relationship</td></tr>
<tr><td>15</td><td>Select the Profile global navigation tab</td><td></td></tr>
<tr><td>16</td><td>Select the Relationships left-side link.</td><td></td></tr>
<tr><td>17</td><td>Within the Business Relationships section, locate the business partner relationship.

Statuses that will display are:

• Temporary
• Active
• Rejected
• Inactive</td><td>See Figure 2-10. Business Relationships section displays</td></tr>
<tr><td></td><td>You have completed this scenario.</td><td></td></tr>
</table>

Continued on next page

Figure 2-8. Submit Documentation section

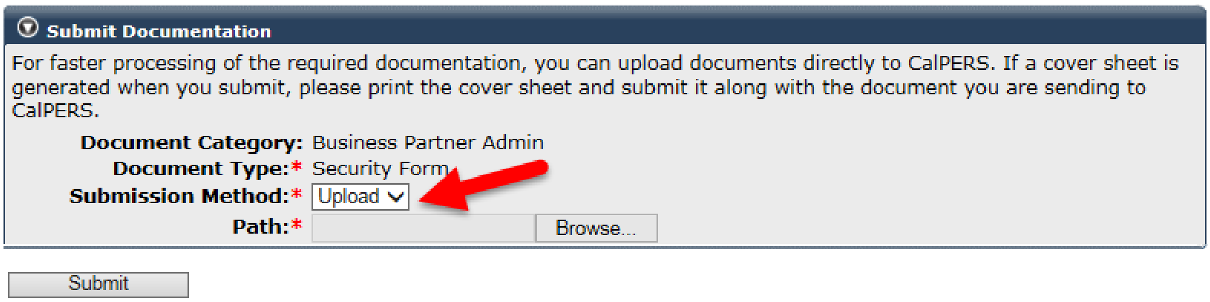
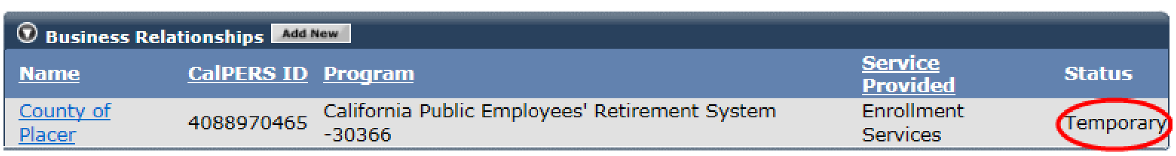


Figure 2-9. Maintain Business Relationships Details section

Figure 2-10. Business Relationships section



Name	CalPERS ID	Program	Service Provided	Status
County of Placer	4088970465	California Public Employees' Retirement System -30366	Enrollment Services	Temporary

Scenario 2: Terminate a Business Partner Relationship

Introduction

A System Access Administrator (SAA) must terminate a Business Partner Relationship with my|CalPERS once the relationship has ended. This will prevent unauthorized access to your agency and employee information.

Scenario: Your agency has terminated their relationship with Automatic Payroll Services Inc. As the SAA, you will terminate the business partner relationship with Automatic Payroll Services Inc. in my|CalPERS.

Step-by-step

Establish a business partner relationship by following the steps below.

Step	Action	Result
1	From the my|CalPERS My Home page select the **Profile** global navigation tab.	**See Figure 2-11.** Business Partner Summary page
2	Select the **Relationships** left-side navigation link.	**See Figure 2-11.** Business Partner List page
3	Select the name of the business relationship you wish to terminate.	Maintain Business Relationship Details section displays. **See Figure 2-12.** Maintain Business Relationship Details section
4	Enter the Relationship End Date.	**See Figure 2-12.** Maintain Business Relationship Details section
5	Select the **Save** button.	Business Relationships section displays. **See Figure 2-13.** Business Relationships section
	You have completed this scenario.	

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Figure 2-11. Business Partner Summary page

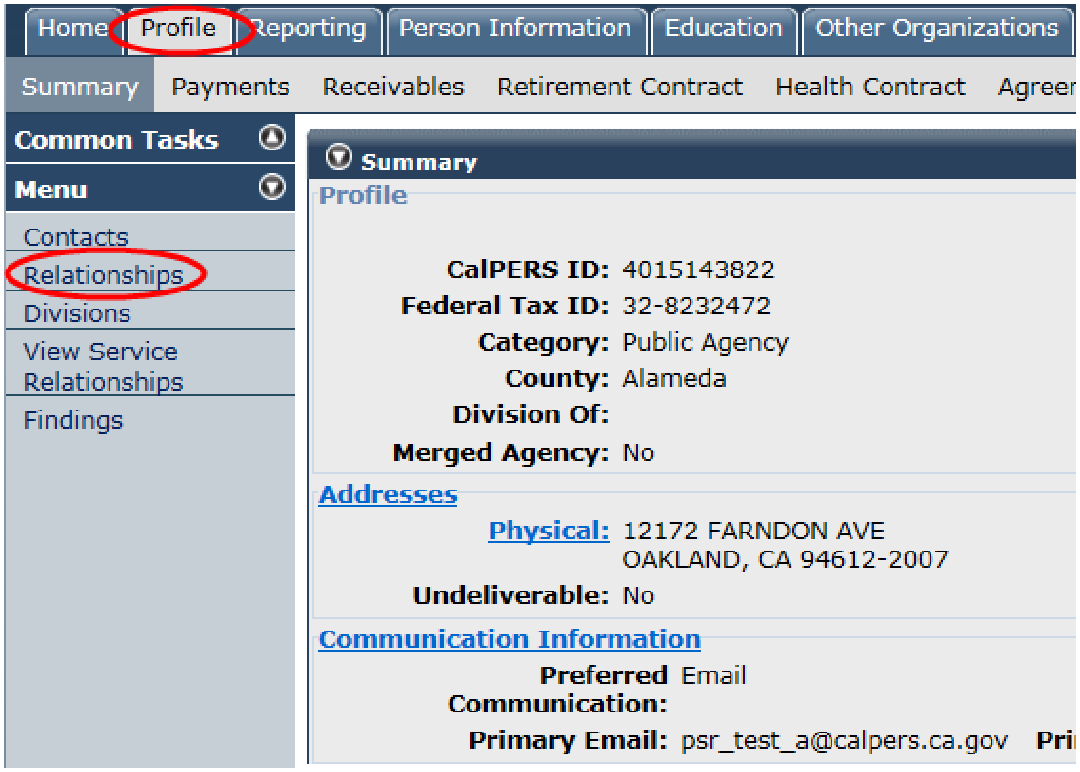


Figure 2-12. Maintain Business Relationships Details section

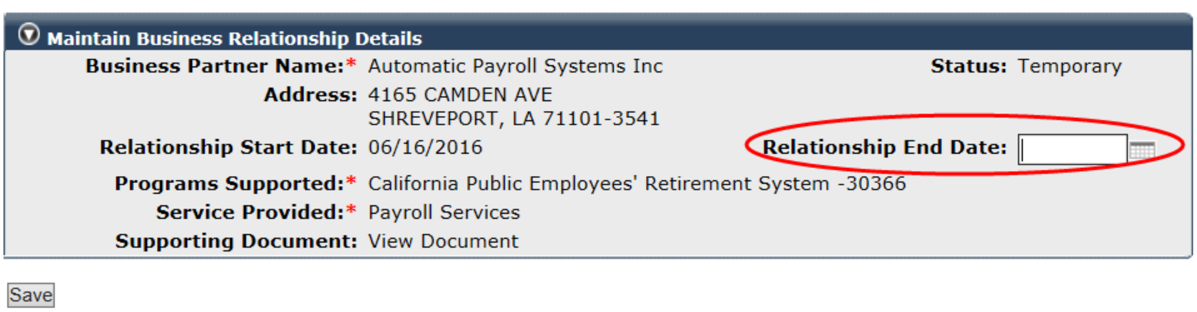
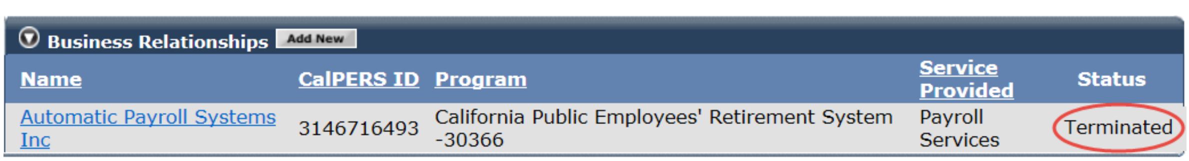


Figure 2-13. Business Relationships section



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Appendix: System Access Administration & Establish a Business Partner Relationship Resources

Overview

Introduction

Additional my|CalPERS information is available within this appendix and may be beneficial to you as a System Access Administrator

Contents

This section contains the following topics:

Reset Your Own Password

Introduction Below are methods available for users to reset their own password if it was forgotten, expired, or their account is locked.

- Request a temporary passcode to be sent via email or text message, or
- Answer the user's challenge questions
- Contact their SAA and request a password reset
- Call CalPERS at **888 CalPERS** (or **888**-225-7377)

Step-by-step To reset your forgotten password, follow the steps below.

Step	Action	Result
	Log In and Select Forgot your Password Link	
1	From the my|CalPERS login page, enter Business Partner (Employer) Username, then select the **Continue** button.	
2	Select the **Forgot your Password?** link.	**See Figure A-1.** Enter Your Password section
3	Within the User Identification section, enter the **Organization Name**, **First Name**, **Last Name**, and **Username** in the appropriate fields.	**See Figure A-2.** User Identification section
4	Select the **Continue** button.	
5	Within the Challenge Recovery Method section, select the appropriate radio button.	**See Figure A-3.** Challenge Recovery Method section
6	Select the **Continue** button.	
7	If you selected: • **By Email**, continue to step 8 • **By Phone**, skip to step 10 • **Answer your Challenge Questions**, skip to step 14	
	Recover Password by Email	
8	After receiving the temporary passcode via email, enter code in **Temporary Passcode** field.	**See Figure A-4.** Temporary Password section
9	Select the **Continue** button and skip to step 16	

Continued on next page

Figure A-1. Enter Your Password section

Figure A-2. User Identification section

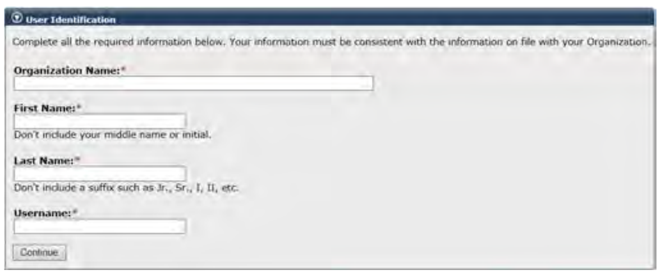


Figure A-3. Challenge Recovery Method section

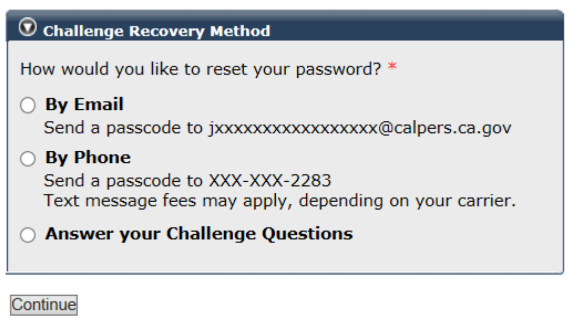
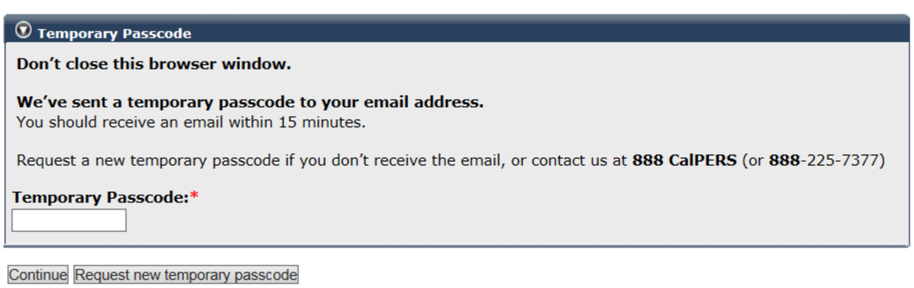


Figure A-4. Temporary Password section



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Reset Your Own Password, Continued

Step	Action	Result
	Recover Password by Phone	
10	Select the appropriate **Mobile Phone Carrier** from drop-down list. **Note**: If you mobile phone carrier is no listed, you must choose another recovery method option.	**See Figure A-5.** Challenge Recovery Method section
11	Select the **Continue** button.	Temporary passcode is sent via text message to your mobile phone.
12	Wait for temporary passcode to arrive via text message on your mobile phone, enter passcode in the **Temporary Passcode** field.	**See Figure A-6.** Temporary Passcode section
13	Select the **Continue** button and skip to step 16.	
	Recover Password by Answering Challenge Questions	
14	Within the Challenge Questions section, enter the answer for each question in the **Answer** field as prompted.	**See Figure A-7.** Challenge Questions section
15	Select the **Continue** button.	
	Enter and Confirm New Password	
16	Enter your new password in the **New Password** field, re-enter your new password in the **Confirm New Password** field.	**See Figure A-8.** Log In Credentials section
17	Select the **Save** button.	OpenSSO (Login) page displays.
18	Within the Log In Credentials section, select the **Continue** button.	**See Figure A-9.** Log In Credentials section
19	Enter your username in the **Username** field and your **new** password in **Password** field to log in.	
	You have completed this scenario.	

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Reset Your Own Password, Continued

Figure A-5. Challenge Recovery Method section

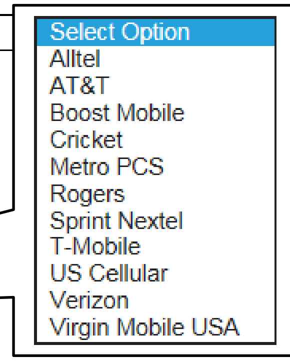


Figure A-6. Temporary Passcode section

Figure A-7. Challenge Questions section

Figure A-8. Log In Credentials section

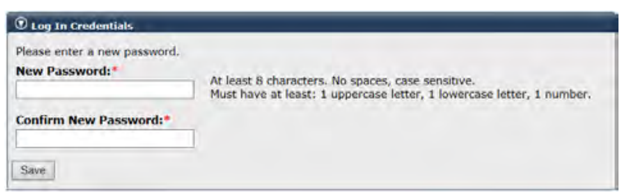
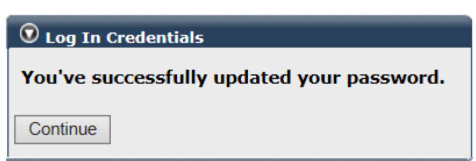


Figure A-9. Log In Credentials section



my|CalPERS and Windows Tips

Introduction

Listed are tips to make using my|CalPERS easier and more efficiently.

Windows Font Size

- Press and hold the “**Ctrl**” key and scroll up and down with your mouse wheel
- Press and hold the “**Ctrl**” key and use the “**+**” or “-“ key

Open a New Tab in Windows

Open multiple my|CalPERS tabs to multi-task. On any tab or link, right click and select “Open in new tab” or click the mouse wheel to open item in a new tab.

Open Multiple Windows

Open multiple my|CalPERS windows to multi-task. Right click on any tab or link select “Open in new window.”

To evenly split the multiple windows, use the **“Windows”** key (between Ctrl & Alt keys) and select the **“left or right”** arrow key. Or, grab the top of the window with your cursor and drag the window to the side of the screen. Let go when window shaded area is in the desired position.

Quick Keyboard Entry

- **Tab** to move forward, **Shift**+**Tab** to go back
- Dates and phone number can be entered without / - (or)
- If the cursor is on a button on the page, press the **Enter** key
- If the cursor is on a radio button, press the **spacebar**
- The dropdown fields are letter sensitive, if you type the first letter or number, it will populate that item e.g., “f” for female, “h” for hourly, etc.

Refresh my|CalPERS

Selecting at the top left is a refresh option and returns you to the Home page.

If you receive an error page and you no longer see the global navigation tabs, select the my|CalPERS logo to refresh. Also, refresh between queries.

Go Back

Avoid using the Internet “back” arrow or Backspace key, unless you’re using Cognos (reports). Use the navigation tabs and links to return to the previous page.

See **Defect/Enhancement Instructions** in the appendix to request for **Return** links.

Global Navigation Tabs

Introduction

my|CalPERS global navigation tabs do not change. Knowing what each tab is used for can help you navigate through my|CalPERS more easily.

Each tab populates different local navigation links located directly below the tabs and also populates different left-side navigation links located under the Menu left-side column.

For more details about these links, please see **Navigating my|CalPERS** in the appendix.

Home

Refresh the query page to search for another employee or retiree with the agency.

Tip! On the Home page is the left side **Contact Personal Security Settings** link that will allow users to change their password, challenge questions, or security image and message.

Profile

Displays an agency's Business Partner Summary page which lists employer address, communication information, contacts, business partner relationships, and retirement contract/agreements.

Reporting

Process a new retirement enrollment, health enrollments, and report payroll.

Person Information

Verify membership status.

Query and maintain employee and retiree profile pages.

Education

Sign up for employer instructor-led or online classes.

Other Organizations

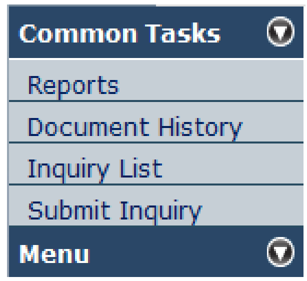
View other employer contact information e.g., addresses, email, name and phone numbers if the employer opted to make it viewable to other organizations

Common Tasks Tools

Introduction

Common Tasks on the left side includes additional tools and is available on the Home, Profile, Reporting, and Education global navigation tabs.

Select the **Common Tasks** title or the carrot to expand the menu.



Reports

Run reports via the Cognos application.

Document History

View documents that your agency sent or those CalPERS provided for the agency.

Inquiry List

View your communication and inquiry/response history with CalPERS

Submit Inquiry

This tool allows you to securely request information, submit a question, or clarify a particular issue regarding your CalPERS record. The inquiry may include confidential data, such as an SSN.

After a CalPERS representative replies, you can view the response to your inquiry.

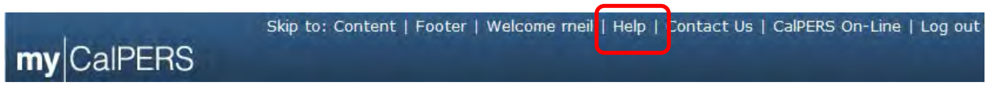
For step actions on how to submit an inquiry through my|CalPERS, please see **my|CalPERS Submit Inquiry** in the appendix.

Continued on next page

Online Help Tool

Introduction

Access the my|CalPERS **Online Help** tool by selecting the **Help** link in the header of any page in my|CalPERS.



The intuitive **Online Help** tool opens a new window and refers to the my|CalPERS page you are currently viewing.

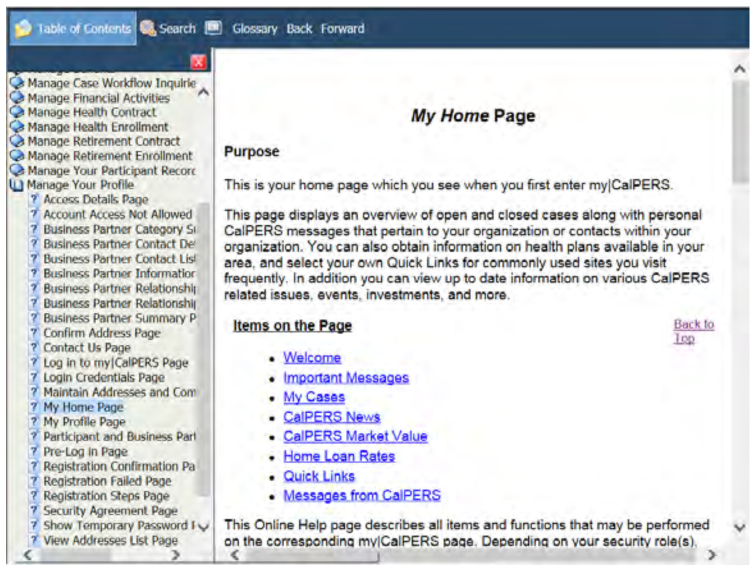


Table of Contents

The **Table of Contents** is organized by business processes or common functionality.

Search

The **Search** button allows users to search for and view keywords or phrases within all online help and “How To…” pages.

Glossary

The Online Help glossary contains key acronyms and common terms that appear throughout online help and displays alphabetical links along the top.

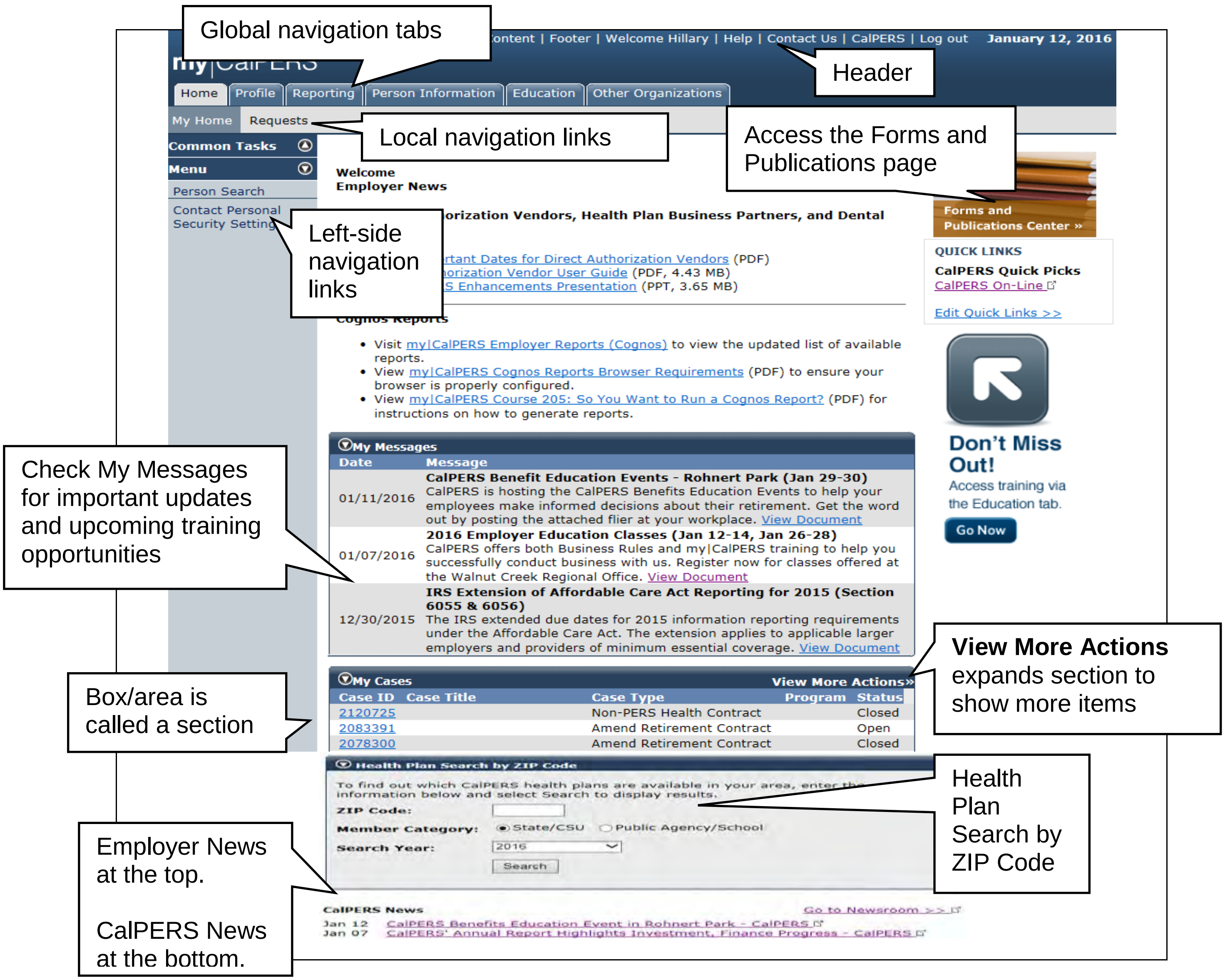
Back and Forward

The **Back** and **Forward** buttons only work in the **Online Help** tool.

my|CalPERS – My Home Page

The screenshot below shows the my|CalPERS – My Home page with a description of the main features. See the following pages for more details about:

- Global navigation tabs
- Local navigation links
- Left-side navigation links
- Help links



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my|CalPERS – Global Navigation Tabs, Local Navigation Links, and Left-Side Links

Listed below are descriptions of the global navigation tabs and the commonly used local navigation links and left-side navigation links. Local and left-side navigation links change depending on the global navigation tab you selected.

Common Tasks items do not change.

Global Navigation Tabs

Home: Refresh the query page to search for another employee or retiree with the agency.

Profile: Displays an agency's Business Partner Summary page which lists employer address(s) & communication information, contacts & users for the agency, business partner relationships, and retirement contract/agreements. Refreshing by selecting the **Profile** tab will prevent the expiring password reminder from reoccurring.

Reporting: Process a new retirement enrollment, health enrollments, and payroll. See the **Billing and Payments** local link below for additional information.

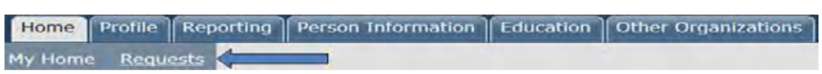
Person Information: Query employee and retiree health and retirement information; add, correct, and delete appointment information.

Education: Sign up for employer instructor-led or online classes.

Other Organizations: View other employer contact information e.g., addresses, email, name and phone numbers, if the employer opted to make it public to other employers.

Local Navigation Links

The first local links are not included in this list because they refresh the same page as the global tab.



- From the **Home** global navigation tab:
  - **Requests**: Request publications

Continued on next page

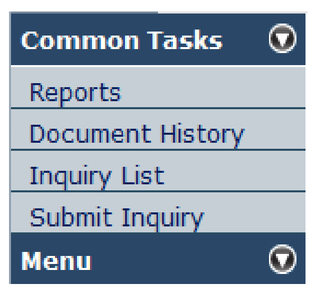
Local Navigation Links, continued

- From the **Profile** global navigation tab:
  - o **Payments**: View the status of payments e.g., pending, posted, cancelled, etc.
  - o **Receivables**: View open & closed receivables, due dates & amounts, receivable balance, and receivable description. You can also generate an employer receivable report.
  - o **Retirement Contract**: View, add, or modify a resolution, submit a valuation request, request an amendment to an agency's CalPERS contract
  - o **Health Contract**: View an agency's health contract(s) and their effective dates

- From the **Reporting** global navigation tab:
  - o **Billing and Payments:** View year-to-date billing and payments for contributions and health, receivable history, health billing roster, and the option to quick pay a receivable or download a Remittance Advice Report to mail with a check to pay contributions
  - o **Payroll Schedule:** Add a new schedule, request an extension or exemption
  - o **Member Requests**: Update the status of an employment certification request, view historical certification information, provide employer certification for a period of service that is not listed, and add a new employment service period
  - o **Health Reconciliation**: This is only used by health carriers

Left-Side Navigation Links

- From the **Common Tasks** folder left-side link:
  - o **Reports**: Run reports via the Cognos application (See unit 4)
  - o **Document History**: View documents that you sent or those CalPERS provided for the agency
  - o **Inquiry List**: View communication and inquiry/response history. Refer to the Submit Inquiry steps 6 – 7 which are located after this information on Navigating my|CalPERS.
  - o **Submit Inquiry**: Submit a question or information to CalPERS through a secure connection with my|CalPERS. You can include confidential data, such as an SSN. Refer to the Submit Inquiry details which are located after this information on Navigating my|CalPERS.



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Left-Side Navigation Links, continued

The left-side links are dictated by the global navigation tabs, local navigation links, and some links within the body of the pages.

- From the **Home** global navigation tab:
  - o **Person Search**: Query employee/retiree information
  - o **Contact Personal Security Settings**: Change your password, challenge questions, or security image and message

- From the **Profile** global navigation tab:
  - o **Contacts**: Lists current and former my|CalPERS contacts
  - o **Relationships**: Lists any business partner relationships that you established to do business on behalf of your agency
  - o **Divisions**: Lists an agency under the umbrella of your agency e.g., a school district is a division of a county office
  - o **Findings**: Displays the findings after a CalPERS auditor has reviewed the agency

- From the **Profile** tab, **Receivables** local link:
  - o **Payments**: View payments e.g., pending, posted, cancelled etc.
  - o **Payment Accounts**: View, add, or delete banking accounts
  - o **Rate Plan Details**: View the year-to-date PERS contributions

- From the **Profile** tab, **Retirement Contract** local link:
  - o **View Benefits**: View benefit levels and provision
    Maintain Positions: Add or update positions. Each agency determines the codes and position names for each category.

- From the **Profile** tab, **Health Contract** local link, select a **health contract** link:
  - o **Group Summary**: View the medical groups
  - o **Contribution Preview**: View the agency's contribution toward enrollees' health premiums & vesting information
  - o **Subscriber List**: View all enrolled under the agency and the number covered
  - o **Contract History**: View the contract's state, type, status, etc.

Continued on next page

Left-Side Navigation Links, continued

- From the **Reporting** global navigation tab:
    - **Adjustment Reports**: Create a payroll adjustment report to add adjustment records
    - **Search Payroll Records by Participant**: To search for posted or unposted payroll records for a specific employee

- From the **Reporting** tab, **Billing and Payments** local link:
    - **Super Funded Accounts**: View the details of rate plans for which you are super funded
    - **Payment Accounts**: Add or delete a banking account for online payments

- From the **Reporting** tab, **Payroll Schedule** local link:
    - **Fees List**: View a list of your assessed fees and waived fees, view the date, type, amount and status of all fees by program and fiscal year. You can change the displayed information by selecting a program and/or fiscal year and the **Display** button.

my|CalPERS Submit Inquiry

my|CalPERS Submit Inquiry

Access and use my|CalPERS Submit Inquiry by following the steps below.

Step	Action	Result
	Submit Inquiry	
1	From any page in my|CalPERS, select the **Common Tasks** menu left-side navigation link.	**See Figure A-1. Common Tasks** menu on left-side navigation links
2	Select the **Submit Inquiry** link from the left-side navigation menu.	**See Figure A-1. Submit Inquiry** left-side navigation link
3	Select or enter: • **Category** (Required field) • **Associated Case** (Select the case number from the dropdown list if there is one) • **Program** (Selecting one is encouraged) • **Preferred Method of Response** • **Work/Daytime Phone Number** (Ensure your contact phone number is populated) • **Email** (Ensure your email is populated)	**See Figure A-2.** Contact Information section When your inquiry is answered, you will receive a system-generated email.
4	Type inquiry in **Inquiry** field.	**See Figure A-2.** Inquiry section
5	Select the **Submit** button.	Self-Serve Inquiry page displays.

Figure A-1. Common Tasks menu and **Submit Inquiry** left-side link

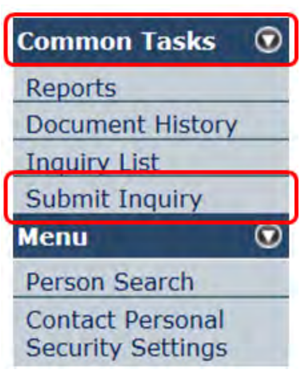
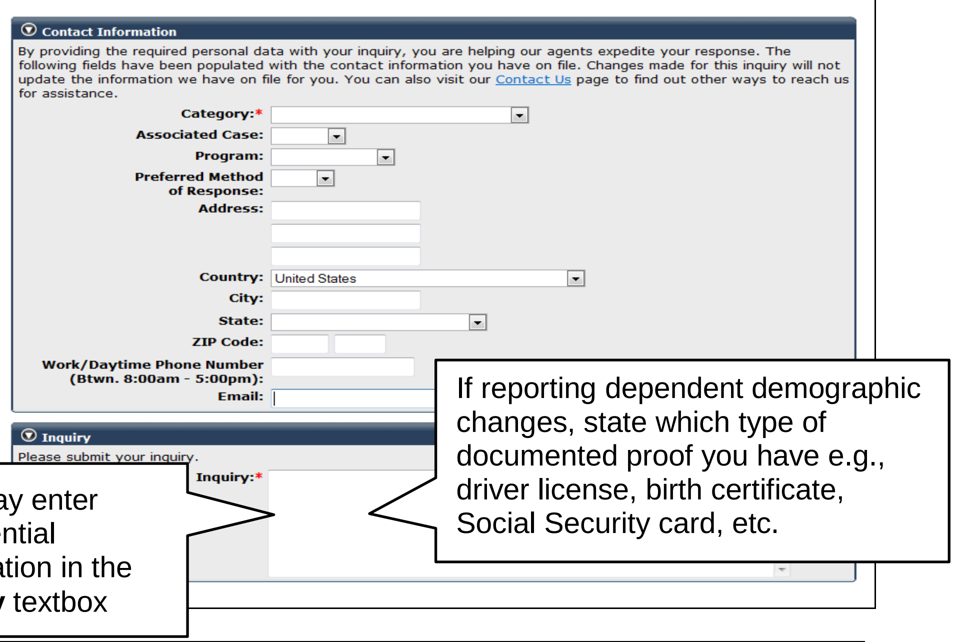


Figure A-2. Contact Information and Inquiry sections



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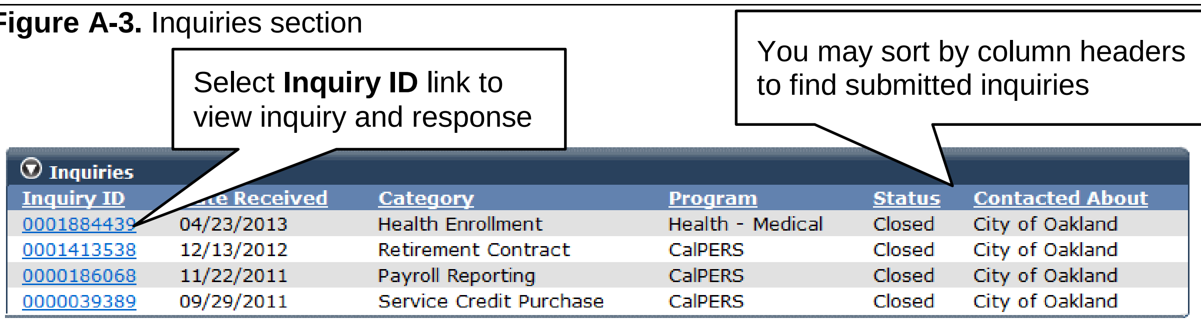
Step	Action	Result
	View Response	
6	To view the details of your inquiry after receiving a system generated notification via email, select **Inquiry List** from **Common Tasks** from the left-side navigation links.	Inquiry List page displays.
7	Select Inquiry **ID number**. CalPERS does not send confidential information via email. The email that you receive is only to notify you that your inquiry has been worked and most likely completed.	**See Figure A-3.** Inquiries section Self -Serve Inquiry page displays.

Figure A-3. Inquiries section



Inquiry ID	Date Received	Category	Program	Status	Contacted About
0001884439	04/23/2013	Health Enrollment	Health - Medical	Closed	City of Oakland
0001413538	12/13/2012	Retirement Contract	CalPERS	Closed	City of Oakland
0000186068	11/22/2011	Payroll Reporting	CalPERS	Closed	City of Oakland
0000039389	09/29/2011	Service Credit Purchase	CalPERS	Closed	City of Oakland

CalPERS Resources

Information for Employers

Obtain information for employers by going to the CalPERS website at www.calpers.ca.gov, then select Employers:

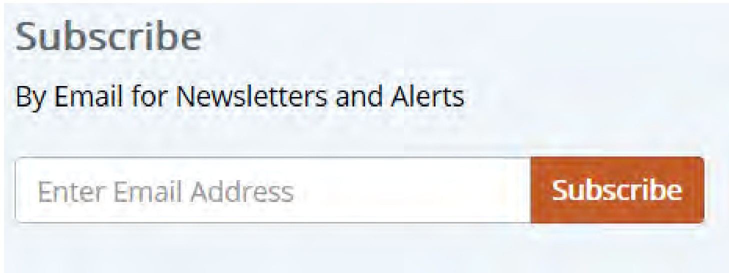
Forms & Publications Page

Obtain forms and publications by going to the CalPERS website at www.calpers.ca.gov, and then selecting the View All link under Forms & Publications:

Continued on next page

Subscribe to Employer Bulletins and Circular Letters

Subscribe to Employer Bulletins and Circular Letters via email by going to the CalPERS website at www.calpers.ca.gov, and then enter your email address under Subscribe.



Note: You may also search for a previously published Circular Letters by subject or date.

Pathway: CalPERS website > Employers > Resources: Circular Letters

System Access Administration Resources

System Access Administration Resources

The following links are valuable references to assist you in your my|CalPERS system access administration:

my|CalPERS Student Guides
Pathway: CalPERS website > Employers > I Want To…: Find my|CalPERS Student Guides

Employer Education Schedule
Pathway: CalPERS website > Employers > I Want To…: Find my|CalPERS Student Guides > Resources: Employer Education Schedule

my|CalPERS Technical Requirements
Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements

System Access Administrators Page
Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > System Access Administrators

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

my|CalPERS Employer Reports (Cognos) has the list of reports that are available and the user roles that are needed for a user to run these reports.
Pathway: CalPERS website > Employers > my|CalPERS Technical Requirements > my|CalPERS Employer Reports (Cognos)

Defect/Enhancement Instructions

Email Instructions

If you encounter any defects in my|CalPERS, please submit defect information by including a brief description of the issue in the Subject line of your email. Some examples would be: “Slow Page Load of UID #” or “Health Plan Enrollment Error Message.” This can also be used to request enhancements. Include all the sections listed below, then email the Defect Report to: CalPERS_Employer_Communications@CalPERS.CA.GOV A my|CalPERS employer educator will contact you after your Defect Report email has been received.

Sections & Instructions

Please include each section below in your email:

Section	Instructions
1. Date of Incident	Enter the date the incident occurred.
2. Time of Incident	Enter the time the incident occurred.
3. Agency CID #	Enter your agency CalPERS ID (CID) #.
4. Agency Name	Enter your agency name reporting the possible defect.
5. Person’s Name	Enter the name of the person reporting the defect.
6. Employer Phone #	Enter phone number where the person can be reached. You can include more than one number.
7. UID Screen #	User Interface Design (UID) # is assigned to each individual Web page within my|CalPERS. This is used to identify the page where the defect or issue occurred. You can locate the UID in the upper right hand corner by hovering over the date with your cursor.
8. Participant ID #	Enter the employee’s CalPERS ID (CID) # if the defect/issue is on an employee’s profile page.
9. Participant Name	Enter the employee’s name if the defect/issue is on an employee’s profile page.
10. Description	When describing the defect/issue, please include the following two pieces of information: ▪ What was the defect/issue (include error message # and language if applicable) ▪ What should have happened
11. Steps	Provide step-by-step detail on how to get to where the defect/issue occurred within the system; include data being used (drop-down selections, fields entered, links selected, etc.).
12. Screen Shot(s)	Include two screen shots of the UID page, one with the defect/issue and one of the UID page prior to that.
13. Comments	Add any additional information relevant to this issue not included above.

CalPERS Contacts

Contact CalPERS via Email	Email CalPERS_Employer_Communications@calpers.ca.gov to connect with training staff and CalPERS subject matter experts for questions and inquiries. Email Employer.Response.Team@calpers.ca.gov for when you need more specialized assistance. The Employer Response Team (ERT) will help your executives to resolve time-critical, sensitive and complex issues quickly. For more information on ERT, refer to the January 17, 2014 Circular Letter 200-005-14. Pathway: CalPERS website > Employers > Resources: Circular Letters > Enter 200-005-14 in the Search field
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 a Questions, Comments, & Complaints	General Questions, Comments, or Complaints can be submitted to CalPERS thru the CalPERS website. We'll respond to general inquiries within five business days. If you have a complaint, we may contact you within 30 days if further information is needed. This is not a secure method to contact CalPERS; therefore, confidential information should not be included. Pathway: CalPERS website > Contact > Questions, Comments, & Complaints To submit a secure online message, log in to your business partner my|CalPERS account to use the Submit Inquiry feature. See page Common Tasks Tools within the appendix.