

my|CalPERS Direct Authorization Vendor User Guide

December 2025

Contents

my CalPERS Login, Demographics and Profile Maintenance for Direct Authorization Vendors	1
Part 1: my CalPERS Login	1
Log in to my CalPERS	1
Log in to my CalPERS after initial log in	5
Part 2: Update Business Partner Demographics	6
Business Partner Demographics	6
Update a business partner’s address and communication information	6
Update Business Partner Demographics	12
Part 3: Business Partner Profile Maintenance	15
Business Partner Profile Maintenance	15
Establish a business partner contact	15
Business Partner Contact Roles	27
Modify business partner contact roles	27
Unlock a business partner contact account (SAA Only)	34
Reset a business partner contact’s password (SAA Only)	39
my CalPERS Agreement Administration and Deduction Processing for Direct Authorization Vendors	44
Setup a New Direct Authorization Agreement	44
Part 1: Direct Authorization Agreement Administration	44
Sign the Hold Harmless agreement	54
Manage Relationship with a Third Party Administrator	60
Add a third party administrator to an existing agreement	60
Replace the third party administrator for an existing agreement	66
Remove a third party administrator from an existing agreement	75
Carrier “Rollover” Terminate Agreement Scenario	80
Terminate an Agreement	86
Part 2: Direct Authorization Agreement Deduction Processing	93
Processing Deductions	93
Search for deduction records	97
Add a new deduction	97
Update deduction amount	100
Delete a deduction	102

my|CalPERS Direct Authorization Vendor User Guide

Perform a Global Rate Change	104
Deductions Request File Submission.....	111
Submit a Deductions Request file using file upload.....	111
Manage Deductions Request File Errors	117
Review deduction records in staging area	117
Clearing errors	120
Deduction Payments.....	121
Generating the Deduction Register Report.....	125

my|CalPERS Login, Demographics and Profile Maintenance for Direct Authorization Vendors

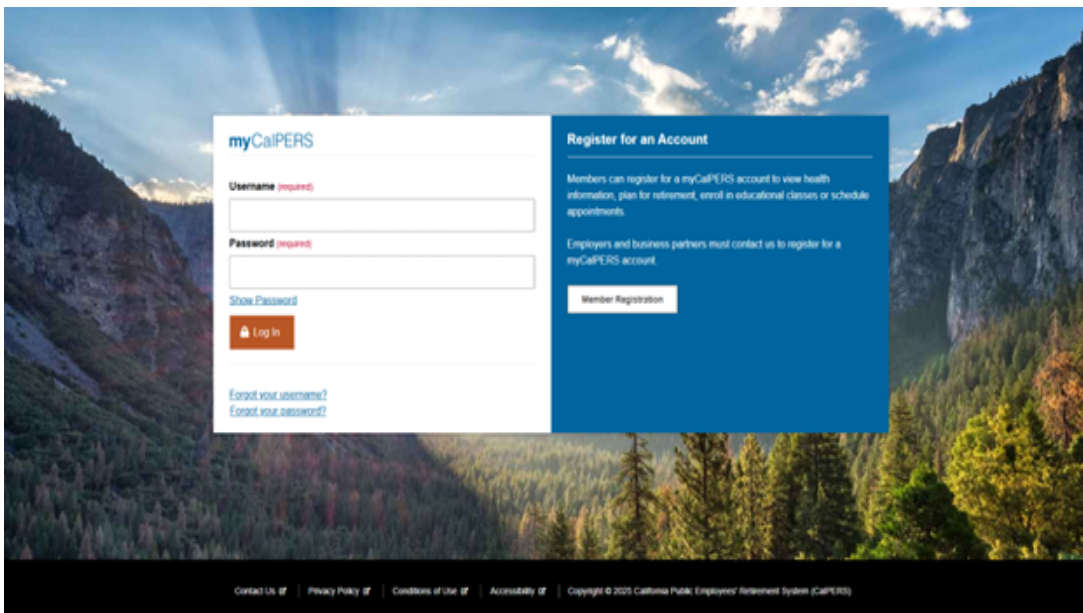
Part 1: my|CalPERS Login

Log in to my|CalPERS

Log in to my|CalPERS for the first time with a temporary password assigned by your organization's system access administrator

Your organization's system access administrator will need to assign a username and system access roles before a system user can log in to my|CalPERS. my|CalPERS will generate a temporary password that will need to be documented and provided to the user by the system access administrator (this process is covered in the Establish a Business Partner Contact and the Assign and Modify Business Partner Contact Roles activities later in this user guide).

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.



Type in your Username and Password and select Log In to continue.

The Reset Your Password page displays.

myCalPERS

Reset Your Password

Complete the following fields so we can confirm your identity. The information you enter must match our records exactly.

Email (required)

Username (required)

Continue

Enter your email and assigned username in the Email and Username field then select the Continue button. This will send a Access Code to your email address.

You will want to enter the Access Code provided in the email within 10 minutes, as it will expire. Once entered, select Continue.

myCalPERS

Enter Your Code

We've sent a six-digit code to R*****@calpers.ca.gov The code expires in 10 minutes. Check your spam folder if you don't see the email.

Code (required)

Continue **Send a New Code** [Cancel](#)

If you need assistance, contact us at **888 CalPERS** (or **888-225-7377**).

The screenshot shows the 'myCalPERS' logo at the top left. Below it is the heading 'Create Your Password'. A sub-heading reads 'Your new password must have:' followed by a bulleted list of requirements: 8 characters minimum, 1 uppercase letter, 1 lowercase letter, 1 number, and no spaces. Below the list is a text input field labeled 'Password (required)'. Underneath the field is a blue link that says 'Show Password'. At the bottom of the form is an orange button labeled 'Continue'.

The Create Your Password page displays. Follow the guidelines to create your password and select Continue.

The screenshot shows the 'myCalPERS' logo at the top left. Below it is the heading 'Password Updated'. A green confirmation banner contains a checkmark icon and the text 'You've successfully updated your password'. Below the banner is a blue link that says 'Return to Log in'.

my|CalPERS Direct Authorization Vendor User Guide

The my|CalPERS Security Agreement page displays.

Security Agreement

The privacy of personal information is important to CalPERS, and CalPERS has taken steps designed to ensure your information is protected. To continue the registration process you must review and agree to the CalPERS Security Agreement below. Your future use of this website acknowledges that you have read, understood, and agreed to the Security Agreement Terms and Conditions. These terms and conditions include responsibilities for both CalPERS and for you.

Terms and Conditions
Last Revised: October 2025

Your Role in Security

- Review the CalPERS Security Policy within our [Conditions of Use](#) and our [Privacy Policy](#) for additional security information.
- Protect your Business Partner account by not revealing your username and password to anyone. CalPERS employees will never ask you for your password.
- Contact CalPERS at 888 CalPERS (or 888-225-7377) if you believe that an unauthorized person has gained access to your username, password, or if you discover unauthorized activity.
- Do not walk away from your computer if you're logged into myCalPERS. Log out and completely shut down your browser first.
- Avoid accessing your account from a public computer or public WiFi.
- These terms and conditions are subject to change. If changed, you will be prompted to review and agree to the latest version the next time you log in.
- When you log in to our secure services on myCalPERS, you're acknowledging you have read and understand our Security Policy (set forth in CalPERS' Conditions of Use) and are attesting that you are an authorized person on the employer account.

CalPERS Responsibilities

- CalPERS will use internet security technology designed to protect your online information, such as, data encryption and password authentication.
- Although CalPERS attempts to ensure the information provided is accurate and access is available, CalPERS accepts no responsibility for problems that occur because of interruption or inability to access the service for any reason, including but not limited to, regularly scheduled down time, user error, or any other reason beyond CalPERS' control.
- We require multifactor authentication to access your Business Partner account. Multifactor authentication is a method of verifying your identity using multiple factors, such as a password and a verification code. Verification codes can be sent to you by text message, a phone call, or email.

Use of Your Contact Information

- CalPERS will use the contact information of employers, contracting agencies, Business Partners, and/or their agents, for CalPERS business purposes.

Read the security agreement and then select the I Agree button.

Business Partner Training Acknowledgement

To help you submit and maintain accurate information, as well as ensure compliance, CalPERS provides Retirement Business Rules, Health Business Rules, and myCalPERS system training. For more information, select the Education tab within myCalPERS or visit the Education Center on the CalPERS website.

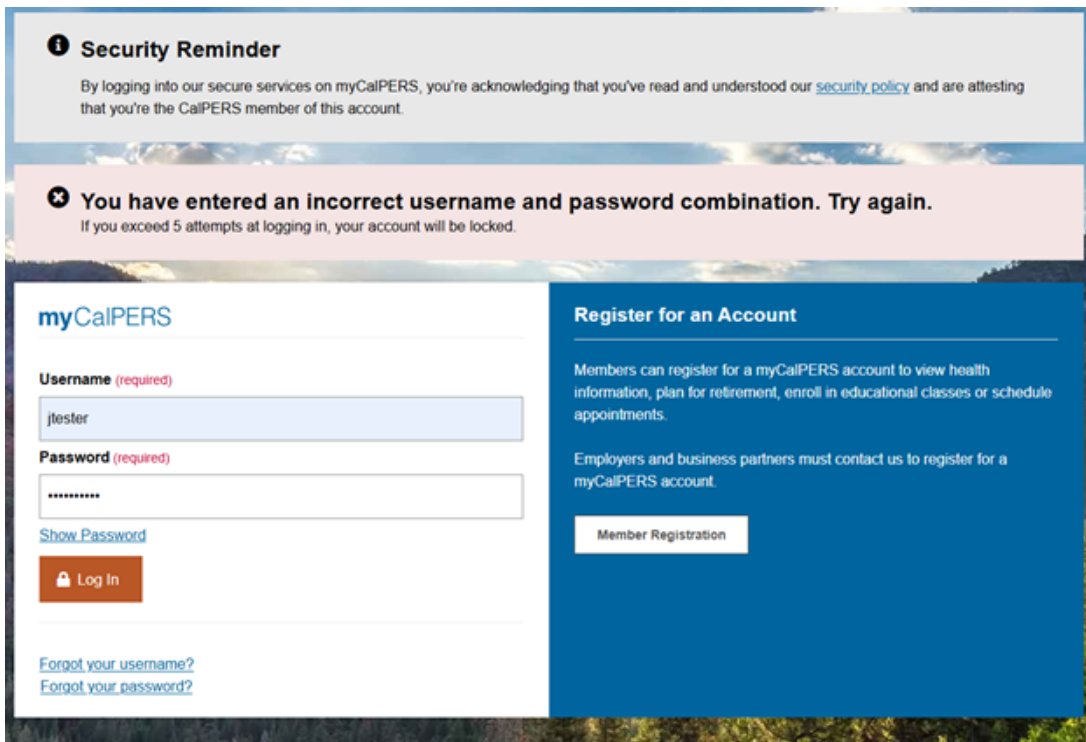
By accessing this application, you acknowledge that training is available to you.

my|CalPERS Direct Authorization Vendor User Guide

The my|CalPERS Home page displays



If you enter an incorrect username and/or password, the error message “You have entered an incorrect Username and Password combination. Try again” will display on the my|CalPERS Business Partner Login page.

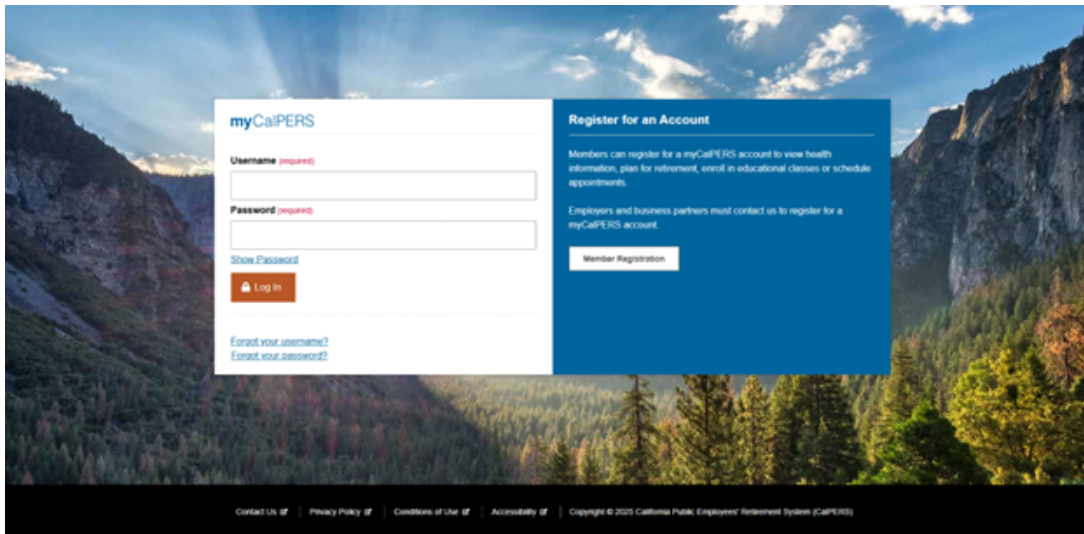


Part 2: Update Business Partner Demographics

Business Partner Demographics

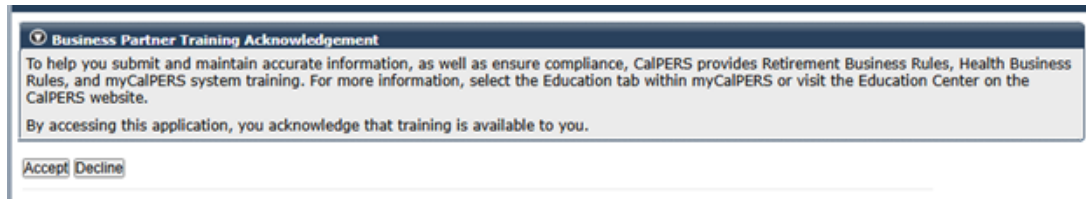
Update a business partner's address and communication information

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.



Type in your Username and Password and select Log In to continue.

Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



The Conditions of Use for Business Partners (Employers) page displays.

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.



Select the **Profile** global navigation tab.

The screenshot shows the 'Profile' page with the following details:

- Summary:**
 - CalPERS ID: 2141025810
 - Federal Tax ID: 11-1111111
 - Category: State of California
 - Regional Office: Sacramento Regional Office
 - Merged Agency: No
 - Status: Pending Active
 - Name: The Business Partner Company
 - Division Of:
 - County: Sacramento
- Addresses:**
 - Physical:** (Selected)
 - Mailing: 01234 ABC STREET, SACRAMENTO, CA 95811
 - Undeliverable: No
- Communication Information:**
 - Preferred Communication: Mail
 - Primary Email:
 - Primary Phone Number:
- Contacts:**

Name	Contact Type	System Admin	Primary	Phone Number
Jonathan Tester	General	Y	N	(555) 666-7777
Laura Tester	General		Y	(555) 666-7777
- Business Relationships:** No results found.
- Contracts/Agreements:** No results found.

The 'Maintain Address Details' form contains the following fields and options:

- Same as Mailing Address
- Address Type:** Physical Address (dropdown)
- Start Date:** 02/04/2026 (calendar icon)
- End Date:** (calendar icon)
- Country:** United States (dropdown)
- Address:** (text input)
- City:** (text input)
- State:** California (dropdown)
- Zip Code:** (text input)

Buttons: Save, Clear

Select the **Physical** link in the Addresses area within the Summary section.

The current mailing address ("PO BOX 94035 San Francisco, CA 94145-5210" in this example) displays with **Maintain Address Details** section.

Maintain Address Details

All address changes are effective immediately.

Address Type: Mailing Address
Start Date: 01/22/2026
Country: United States
Address: 01234 ABC STREET
City: SACRAMENTO
State: California
County: Sacramento
Zip Code: 95811

Save Clear

Enter the revised address information in the **Maintain Address Details** section. In this example, we entered "01234 ABC Street Sacramento, CA". Select the **Save** button.

Confirm Address

We have validated your address against U.S. postal records and no results have been found. Please select the correct address and click Confirm to return to the address page.

Entered Address: 01234 ABC STREET, SACRAMENTO, CA 95811
U.S. Postal Service Matches:

Confirm

The **Confirm Address** page displays. my|CalPERS searches for matching U.S. postal records. Select either the **Entered Address** or the **U.S. Postal Service Matches** radio button next to the correct physical mailing address and then select the **Confirm** button.

my|CalPERS Direct Authorization Vendor User Guide

The confirmed mailing address displays in the Maintain Address Details section.

The screenshot displays a web application interface with a top navigation bar containing tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this is a sub-navigation bar with Summary, Payments, Receivables, and Agreements. A left sidebar menu lists various tasks and services. The main content area is titled 'Maintain Address Details' and includes a note that address changes are effective immediately. It contains a form with the following fields: Address Type (Mailing Address), Start Date (02/04/2026), Country (United States), Address (01234 ABC STREET), City (SACRAMENTO), State (California), County (Sacramento), and Zip Code (95811). A red asterisk indicates required fields. At the bottom of the form are 'Save' and 'Clear' buttons.

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Agreements

Common Tasks **Name:** The Business Partner **CalPERS ID:** 2141025810
Company

Menu *Required Fields

Maintain Address Details
All address changes are effective immediately.

Address Type: Mailing Address
Start Date: 02/04/2026
Country:* United States
Address:* 01234 ABC STREET
City:* SACRAMENTO
State:* California
County: Sacramento
Zip Code:* 95811 -

Save Clear

If the revised mailing address is displayed correctly, select the **Save** button.

my|CalPERS Direct Authorization Vendor User Guide

The updated mailing address is displayed in the Addresses area of the Summary section. Note that the process is the same for updating a physical address.

The screenshot displays the 'Summary' section of the application. It includes a navigation menu on the left and a main content area with several sections:

- Profile:**
 - CalPERS ID: 2141025810
 - Federal Tax ID: 11-1111111
 - Category: State of California
 - Regional Office: Sacramento Regional Office
 - Merged Agency: No
 - Status: Pending Active
 - Name: The Business Partner Company
 - Division Of: Sacramento
 - County: Sacramento
- Addresses:**
 - Physical:** Undeliverable: No
 - Mailing:** 01234 ABC STREET, SACRAMENTO, CA 95811. Undeliverable: No
- Communication Information:**
 - Preferred Communication: Mail
 - Primary Email:
 - Primary Phone Number:
- Contacts:**

Name	Contact Type	System Admin	Primary	Phone Number
Jonathan Tester	General	Y	N	(555) 666-7777
Laura Tester	General		Y	(555) 666-7777
- Business Relationships:**

Name	CalPERS ID	Program	Service Provided	Status
No results found.				
- Contracts/Agreements:**

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
No results found.						

Update Business Partner Demographics

The screenshot displays the my|CalPERS interface for updating business partner demographics. The top navigation bar includes Home, Profile, Reporting, Person Information, Education, and Other Organizations. The main content area is divided into several sections:

- Summary:**
 - Profile:**
 - CalPERS ID: 2141025810
 - Federal Tax ID: 11-1111111
 - Category: State of California
 - Regional Office: Sacramento Regional Office
 - Merged Agency: No
 - Status: Pending Active
 - Name: The Business Partner Company
 - Division Of:
 - County: Sacramento
 - Addresses:**
 - Physical:**
 - Undeliverable: No
 - Mailing:** 01234 ABC STREET, SACRAMENTO, CA 95811
 - Undeliverable: No
 - Communication Information:**
 - Preferred Communication: Mail
 - Primary Email:
 - Primary Phone Number:
- Contacts:**

Name	Contact Type	System Admin	Primary	Phone Number
Jonathan Tester	General	Y	N	(555) 666-7777
Laura Tester	General		Y	(555) 666-7777
- Business Relationships:**

Name	CalPERS ID	Program	Service Provided	Status
No results found.				
- Contracts/Agreements:**

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
No results found.						

Similar to the address update process, select the Communication Information link within the Summary section to update your organization's contact information within my|CalPERS.

my|CalPERS Direct Authorization Vendor User Guide

Your organization's current contact information displays within the Maintain Communication Details section.

Note that you can select your organization's preferred method of communication in the Maintain Preferred Communication Details section so that CalPERS will contact your organization using your requested method of communication.

Result of contact number change.

In this example, we selected “Email” from the Preferred Communication dropdown in the Maintain Preferred Communication Details section and entered a new primary email address (“alice@daocu.org” instead of “robert@calpers.ca.gov” in this example). Select the Primary radio button associated with the primary email address. You can also update phone numbers within the Maintain Communication Details section, which we did not do in this example. Select the Save button. Note that in the Communication Information area of the Summary section, the Preferred Communication now displays as “Email” and the Primary Email displays as “robert@calpers.ca.gov”.

The screenshot displays the 'Summary' section of the CalPERS system. The top navigation bar includes 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Below this, there are tabs for 'Summary', 'Payments', 'Receivables', and 'Agreements'. The 'Summary' section is expanded, showing a 'Profile' section with the following details:

- CalPERS ID:** 2141025810
- Federal Tax ID:** 11-1111111
- Category:** State of California
- Regional Office:** Sacramento Regional Office
- Merged Agency:** No
- Status:** Pending Active
- Name:** The Business Partner Company
- Division Of:**
- County:** Sacramento

Below the profile section is the 'Addresses' section, which includes 'Physical' and 'Mailing' addresses. The 'Mailing' address is 01234 ABC STREET, SACRAMENTO, CA 95811. The 'Communication Information' section shows 'Preferred Communication: Mail' and 'Primary Email: robert@calpers.ca.gov'.

There are also sections for 'Contacts', 'Business Relationships', and 'Contracts/Agreements', each with an 'Add New' button and a 'View More Actions' link.

The screenshot displays the 'Maintain Preferred Communication Details' section of the CalPERS system. The 'Preferred Communication' dropdown is set to 'Email'. Below this is the 'Maintain Communication Details' section, which includes a 'Primary' radio button selected for the 'Email' field. The email address 'alice@daocu.org' is entered in the 'Email' field. The 'Save' button is visible at the bottom of the form.

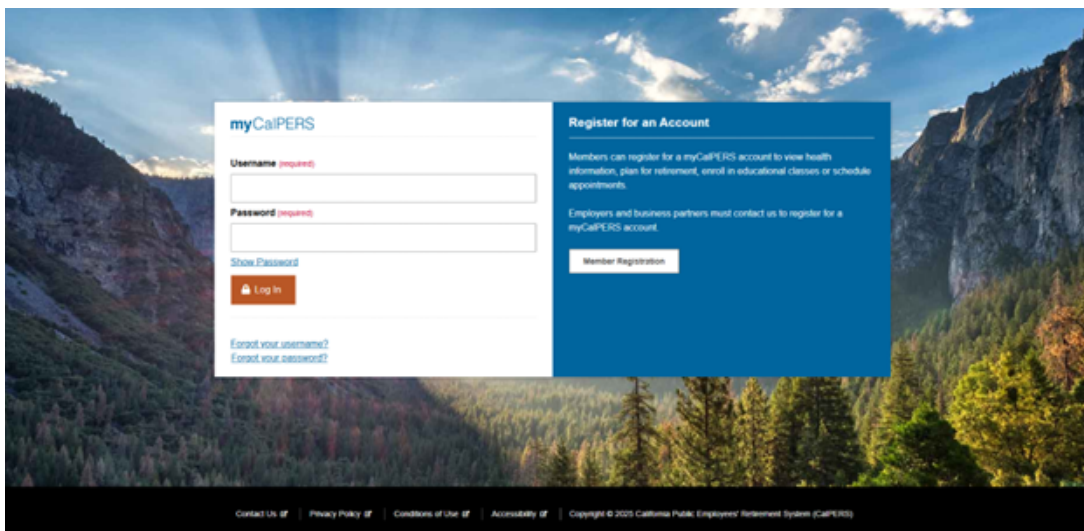
Part 3: Business Partner Profile Maintenance

Business Partner Profile Maintenance

Establish a business partner contact

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



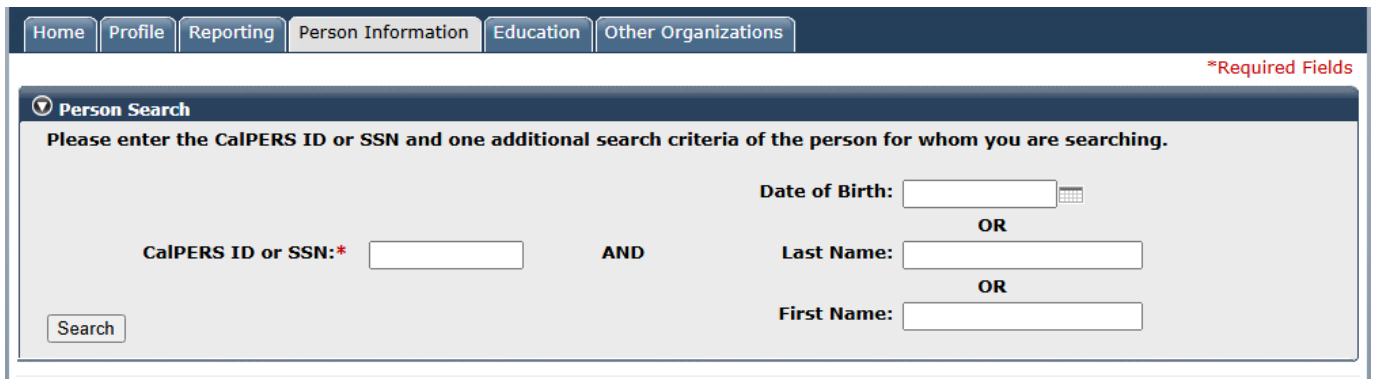
Type in your Username and Password and select Log In to continue.

The my|CalPERS Home page displays.



If your organization is a school, public agency or State agency and the contact you are adding is a CalPERS covered employee, you will add them as a contact using their CalPERS ID. You can look up the person information for the contact to retrieve this information.

Select **Person Search** from the left-side navigation and then select the **Person Information** tab.



The *Person Search* page displays. Enter the Social Security number (SSN) of the contact in the **SSN / Federal or Individual Tax ID** field and then select the **Search** button.

The *Summary* page displays. The CalPERS ID of "Jonathan Tester" is displayed ("4622263933" in this example).

Make note of the CalPERS ID for "Jonathan Tester" ("4622263933" in this example) and then select the **Profile** global navigation tab.

If the individual you are adding has never been a member of CalPERS, they will not have a CalPERS ID and you can add them using **Add New Person** on the *Maintain Contact Details* page. See below for detailed instructions on how to do this.

Name	Contact Type	System Admin	Primary	Phone Number
Jonathan Tester	General	Y	N	(555) 666-7777
Laura Tester	General		Y	(555) 666-7777

The *Business Partner Profile Summary* page displays.

The screenshot shows the 'Business Partner Profile Summary' page. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, and Agreements. A 'Common Tasks' section is on the left. The main content area is divided into several sections:

- Summary Profile:** Displays key information such as CalPERS ID (2141025810), Federal Tax ID (11-1111111), Status (Pending Active), Name (The Business Partner Company), Division (Sacramento), and County (Sacramento).
- Addresses:** Shows physical and mailing addresses. The mailing address is 01234 ABC STREET, SACRAMENTO, CA 95811.
- Communication Information:** Lists preferred communication methods like Mail and Primary Email, along with a Primary Phone Number field.
- Contacts:** A table listing contacts with columns for Name, Contact Type, System Admin, Primary, and Phone Number. Two contacts are listed: Jonathan Tester and Laura Tester.
- Business Relationships:** A table with columns for Name, CalPERS ID, Program, Service Provided, and Status. It currently shows 'No results found.'
- Contracts/Agreements:** A table with columns for Contract/Agreement ID, Status, Date Status Changed, Effective Date, Termination Date, and View More Actions. It also shows 'No results found.'

Select the **Add New** button in the Contacts section title banner.

The Maintain Contact Details page displays. This is a view of the entire page.

The screenshot shows the 'Maintain Contact Details' page for a business partner with CalPERS ID 7656538270. The page is divided into several sections:

- Contact Details:** Includes a dropdown for 'Contact Types' and a radio button for 'Entity' (selected as 'CalPERS ID or SSN'). There are checkboxes for 'Allow System Access', 'Make Contact Viewable to Other Organizations', and 'Primary Contact'.
- Maintain Preferred Communication Details:** Features a dropdown for 'Preferred Communication'.
- Maintain Contact Address Details:** Includes fields for 'Existing Business Partner Address', 'Address', 'Country' (set to United States), 'City', 'State' (set to California), and 'Zip Code'.
- Maintain Communication Details:** A table for entering phone numbers with columns for 'Phone Type' (Work, FAX, TTY, Cellular, Home, Other), 'Phone Number', 'Extension', and 'International'.
- Email and Undeliverable Date:** Fields for 'Email' and 'Undeliverable Date'.

At the bottom of the page, there are 'Save' and 'Clear' buttons.

Step 1: Within the Maintain Contact Details section, select the appropriate contact type from the **Contact Type** dropdown. In most cases, this will be "General".

Step 2: Select the appropriate checkbox(es) for **Programs Supported**.

Step 3: Select the **Person CalPERS ID Entity** radio button, and enter the CalPERS ID of the individual that you noted previously in the **Person CalPERS ID** field. Skip to **Step 6**.

Step 4: If the individual is not in my|CalPERS, select the **Individual Name Entity** radio button and then the **Add New Person** link.

Maintain Contact Type

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: * General

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

And one of the following

Date of Birth:

First Name:

Last Name:

Other:

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: * General

Entity: * CalPERS ID or SSN: 1581229571 [Verify](#)

And one of the following

Date of Birth:

First Name:

Last Name:

Other:

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: * General

Entity: * CalPERS ID or SSN: 111222233 [Verify](#)

And one of the following

Date of Birth:

First Name: Mike

Last Name:

Other:

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

No person found for CalPERS ID/SSN. Review entered data.
If data is correct [Add Person](#)

The *Person Details* page displays.

Step 5: Enter the contact information for the contact person within the Person Details section. Note that the only required fields are **First Name** and **Last Name**, as indicated by the red asterisks. Including the **SSN** and **Date of Birth** will ensure that the contact is matched with their existing CalPERS ID if they have one. You will want to enter as much contact information as you have available, and then select the **Save** button.

Note that if you have the contact person's Social Security number and date of birth, you can enter them in the **SSN** and **Date of Birth** fields, and after selecting the **Save** button, my|CalPERS will match the entered information to information already in the system, to prevent duplication of individual participant records. If information is not already in the system, then my|CalPERS will save the entered contact information and assign a new Participant CalPERS ID.

Step 6: The *Contact Details* page displays.



Maintain Contact Type

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type:* General

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

And one of the following

Date of Birth:

First Name:

Last Name:

Other:

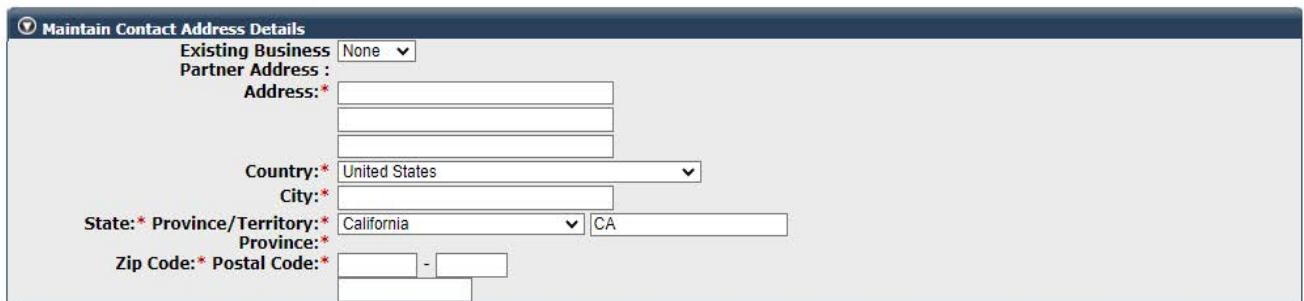
Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

Step 7: Select the **Allow System Access** checkbox. If appropriate for this contact person, select the **Make Contact Viewable to Other Organizations** and/or the **Primary Contact** checkbox(es).

Step 8: Select the preferred method of communication from the **Preferred Communication** dropdown within the Maintain Preferred Communication Details section.



Maintain Contact Address Details

Existing Business Partner Address : None

Address:*

Country:* United States

City:*

State:* **Province/Territory:*** California CA

Zip Code:* -

Step 9: Select the appropriate value from the **Existing Business Partner Address** dropdown if the business address is used for the contact person. Otherwise, enter the mailing address in the **Address** field, select the country from the **Country** dropdown, and enter the city in the **City** field, the state in the **State** field and the ZIP Code in the **ZIP Code** field within the Maintain Contact Address Details section.

The *Confirm Address* page displays.

Confirm Address

We have validated your address against U.S. postal records and no results have been found. Please select the correct address and click Confirm to return to the address page.

Entered Address: 56789 DEF STREET, sacramento, CA 95811

U.S. Postal Service Matches:

Confirm

Step 10: my|CalPERS searches for matching U.S. postal records and displays the results within the Confirm Address section. In this example, no results were found. Select the **Entered Address** radio button and then the **Confirm** button.

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Agreements

Common Tasks

Menu

Contacts

View Service Relationships

Health Invoice History

Person Details

Prefix: [v]
First Name: Mickey Middle Name: Last Name: Mouse
Suffix: [v]
Date of Birth: 01/01/2021 Gender: [v]
SSN: xxx-xx-6789

Address Details

Address Type: Mailing Address [v] Temporary []
Country: United States [v]
Address: 56789 DEF STREET
City: Sacramento
State: California [v]
County: Sacramento
Zip Code: 95811 - []

Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Work			<input type="checkbox"/>
<input type="radio"/>	Fax			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Home			<input type="checkbox"/>
<input checked="" type="radio"/>	Other	5556667777		<input type="checkbox"/>

Primary Email: mickeymouse@business.gov
Secondary Email: []

Save Cancel Clear

Step 11: Within the Maintain Communication Details section, select the radio button associated with the appropriate primary phone type and enter the phone number and extension in the **Phone Number** and **Extension** fields. Use the **International** checkbox to indicate if it is an International phone number. Select the radio button associated with the primary email address and enter the email address.

my|CalPERS Direct Authorization Vendor User Guide

Here is how the Maintain Contact Details page might look when completed:

The screenshot displays the 'Maintain Contact Details' page for a contact named Jonathan Tester. The contact is associated with the entity 'Union First Insurance Solutions, LLC' and has a CalPERS ID of 9141120508. The 'Maintain Contact Details' section includes a 'Contact Type' dropdown set to 'Human Resources', an 'Entity' dropdown set to 'CalPERS ID: 6209004800', and a 'Contact Name' field containing 'Jonathan Tester'. The 'Allow System Access' checkbox is checked, while 'Make Contact Viewable to Other Organizations' and 'Primary Contact' are unchecked. Below this, the 'Maintain Preferred Communication Details' section shows 'Preferred Communication' set to 'Email'. The 'Maintain Contact Address Details' section shows the address as '931 Sw Frontenac Street, IRVINE, CA 92612-0531, United States, California'. The 'Maintain Contact Communication Details' section includes a table for phone numbers and an email field set to 'jonathantester@business.gov'.

Step 12: Select the **Allow System Access** link within the Maintain Contact Details section.

The screenshot displays the 'Set Password' page. The 'Username' field contains 'tester'. The 'Delivery Method' dropdown is set to 'Email - jonathantester@business.gov'. The 'Submit' button is highlighted. The page footer contains technical information including 'DataSource: Shifter', 'Build: v13.6', and 'SQL query executed by this page: 2 in seconds with 2 rows received.' There is also a search bar at the bottom with the text 'Search by CalPERS ID' and a 'Search' button.

Step 13: The Reset Password page displays. Choose the preferred delivery method.

The *System Access* page displays and confirms the Create Password link has been sent.

Home Participant **Business Partner** Reporting Admin Workflow my Toolbox

Summary Financials Retirement Contract Health Contract Agreements Mergers and Reorganizations Reports

Common Tasks Name: Union First Insurance Solutions, LLC CalPERS ID: 9141120508

Menu

- Search
- Contacts
- Findings
- View BP Relationships
- Divisions
- View Service Relationships
- Health Invoice History
- Billing and Payment Summary
- Capture Interaction Information
- SSA Annual Information Request
- Health Email Notification
- Compensation Compliance Analysis Requests
- Employer Education**
- Activity & History
- Enroll in Class
- Schedule Consultation

Create Password link has been sent to jxxxxxxxxxxxx@business.gov.

Assigned Username

Contact Name: Jonachan Tester Created By: I. OCTOBER / I
 Contact Username: (tester) Created On: 11/24/2025
 Prevent the user from accessing the site Assigned Roles Last Updated On: 11/24/2025
 Updated By: I. OCTOBER / I

[Send Reset Password Link](#)
[Reset Password](#)
[System Access History](#)

Assign Roles

Select All

Role	End Date
<input type="checkbox"/> Authorized Personal Loan Representative	
<input checked="" type="checkbox"/> Business Partner AR/Billing	
<input type="checkbox"/> Business Partner AR/Billing Limited	
<input type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	
<input type="checkbox"/> Business Partner Arrears	
<input type="checkbox"/> Business Partner CERBT/CEPPT	
<input type="checkbox"/> Business Partner CalHR	
<input checked="" type="checkbox"/> Business Partner Direct Authorization	
<input checked="" type="checkbox"/> Business Partner Direct Authorization Agreements	
<input type="checkbox"/> Business Partner Division Maintenance	
<input checked="" type="checkbox"/> Business Partner Employer Inquiry	
<input type="checkbox"/> Business Partner Employer Maintenance	
<input type="checkbox"/> Business Partner Health Contracts	
<input type="checkbox"/> Business Partner Health Enrollment	
<input type="checkbox"/> Business Partner Health Enrollment Read Only	
<input type="checkbox"/> Business Partner IME/JA	
<input type="checkbox"/> Business Partner Limited	
<input type="checkbox"/> Business Partner PA Billing	
<input type="checkbox"/> Business Partner Payroll	
<input type="checkbox"/> Business Partner Payroll Limited	
<input type="checkbox"/> Business Partner Reciprocal	
<input type="checkbox"/> Business Partner Retirement Contracts	
<input type="checkbox"/> Business Partner Retirement Enrollment	
<input type="checkbox"/> Business Partner Retirement Enrollment Limited	
<input type="checkbox"/> Business Partner SCP Certification	
<input type="checkbox"/> Business Partner Social Security	
<input type="checkbox"/> Business Partner Supplemental Income Plan	
<input type="checkbox"/> Business Partner Workers Compensation	
<input type="checkbox"/> Carrier	
<input type="checkbox"/> GASB Contact	
<input checked="" type="checkbox"/> System Access Administrator	

Select All

Save

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Step 14: Enter the assigned username for the new contact person in the Contact Username field, select the appropriate checkbox(es) in the Assign Roles section, and then select the Save button. Note that there are only two roles for direct authorization vendor organizations: Business Partner Direct Authorization and System Access Administrator. Some direct authorization vendor organizations are also CalPERS contracting employers, so other roles may be appropriate for these organizations.

The Maintain Contact Details page displays.

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Agreements

Common Tasks **Name:** The Business Partner Company **CalPERS ID:** 2141025810

Menu *Required Fields

Maintain Contact Type

Contact Type	Address Type	Address	Primary Phone	Phone Type	Primary Email	System Admin	Deactivation Date
General	Mailing Address	01234 ABC STREET, SACRAMENTO, CA 95811	5556667777	Work	jonathantester@business.gov	Y	

Save Deactivation

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: General

Entity: CalPERS ID: 4622263933
 Contact Name: Jonathan Tester
 Other:

Allow System Access [System Access](#)
 Make Contact Viewable to Other Organizations [System Access History](#)
 Primary Contact

Maintain Preferred Communication Details

Preferred Communication: Mail

Maintain Contact Address Details

Existing Business: Mailing
 Partner Address:
 Address: 01234 ABC STREET
 Country: United States
 City: SACRAMENTO
 ZIP Code: 95811
 State: California

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Work	5556667777		<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Home			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary **Email** **Undeliverable Date**

<input checked="" type="radio"/>	jonathantester@business.gov	
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		

Save Clear

my|CalPERS Direct Authorization Vendor User Guide

Step 16: Review the entire page to verify that the contact information entered is accurate and select the Save button.

The new contact person has been added successfully and now displays within the Contacts section.

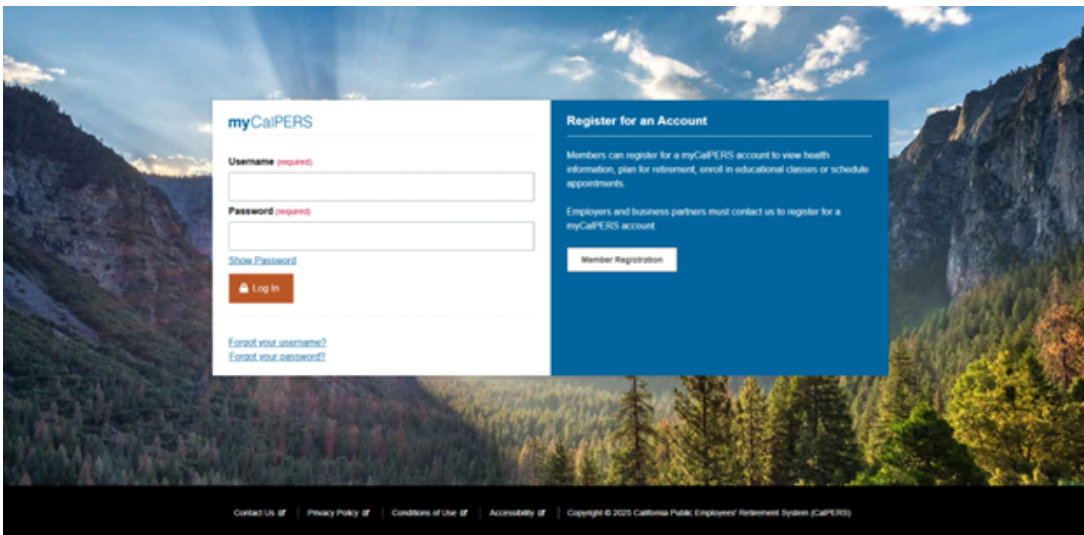
The screenshot displays the user interface for managing contacts. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, and Agreements. A left-hand menu contains options like Common Tasks, Menu, Contacts, View Service Relationships, Health Invoice History, Health Email Notification, Request Compensation, and Compliance Analysis. The main content area shows the details for 'The Business Partner Company' with a CalPERS ID of 2141025810. It includes a 'Contacts to Display' section with filters for Active (Yes), First Name, Last Name, Contact Type (All), and Contact Role (All), along with a 'Display' button. Below this is a 'Contacts' table with an 'Add New' button. The table lists one contact: Jonathan Tester, with a General contact type, System Admin status, phone number (555) 666-7777, email jonathantester@business.gov, and both Active and Primary status flags.

Name	Contact Type	System Admin	Phone Number	Email	Active	Primary
Jonathan Tester	General	Y	(555) 666-7777	jonathantester@business.gov	Y	Y

Employers & Business Partner Contact Roles

Modify business partner contact roles

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.



Type in your Username and Password and select Log In to continue.

The my|CalPERS Home page displays



my|CalPERS Direct Authorization Vendor User Guide

Select the Profile global navigation tab.

The Business Partner Profile Summary page displays.

The screenshot displays the Business Partner Profile Summary page. The navigation menu on the left includes: Home, Profile, Reporting, Person Information, Education, Other Organizations, Summary, Payments, Receivables, and Agreements. The main content area is divided into several sections:

- Summary Profile:**
 - CalPERS ID: 2141025810
 - Federal Tax ID: 11-1111111
 - Category: State of California
 - Regional Office: Sacramento Regional Office
 - Merged Agency: No
 - Status: Pending Active
 - Name: The Business Partner Company
 - Division Of:
 - County: Sacramento
- Addresses:**
 - Physical:** Undeliverable: No
 - Mailing:** 01234 ABC STREET, SACRAMENTO, CA 95811
 - Undeliverable: No
- Communication Information:**
 - Preferred Communication: Mail
 - Primary Email:
 - Primary Phone Number:
- Contacts:**

Name	Contact Type	System Admin	Primary	Phone Number
Jonathan Tester	General	Y	N	(555) 666-7777
Laura Tester	General		Y	(555) 666-7777
- Business Relationships:**

Name	CalPERS ID	Program	Service Provided	Status
No results found.				
- Contracts/Agreements:**

Contract/ Agreement Type	Contract/ Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
No results found.						

To modify a contact person's business partner contact role, select the link (General in this example) associated with the contact person "Jonathan Tester" in this example) under the Contact Type column within the Contacts section.

The *Maintain Contact Details* page for " Laura Tester" displays.

Home	Profile	Reporting	Person Information	Education	Other Organizations		
Summary Payments Receivables Agreements							
Common Tasks		Name: The Business Partner Company CalPERS ID: 2141025810					
Menu		*Required Fields					
Maintain Contact Type							
Contact Type	Address Type	Address	Primary Phone	Phone Type	Primary Email	System Admin	Deactivation Date
General	Mailing Address	01234 ABC STREET, SACRAMENTO, CA 95811	5556667777	Work	PSR_TEST@calpers.ca.gov		<input type="text"/>
<input type="button" value="Save Deactivation"/>							
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: * <input type="text" value="General"/>							
Entity: <input checked="" type="radio"/> CalPERS ID: <input type="text" value="5308913255"/>							
Contact Name: Laura Tester							
<input type="radio"/> Other: <input type="text"/>							
<input checked="" type="checkbox"/> Allow System Access System Access							
<input type="checkbox"/> Make Contact Viewable to Other Organizations System Access History							
<input checked="" type="checkbox"/> Primary Contact							
Maintain Preferred Communication Details							
Preferred Communication: <input type="text" value="Mail"/>							
Maintain Contact Address Details							
Existing Business Partner Address: <input type="text" value="Mailing"/>							
Address: 01234 ABC STREET							
Country: United States							
City: SACRAMENTO State: California							
ZIP Code: 95811							
Maintain Communication Details							
Primary	Phone Type	Phone Number	Extension	International			
<input checked="" type="radio"/>	Work	<input type="text" value="5556667777"/>	<input type="text"/>	<input type="checkbox"/>			
<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
Primary		Email		Undeliverable Date			
<input checked="" type="radio"/>	<input type="text" value="PSR_TEST@calpers.ca.gov"/>	<input type="text"/>		<input type="text"/>			
<input type="radio"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>			
<input type="radio"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>			
<input type="radio"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>			
<input type="button" value="Save"/> <input type="button" value="Clear"/>							

You can modify the information within the Maintain Contact Details section, including the **Contact Type** and **Contact Type Detail** dropdowns, the **Deactivation Date** field and the **Programs Supported** checkboxes.

If applicable, you can enter a business partner contact deactivation date in the **Deactivation Date** field.

The screenshot displays the 'Maintain Contact Details' form for a contact named 'The Business Partner Company' with CalPERS ID 2141025810. The form is divided into several sections:

- Maintain Contact Type:** A table listing contact types. The 'General' type is selected, with details: Mailing Address, 01234 ABC STREET, SACRAMENTO, CA 95811, Primary Phone 5556667777 (Work), and Primary Email PSR_TEST@calpers.ca.gov.
- Maintain Contact Details:** Includes a 'Contact Type' dropdown set to 'General', an 'Entity' section with 'CalPERS ID' (5308913255) and 'Contact Name' (Laura Tester), and checkboxes for 'Allow System Access' (checked), 'Make Contact Viewable to Other Organizations' (unchecked), and 'Primary Contact' (checked).
- Maintain Preferred Communication Details:** Shows 'Preferred Communication' set to 'Mail'.
- Maintain Contact Address Details:** Shows 'Existing Business' as 'Mailing' and 'Partner Address' as 01234 ABC STREET, Sacramento, CA 95811.
- Maintain Communication Details:** A table for phone numbers with columns for Primary, Phone Type, Phone Number, Extension, and International. The 'Work' type is selected with phone number 5556667777. Below this is an 'Email' section with 'PSR_TEST@calpers.ca.gov' entered and an 'Undeliverable Date' field.

A calendar pop-up is overlaid on the 'Deactivation Date' field, showing January 2026 with the 27th selected. The calendar has a header 'January' and '2026', and a grid of days from Sunday to Saturday. The date '27' is highlighted in red.

Enter a date in the **Deactivation Date** field or select the calendar icon to select the date. Since this is an optional field, we will go back to the previous screen to complete the modify contact role activity.

The *Maintain Contact Details* page displays.

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Agreements

Common Tasks
Menu

Name: The Business Partner Company **CalPERS ID:** 2141025810

*Required Fields

Maintain Contact Type

Contact Type	Address Type	Address	Primary Phone	Phone Type	Primary Email	System Admin	Deactivation Date
General	Mailing Address	01234 ABC STREET, SACRAMENTO, CA 95811	5556667777	Work	jonanthantester@business.gov	Y	01/28/2026

[Save Deactivation](#)

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: * General

Entity: CalPERS ID: 4622263933
 Contact Name: Jonathan Tester

Other: _____

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations [System Access History](#)

Primary Contact

Maintain Preferred Communication Details

Preferred Communication: Mail

Maintain Contact Address Details

Existing Business: Mailing

Partner Address:

Address: 01234 ABC STREET

Country: United States State: California

City: SACRAMENTO

ZIP Code: 95811

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Work	5556667777		<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Home			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	jonanthantester@business.gov	
<input type="radio"/>		
<input type="radio"/>		

[Save](#) [Clear](#)

Select the **System Access** link within the Maintain Contact Details section.

The Assigned Username page for " Laura Tester" displays.

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Agreements

Common Tasks **Menu**

Name: The Business Partner Company CalPERS ID: 2141025810

Maintain Contact Type

Contact Type	Address Type	Address	Primary Phone	Phone Type	Primary Email	System Admin	Deactivation Date
General	Mailing Address	01234 ABC STREET, SACRAMENTO, CA 95811	5556667777	Work	PSR_TEST@calpers.ca.gov		

Save Deactivation

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: *

Entity: CalPERS ID: 5308913255
 Contact Name: Laura Tester

Other:

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations [System Access History](#)

Primary Contact

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address:

Address: 01234 ABC STREET
 Country: United States
 City: SACRAMENTO
 ZIP Code: 95811
 State: California

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Work	5556667777		<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Home			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	PSR_TEST@calpers.ca.gov	
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		

Save Clear

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Agreements

Common Tasks **Menu**

Name: The Business Partner Company CalPERS ID: 2141025810

Assigned Username

Contact Name: Laura Tester [Reset Password](#)

Contact Username:

Created By: J. Tester
 Created On: 01/27/2026

Current MFA Method: Email: PSR_TEST@calpers.ca.gov [Change](#)

Assigned Roles Last Updated On: 01/27/2026

Prevent the user from accessing the site [System Access History](#)

Updated By: J. Tester

The system access administrator can reset a user's password by selecting the **Reset Password** link, or they may prevent a user from accessing my|CalPERS by selecting the **Prevent the user from accessing the site** checkbox to remove access privileges for a specific user within the Assigned Username section.

my|CalPERS Direct Authorization Vendor User Guide

Note the previously selected Role check boxes within the Assign Roles section, Business Partner Direct Authorization and System Access Administrator. These are the only roles available for direct authorization vendor organizations.

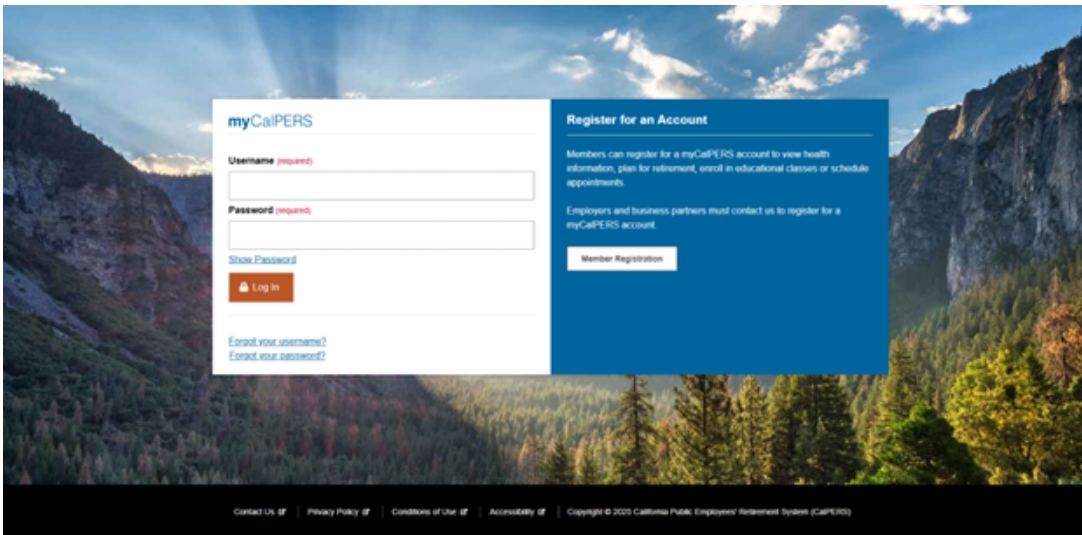
The screenshot displays the 'my|CalPERS' user interface. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, and Agreements. A 'Common Tasks' menu is visible on the left. The main content area shows details for a contact named 'The Business Partner Company' with CalPERS ID 2141025810. The 'Assigned Username' section shows contact information for Laura Tester, including email (PSR_TEST@calpers.ca.gov) and creation/updated dates. The 'Assign Roles' section is a table with columns for 'Role' and 'End Date'. Several roles are checked, including 'Business Partner AR/Billing', 'Business Partner Direct Authorization', and 'Business Partner Direct Authorization Agreements'. The 'System Access Administrator' role is also checked. A 'Save' button is located at the bottom of the form.

Role	End Date
<input type="checkbox"/> Authorized Personal Loan Representative	
<input checked="" type="checkbox"/> Business Partner AR/Billing	
<input type="checkbox"/> Business Partner AR/Billing Limited	
<input type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	
<input type="checkbox"/> Business Partner Arrears	
<input type="checkbox"/> Business Partner CERBT/CEPPT	
<input type="checkbox"/> Business Partner CalHR	
<input checked="" type="checkbox"/> Business Partner Direct Authorization	
<input checked="" type="checkbox"/> Business Partner Direct Authorization Agreements	
<input type="checkbox"/> Business Partner Division Maintenance	
<input checked="" type="checkbox"/> Business Partner Employer Inquiry	
<input type="checkbox"/> Business Partner Employer Maintenance	
<input type="checkbox"/> Business Partner Health Contracts	
<input type="checkbox"/> Business Partner Health Enrollment	
<input type="checkbox"/> Business Partner Health Enrollment Read Only	
<input type="checkbox"/> Business Partner IME/JA	
<input type="checkbox"/> Business Partner Limited	
<input type="checkbox"/> Business Partner PA Billing	
<input type="checkbox"/> Business Partner Payroll	
<input type="checkbox"/> Business Partner Payroll Limited	
<input type="checkbox"/> Business Partner Reciprocal	
<input type="checkbox"/> Business Partner Retirement Contracts	
<input type="checkbox"/> Business Partner Retirement Enrollment	
<input type="checkbox"/> Business Partner Retirement Enrollment Limited	
<input type="checkbox"/> Business Partner SCP Certification	
<input type="checkbox"/> Business Partner Social Security	
<input type="checkbox"/> Business Partner Supplemental Income Plan	
<input type="checkbox"/> Business Partner Workers Compensation	
<input type="checkbox"/> Carrier	
<input type="checkbox"/> GASB Contact	
<input checked="" type="checkbox"/> System Access Administrator	

Select the appropriate PA system access administrator check-box(es) and then select the **Save** button to update the business partner contact role.

Unlock a business partner contact account (SAA Only)

Your system access administrator can lock or unlock your account. Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.



Type in your Username and Password and select Log In to continue.

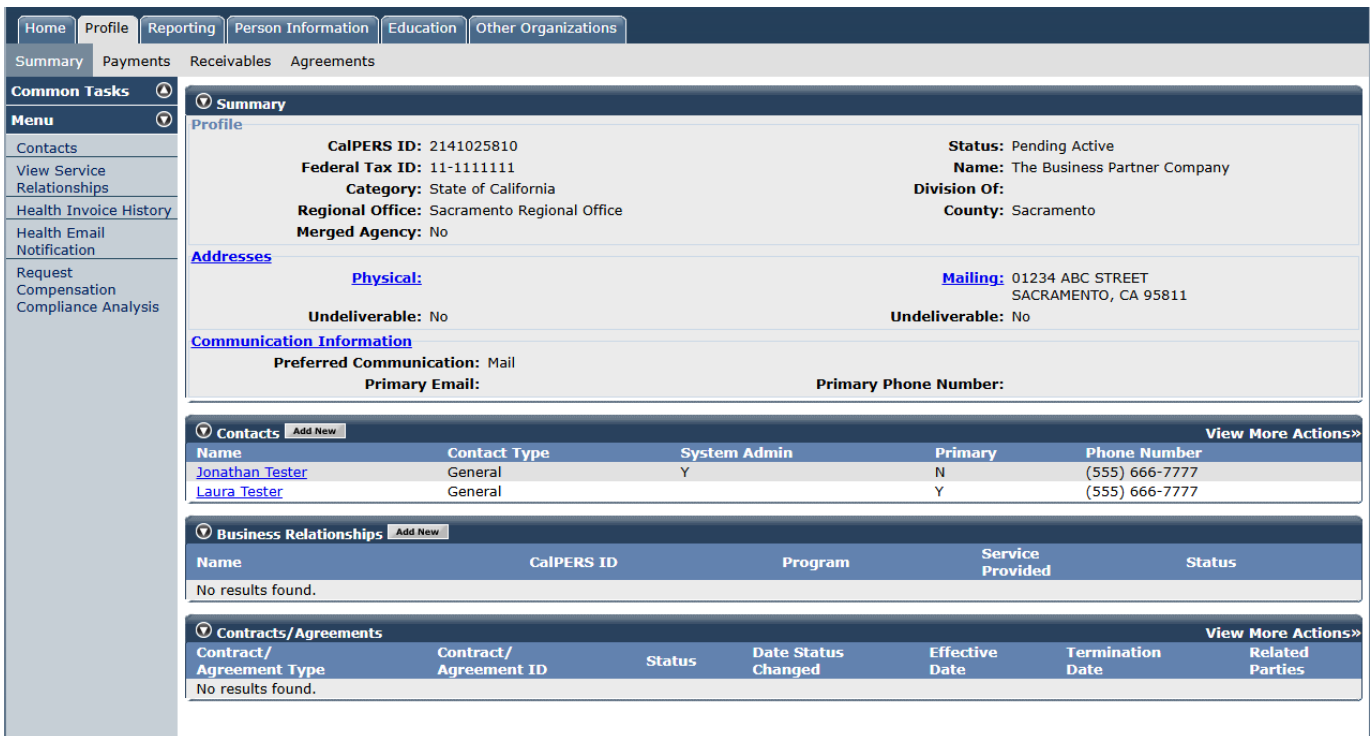
my|CalPERS Direct Authorization Vendor User Guide

The my|CalPERS *Home* page displays.



Select the **Profile** global navigation tab. The *Business Partner Profile*

Summary page displays. Select View More Actions.



To unlock a contact's account, select the link (**General** in this example) under the Contact Type column associated with the contact person ("Laura Tester" in this example) within the Contacts section.

The *Maintain Contact Details* page for "Laura Tester" displays.

Home	Profile	Reporting	Person Information	Education	Other Organizations			
Summary	Payments	Receivables	Agreements					
Common Tasks	Name: The Business Partner Company		CalPERS ID: 2141025810					
Menu	*Required Fields							
Contacts	Maintain Contact Type							
View Service Relationships	Contact Type	Address Type	Address	Primary Phone	Phone Type	Primary Email	System Admin	Deactivation Date
Health Invoice History	General	Mailing Address	01234 ABC STREET, SACRAMENTO, CA 95811	5556667777	Work	PSR_TEST@calpers.ca.gov		
Health Email Notification	Save Deactivation							
Request Compensation Compliance Analysis	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: <input type="text" value="General"/>							
	Entity: <input checked="" type="radio"/> CalPERS ID: <input type="text" value="5308913255"/>							
	Contact Name: Laura Tester							
	<input type="radio"/> Other: <input type="text"/>							
	<input checked="" type="checkbox"/> Allow System Access System Access							
	<input type="checkbox"/> Make Contact Viewable to Other Organizations System Access History							
	<input checked="" type="checkbox"/> Primary Contact							
	Maintain Preferred Communication Details							
	Preferred Communication: <input type="text" value="Mail"/>							
	Maintain Contact Address Details							
	Existing Business Partner Address: <input type="text" value="Mailing"/>							
	Address: 01234 ABC STREET							
	Country: United States							
	City: SACRAMENTO							
	State: California							
	ZIP Code: 95811							
	Maintain Communication Details							
	Primary	Phone Type	Phone Number	Extension	International			
	<input checked="" type="radio"/>	Work	<input type="text" value="5556667777"/>	<input type="text"/>	<input type="checkbox"/>			
	<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
	<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
	<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
	<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
	<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>			
	Primary	Email			Undeliverable Date			
	<input checked="" type="radio"/>	<input type="text" value="PSR_TEST@calpers.ca.gov"/>			<input type="text"/>			
	<input type="radio"/>	<input type="text"/>			<input type="text"/>			
	<input type="radio"/>	<input type="text"/>			<input type="text"/>			
	<input type="radio"/>	<input type="text"/>			<input type="text"/>			
	Save Clear							

Select the **System Access** link within the Maintain Contact Details section.

my|CalPERS Direct Authorization Vendor User Guide

The Assigned Username page for "Laura Tester" displays.

The screenshot displays the my|CalPERS interface. At the top, there is a navigation bar with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, a secondary navigation bar includes Summary, Payments, Receivables, and Agreements. A left-hand menu contains sections for Common Tasks and Menu, with sub-items like Contacts, View Service Relationships, Health Invoice History, Health Email Notification, and Request. The main content area is titled "Assigned Username" and displays the following information:

Name: The Business Partner Company	CalPERS ID: 2141025810
Contact Name: Laura Tester	Created By: J. Tester Reset Password
Contact Username: <input type="text" value="ltester"/>	Created On: 01/27/2026
Current MFA Method: Email: PSR_TEST@calpers.ca.gov Change	Assigned Roles Last Updated On: 01/27/2026
<input checked="" type="checkbox"/> Prevent the user from accessing the site	Updated By: J. Tester System Access History

You can lock or unlock a contact person's account by selecting or de-selecting the Prevent the user from accessing the site check box.

The *Maintain Contact Details* page for "Laura Tester" displays.

Home
Profile
Reporting
Person Information
Education
Other Organizations

Summary
Payments
Receivables
Agreements

Common Tasks ▲

Menu ▼

- Contacts
- View Service Relationships
- Health Invoice History
- Health Email Notification
- Request Compensation Compliance Analysis

Name: The Business Partner Company **CalPERS ID:** 2141025810

*Required Fields

▼ Maintain Contact Type

Contact Type	Address Type	Address	Primary Phone	Phone Type	Primary Email	System Admin	Deactivation Date
General	Mailing Address	01234 ABC STREET, SACRAMENTO, CA 95811	5556667777	Work	PSR_TEST@calpers.ca.gov		

[Save Deactivation](#)

▼ Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: * General ▼

Entity: **CalPERS ID:** 5308913255
Contact Name: Laura Tester

Other:

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations [System Access History](#)

Primary Contact

▼ Maintain Preferred Communication Details

Preferred Communication: Mail ▼

▼ Maintain Contact Address Details

Existing Business Partner Address: Mailing ▼

Address: 01234 ABC STREET
Country: United States **State:** California
City: SACRAMENTO
ZIP Code: 95811

▼ Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Work	5556667777	 	<input type="checkbox"/>
<input type="radio"/>	FAX	 	 	<input type="checkbox"/>
<input type="radio"/>	TTY	 	 	<input type="checkbox"/>
<input type="radio"/>	Cellular	 	 	<input type="checkbox"/>
<input type="radio"/>	Home	 	 	<input type="checkbox"/>
<input type="radio"/>	Other	 	 	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	PSR_TEST@calpers.ca.gov	
<input type="radio"/>	 	
<input type="radio"/>	 	
<input type="radio"/>	 	

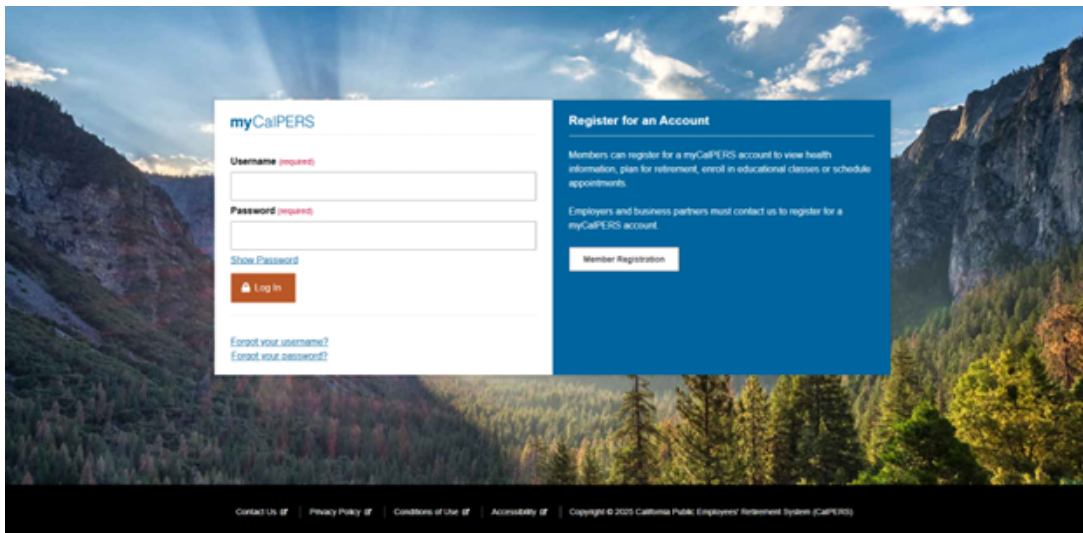
[Save](#) [Clear](#)

Review the page to ensure that the information is accurate and then select the **Save** button.

38

Reset a business partner contact's password (SAA Only)

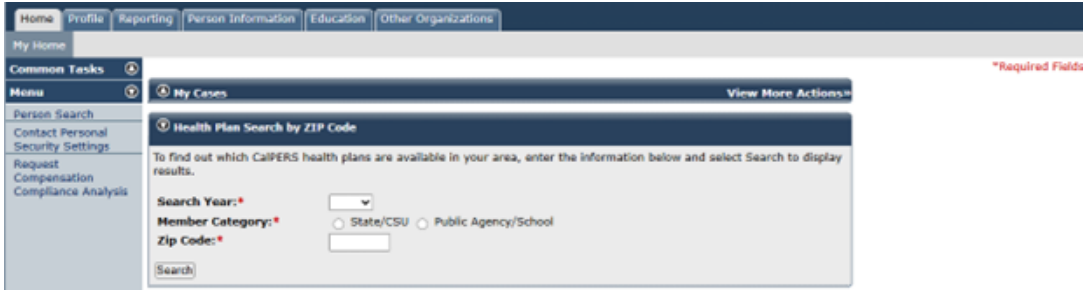
Your system access administrator can reset your password. Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.



Type in your Username and Password and select Log In to continue.

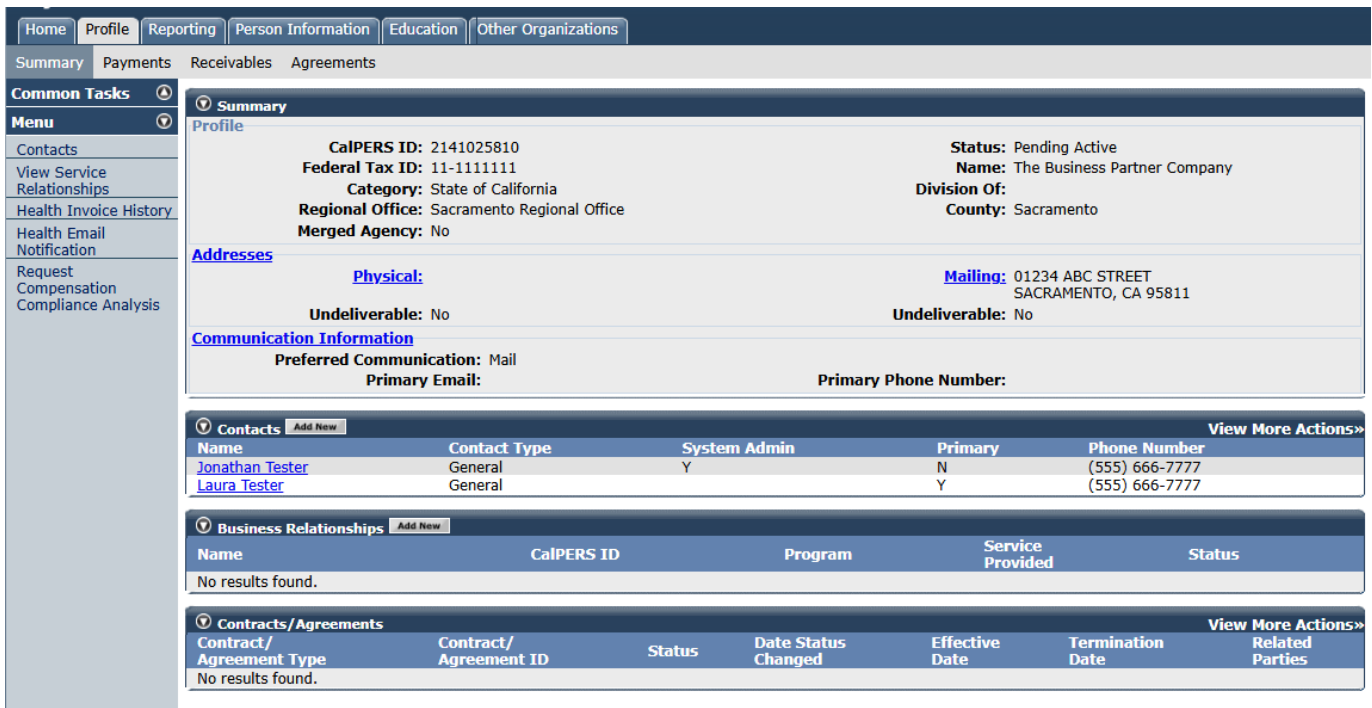
my|CalPERS Direct Authorization Vendor User Guide

The my|CalPERS Home page displays



Select the Profile global navigation tab.

The Business Partner Profile Summary page displays.



To reset a contact person's password, select the link (General in this example) under the Contact Type column associated with the contact person ("Jonathan Tester" in this example) under the Contact Type column within the Contacts section.

The *Maintain Contact Details* page for "Jonathan Tester" displays.

The screenshot shows the 'Maintain Contact Details' page for Jonathan Tester. The page is divided into several sections:

- Maintain Contact Type:** Shows 'Contact Type' as 'General', 'Address Type' as 'Physical Address', and 'Address' as '01234 ABC STREET, SACRAMENTO, CA 95811'. There is a 'Save Deactivation' button.
- Maintain Contact Details:** Contains a message: "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." It includes:
 - Contact Type:** General (selected)
 - Entity:** CalPERS ID: 4622263933 (selected), Contact Name: Jonathan Tester
 - Other:** (empty field)
 - Allow System Access
 - Make Contact Viewable to Other Organizations
 - Primary Contact
 - [System Access History](#) link
 - [Delete](#) link
- Maintain Preferred Communication Details:** Shows 'Preferred Communication' as 'Mail'.
- Maintain Contact Address Details:** Includes 'Existing Business' (None), 'Partner Address', and a warning: "To maintain account security refrain from using personal or shared email addresses. Instead, opt for a dedicated assigned work email address to safeguard user information." Fields include:
 - Address:** 01234 ABC STREET
 - Country:** United States
 - City:** SACRAMENTO
 - State:** California
 - Zip Code:** 95811
- Maintain Contact Communication Details:** A table for phone numbers and email addresses.

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Work			<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Home			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		

Select the **System Access** link within the Maintain Contact Details section. The

Assigned Username page for "Jonathan Tester" displays

my|CalPERS Direct Authorization Vendor User Guide

Name: Union First Insurance Solutions, LLC CalPERS ID: 9141120508

Assigned Username	
Contact Name: Jonathan Tester	Created By: I. OCTOBER / I
Contact Username: <input type="text" value="tester"/>	Created On: 11/24/2025
<input type="checkbox"/> Prevent the user from accessing the site	Assigned Roles Last Updated On: 11/24/2025
	Updated By: I. OCTOBER / I

[Send Reset Password Link](#)
[Reset Password](#)
[System Access History](#)

Select the **Reset Password** link within the Assigned Username section.

The *Password Maintenance* page displays. my|CalPERS assigns a temporary password.

Home Participant Business Partner Reporting Admin Workflow my Toolbox

Summary Financials Retirement Contract Health Contract Agreements Mergers and Reorganizations Reports

Common Tasks Name: Union First Insurance Solutions, LLC CalPERS ID: 9141120508

Menu *Required Fields

Password Recovery Options

Recovery options give you a way to access your account. We can send you an email or text message, if you forget your password. Your email address and mobile phone number will be used for CalPERS purposes and are protected by our [Privacy Policy](#).

Email Address: *
 Work email is preferred.

Mobile Phone:
 We can't send a temporary passcode to international phone numbers.

Note: Changes only update password recovery options and will not update communication details.

[Save and Continue](#) [Clear](#)

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DataSource: Shifter | Time Shifter | Dev Console | Data Search Tool | Batch Analysis Tool
Build: v12.6 Baseline: 231121_062738_v12.6_release UID: 1190
Username: rborrel2 DataSource: env95_s1ds Schema owner: ENV95_S1_PSRAPR1X4 Server: Env95_node2
Last imported dataset name: 2025/10/06 06:21:32 FULL MASKED DEM
Current patch level: UNKNOWN Database: MYC95_S1.CALPERS.CA.GOV
Action class: gov.web.mvc.general.systemaccess.OnetimePasscodeSettingBPAction
JSP: general/ent/onetimePasscodeSettingBP.jsp
SQL query executed by this page: 0
Action execution time: seconds

Home Participant Business Partner Reporting Admin Workflow my Toolbox

Summary Financials Retirement Contract Health Contract Agreements Mergers and Reorganizations Reports

Common Tasks Name: Union First Insurance Solutions, LLC CalPERS ID: 9141120508

Menu *Required Fields

Password Recovery Options

Recovery options give you a way to access your account. We can send you an email or text message, if you forget your password. Your email address and mobile phone number will be used for CalPERS purposes and are protected by our [Privacy Policy](#).

Email Address: *
 Work email is preferred.

Mobile Phone:
 We can't send a temporary passcode to international phone numbers.

Note: Changes only update password recovery options and will not update communication details.

[Save and Continue](#) [Clear](#)

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DataSource: Shifter | Time Shifter | Dev Console | Data Search Tool | Batch Analysis Tool
Build: v12.6 Baseline: 231121_062738_v12.6_release UID: 1190
Username: rborrel2 DataSource: env95_s1ds Schema owner: ENV95_S1_PSRAPR1X4 Server: Env95_node2
Last imported dataset name: 2025/10/06 06:21:32 FULL MASKED DEM
Current patch level: UNKNOWN Database: MYC95_S1.CALPERS.CA.GOV
Action class: gov.web.mvc.general.systemaccess.OnetimePasscodeSettingBPAction
JSP: general/ent/onetimePasscodeSettingBP.jsp
SQL query executed by this page: 0
Action execution time: seconds

Select the **Save and Continue** button.

The *Maintain Contact Details* page for "Jonathan Tester" displays.

The screenshot shows the 'Maintain Contact Details' page for Jonathan Tester. The interface includes a navigation menu on the left with options like Home, Profile, Reporting, Person Information, Education, and Other Organizations. The main content area has a header with 'Name: The Business Partner Company' and 'CalPERS ID: 2141025810'. Below this is a 'Contacts to Display' section with form fields for 'Active' (Yes), 'First Name', 'Last Name', 'Contact Type' (All), and 'Contact Role' (All). A 'Display' button is present. At the bottom, there is a table of contacts.

Name	Contact Type	System Admin	Phone Number	Email	Active	Primary
Laura Tester	General		(555) 666-7777	PSR_TEST@calpers.ca.gov	Y	Y
Jonathan Tester	General	Y	(555) 666-7777	jonathantester@business.gov	Y	N

Select the **Save** button. The Contacts to Display page displays and lists your organization's updated contact within the Contacts section. The business partner contact's password has been reset successfully.

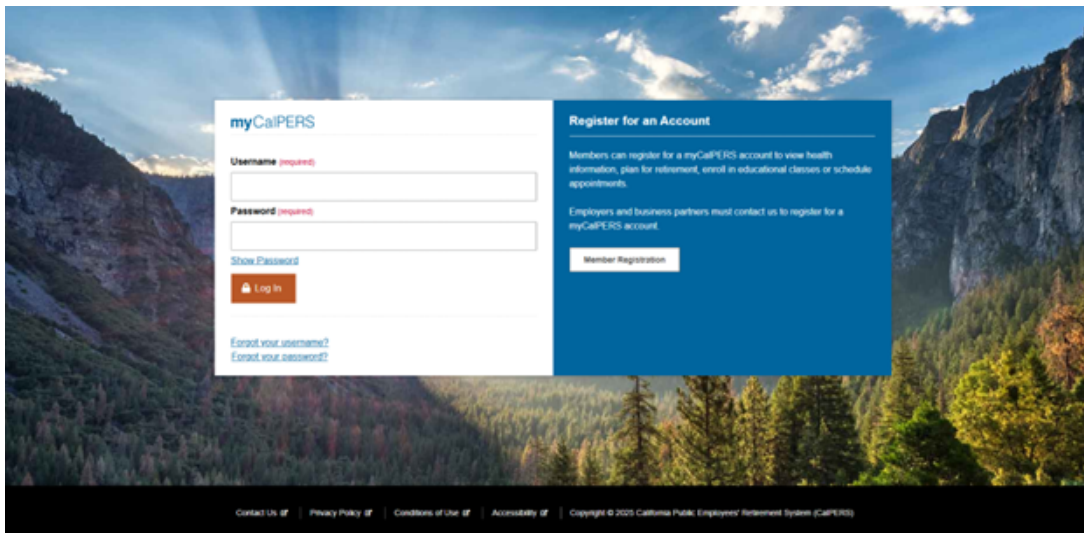
my|CalPERS Direct Authorization Vendor User Guide
my|CalPERS Agreement Administration and Deduction Processing for Direct
Authorization Vendors

Setup a New Direct Authorization Agreement

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.

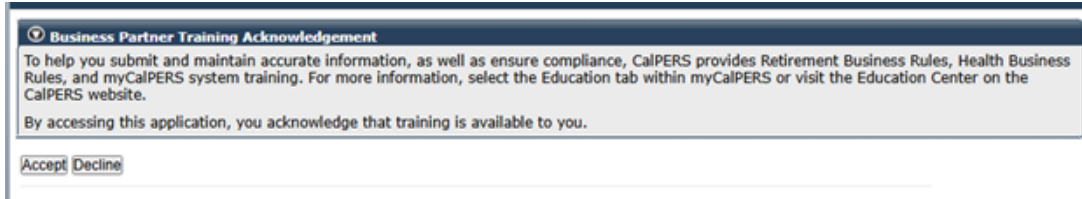
The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

Part 1: Direct Authorization Agreement Administration



Type in your Username and Password and select Log In to continue.

my|CalPERS Direct Authorization Vendor User Guide



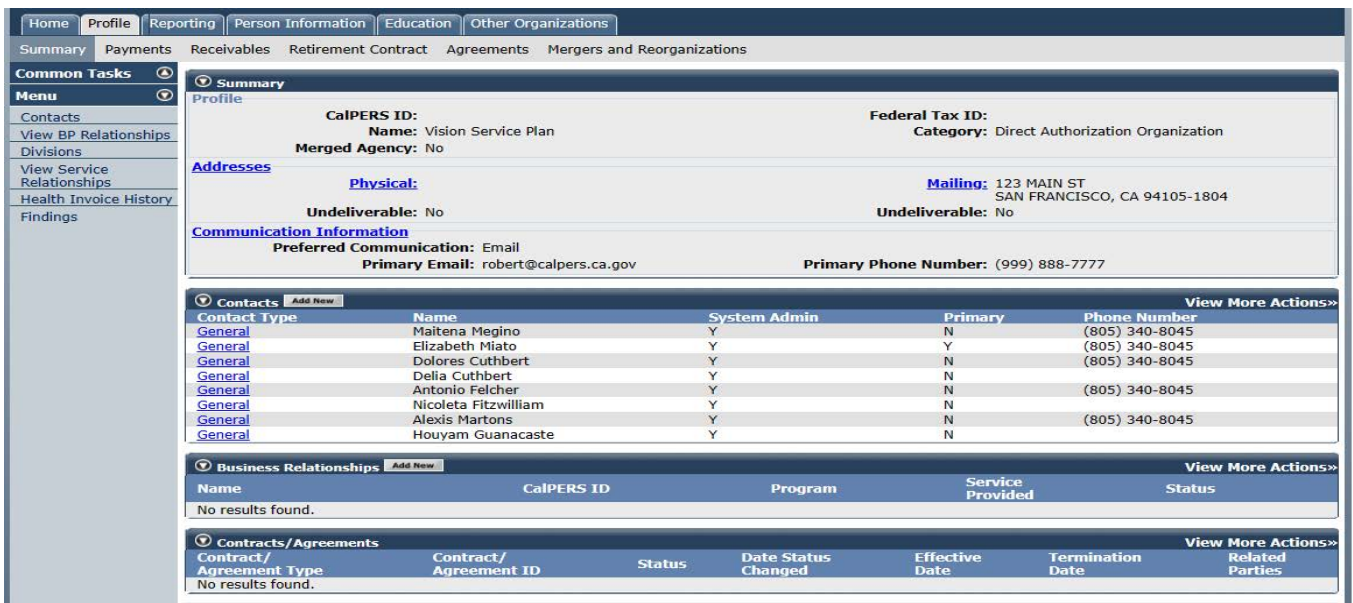
The Conditions of Use for Business Partners (Employers) page displays.

Review the conditions of use statement and then select the Accept button

The my|CalPERS Home page displays.



Select the Profile global navigation tab. The Business Partner Profile page displays.



Select the Agreements local navigation tab. The Agreements page displays.

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
CALIF VISION-DA	1000000961	Active	CalPERS	02/29/1988		Sacramento County Schools
CCPOA/RET VISION-DA	1000001029	Active	CalPERS	02/01/1998		CCPOA/California Correctional Peace Officers' Association
RPEA vision -DA	1000001187	Active	CalPERS	05/01/2004		Retired Public Employees Association
VSP/CSU 1PC-DA	1000000922	Active	CalPERS	08/01/2008		The California State University Chancellor's Office
CalHR/VSP 1PC- DA	1000000800	Active	CalPERS	02/01/2007		California Department of Human Resources
VSP/CSU 2PC-DA	1000001202	Active	CalPERS	10/01/2008		The California State University Chancellor's Office
CalHR/VSP 2PC- DA	1000000934	Active	CalPERS	02/01/2007		California Department of Human Resources
VSP-DA	1000001338	Active	CalPERS	01/01/2011		City of Sacramento
VSP/CSU 3PC-DA	1000001061	Active	CalPERS	10/01/2008		The California State University Chancellor's Office
CalHR/VSP 3PC- DA	1000000933	Active	CalPERS	02/01/2007		California Department of Human Resources

Select the Add New button within the Agreements section title banner. The Add New Agreement page displays.

Direct Authorization Information

Program: *

Deduction Type: *

Please confirm: * The contract between the organization and your carrier allows for the continuation of coverage into retirement.

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? *

Yes

No

Will the deductions be managed by a Third Party Administrator (TPA)? *

Yes, deductions will be managed by one TPA.

Yes, deductions will be managed by two TPAs.

No

Carrier Information

Direct Authorization Carrier Name: * [Select](#) Federal Tax ID:

Who will submit the Direct Authorization Deductions for this agreement? *

Sponsor

Which organization should receive the deduction payments?: *

Sponsor

When do you wish to have the payments begin?: *

[Save & Continue](#)

To setup a direct authorization agreement for the first time, you will need to enter the information as displayed on the Agreements screen.

Enter the appropriate information in the Direct Authorization Information area within the Direct Authorization Deductions section. Note that the red asterisks indicate required fields. This includes selecting the program from the Program dropdown ("CalPERS" in this example), the type of deduction from the Deduction Type dropdown ("Credit Union Deduction" in this example), the Please confirm checkbox, to indicate if "The contract between the organization and your carrier allows for the continuation of coverage into retirement.", and the Yes or No radio button, to indicate "Will the deductions be managed by a Third Party Administrator (TPA)?" ("No" in this example). Select which organization will submit the deductions for this agreement and which organization will receive the deduction payments ("Sponsor" was selected for both in this example). At the bottom of the page, indicate the date you wish to have the deduction payments begin.

The Save and Continue displays at the bottom.

The screenshot shows a web application interface for managing direct authorization deductions. The top navigation bar includes links for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this is a secondary navigation bar with Summary, Payments, Receivables, Retirement Contract, Agreements, and Mergers and Reorganizations. A left sidebar contains Common Tasks and a Menu with an Agreements List. The main content area is titled 'Direct Authorization Deductions' and contains the following sections:

- Direct Authorization Information:**
 - Program: * CalPERS (dropdown)
 - Deduction Type: * Credit Union Deduction (dropdown)
 - Please confirm: * The contract between the organization and your carrier allows for the continuation of coverage into retirement.
 - Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? *
 - Yes
 - No
 - Will the deductions be managed by a Third Party Administrator (TPA)? *
 - Yes, deductions will be managed by one TPA.
 - Yes, deductions will be managed by two TPAs.
 - No
- Carrier Information:**
 - Direct Authorization Carrier Name: * County Schools [Select](#)
 - Federal Tax ID: *
- Submission and Payment Details:**
 - Who will submit the Direct Authorization Deductions for this agreement? *
 - Sponsor
 - Carrier
 - Which organization should receive the deduction payments?: *
 - Sponsor
 - Carrier
 - When do you wish to have the payments begin?: * 06/20/2023 (calendar icon)

At the bottom of the form is a 'Save & Continue' button.

The Direct Authorization Agreement page displays.

Home Profile Reporting Person Information Education Other Organizations	
Summary Payments Receivables Retirement Contract Agreements Mergers and Reorganizations	
Common Tasks	Name: Vision Service Plan CalPERS ID:
Menu	*Required Fields
Agreements List	<div style="border: 1px solid black; padding: 5px;"> <p>Direct Authorization Agreement</p> <p>CalPERS charges a one-time administration fee of \$400.00 to cover the initial review and approval of this new direct authorization agreement. This fee will be invoiced upon approval.</p> <p>The charge to provide the deductions processing service is \$0.06 per deduction taken or the monthly minimum fee of \$25 each month. These charges are accumulated on a fiscal year basis and billed in July of each year.</p> <p>CalPERS will recover money paid to you in error, or from allowances not actually payable due to the payee(s) no longer receiving a retirement benefit, for example due to death. These amounts will be offset against the amount which would otherwise be transmitted to the carrier/sponsor/Third Party Administrator (TPA). Amounts that cannot be offset from the carrier/sponsor/TPA will refund such payments directly to CalPERS upon demand.</p> <p>This agreement is specific for this program and carrier/deduction type. ANY changes to this relationship requires a new agreement. Failure to notify CalPERS may jeopardize this agreement, which may result in termination.</p> <p><input type="checkbox"/> * By checking this box and clicking the Sign Now button, I am indicating that I have read and understood the terms and conditions as stated above.</p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p>e-Signature</p> <p><u>You Are Not Required to Complete This Transaction Electronically</u></p> <p>If you <u>do not</u> wish to complete this transaction electronically, please call the CalPERS Customer Contact Center at 1-888-CalPERS (1-888-225-7377) for assistance. The TTY - For Speech & Hearing Impaired number is (916) 795-3240.</p> <p>Electronic Signature Agreement</p> <p>You may complete this transaction electronically by selecting the "Sign Now" button which appears on your computer screen.</p> <p>By completing this transaction electronically, you acknowledge and agree that:</p> <p>(1) This transaction will be conducted by electronic means in accordance with the federal Electronic Signatures in Global and National Commerce Act (E-Sign), 15 U.S.C.A. sections 7001-7031 and the Uniform Electronic Transactions Act, California Civil Code sections 1633.1 to 1633.17;</p> <p>(2) You have read and understand the terms and conditions regarding this transaction;</p> <p>(3) You accept the terms and conditions of this Electronic Signature Agreement and the above terms and conditions regarding this transaction; and</p> <p>(4) Completion of this transaction electronically shall have the same effect as if you signed your name in ink on a piece of paper to accomplish the transaction and CalPERS will store by electronic means an electronic record of this transaction.</p> <p><input type="checkbox"/> * I have read and agree to the Electronic Signature Agreement above.</p> <p><input type="button" value="Sign Now"/></p> </div>

The Direct Authorization Deductions section is updated with the information we entered. Note that **Accept Administration Fee** displays and the **Sign Agreement** link.

Home Profile Reporting Person Information Education Other Organizations	
Summary Payments Receivables Retirement Contract Agreements Mergers and Reorganizations	
Common Tasks	*Required Fields
Menu	Direct Authorization Deductions
Agreements List	Direct Authorization Information <p> Agreement ID: Program: California Public Employees' Retirement System Agreement Status: Pending Deduction Type: Credit Union Deduction Sign Administration Fee: Accept Administration Fee Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? Yes Will the deductions be managed by a Third Party Administrator (TPA)? No Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes Who will submit the Direct Authorization Deductions for this agreement? Sponsor Date Hold Harmless Agreement Signed: Sign Agreement </p> <hr/> Carrier Information <p> Direct Authorization Carrier Name: Sacramento County Schools Federal Tax ID: 900049130 Date Hold Harmless Agreement Signed: Not Signed </p>
	Direct Authorization Deduction Submission Details <p> Organization submitting the Direct Authorization Deductions for this agreement: Vision Service Plan </p>
	Direct Authorization Payment Details <p> Organization receiving the deduction payments for this agreement: Vision Service Plan </p> <p> Retiree Deduction Text: </p>
	Available Actions <p> Select an Available Action: <input type="radio"/> Submit Agreement <input type="radio"/> Cancel Agreement </p>
	<input type="button" value="Submit"/>

The *Direct Authorization Agreement* page displays.

Skip to: Content | Footer | Welcome George | Customize | Help | Contact Us | CalPERS On-Line | Log out **June 15, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks

Name: Direct Authorization Credit Union **CalPERS ID:** 4499089095 *Required Fields

Hold Harmless Agreement

**CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM
AGREEMENT RELATING TO DEDUCTIONS FOR "Credit Union Deduction"**

Direct Authorization Credit Un., hereinafter referred to as Sponsor requests that the Executive Officer approve, as authorized in Section 581 Title 2, California Administrative Code, the filing directly with said Sponsor of authorizations for retirement allowance deductions of dues for the Sponsor charges under Section 21264, Government Code. In consideration of such approval and of forbearance by the Public Employees' Retirement System at the request of the Sponsor of the Board's right to require a waiver from retired persons of any liability for inadvertence or error as a condition of making such deductions and of benefits accruing to the Sponsor as a result of such forbearance, the Sponsor hereby agrees:

1. To supply to the Board statements, in such forms as the Executive Officer may prescribe, of deductions specified in authorizations received by it.
2. To save the State of California, Board of Administration, the Public Employees' Retirement System and its employees harmless from any liability for any errors in transmitting such dues, or charges except for liability to the Sponsor for money actually withheld but not transmitted.
3. To keep all authorizations received by it available for inspection by authorized representatives of the Board.

The Sponsor further agrees that any amounts which have been deducted and paid to the Sponsor and which are refundable under the plan because of the death of a retired person shall be refunded to the Board for distribution under the Public Employees' Retirement Law.

This agreement applies to authorization for deductions from retirement allowance of retirees who are members of the Direct Authorization Credit Union.

This agreement applies to the California Public Employees' Retirement System program.

By checking this box and clicking the Sign Now button, I am agreeing to conduct business electronically with the **State of California** and the **California Public Retirement System** on **06/07/2011**.

* I understand that transactions and/or signatures in records may not be denied legal effect solely because they are conducted, executed, or prepared in electronic form, and that if a law requires a record or signature to be in writing an electronic record or signature satisfies that requirement.

e-Signature

You Are Not Required to Complete This Transaction Electronically

If you do not wish to complete this transaction electronically, please call the CalPERS Customer Contact Center at 1-888-CalPERS (1-888-225-7377) for assistance. The TTY - For Speech & Hearing Impaired number is (916) 795-3240.

Electronic Signature Agreement

You may complete this transaction electronically by selecting the "Sign Now" button which appears on your computer screen.

By completing this transaction electronically, you acknowledge and agree that:

- (1) This transaction will be conducted by electronic means in accordance with the federal Electronic Signatures in Global and National Commerce Act (E-Sign), 15 U.S.C.A. sections 7001-7031 and the Uniform Electronic Transactions Act, California Civil Code sections 1633.1 to 1633.17;
- (2) You have read and understand the terms and conditions regarding this transaction;
- (3) You accept the terms and conditions of this Electronic Signature Agreement and the above terms and conditions regarding this transaction; and
- (4) Completion of this transaction electronically shall have the same effect as if you signed your name in ink on a piece of paper to accomplish the transaction and CalPERS will store by electronic means an electronic record of this transaction.

* I have read and agree to the Electronic Signature Agreement above.

Sign Now

Read the important information related to the direct authorization agreement, including the one-time administration fee and the deductions processing service charge for each deduction.

my|CalPERS Direct Authorization Vendor User Guide

my|CalPERS uses e-Signature for electronic signatures in lieu of signing hard copy documents. You may submit your new agreement request by reviewing the agreement terms within the e-Signature section, selecting the checkbox associated with the statement “I have read and agree to the Electronic Signature Agreement above,” and then selecting the Sign Now button. Note that red asterisks indicate required fields. Also note that if you do not wish to submit your new agreement request using e-Signature, there is information within the e-Signature section to instruct you how to submit the new agreement request via hard copy.

The screenshot displays the my|CalPERS interface for a Direct Authorization Agreement. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, Retirement Contract, Agreements, and Mergers and Reorganizations. A left sidebar contains 'Common Tasks' and 'Menu' with a link to 'Agreements List'. A green confirmation box states, 'Thank you for submitting your information.' The main content area is titled 'Direct Authorization Deductions' and includes the following information:

- Agreement ID:** 1000468903
- Program:** California Public Employees' Retirement System
- Agreement Status:** Pending
- Deduction Type:** Credit Union Deduction
- Sign Administration Fee:** [Accept Administration Fee](#)
- Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit?** Yes
- Will the deductions be managed by a Third Party Administrator (TPA)?** No
- Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement?** Yes
- Who will submit the Direct Authorization Deductions for this agreement?** Sponsor
- Date Hold Harmless Agreement Signed:** 06/21/2023 [View Hold Harmless Agreement](#)

Carrier Information:

- Direct Authorization Carrier Name:** County Schools
- Federal Tax ID:**
- Date Hold Harmless Agreement Signed:** Not Signed

Direct Authorization Deduction Submission Details: Organization submitting the Direct Authorization Deductions for this agreement: Vision Service Plan

Direct Authorization Payment Details: Organization receiving the deduction payments for this agreement: Vision Service Plan

Retiree Deduction Text:

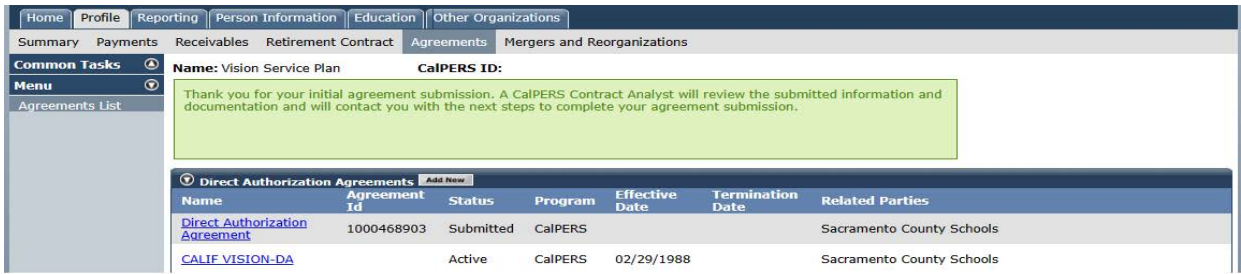
Available Actions: Select an Available Action: Submit Agreement Cancel Agreement

A 'Submit' button is located at the bottom left of the form.

The Direct Authorization Agreement page displays. my|CalPERS displays the confirmation message “Thank you for submitting your information.” Note that the Agreement Status indicates “Pending” within the Direct Authorization Deductions section. Select the **Submit Agreement** radio button within the **Available Actions** section and then select the Submit button.

my|CalPERS Direct Authorization Vendor User Guide

my|CalPERS displays the confirmation message “Thank you for your initial agreement submission. A CalPERS Contract Analyst will review the submitted information and documentation and will contact you with the next steps to complete your agreement submission.” Once a CalPERS Contract Analyst reviews and approves the submitted new agreement, the **Agreement Status** will be updated to “Active”.



The screenshot shows the my|CalPERS interface. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, Retirement Contract, Agreements, and Mergers and Reorganizations. The main content area displays a confirmation message in a green box: "Thank you for your initial agreement submission. A CalPERS Contract Analyst will review the submitted information and documentation and will contact you with the next steps to complete your agreement submission." Below the message is a table titled "Direct Authorization Agreements" with columns for Name, Agreement Id, Status, Program, Effective Date, Termination Date, and Related Parties. The table contains two rows of data.

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	1000468903	Submitted	CalPERS			Sacramento County Schools
CALIF VISION-DA		Active	CalPERS	02/29/1988		Sacramento County Schools

Select the Profile global navigation tab.

my|CalPERS Direct Authorization Vendor User Guide

The new direct authorization agreement is displayed as “Work In Progress” under the Status column within the Contracts/Agreements section.

The screenshot displays the user interface for the my|CalPERS Direct Authorization Vendor User Guide. The interface is divided into several sections:

- Navigation:** Home, Profile, Reporting, Person Information, Education, Other Organizations.
- Summary:** Payments, Receivables, Retirement Contract, Agreements, Mergers and Reorganizations.
- Common Tasks:** Summary, Profile, Addresses, Communication Information.
- Contacts:** A table listing contact information for various individuals.
- Business Relationships:** A section showing no results found.
- Contracts/Agreements:** A table showing a single direct authorization agreement in "Work In Progress" status.

Profile Information:

- CalPERS ID:** Name: Vision Service Plan, Merged Agency: No
- Federal Tax ID:** Category: Direct Authorization Organization
- Addresses:**
 - Physical:** (Empty)
 - Mailing:** 123 MAIN ST, SAN FRANCISCO, CA 94105-1804
 - Undeliverable:** No
- Communication Information:**
 - Preferred Communication:** Email
 - Primary Email:** robert@calpers.ca.gov
 - Primary Phone Number:** (999) 888-7777

Contacts Table:

Contact Type	Name	System Admin	Primary	Phone Number
General	Maitena Megino	Y	N	(805) 340-8045
General	Elizabeth Miato	Y	Y	(805) 340-8045
General	Dolores Cuthbert	Y	N	(805) 340-8045
General	Delia Cuthbert	Y	N	
General	Antonio Felcher	Y	N	(805) 340-8045
General	Nicoleta Fitzwilliam	Y	N	
General	Alexis Martons	Y	N	(805) 340-8045
General	Houyam Guanacaste	Y	N	

Business Relationships Table:

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

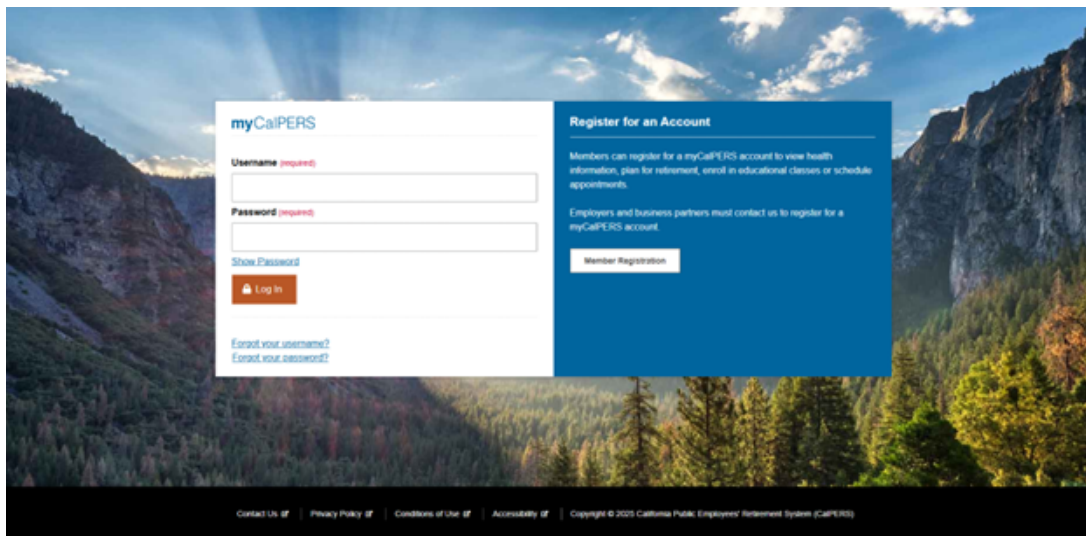
Contracts/Agreements Table:

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	1000468903	Work In Progress	06/20/2023	06/20/2023		Sacramento County Schools

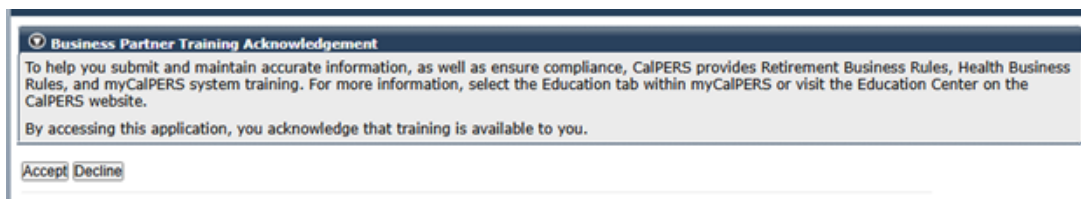
Sign the Hold Harmless agreement

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS *Log In* screen displays.

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Type in your Username and Password and select Log In to continue.



The Conditions of Use for Business Partners (Employers) page displays. Review the conditions of use statement and then select the Accept button.

my|CalPERS Direct Authorization Vendor User Guide

The my|CalPERS *Home* page displays.



Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

Summary

Profile

CalPERS ID: [Redacted] **Federal Tax ID:** [Redacted]
Name: Vision Service Plan **Category:** Direct Authorization Organization
Merged Agency: No

Addresses

Physical: [Redacted] **Mailing:** 123 MAIN ST
SAN FRANCISCO, CA 94105-1804
Undeliverable: No

Communication Information

Preferred Communication: Email
Primary Email: robert@calpers.ca.gov **Primary Phone Number:** (999) 888-7777

Contacts [Add New](#) [View More Actions»](#)

Contact Type	Name	System Admin	Primary	Phone Number
General	Maitena Megino	Y	N	(805) 340-8045
General	Elizabeth Miato	Y	Y	(805) 340-8045
General	Dolores Cuthbert	Y	N	(805) 340-8045
General	Delia Cuthbert	Y	N	
General	Antonio Felcher	Y	N	(805) 340-8045
General	Nicoleta Fitzwilliam	Y	N	
General	Alexis Martons	Y	N	(805) 340-8045
General	Houyam Guanacaste	Y	N	

Business Relationships [Add New](#) [View More Actions»](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements [View More Actions»](#)

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	1000468903	Work In Progress	06/20/2023	06/20/2023		Sacramento County Schools

Select the **Agreements** local navigation tab.

The Agreements page displays.

The screenshot shows the 'Agreements' page in the my|CalPERS system. The page header includes navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, there are sub-tabs: Summary, Payments, Receivables, Retirement Contract, Agreements (selected), and Mergers and Reorganizations. The main content area is titled 'Name: Vision Service Plan' and 'CalPERS ID'. A 'Direct Authorization Agreements' section is active, with an 'Add new' button. Below this is a table with the following data:

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	1000468903	Submitted	CalPERS			Sacramento County Schools
CALIF VISION-DA	1000000961	Active	CalPERS			Sacramento County Schools
CCPOA/RET VISION-DA	1000001029	Active	CalPERS			CCPOA/California Correctional Peace Officers' Association
RPEA vision -DA	1000001187	Active	CalPERS			Retired Public Employees Association
VSP /CSU 1PC -DA	1000000922	Active	CalPERS			The California State University Chancellor's Office
CalHR/VSP 1PC- DA	1000000800	Active	CalPERS			California Department of Human Resources

Select the Direct Authorization Agreement link under the Agreement Type column within the Agreement section for the agreement and organization for which you would like to sign the Hold Harmless Agreement.

The *Direct Authorization Deductions* page displays.

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Retirement Contract Agreements Mergers and Reorganizations

Common Tasks *Required Fields

Menu Direct Authorization Deductions

Agreements List

Direct Authorization Information

Agreement ID:
Program: California Public Employees' Retirement System
Agreement Status: Pending
Deduction Type: Credit Union Deduction
Sign Administration Fee: [Accept Administration Fee](#)

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? Yes

Will the deductions be managed by a Third Party Administrator (TPA)? No

Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes

Who will submit the Direct Authorization Deductions for this agreement? Sponsor

Date Hold Harmless Agreement Signed: [Sign Agreement](#)

Carrier Information

Direct Authorization Carrier Name: Sacramento County Schools
Date Hold Harmless Agreement Signed: Not Signed
Federal Tax ID: 900049130

Direct Authorization Deduction Submission Details

Organization submitting the Direct Authorization Deductions for this agreement: Vision Service Plan

Direct Authorization Payment Details

Organization receiving the deduction payments for this agreement: Vision Service Plan

Retiree Deduction Text:

Available Actions

Select an Available Action:* Submit Agreement Cancel Agreement

Submit

Select the **Sign Agreement** link to the right of the Date Hold Harmless Agreement Signed within the Direct Authorization Deductions section.

The *Hold Harmless Agreement* page displays.

Home	Profile	Reporting	Person Information	Education	Other Organizations
Summary	Payments	Receivables	Retirement Contract	Agreements	Mergers and Reorganizations
Common Tasks	Name: Vision Service Plan		CalPERS ID:		
Menu	*Required Fields				
Agreements List	<p>Hold Harmless Agreement</p> <p style="text-align: center;">CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM AGREEMENT RELATING TO DEDUCTIONS FOR "Credit Union Deduction"</p> <p>Vision Service Plan, hereinafter referred to as Sponsor requests that the Executive Officer approve, as authorized in Section 581 Title 2, California Administrative Code, the filing directly with said Sponsor of authorizations for retirement allowance deductions of dues for the Sponsor charges under Section 21264, Government Code. In consideration of such approval and of forbearance by the Public Employees' Retirement System at the request of the Sponsor of the Board's right to require a waiver from retired persons of any liability for inadvertence or error as a condition of making such deductions and of benefits accruing to the Sponsor as a result of such forbearance, the Sponsor hereby agrees:</p> <ol style="list-style-type: none"> To supply to the Board statements, in such forms as the Executive Officer may prescribe, of deductions specified in authorizations received by it. To save the State of California, Board of Administration, the Public Employees' Retirement System and its employees harmless from any liability for any errors in transmitting such dues, or charges except for liability to the Sponsor for money actually withheld but not transmitted. To keep all authorizations received by it available for inspection by authorized representatives of the Board. <p>The Sponsor further agrees that any amounts which have been deducted and paid to the Sponsor and which are refundable under the plan because of the death of a retired person shall be refunded to the Board for distribution under the Public Employees' Retirement Law.</p> <p>This agreement applies to authorization for deductions from retirement allowance of retirees who are members of the Vision Service Plan.</p> <p>This agreement applies to the California Public Employees' Retirement System program.</p> <p>By checking this box and clicking the Sign Now button, I am agreeing to conduct business electronically with the State of California and the California Public Retirement System on 06/21/2023.</p> <p><input checked="" type="checkbox"/> * I understand that transactions and/or signatures in records may not be denied legal effect solely because they are conducted, executed, or prepared in electronic form, and that if a law requires a record or signature to be in writing an electronic record or signature satisfies that requirement.</p>				
	<p>e-Signature</p> <p>You Are Not Required to Complete This Transaction Electronically</p> <p>If you <u>do not</u> wish to complete this transaction electronically, please call the CalPERS Customer Contact Center at 1-888-CalPERS (1-888-225-7377) for assistance. The TTY - For Speech & Hearing Impaired number is (916) 795-3240.</p> <p>Electronic Signature Agreement</p> <p>You may complete this transaction electronically by selecting the "Sign Now" button which appears on your computer screen.</p> <p>By completing this transaction electronically, you acknowledge and agree that:</p> <ol style="list-style-type: none"> This transaction will be conducted by electronic means in accordance with the federal Electronic Signatures in Global and National Commerce Act (E-Sign), 15 U.S.C.A. sections 7001-7031 and the Uniform Electronic Transactions Act, California Civil Code sections 1633.1 to 1633.17; You have read and understand the terms and conditions regarding this transaction; You accept the terms and conditions of this Electronic Signature Agreement and the above terms and conditions regarding this transaction; and Completion of this transaction electronically shall have the same effect as if you signed your name in ink on a piece of paper to accomplish the transaction and CalPERS will store by electronic means an electronic record of this transaction. <p><input checked="" type="checkbox"/> * I have read and agree to the Electronic Signature Agreement above.</p>				

Review the information within the Hold Harmless Agreement section and select the checkbox to the left of the statement "I understand that transactions and/or signatures in records may not be denied legal effect solely because they are conducted, executed, or prepared in electronic form, and that if a law requires a record or signature to be in writing an electronic record or signature satisfies that requirement." Review the information within the e-Signature section and select the checkbox to the left of the statement "I have read and agree to the Electronic Signature Agreement above." Select the Sign Now button.

my|CalPERS Direct Authorization Vendor User Guide

The Date Hold Harmless Agreement Signed displays within the Direct Authorization Deductions section. You can view the agreement at any time by selecting the View Hold Harmless Agreement link.

The screenshot displays the my|CalPERS Direct Authorization Vendor User Guide interface. The top navigation bar includes tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this, a secondary navigation bar shows Summary, Payments, Receivables, Retirement Contract, Agreements, and Mergers and Reorganizations. A left sidebar contains Common Tasks and Menu, with Agreements List selected. The main content area features a green message box: "Thank you for submitting your information." Below this is the "Direct Authorization Deductions" section, which includes "Direct Authorization Information" with fields for Agreement ID (1000468903), Program (California Public Employees' Retirement System), Agreement Status (Pending), Deduction Type (Credit Union Deduction), Sign Administration Fee (Accept Administration Fee), and various questions about beneficiary continuation, TPA management, and retirement coverage. The "Date Hold Harmless Agreement Signed" is 06/21/2023, with a "View Hold Harmless Agreement" link. The "Carrier Information" section shows the Direct Authorization Carrier Name as County Schools and the Date Hold Harmless Agreement Signed as Not Signed. Below this are sections for "Direct Authorization Deduction Submission Details" (Organization: Vision Service Plan) and "Direct Authorization Payment Details" (Organization: Vision Service Plan). The "Available Actions" section includes radio buttons for "Submit Agreement" and "Cancel Agreement". A "Submit" button is located at the bottom left of the form.

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Retirement Contract Agreements Mergers and Reorganizations

Common Tasks ⬆

Menu ⬇

Agreements List

*Required Fields

Thank you for submitting your information.

Direct Authorization Deductions

Direct Authorization Information

Agreement ID: 1000468903
Program: California Public Employees' Retirement System
Agreement Status: Pending
Deduction Type: Credit Union Deduction
Sign Administration Fee: [Accept Administration Fee](#)

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? Yes
Will the deductions be managed by a Third Party Administrator (TPA)? No
Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes
Who will submit the Direct Authorization Deductions for this agreement? Sponsor

Date Hold Harmless Agreement Signed: 06/21/2023 [View Hold Harmless Agreement](#)

Carrier Information

Direct Authorization Carrier Name: County Schools
Date Hold Harmless Agreement Signed: Not Signed
Federal Tax ID:

Direct Authorization Deduction Submission Details

Organization submitting the Direct Authorization Deductions for this agreement: Vision Service Plan

Direct Authorization Payment Details

Organization receiving the deduction payments for this agreement: Vision Service Plan

Retiree Deduction Text:

Available Actions

Select an Available Action: Submit Agreement Cancel Agreement

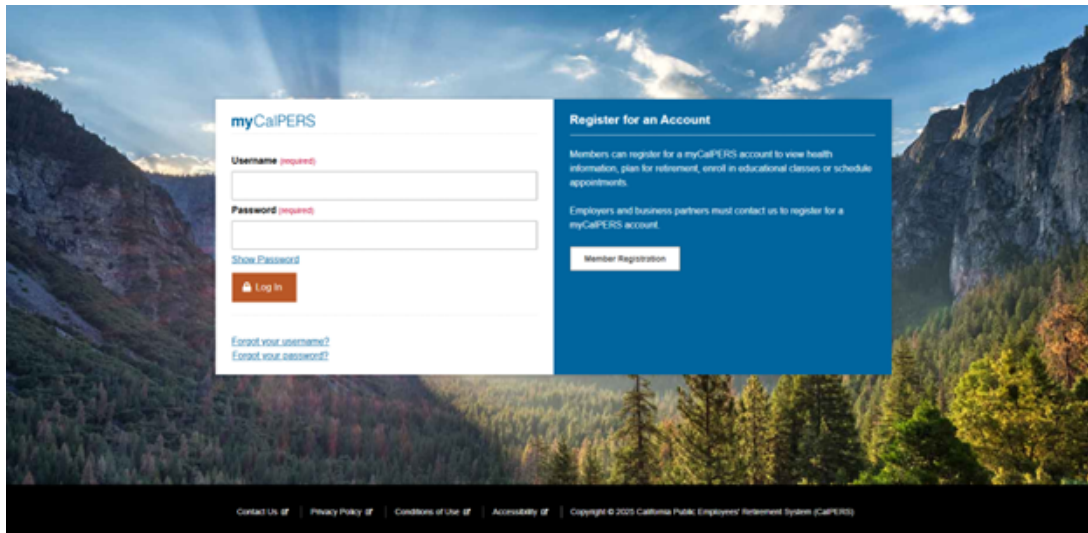
Submit

Manage Relationship with a Third Party Administrator

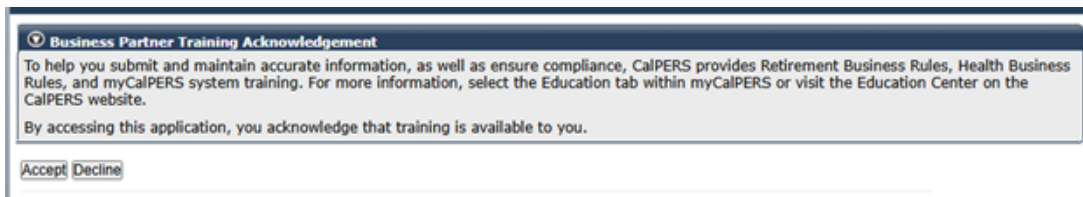
Add a third party administrator to an existing agreement

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.

The Business Partner Log In page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Type in your Username and Password and select Log In to continue.



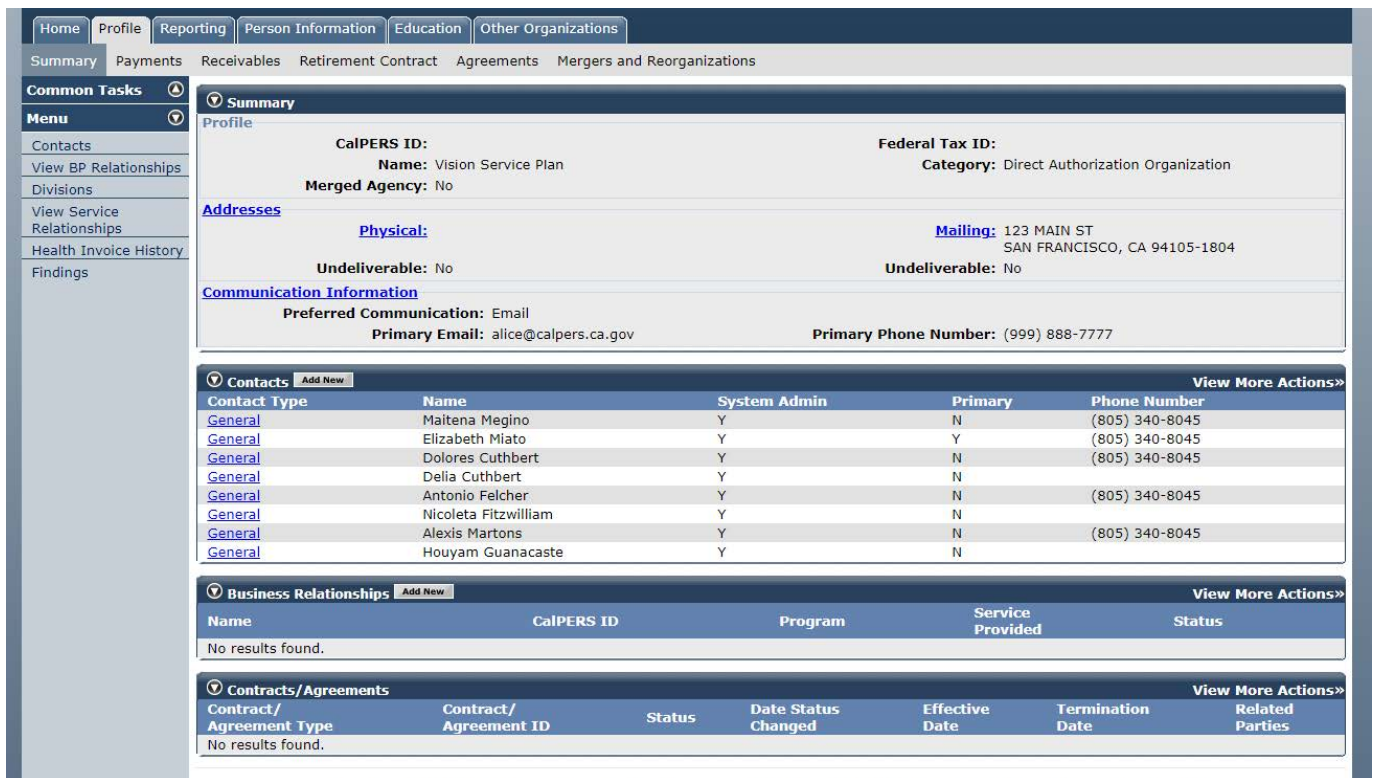
The Conditions of Use for Business Partners (Employers) page displays. Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.



Select the **Profile** global navigation tab.

The *Business Partner Profile* page displays.



Select the **Agreements** local navigation tab.

The Agreements page displays.

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	1000468903	Submitted	CalPERS			Sacramento County Schools
CALIF VISION-DA	1000000961	Active	CalPERS			Sacramento County Schools
CCPOA/RET VISION-DA	1000001029	Active	CalPERS			CCPOA/California Correctional Peace Officers' Association
RPEA vision -DA	1000001187	Active	CalPERS			Retired Public Employees Association
VSP /CSU 1PC -DA	1000000922	Active	CalPERS			The California State University Chancellor's Office
CalHR/VSP 1PC- DA	1000000800	Active	CalPERS			California Department of Human Resources

Select the Direct Authorization Agreement link under the Agreement Type column within the Agreement section to which you would like to add a third party administrator.

Direct Authorization Deductions

Direct Authorization Information

Agreement ID:
 Program: California Public Employees' Retirement System
 Agreement Status: Active
 Deduction Type: DA Deduction Vision

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? Yes
 Will the deductions be managed by a Third Party Administrator (TPA)? No
 Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes
 Who will submit the Direct Authorization Deductions for this agreement? Carrier
 Date Hold Harmless Agreement Signed: 02/01/2007 [View Hold Harmless Agreement](#)

Carrier Information

Direct Authorization Carrier Name: Vision Service Plan
 Date Hold Harmless Agreement Signed: 02/01/2007 [View Hold Harmless Agreement](#) **Federal Tax ID:**

Direct Authorization Deduction Submission Details

Organization submitting the Direct Authorization Deductions for this agreement: Vision Service Plan

Direct Authorization Payment Details

Organization receiving the deduction payments for this agreement: California Department
 Check
 Any One
 SPACE130
 FREDDY MOJICA
 4832 15 Nb - Columbian Wy Rp
 SACRAMENTO CA 95811-7243
 Retiree Deduction Text: CalHR/VSP 1PC- DA

Available Actions

Select an Available Action: Edit Agreement

To add a third party administrator to an existing agreement, select the **“Edit Agreement”** link in the Select an Available Actions area within the Available Actions section.

The Direct Authorization Information page displays. Select the radio button under **Will the deductions be managed by a Third Party Administrator (TPA)?**

The screenshot shows the 'Direct Authorization Information' page. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, Retirement Contract, Agreements, and Mergers and Reorganizations. The main content area is titled 'Direct Authorization Deductions' and includes the following fields and options:

- Program:** CalPERS
- Deduction Type:** DA Deduction Vision
- Please confirm:** The contract between the organization and your carrier allows for the continuation of coverage into retirement.
- Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit?***
 - Yes
 - No
- Will the deductions be managed by a Third Party Administrator (TPA)?***
 - Yes, deductions will be managed by one TPA.
 - Yes, deductions will be managed by two TPAs.
 - No
- Carrier Information**
 - Direct Authorization Carrier Name:** * Vision Service Plan
 - Federal Tax ID:**
- Third Party Administrator Information**
 - Third Party Administrator Name:** * [Select](#)
 - Federal Tax ID:**
- Who will submit the Direct Authorization Deductions for this agreement?***
 - Sponsor
 - Carrier
- Which organization should receive the deduction payments?***
 - Sponsor
 - Carrier
- When do you wish to have the payments begin?*** 06/21/2023

At the bottom left, there is a 'Save & Continue' button.

The Organization Search page displays.

The screenshot shows the 'Organization Search' page. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. The main content area is titled 'Organization Search' and includes the following fields and a button:

- Name:** [Text Input Field]
- Federal Tax ID:** [Text Input Field]
- CalPERS ID:** [Text Input Field]
- Search** button

Enter the name of the Third Party Administrator organization in the **Name** field and then select the **Search** button.

my|CalPERS Direct Authorization Vendor User Guide

The results of the organization search are displayed within the Search Results section.

The screenshot shows the 'Organization Search' section of the application. It includes a search form with the following fields: Name (California Department), Federal Tax ID, and CalPERS ID. A 'Search' button is located below the form. Below the search form is a 'Search Results' table with the following data:

CalPERS ID	Business Partner	Category	Type	Mailing Address	Status
<input type="radio"/>	California Department	State of California	Civil Service	1516 S Bozeman Street SACRAMENTO, CA 95811-7243	Active

A 'Select' button is located below the table.

Select the Third Party Administrator radio button in the Third Party Administrator Information area within the Direct Authorization Payment Details section to indicate that the newly added third party administrator will be the organization that will receive the deduction payments. Select the Save & Continue button within the Direct Authorization Deductions section.

The screenshot shows the 'Direct Authorization Deductions' form. The form includes the following sections and fields:

- Program:** CalPERS
- Deduction Type:** DA Deduction Vision
- Please confirm:** The contract between the organization and your carrier allows for the continuation of coverage into retirement.
- Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit?***
 - Yes
 - No
- Will the deductions be managed by a Third Party Administrator (TPA)?***
 - Yes, deductions will be managed by one TPA.
 - Yes, deductions will be managed by two TPAs.
 - No
- Carrier Information**
 - Direct Authorization Carrier Name:** * Vision Service Plan
 - Federal Tax ID:**
- Third Party Administrator Information**
 - Third Party Administrator Name:** * California Department [Select](#)
 - Federal Tax ID:**
- Who will submit the Direct Authorization Deductions for this agreement?***
 - Sponsor
 - Carrier
 - Third Party Administrator - California Department
- Which organization should receive the deduction payments?***
 - Sponsor
 - Carrier
 - Third Party Administrator - California Department
- When do you wish to have the payments begin?*** 06/21/2023

A 'Save & Continue' button is located at the bottom of the form.

Select the Add Third Party Administrator radio button within the Available Actions section. The Effective Date field appears within the Available Actions section once one of the radio buttons is selected.

my|CalPERS Direct Authorization Vendor User Guide

Direct Authorization Deductions - Pending

Direct Authorization Information

Agreement ID: 100000800
Program: California Public Employees' Retirement System
Agreement Status: Active
Deduction Type: DA Deduction Vision

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? Yes
Will the deductions be managed by a Third Party Administrator (TPA)? Yes
Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes
Who will submit the Direct Authorization Deductions for this agreement?
Date Hold Harmless Agreement Signed: 02/01/2007 [View Hold Harmless Agreement](#)

Carrier Information

Direct Authorization Carrier Name: Vision Service Plan
Date Hold Harmless Agreement Signed: 02/01/2007 [View Hold Harmless Agreement](#)
Federal Tax ID:

Third Party Administrator Information

TPA manages deductions for: Vision Service Plan
Third Party Administrator Name: Vision Service Plan
Date Hold Harmless Agreement Signed: 02/01/2007 [View Hold Harmless Agreement](#)
Third Party Administrator Name: California Department
Date Hold Harmless Agreement Signed: Not Signed
Federal Tax ID:

Direct Authorization Deduction Submission Details

Organization submitting the Direct Authorization Deductions for this agreement: Vision Service Plan

Direct Authorization Deduction Submission Details - Pending

Organization submitting the Direct Authorization Deductions for this agreement: Vision Service Plan

Direct Authorization Payment Details

Organization receiving the deduction payments for this agreement: California Department

Check
Any One
SPACE130
FREDDY MOJICA
4832 I5 Nb - Columbian Wy Rp
SACRAMENTO CA 95811-7243

Retiree Deduction Text: CalHR/VSP 1PC- DA

Direct Authorization Payment Details - Pending

Organization receiving the deduction payments for this agreement: California Department

Available Actions

Select an Available Action:* Submit Agreement Edit Cancel Agreement Edit

Select the **Submit** button. Note that the Third Party Administrator has been updated as the organization which should receive the deduction payments within the Direct Authorization Payment Details section.

my|CalPERS Direct Authorization Vendor User Guide

Replace the third party administrator for an existing agreement

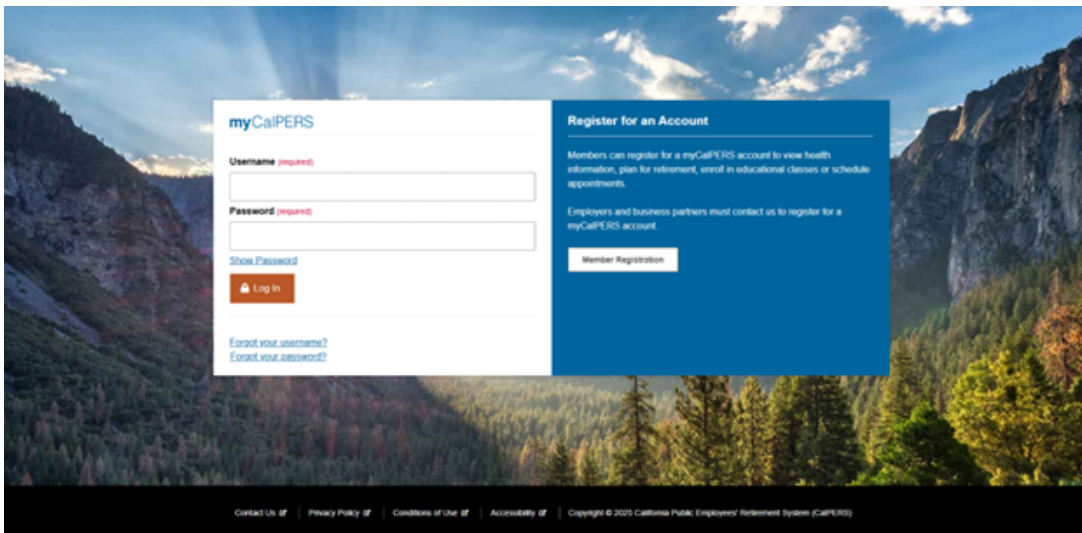
You may add, replace or remove a third party administrator. Remember that carriers or third party administrators involved in direct authorization agreements with my|CalPERS must sign hold harmless agreements for each new direct authorization agreement.

When a business partner makes modifications to a direct authorization agreement, the effective date must fall within a specific range to be enacted on the desired effective date.

Generally, for a modification to be effective for the beginning of the next calendar month, the change must be submitted prior to the end of the current business month. For example, if December 15 is the end of the business month and a modification was made on December 11, then the modification would be effective on the first of January, the following calendar month.

If the effective date does not fall into the specific date range, my|CalPERS adjusts the effective date accordingly.

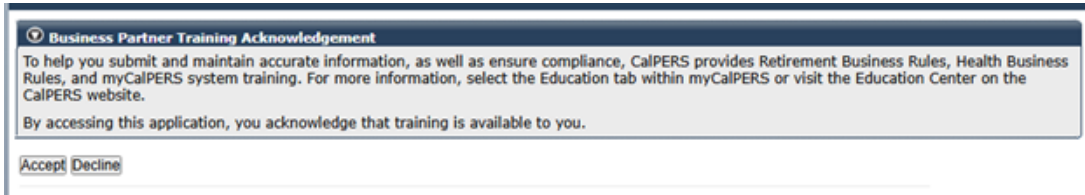
Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.



Type in your Username and Password and select Log In to continue.

my|CalPERS Direct Authorization Vendor User Guide

The Conditions of Use for Business Partners (Employers) page displays. Review the conditions of use statement and then select the Accept button.



Business Partner Training Acknowledgement

To help you submit and maintain accurate information, as well as ensure compliance, CalPERS provides Retirement Business Rules, Health Business Rules, and myCalPERS system training. For more information, select the Education tab within myCalPERS or visit the Education Center on the CalPERS website.

By accessing this application, you acknowledge that training is available to you.

The my|CalPERS Home page displays.



Home Profile Reporting Person Information Education Other Organizations

My Home

Common Tasks

Menu

Person Search
Contact Personal Security Settings
Request Compensation Compliance Analysis

My Cases View More Actions

Health Plan Search by ZIP Code

To find out which CalPERS health plans are available in your area, enter the information below and select Search to display results.

Search Year:

Member Category: State/CSU Public Agency/School

Zip Code:

*Required Fields

Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

The screenshot shows the 'Business Partner Profile Summary' page. The navigation menu on the left includes 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. The 'Profile' tab is selected. The main content area is divided into several sections:

- Summary Profile:**
 - CalPERS ID: [Redacted]
 - Federal Tax ID: [Redacted]
 - Category: Direct Authorization Organization
 - Status: Active
 - Name: SEIU Local
 - Merged Agency: No
- Addresses:**
 - Physical:** [Redacted]
 - Mailing:** 3946 Surber Drive, COVINA, CA 91724-4049
 - Undeliverable: No
- Communication Information:**
 - Preferred Communication: Mail
 - Primary Email: [Redacted]
 - Primary Phone Number: (999) 888-7777
- Contacts:**

Contact Type	Name	System Admin	Primary	Phone Number
General	Mariano Engra	Y	N	(559) 877-4837
General	Dario Littow		N	(714) 290-9201
General	Hunt Stevenson		N	
- Business Relationships:**

Name	CalPERS ID	Program	Service Provided	Status
No results found.				
- Contracts/Agreements:**

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	[Redacted]	Active	03/01/2023	03/01/2023		California, Zenith American Solutions
Direct Authorization Agreement	[Redacted]	Active	03/01/2023	03/01/2023		Zenith American Solutions
Direct Authorization Agreement	[Redacted]	Active	03/01/2023	03/01/2023		Zenith American Solutions
Direct Authorization Agreemen	[Redacted]	Active	03/01/2023	03/01/2023		Zenith American Solutions

Select the **Agreements** local navigation tab.

my|CalPERS Direct Authorization Vendor User Guide

The Agreements List page displays. Your organization's direct authorization agreements display under the Agreement Type column within the Agreements section. The status of each agreement, effective dates and related parties may also be found in this section under the appropriate columns. Note that there are two terminated agreements on this screen, with the agreement termination dates displayed under the Termination Date column.

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
SEIU 721/Optum- DA	1000453906	Active	CalPERS	03/01/2023		Physical of California, Zenith American Solutions
SEIU 721/Legal- DA	1000453907	Active	CalPERS	03/01/2023		Services, Zenith American Solutions
SEIU 721/ VSP- DA	1000453908	Active	CalPERS	03/01/2023		Service Plan, Zenith American Solutions
SEIU 721/Dental- DA	1000454901	Active	CalPERS	03/01/2023		Health Services, Zenith American Solutions

my|CalPERS Direct Authorization Vendor User Guide

The *Direct Authorization Deductions* page displays.

The screenshot shows the 'Direct Authorization Deductions' page. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, and Agreements. A 'Common Tasks' menu is on the left. The main content area is titled 'Direct Authorization Deductions' and contains several sections:

- Direct Authorization Information:** Agreement ID: 1000453906, Program: California Public Employees' Retirement System, Agreement Status: Active, Deduction Type: DA Deduction Medical. It includes questions about beneficiary continuation, TPA management, and retirement coverage, all with 'Yes' selected. The TPA is identified as 'Third Party Administrator'.
- Carrier Information:** Direct Authorization Carrier Name: Physical of California, Federal Tax ID: (blank), Date Hold Harmless Agreement Signed: Not Signed.
- Third Party Administrator Information:** TPA manages deductions for: Physical of California, Third Party Administrator Name: Zenith American Solutions, Federal Tax ID: (blank), Date Hold Harmless Agreement Signed: 01/17/2023.
- Direct Authorization Deduction Submission Details:** Organization submitting the Direct Authorization Deductions for Zenith American Solutions this agreement: (blank).
- Direct Authorization Payment Details:** Organization receiving the deduction payments for this agreement: Zenith American Solutions, Preferred Method of Payment: Check, Check Payable Name: Any One, Address: Aprille Rafidson, 3946 Surber Drive, COVINA CA, 91724-4049, Direct Deposit Account: (blank), Retiree Deduction Text: SEIU 721/Optum- DA.
- Available Actions:** Select an Available Action: Edit Agreement, Terminate Agreement.

A 'Submit' button is located at the bottom left of the form.

Select the **Edit** radio button within the *Available Actions* section.

This screenshot shows the 'Direct Authorization Deductions' page in edit mode. The layout is similar to the previous screenshot, but with several fields highlighted for editing:

- Program:** CalPERS
- Deduction Type:** DA Deduction Medical (dropdown menu)
- Please confirm:** The contract between the organization and your carrier allows for the continuation of coverage into retirement.
- Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit?*** Yes, No
- Will the deductions be managed by a Third Party Administrator (TPA)?*** Yes, deductions will be managed by one TPA. Yes, deductions will be managed by two TPAs. No
- Carrier Information:** Direct Authorization Carrier Name: Physical of California, Federal Tax ID: (blank)
- Third Party Administrator Information:** Third Party Administrator Name: Zenith American Solutions (dropdown menu), Federal Tax ID: (blank)
- Who will submit the Direct Authorization Deductions for this agreement?*** Sponsor, Carrier, Third Party Administrator - Zenith American Solutions
- Which organization should receive the deduction payments?*** Sponsor, Carrier, Third Party Administrator - Zenith American Solutions
- When do you wish to have the payments begin?*** 06/23/2023 (calendar icon)

A 'Save & Continue' button is located at the bottom left of the form.

Identify if the Third Party Administrator (TPA) will be submitting the deductions and/or if the TPA will be receiving the deduction payments.

my|CalPERS Direct Authorization Vendor User Guide

The screenshot shows the 'Organization Search' section of the application. It includes a navigation bar with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below the navigation bar, there is a search form with three input fields: 'Name', 'Federal Tax ID', and 'CalPERS ID'. A 'Search' button is located at the bottom left of the form.

Enter identifying information of the Third Party Administrator and Select the **Search** button.

This screenshot shows the search results for the 'Organization Search' form. The 'Name' field is filled with 'brown insurance'. Below the search form, there is a table with the following data:

CalPERS ID	Business Partner	Category	Type	Mailing Address	Status
<input type="radio"/>	Brown Insurance Services	Other Organization	Miscellaneous	4306 Westmont Way ORANGE, CA 92866-2502	Temporary

A 'Select' button is located below the table.

Select the radio button next to the Business Partner and Click the Select button.

The screenshot shows the 'Direct Authorization Deductions - Pending' form. It contains the following information:

- Direct Authorization Information**
 - Agreement ID: 1000453906
 - Program: California Public Employees' Retirement System
 - Agreement Status: Active
 - Deduction Type: DA Deduction Medical
 - Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? Yes
 - Will the deductions be managed by a Third Party Administrator (TPA)? Yes
 - Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes
 - Who will submit the Direct Authorization Deductions for this agreement?
 - Carrier Information:
 - Direct Authorization Carrier Name: Physical of California
 - Date Hold Harmless Agreement Signed: Not Signed
 - Federal Tax ID:
 - Third Party Administrator Information:
 - TPA manages deductions for: Physical of California
 - Third Party Administrator Name: Brown Insurance Services
 - Date Hold Harmless Agreement Signed: Not Signed
 - Federal Tax ID:

The *Organization Search* page displays.

Skip to: Content | Footer | Welcome William | Customize | Help | Contact Us | CalPERS On-Line | Log out June 15, 2011

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Organization Search

If Exact Match for Name is left unchecked, the system will return results with a partial match.

Name: Exact Match

Federal Tax ID:

CalPERS ID:

Search

Enter the name, Federal Tax ID or CalPERS ID of the third party administrator organization in the corresponding field and select the **Search** button within the Organization Search section.

The page refreshes and the results ("Brown Insurance Services" in this example) is displayed in the Search Results section.

Home Profile Reporting Person Information Education Other Organizations

Organization Search

Name: brown insurance Exact Match

Federal Tax ID:

CalPERS ID:

Search

Search Results [Add New](#)

CalPERS ID	Business Partner	Category	Type	Mailing Address	Status
<input type="radio"/>	Brown Insurance Services	Other Organization	Miscellaneous	4306 Westmont Way ORANGE, CA 92866-2502	Temporary

Select

Select the radio button associated with the appropriate third party administrator (**Brown Insurance Services** in this example) and then the Select button.

The Direct Authorization Deductions section displays “Brown Insurance Services” in the **Third Party Administrator Name** field within the Third Party Administrator Information subsection.

Direct Authorization Deductions - Pending		
Direct Authorization Information		
Agreement ID:	1000453906	
Program:	California Public Employees' Retirement System	
Agreement Status:	Active	
Deduction Type:	DA Deduction Medical	
Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit?	Yes	
Will the deductions be managed by a Third Party Administrator (TPA)?	Yes	
Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement?	Yes	
Who will submit the Direct Authorization Deductions for this agreement?	Physical of California	
Date Hold Harmless Agreement Signed:	02/03/2023	View Hold Harmless Agreement
Carrier Information		
Direct Authorization Carrier Name:	Physical of California	Federal Tax ID:
Date Hold Harmless Agreement Signed:	Not Signed	
Third Party Administrator Information		
TPA manages deductions for:	Physical of California	
Third Party Administrator Name:	Brown Insurance Services	Federal Tax ID:
Date Hold Harmless Agreement Signed:	Not Signed	

Select the **Third Party Administrator (TPA)** will reflect on the next page displayed. Select the **Submit Agreement Edit** button.

Direct Authorization Payment Details - Pending	
Organization receiving the deduction payments for this agreement:	Brown Insurance Services
Available Actions	
Select an Available Action:*	<input type="radio"/> Submit Agreement Edit <input type="radio"/> Cancel Agreement Edit
<input type="button" value="Submit"/>	

The *Direct Authorization Deduction Payment Details* page displays.

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
SEIU 721/Optum- DA	1000453906	Active	CalPERS	03/01/2023		Physical of California, Zenith American Solutions
SEIU 721/Legal- DA	1000453907	Active	CalPERS	03/01/2023		Services, Zenith American Solutions
SEIU 721/ VSP- DA	1000453908	Active	CalPERS	03/01/2023		Service Plan, Zenith American Solutions
SEIU 721/Dental- DA	1000454901	Active	CalPERS	03/01/2023		Health Services, Zenith American Solutions

The Direct Authorization Agreements page will display.

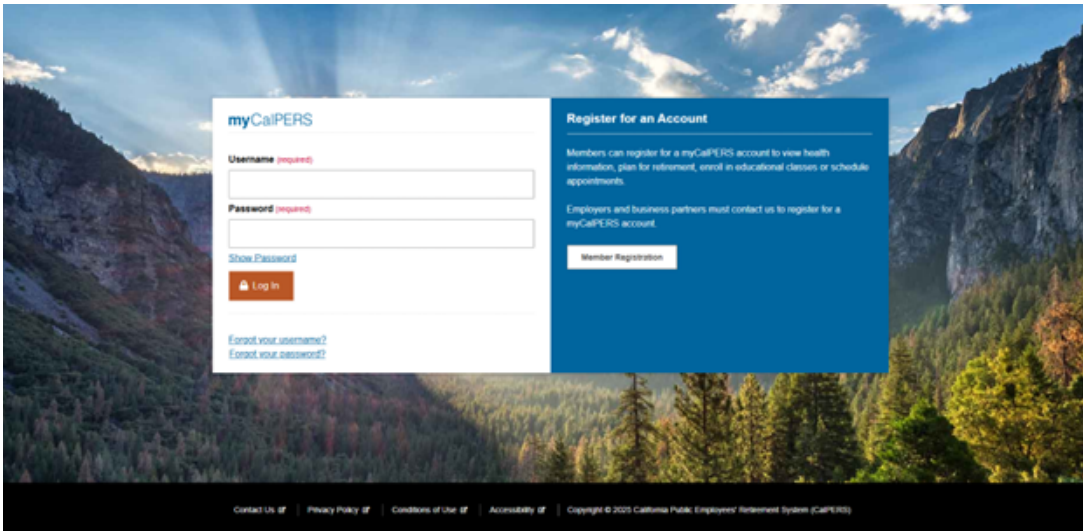
At the completion of this activity a direct authorization termination notification letter is sent to the sponsor and the previous third party administrator notifying them of the termination and effective date of the direct authorization agreement relationship. A contract agreement qualifications approval notice is sent to the sponsor and the new third party administrator notifying them of the direct authorization agreement approval.

When a direct authorization agreement makes a modification involving a third party administrator, my|CalPERS disables and enables deduction submission for the previous and new third party administrator or payment recipient, updates all relationships associated with the direct authorization agreement, and reassigns pending deductions to the new third party administrator or payment recipient. When a new third party administrator is added to a direct authorization agreement, a contract agreement qualifications approval notice is sent to the sponsor and the new third party administrator notifying them of the direct authorization agreement approval.

If the removed third party administrator was the payment recipient in a direct authorization agreement with an existing carrier, my|CalPERS then selects the carrier to receive payments. Also, when a third party administrator is removed, a direct authorization termination notification is sent to the sponsor and the third party administrator notifying them of the termination and effective date of the direct authorization agreement relationship.

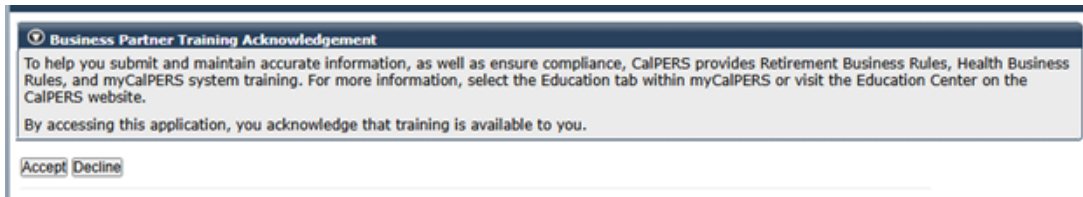
Remove a third party administrator from an existing agreement

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.



Type in your Username and Password and select Log In to continue.

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



The Conditions of Use for Business Partners (Employers) page displays. Review the conditions of use statement and then select the Accept button.

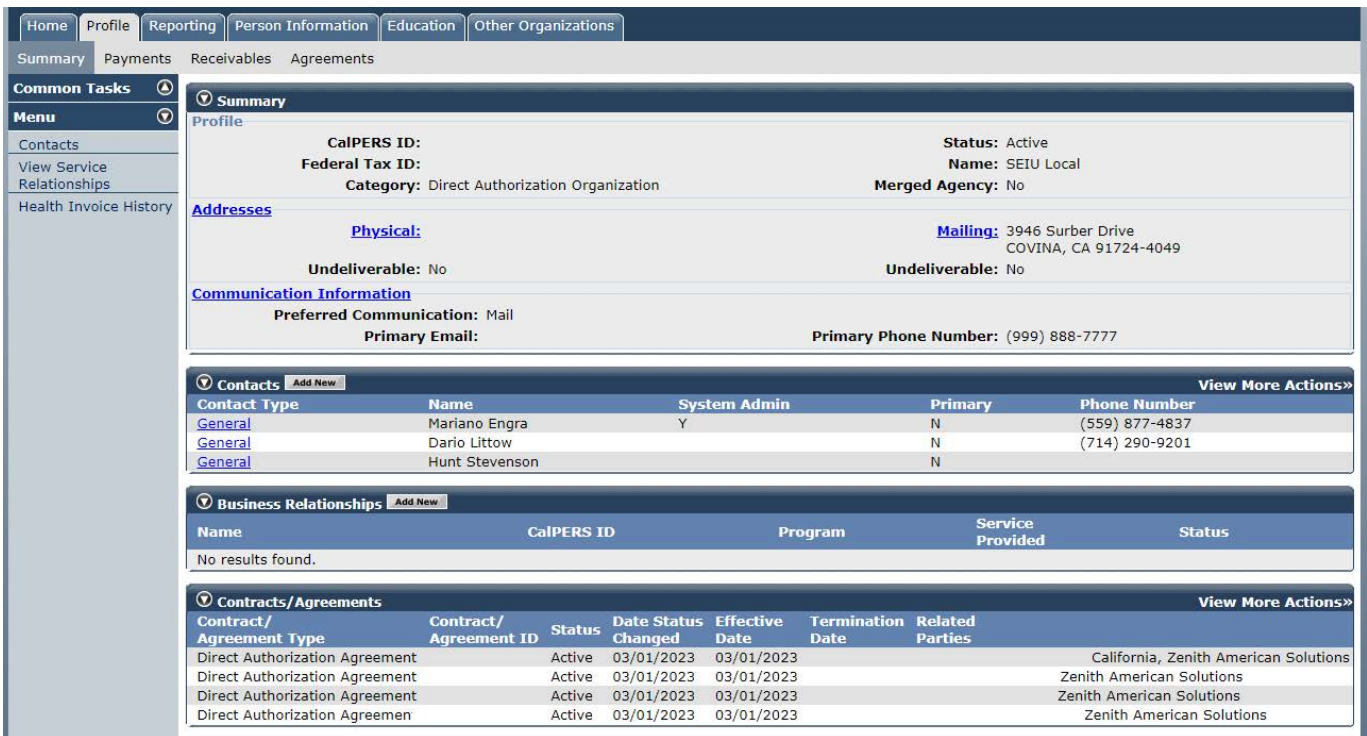
my|CalPERS Direct Authorization Vendor User Guide

The my|CalPERS *Home* page displays.



Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.



Select the **Agreements** local navigation tab.

my|CalPERS Direct Authorization Vendor User Guide

The Agreements List page displays. Your organization's direct authorization agreements display under the Direct Authorization Agreements column within the Agreements section. The status of each agreement, effective dates and related parties may also be found in this section under the appropriate columns. Note that there is a Termination Date column.

The screenshot shows the 'Agreements List' page. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, and Agreements. The main content area shows the 'Direct Authorization Agreements' section with an 'Add New' button. A table lists four agreements:

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
SEIU 721/Optum- DA	1000453906	Active	CalPERS	03/01/2023		Physical of California, Zenith American Solutions
SEIU 721/Legal- DA	1000453907	Active	CalPERS	03/01/2023		Services, Zenith American Solutions
SEIU 721/ VSP- DA	1000453908	Active	CalPERS	03/01/2023		Service Plan, Zenith American Solutions
SEIU 721/Dental- DA	1000454901	Active	CalPERS	03/01/2023		Health Services, Zenith American Solutions

Select the Direct Authorization Agreement link under the Agreement Type column that is associated with the appropriate direct authorization agreement within the Agreements section.

The screenshot shows the 'Direct Authorization Deductions' form. It includes sections for 'Direct Authorization Information', 'Carrier Information', 'Third Party Administrator Information', 'Direct Authorization Deduction Submission Details', and 'Direct Authorization Payment Details'. At the bottom, there are 'Available Actions' and a 'Submit' button.

Direct Authorization Information

Agreement ID: 1000453906
 Program: California Public Employees' Retirement System
 Agreement Status: Active
 Deduction Type: DA Deduction Medical
 Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? Yes
 Will the deductions be managed by a Third Party Administrator (TPA)? Yes
 Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes
 Who will submit the Direct Authorization Deductions for this agreement? Third Party Administrator
 Date Hold Harmless Agreement Signed: 02/03/2023 [View Hold Harmless Agreement](#)

Carrier Information

Direct Authorization Carrier Name: Physical of California
 Date Hold Harmless Agreement Signed: Not Signed
 Federal Tax ID:

Third Party Administrator Information

TPA manages deductions for: Physical of California
 Third Party Administrator Name: Zenith American Solutions
 Date Hold Harmless Agreement Signed: 01/17/2023
 Federal Tax ID: [View Hold Harmless Agreement](#)

Direct Authorization Deduction Submission Details

Organization submitting the Direct Authorization Deductions for this agreement: Zenith American Solutions

Direct Authorization Payment Details

Organization receiving the deduction payments for this agreement: Zenith American Solutions
 Preferred Method of Payment: Check
 Check Payable Name: Any One
 Address: Aprille Rafidson
 3946 Surber Drive
 COVINA CA
 91724-4049
 Direct Deposit Account:
 Retiree Deduction Text: SEIU 721/Optum- DA

Available Actions

Select an Available Action: Edit Agreement Terminate Agreement

Submit

The Direct Authorization Deductions page displays.

Select the radio button where it identifies if there will be a Third Party Administrator (TPA) for this agreement. Update any additional information regarding changes to the agreement due to the removal of the TPA.

The screenshot shows the 'Direct Authorization Deductions' page. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Summary, Payments, Receivables, and Agreements. A left sidebar contains 'Common Tasks' and 'Menu' sections. The main content area is titled 'Direct Authorization Deductions' and includes a 'Direct Authorization Information' section with the following fields:

- Program:** CalPERS
- Deduction Type:** DA Deduction Medical (dropdown menu)
- Please confirm:** The contract between the organization and your carrier allows for the continuation of coverage into retirement.
- Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit?***
 - Yes
 - No
- Will the deductions be managed by a Third Party Administrator (TPA)?***
 - Yes, deductions will be managed by one TPA.
 - Yes, deductions will be managed by two TPAs.
 - No

Below this is the 'Carrier Information' section:

- Direct Authorization Carrier Name: *** Physical of California
- Federal Tax ID:**

Next is the 'Who will submit the Direct Authorization Deductions for this agreement?*' section:

- Sponsor
- Carrier
- Third Party Administrator - Zenith American Solutions

Then the 'Which organization should receive the deduction payments?*' section:

- Sponsor
- Carrier
- Third Party Administrator - Zenith American Solutions

At the bottom of the form, there is a date field: **When do you wish to have the payments begin?:*** 06/24/2023. A 'Save & Continue' button is located at the bottom left of the form area.

Select the Submit Agreement Edit button.

The screenshot shows the 'Direct Authorization Payment Details - Pending' section. It includes the following information:

- Organization receiving the deduction payments for this agreement:** SEIU Local
- Available Actions:**
 - Select an Available Action:***
 - Submit Agreement Edit
 - Cancel Agreement Edit

A 'Submit' button is located at the bottom left of this section.

A CalPERS Contract Analyst will review the submitted information and/or documentation.”

The screenshot shows a web application interface with a navigation menu at the top. The main content area displays a table of Direct Authorization Agreements. The table has columns for Name, Agreement Id, Status, Program, Effective Date, Termination Date, and Related Parties. There are four rows of data, each representing a different agreement type (Optum-DA, Legal-DA, VSP-DA, and Dental-DA).

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
SEIU 721/Optum- DA	1000453906	Active	CalPERS	03/01/2023		Physical of California, Zenith American Solutions
SEIU 721/Legal- DA	1000453907	Active	CalPERS	03/01/2023		Services, Zenith American Solutions
SEIU 721/ VSP- DA	1000453908	Active	CalPERS	03/01/2023		Service Plan, Zenith American Solutions
SEIU 721/Dental- DA	1000454901	Active	CalPERS	03/01/2023		Health Services, Zenith American Solutions

At the completion of this activity a direct authorization termination notification letter is sent to the sponsor and the removed third party administrator notifying them of the third party administrator termination effective date of the direct authorization agreement relationship.

When a direct authorization agreement makes a modification involving a third party administrator, my|CalPERS disables and enables deduction submission for the previous and new third party administrator or payment recipient (if applicable), updates all relationships associated with the direct authorization agreement, and reassigns pending deductions to the new third party administrator or payment recipient (if applicable).

If applicable, when a new third party administrator is added to a direct authorization agreement, a contract agreement qualifications approval notice is sent to the sponsor and the new third party administrator notifying them of the direct authorization agreement approval.

If the removed third party administrator was the payment recipient in a direct authorization agreement with an existing carrier, my|CalPERS then selects the carrier (if applicable) to receive payments.

Also, when a third party administrator is removed, a direct authorization termination notification is sent to the sponsor and the third party administrator

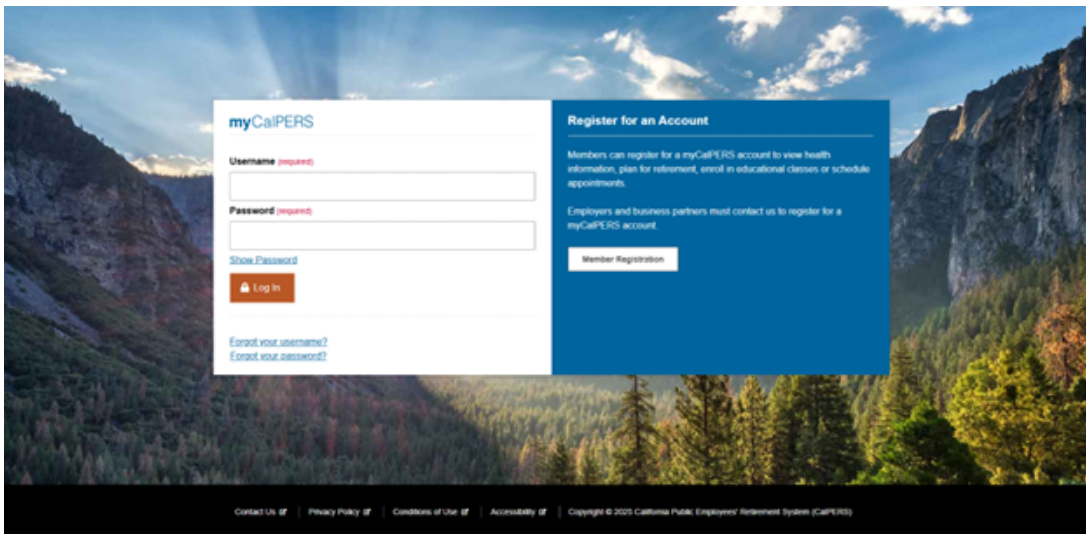
notifying them of the termination and effective date of the direct authorization agreement relationship.

Carrier “Rollover” Terminate Agreement Scenario

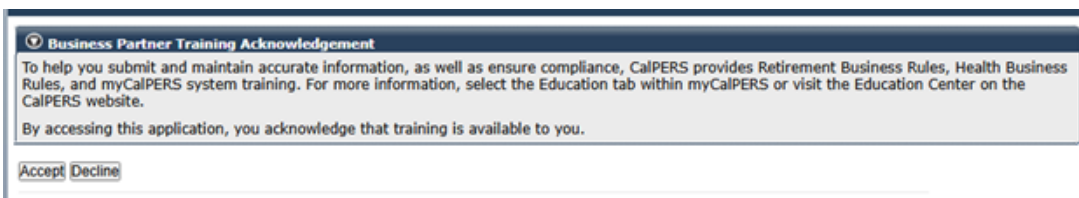
Sponsoring business partners can change carriers one of two ways:

1. Terminate the existing direct authorization agreement and submit a new direct authorization agreement with the new approved carrier, or
2. Replace the current carrier with a carrier that the sponsoring business partner has already contracted with in another existing direct authorization agreement.

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.



Type in your Username and Password and select Log In to continue.



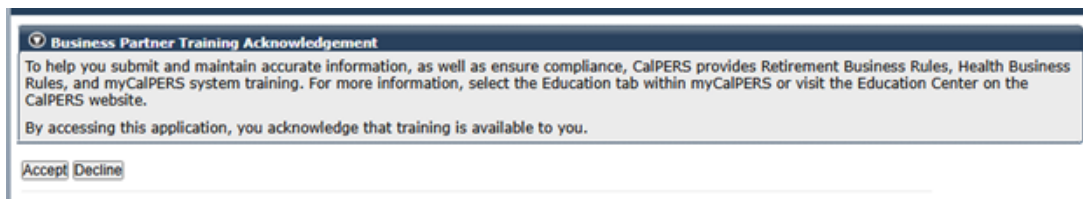
my|CalPERS Direct Authorization Vendor User Guide

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user

role that provides access to the screens you need to perform the business functions assigned to you.

The Conditions of Use for Business Partners (Employers) page displays.

Review the conditions of use statement and then select the Accept button.



Business Partner Training Acknowledgement

To help you submit and maintain accurate information, as well as ensure compliance, CalPERS provides Retirement Business Rules, Health Business Rules, and myCalPERS system training. For more information, select the Education tab within myCalPERS or visit the Education Center on the CalPERS website.

By accessing this application, you acknowledge that training is available to you.

The my|CalPERS Home page displays.



Home Profile Reporting Person Information Education Other Organizations

My Home

Common Tasks

Menu

- Person Search
- Contact Personal Security Settings
- Request Compensation Compliance Analysis

My Cases [View More Actions](#)

Health Plan Search by ZIP Code

To find out which CalPERS health plans are available in your area, enter the information below and select Search to display results.

Search Year:

Member Category: State/CSU Public Agency/School

Zip Code:

***Required Fields**

Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

The screenshot displays the 'Business Partner Profile Summary' page. The navigation tabs at the top include Home, Profile, Reporting, Person Information, Education, and Other Organizations. The 'Profile' tab is active. The page content is organized into several sections:

- Summary Profile:**
 - CalPERS ID: [Redacted]
 - Federal Tax ID: [Redacted]
 - Category: Direct Authorization Organization
 - Status: Active
 - Name: SEIU Local
 - Merged Agency: No
- Addresses:**
 - Physical: [Redacted]
 - Mailing: 3946 Surber Drive, COVINA, CA 91724-4049
 - Undeliverable: No
- Communication Information:**
 - Preferred Communication: Mail
 - Primary Email: [Redacted]
 - Primary Phone Number: (999) 888-7777
- Contacts:**

Contact Type	Name	System Admin	Primary	Phone Number
General	Mariano Engra	Y	N	(559) 877-4837
General	Dario Littow		N	(714) 290-9201
General	Hunt Stevenson		N	
- Business Relationships:**

No results found.
- Contracts/Agreements:**

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	[Redacted]	Active	03/01/2023	03/01/2023		California, Zenith American Solutions
Direct Authorization Agreement	[Redacted]	Active	03/01/2023	03/01/2023		Zenith American Solutions
Direct Authorization Agreement	[Redacted]	Active	03/01/2023	03/01/2023		Zenith American Solutions
Direct Authorization Agreement	[Redacted]	Active	03/01/2023	03/01/2023		Zenith American Solutions

Select the **Agreements** local navigation tab.

The *Agreements List* page displays.

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Agreements

Common Tasks ▲

Menu ▼

Agreements List

Name: SEIU Local 721 Benefits Trust CalPERS ID: 1114176602

▼ Direct Authorization Agreements [Add New](#)

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
SEIU 721/Optum- DA	1000453906	Active	CalPERS	03/01/2023		Physical of California, Zenith American Solutions
SEIU 721/Legal- DA	1000453907	Active	CalPERS	03/01/2023		Services, Zenith American Solutions
SEIU 721/ VSP- DA	1000453908	Active	CalPERS	03/01/2023		Service Plan, Zenith American Solutions
SEIU 721/Dental- DA	1000454901	Active	CalPERS	03/01/2023		Health Services, Zenith American Solutions

Select the **Direct Authorization Agreement** link under the Direct Authorization Agreements column associated with the agreement that you would like to change carriers for within the Agreements section.

my|CalPERS Direct Authorization Vendor User Guide

The *Agreement Details* page displays.

The screenshot displays the 'Agreement Details' page for a Direct Authorization Deduction. The page is organized into several sections:

- Direct Authorization Deductions:** This section contains information about the agreement, including the Agreement ID (1000453906), Program (California Public Employees' Retirement System), Agreement Status (Active), and Deduction Type (DA Deduction Medical). It also includes a series of questions and answers regarding the agreement's terms, such as whether it provides for continuation to beneficiaries and if deductions are managed by a Third Party Administrator (TPA).
- Carrier Information:** This section provides details about the carrier, including the Direct Authorization Carrier Name (Physical of California) and the Date Hold Harmless Agreement Signed (Not Signed).
- Third Party Administrator Information:** This section provides details about the TPA, including the TPA Name (Zenith American Solutions) and the Date Hold Harmless Agreement Signed (01/17/2023).
- Direct Authorization Deduction Submission Details:** This section provides information about the organization submitting the deductions, which is Zenith American Solutions.
- Direct Authorization Payment Details:** This section provides information about the organization receiving the deduction payments, which is Zenith American Solutions. It also includes the Preferred Method of Payment (Check), Check Payable Name (Any One), and the Address (3946 Surber Drive, COVINA CA, 91724-4049).
- Available Actions:** This section contains two radio buttons: 'Edit Agreement' and 'Terminate Agreement'. The 'Terminate Agreement' radio button is selected.

Select the **Terminate Agreement** radio button within the Available Actions section.

The **Effective Date** and **Termination Reason** fields appear in the Available Actions section once the **Terminate Agreement** radio button is selected.

The close-up screenshot shows the 'Available Actions' section with the 'Terminate Agreement' radio button selected. The 'Effective Date' field is empty, and the 'Termination Reason' dropdown menu is open, showing 'Business Partner not Qualified'.

The screenshot shows a form titled "Available Actions". It contains the following fields and options:

- Select an Available Action:** Two radio buttons are present: "Edit Agreement" (unselected) and "Terminate Agreement" (selected).
- Effective Date:** A text input field containing "7/01/2012" and a calendar icon to its right.
- Termination Reason:** A dropdown menu with "Changing Carriers" selected.
- New Carrier:** A dropdown menu.
- Submit:** A button at the bottom left of the form.

Enter the agreement termination effective date in the **Effective Date** field, or select the calendar icon to select the date. Select "Changing Carriers" from the **Termination Reason** dropdown. Select "New Carrier" from the **New Carrier** dropdown. Select the **Submit** button.

The *Agreements List* page displays with the confirmation message “You have made the decision to terminate your agreement. A notification will be sent to you once the termination is effective. No further action is needed on your part.”

The screenshot shows a web application interface with a navigation menu on the left and a table of agreements. The table is titled "Direct Authorization Agreements" and has an "Add New" button. The table columns are: Name, Agreement Id, Status, Program, Effective Date, Termination Date, and Related Parties. The data rows are as follows:

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
SEIU 721/Optum- DA	1000453906	Active	CalPERS	03/01/2023		Physical of California, Zenith American Solutions
SEIU 721/Legal- DA	1000453907	Active	CalPERS	03/01/2023		Services, Zenith American Solutions
SEIU 721/VSP- DA	1000453908	Active	CalPERS	03/01/2023		Service Plan, Zenith American Solutions
SEIU 721/Dental- DA	1000454901	Active	CalPERS	03/01/2023		Health Services, Zenith American Solutions

A direct authorization termination notification letter is sent to the sponsor and the previous carrier notifying them of the termination and the termination effective date of the direct authorization agreement relationship.

For direct authorization agreements that have changed carriers, all pending deductions are rolled to the new agreement.

For direct authorization agreements that have been terminated, all pending deductions are cancelled.

Terminate an Agreement

When a direct authorization agreement is terminated, my|CalPERS disables deduction submission and relationships associated with the agreement, and creates a PeopleSoft receivable to collect remaining annual billing fees through the termination date, if a business partner is terminating their last remaining direct authorization agreement. If the business partner terminating the agreement has other existing agreements, the receivable is not created until the annual process is run.

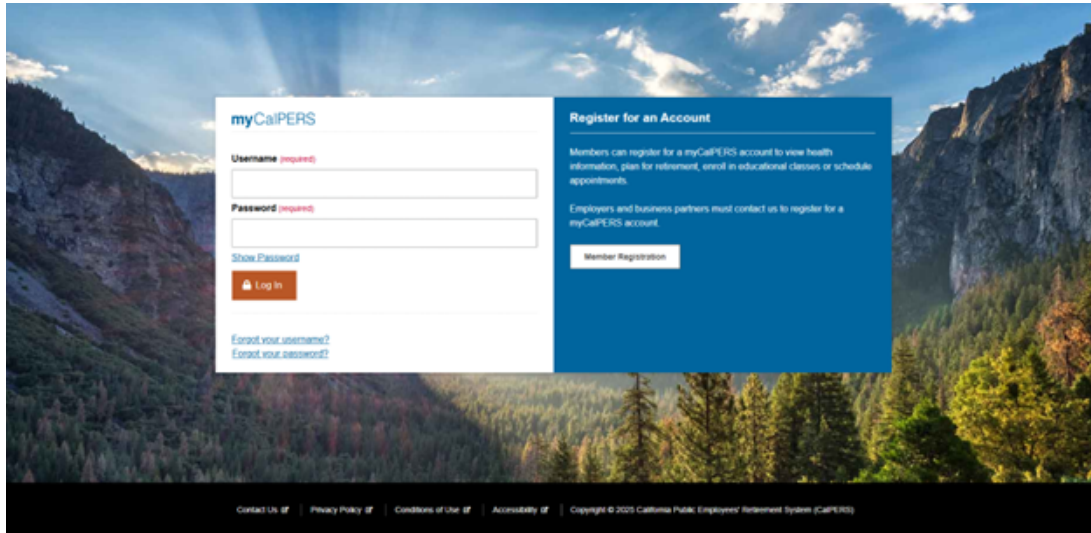
my|CalPERS cancels future deductions if the agreement is terminated by the business partner and they have not selected a new carrier. my|CalPERS generates and sends an invoice for outstanding payments if the business partner is terminating their last remaining agreement. The invoice is not sent out if the business partner has additional existing agreements.

When a business partner terminates a direct authorization agreement, the effective date must fall within a specific range to be enacted on the desired effective date.

Generally, for a termination to be effective for the beginning of the next calendar month, the change must be submitted prior to the end of the current business month. For example, if December 15 is the end of the business month and a modification was made on December 11, then the modification would be effective on the first of January, the following calendar month. If the effective date does not fall into the specific date range, my|CalPERS adjusts the effective date to be in accordance with the business rules.

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.

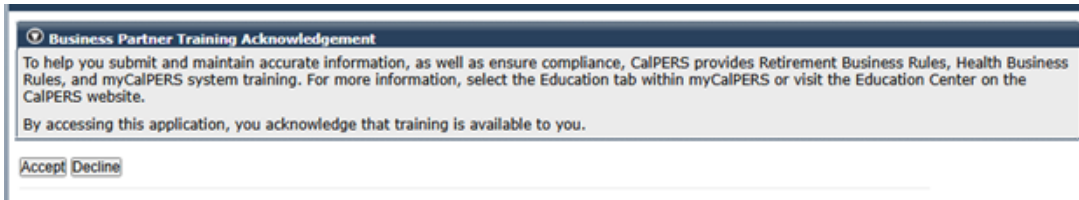
my|CalPERS Direct Authorization Vendor User Guide



Type in your Username and Password and select Log In to continue.

The Business Partner *Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my|CalPERS Direct Authorization Vendor User Guide



The Conditions of Use for Business Partners (Employers) page displays.

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.



Select the **Profile** global navigation tab. The *Business Partner Profile Summary* page displays.

The screenshot displays the 'Business Partner Profile Summary' page. The navigation bar includes 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. The left-hand menu contains 'Summary', 'Payments', 'Receivables', 'Agreements', 'Common Tasks', and 'Menu'. The main content area is divided into several sections:

- Profile:** Displays CalPERS ID, Federal Tax ID, Category (Direct Authorization Organization), Status (Active), Name (SEIU Local), and Merged Agency (No).
- Addresses:** Shows Physical and Mailing addresses. The mailing address is 3946 Surber Drive, COVINA, CA 91724-4049. Undeliverable status is No.
- Communication Information:** Shows Preferred Communication (Mail) and Primary Email. Primary Phone Number is (999) 888-7777.
- Contacts:** A table listing contacts with columns for Contact Type, Name, System Admin, Primary, and Phone Number.

Contact Type	Name	System Admin	Primary	Phone Number
General	Mariano Engra	Y	N	(559) 877-4837
General	Dario Littow		N	(714) 290-9201
General	Hunt Stevenson		N	
- Business Relationships:** A table with columns for Name, CalPERS ID, Program, Service Provided, and Status. It shows 'No results found.'
- Contracts/Agreements:** A table listing agreements with columns for Contract/Agreement Type, Contract/Agreement ID, Status, Date Status Changed, Effective Date, Termination Date, and Related Parties.

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement		Active	03/01/2023	03/01/2023		California, Zenith American Solutions
Direct Authorization Agreement		Active	03/01/2023	03/01/2023		Zenith American Solutions
Direct Authorization Agreement		Active	03/01/2023	03/01/2023		Zenith American Solutions
Direct Authorization Agreement		Active	03/01/2023	03/01/2023		Zenith American Solutions

Select the **Agreements** local navigation tab.

my|CalPERS Direct Authorization Vendor User Guide

The *Agreements List* page displays. Your organization's direct authorization agreements display under the Direct Authorization Agreements column within the Agreements section. The status of each agreement, effective dates and related parties may also be found in this section under the appropriate columns. Note that there is a Termination Date column.

The screenshot shows the 'Agreements List' page for 'SEIU Local 721 Benefits Trust' with CalPERS ID: 1114176602. The page features a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below the navigation, there are sub-tabs for Summary, Payments, Receivables, and Agreements. The 'Agreements' sub-tab is active, displaying a table of Direct Authorization Agreements. The table has the following columns: Name, Agreement Id, Status, Program, Effective Date, Termination Date, and Related Parties. The data rows are as follows:

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
SEIU 721/Optum- DA	1000453906	Active	CalPERS	03/01/2023		Physical of California, Zenith American Solutions
SEIU 721/Legal- DA	1000453907	Active	CalPERS	03/01/2023		Services, Zenith American Solutions
SEIU 721/ VSP- DA	1000453908	Active	CalPERS	03/01/2023		Service Plan, Zenith American Solutions
SEIU 721/Dental- DA	1000454901	Active	CalPERS	03/01/2023		Health Services, Zenith American Solutions

Select the **Direct Authorization Agreement** link under the Agreement Type column that is associated with the appropriate direct authorization agreement that you would like to terminate within the Agreements section.

The *Direct Authorization Deductions* page displays.

Home Profile Reporting Person Information Education Other Organizations

Summary Payments Receivables Agreements

Common Tasks *Required Fields

Menu ▼

Agreements List

Direct Authorization Deductions

Direct Authorization Information

Agreement ID: 1000453906
 Program: California Public Employees' Retirement System
 Agreement Status: Active
 Deduction Type: DA Deduction Medical

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? Yes
 Will the deductions be managed by a Third Party Administrator (TPA)? Yes
 Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes
 Who will submit the Direct Authorization Deductions for this agreement? Third Party Administrator
 Date Hold Harmless Agreement Signed: 02/03/2023 [View Hold Harmless Agreement](#)

Carrier Information

Direct Authorization Carrier Name: Physical of California
 Date Hold Harmless Agreement Signed: Not Signed
 Federal Tax ID:

Third Party Administrator Information

TPA manages deductions for: Physical of California
 Third Party Administrator Name: Zenith American Solutions
 Date Hold Harmless Agreement Signed: 01/17/2023
 Federal Tax ID: [View Hold Harmless Agreement](#)

Direct Authorization Deduction Submission Details

Organization submitting the Direct Authorization Deductions for this agreement: Zenith American Solutions

Direct Authorization Payment Details

Organization receiving the deduction payments for this agreement: Zenith American Solutions
 Preferred Method of Payment: Check
 Check Payable Name: Any One
 Address: Aprille Rafidson
 3946 Surber Drive
 COVINA CA
 91724-4049
 Direct Deposit Account:
 Retiree Deduction Text: SEIU 721/Optum- DA

Available Actions

Select an Available Action: Edit Agreement Terminate Agreement

Submit

Select the **Terminate Agreement** radio button in the Available Actions section.

The **Effective Date** and **Termination Reason** fields appear in the Available Actions section once the **Terminate Agreement** radio button is selected.

Available Actions

Select an Available Action: Edit Agreement Terminate Agreement

Effective Date: 08/01/2011

Termination Reason: Business Partner not Qualified

Submit

Enter the agreement termination effective date in the **Effective Date** field, or select the calendar icon to select the date, and select the reason for the

agreement termination from the **Termination Reason** dropdown ("Business Partner Not Qualified" in this example) and then select the **Submit** button. The following are examples of additional reasons that may be selected from the **Termination Reason** dropdown.

The screenshot shows a web application interface with a navigation menu on the left and a main content area. The navigation menu includes 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. The main content area has tabs for 'Summary', 'Payments', 'Receivables', and 'Agreements'. A confirmation message is displayed in a green box: "You have made a decision to terminate your agreement. A notification will be sent to you once this termination is effective. No further action is needed on your part." Below the message is a table titled "Direct Authorization Agreements" with columns for Name, Agreement Id, Status, Program, Effective Date, Termination Date, and Related Parties. The table contains four rows of data, with the last row showing a terminated agreement.

Name	Agreement Id	Status	Program	Effective Date	Termination Date	Related Parties
SEIU 721/Legal- DA	1000453907	Active	CalPERS	03/01/2023		Services, Zenith American Solutions
SEIU 721/ VSP- DA	1000453908	Active	CalPERS	03/01/2023		Service Plan, Zenith American Solutions
SEIU 721/Dental- DA	1000454901	Active	CalPERS	03/01/2023		Services, Zenith American Solutions
SEIU 721/Optum- DA	1000453906	Terminated	CalPERS	03/01/2023		Physical of California, Zenith American Solutions

The Agreements List page displays with the confirmation message *“You have made a decision to terminate your agreement. A notification will be sent to you once this termination is effective. No further action is needed on your part.”* Note that the termination effective date is displayed under the Termination Date column within the Agreements section.

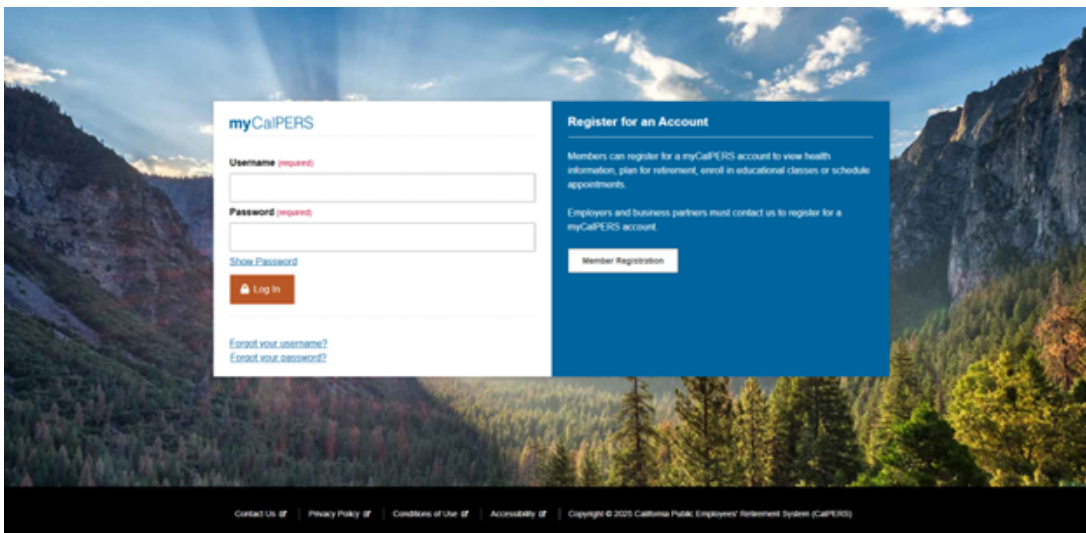
A direct authorization termination notification letter is sent to the sponsor and the previous third party administrator notifying them of the termination and the termination effective date of the direct authorization agreement relationship. The deductions associated with the terminated direct authorization agreement are canceled.

Part 2: Direct Authorization Agreement Deduction Processing

Processing Deductions

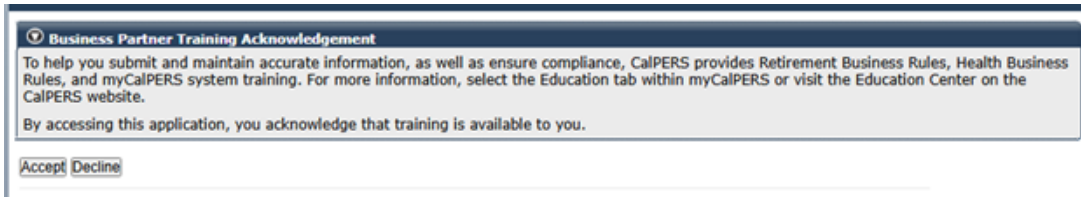
Maintain DA Deductions

Within myCalPERS, you can Maintain DA Deductions (add, update, delete), review and resolve Current DA Errors or Unresolved Historical Errors. Note only the business partner assigned as the submitter of deductions in the Agreement is allowed to submit direct authorization deductions to prevent duplicate deduction submission. Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.



Type in your Username and Password and select Log In to continue.

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



The Conditions of Use for Business Partners (Employers) page displays.

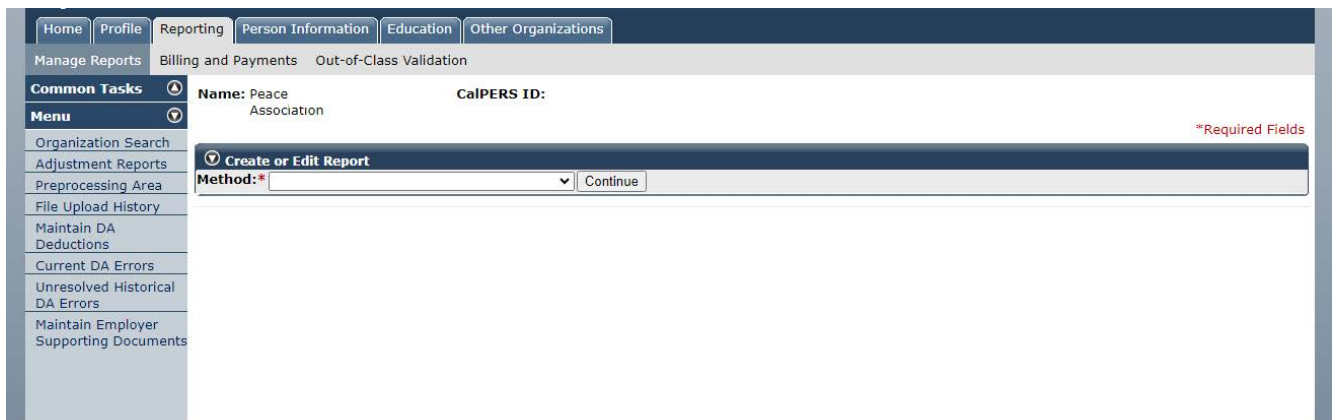
Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.



Select the **Reporting** global navigation tab.

The Create or Edit *Report* section displays. *Note* the Maintain DA Deductions, Current DA Errors, and Unresolved Historical DA Errors links on the Left Hand Navigation Menu.



To **Add, Update, Delete** deductions, select Maintain DA Deductions link from the Left Hand Navigation Menu. *Note* the Create or Edit Report panel is used to process Global Rate Change or Dues Recalculation deduction information.

my|CalPERS Direct Authorization Vendor User Guide

The *Maintain Current and Future Deductions* section displays. The warrant issue date is the effective date for the deduction. (defaults to the current pending warrant)
 Select the **Display** button.

The screenshot shows a web application interface with a top navigation bar containing tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this is a sub-navigation bar with Manage Reports, Billing and Payments, and Out-of-Class Validation. A left sidebar lists various menu items, including Organization Search, Adjustment Reports, Preprocessing Area, File Upload History, Maintain DA Deductions, Current DA Errors, Unresolved Historical DA Errors, and Maintain Employer Supporting Documents. The main content area displays the 'Maintain Current and Future Deductions' section, which includes a 'Name' field (Peace Association) and a 'CalPERS ID' field. A 'Warrant Issue Date' dropdown menu is set to 08/01/2023, and a 'Display' button is located below it. A red asterisk indicates that the 'Warrant Issue Date' field is required.

In this example, we are creating a Direct Authorization Report for the *August 2023* business month for the Direct Authorization Organization. Select the **radio** button associated with the appropriate **Agreement ID** within the Direct Authorization Agreements section. Then select the **Maintain Deductions** button.

The screenshot shows the same web application interface as above, but with the 'Direct Authorization Agreements' section expanded. This section contains a table with the following columns: Agreement ID, Deduction Type, Program, Sponsor, Carrier, Third Party Administrator, and Effective Date. A single row is visible with the following data: Agreement ID: 1000001050, Deduction Type: Association Dues, Program: California Public Employees' Retirement System, and a radio button selected in the Agreement ID column. Below the table is a 'MaintainDeductions' button. The 'Warrant Issue Date' dropdown menu is still set to 08/01/2023, and the 'Display' button is also visible.

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
<input checked="" type="radio"/> 1000001050	Association Dues	California Public Employees' Retirement System				

The *Deductions Information* page displays.

The screenshot shows the 'Deductions Information' page. At the top, there are navigation tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, and Out-of-Class Validation. A 'Common Tasks' section is visible on the left. The main content area shows a 'Name: Peace Association' and 'CalPERS ID:' field. Below this is a 'Direct Authorization Agreement' table with columns: Agreement ID, Deduction Type, Program, Sponsor, Carrier, Third Party Administrator, and Effective Date. A single record is shown with Agreement ID 1000001050, Deduction Type Association Dues, and Program California Public Employees' Retirement System. Below the table is a 'Search Direct Authorization Records' section with input fields for CalPERS ID, Social Security Number, Last Name, Deduction Amount, and Updated By, along with Search and Clear buttons.

Search for a participant record before you can **Add**, **Update** or **Delete** participant deductions. You must search for only **one** of the displayed values, (CalPERS ID, SSN, Last Name, Deduction Amount, or a selection from the dropdown for Updated By). Searches by Last name, Deduction Amount or Updated By field may result in more than one participant returned in the results and may take longer to load the page.

Note: the results from the search contain live data and will display current, active deductions for the agreement in context. This is the amount which will appear on the participant's next issued warrant.

This screenshot shows the 'Deductions Information' page after a search. The search criteria are: CalPERS ID: 1983772229, Social Security Number: (empty), Last Name: (empty), Deduction Amount: (empty), and Updated By: (dropdown). Below the search form, there is a 'Direct Authorization Records' section with an 'Add New' button and a 'Delete' button. The table below shows 'Number of records displayed: 0' and a table with columns: CalPERS ID, SSN-4, Participant Name, Deduction Type, Deduction Amount, Setup Month, and Updated By. The table content is 'No results found.' with a 'Delete' button below it.

1.Add: When you search and receive *No Results Found*, a deduction does not yet exist for the agreement. Click the **Add New** button to add a deduction for a participant.

In this example, we selected the **CalPERS ID** radio button. Note that the field below the radio button displays as the **CalPERS ID** field.

The screenshot shows the 'Deduction Information' form. The 'Participant ID' section has two radio buttons: 'CalPERS ID' (selected) and 'Social Security Number'. Below the 'CalPERS ID' radio button is a text input field labeled 'CalPERS ID*'. To the right of this field is a 'Name Search' button. Below the 'CalPERS ID' field is a 'Participant Social Security Number-4*' field. Below that is a 'Deduction Amount:*' field. The form also includes a table for 'Direct Authorization Agreements' with columns for Agreement ID, Deduction Type, Program, Sponsor, Carrier, Third Party Administrator, and Effective Date. The table contains one row with the following data: Agreement ID: 1000001050, Deduction Type: Association Dues, Program: California Public Employees' Retirement System, Sponsor: (blank), Carrier: (blank), Third Party Administrator: (blank), Effective Date: (blank). At the bottom of the form are two buttons: 'Save & Continue' and 'Save & Add Another'.

Enter the individual's **CalPERS ID** in the **CalPERS ID** field, the last four-digits of the individual's Social Security number in the **Participant Social Security Number-4** field, and the amount of the deduction in the Deduction Amount field. *Note* that the red asterisks indicate that these are all required fields. Select the **Save & Continue** button if you are finished entering new deductions, or the **Save & Add Another** button if you want to enter more new deductions.

The screenshot shows the 'Deduction Information' form. The 'Participant ID' section has two radio buttons: 'CalPERS ID' and 'Social Security Number' (selected). Below the 'Social Security Number' radio button is a text input field labeled 'Social Security Number*'. Below this field is a 'Deduction Amount:*' field. The form also includes a table for 'Direct Authorization Agreements' with columns for Agreement ID, Deduction Type, Program, Sponsor, Carrier, Third Party Administrator, and Effective Date. The table contains one row with the following data: Agreement ID: 1000001050, Deduction Type: Association Dues, Program: California Public Employees' Retirement System, Sponsor: (blank), Carrier: (blank), Third Party Administrator: (blank), Effective Date: (blank). At the bottom of the form are two buttons: 'Save & Continue' and 'Save & Add Another'.

Enter the individual's **Social Security Number**, in the **Social Security Number** field, and the amount of the deduction, in the Deduction Amount field. *Note* that the red asterisks indicate that these are all required fields. Select the **Name Search** button to validate the participant name for the identifier entered.

Note that if you enter an erroneous **Social Security Number** or **CalPERS ID** and the Participant Social Security Number-4 combination, myCalPERS displays an error message upon click of the Name Search, **Save & Continue**, or **Save & Add Another**.

A Participant does not exist in the system for the reported CalPERS ID and SSN combination. Verify and update your entry.

The Social Security Number (SSN) reported is invalid.

The screenshot shows the 'Direct Authorization Agreement' section with a table listing agreement details. Below it is the 'Search Direct Authorization Records' panel with search criteria for CalPERS ID, Social Security Number, Deduction Amount, and Updated By. At the bottom is the 'Direct Authorization Records' table showing one record for Dale King.

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001050	Association Dues	California Public Employees' Retirement System				

CalPERS ID	SSN-4	Participant Name	Deduction Type	Deduction Amount	Setup Month	Updated By
<input type="checkbox"/> 1494142723		Dale King	Association Dues	\$10.00	02/01/2015	BNF-7022-DD-04 / S 12-12-2014

The **Save & Continue** button will display the **Direct Authorization Records** panel with the participant who was added.

If the **Save and Add Another** button was selected and other participants were added, you can confirm successful transactions of those participants by selecting the **Clear** button in the **Search Direct Authorization Records** panel and then search for those participants individually.

You can search for the next record to Add, Delete or Update for the Agreement ID in context by selecting the **Clear** button in the **Search Direct Authorization Records** panel.

Update deduction amount

You will need to Search for a participant record before you can update participant deductions. You must search for at least one of the displayed values, (CalPERS ID, SSN, Last Name, Deduction Amount, or a selection from the drop-down for Updated By). Note if a deduction under a different Agreement ID needs to be processed, select the Maintain DA Deductions left hand navigation link.

The screenshot shows the user interface with the following sections:

- Navigation:** Home, Profile, Reporting, Person Information, Education, Other Organizations, Manage Reports, Billing and Payments, Out-of-Class Validation.
- Common Tasks:** Organization Search, Adjustment Reports, Preprocessing Area, File Upload History, Maintain DA Deductions, Current DA Errors, Unresolved Historical DA Errors, Maintain Employer Supporting Documents.
- Participant Info:** Name: Peace Association, CalPERS ID: [blank]
- Direct Authorization Agreement Table:**

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001050	Association Dues	California Public Employees' Retirement System				
- Search Direct Authorization Records Form:**

CalPERS ID: Social Security Number: to:
 Last Name: Deduction Amount:
 Updated By:
- Direct Authorization Records Table:**

Number of records displayed: 0

CalPERS ID	SSN-4	Participant Name	Deduction Type	Deduction Amount	Setup Month	Updated By
No results found.						

Enter a value to search. Select the **Search** button.

The Search *Direct Authorization Records* panel displays. You will see a **Setup Month** column, when the deduction was last updated, and **Updated By** column, for whom or what will process updated the deduction. Note this page contains live data and will display current, active deductions for the agreement in context, which will appear on the participant's next issued warrant.

The screenshot shows the search results with the following sections:

- Direct Authorization Agreement Table:** (Same as above)
- Search Direct Authorization Records Form:** (Same as above)
- Direct Authorization Records Table:**

Number of records displayed: 1

CalPERS ID	SSN-4	Participant Name	Deduction Type	Deduction Amount	Setup Month	Updated By
<input type="checkbox"/> 1494142723		Dale King	Association Dues	\$2.50	02/01/2015	BNF-7022-DD-04 / S 12-12-2014

Select the link under the CalPER ID column.

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Required Items

▼ Deduction Information
Submitter: Peace
Business Month: 07/2023
Participant ID: CalPERS ID
CalPERS ID*: 1021052924
Participant Social Security Number-9656
4*
Deduction Amount*:
Ending Business Month:

▼ Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001050	Association Dues	California Public Employees' Retirement System				

The **Edit Deduction Record** page displays.

▼ Deduction Information
Submitter: Peace
Business Month: 07/2023
Participant ID: CalPERS ID
CalPERS ID*: 1021052924
Participant Social Security Number-9656
4*
Deduction Amount*:
Ending Business Month:

▼ Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001050	Association Dues	California Public Employees' Retirement System				

Enter the update deduction amount in the Deduction Amount field within the Deduction Information Section, select the Name Search button, (to verify the name of the participant) and select the Save & Continue button. Note an error message will display on the page in a red box if there was a problem with the transaction.

The *Search Direct Authorization Records* page displays the record just updated. The transaction was processed successfully.

The screenshot shows two main sections. The top section, titled "Direct Authorization Agreement", contains a table with the following data:

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001050	Association Dues	California Public Employees' Retirement System				

The bottom section, titled "Search Direct Authorization Records", contains search criteria fields: "CalPERS ID:" with a "Select" dropdown, "Last Name:" with a text input, "Social Security Number:" with a text input, "Deduction Amount:" with a text input, "Updated By:" with a dropdown menu, and a "to:" text input. There are "Search" and "Clear" buttons below these fields.

Select the **Clear** button for the next participant record to update. If processing is needed under a different Agreement ID, select the **Maintain DA Deductions** left hand navigation link.

Delete a Deduction

You will need to search for a participant record before you can delete participant deductions. You must search for at least one of the displayed values, (CalPERS ID, SSN, Last Name, Deduction Amount, or selection from the drop-down for Updated By). Note if a deduction under a different Agreement ID needs to be processed, select the Maintain DA Deductions left hand navigation link.

The screenshot shows a navigation menu on the left with tabs for "Home", "Profile", "Reporting", "Person Information", "Education", and "Other Organizations". Below these are "Manage Reports", "Billing and Payments", and "Out-of-Class Validation". The "Common Tasks" menu is expanded, showing "Organization Search", "Adjustment Reports", "Preprocessing Area", "File Upload History", "Maintain DA Deductions", "Current DA Errors", "Unresolved Historical DA Errors", and "Maintain Employer Supporting Documents".

The main content area shows the "Direct Authorization Agreement" table from the previous screenshot. Below it is the "Search Direct Authorization Records" section with the same search criteria fields as before.

Enter a value to search. Select the **Search** button.

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The Direct Authorization Records panel displays.

Direct Authorization Agreement

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001050	Association Dues	California Public Employees' Retirement System				

Search Direct Authorization Records

CalPERS ID: Select Social Security Number:

Last Name: Deduction Amount: to:

Updated By:

Direct Authorization Records

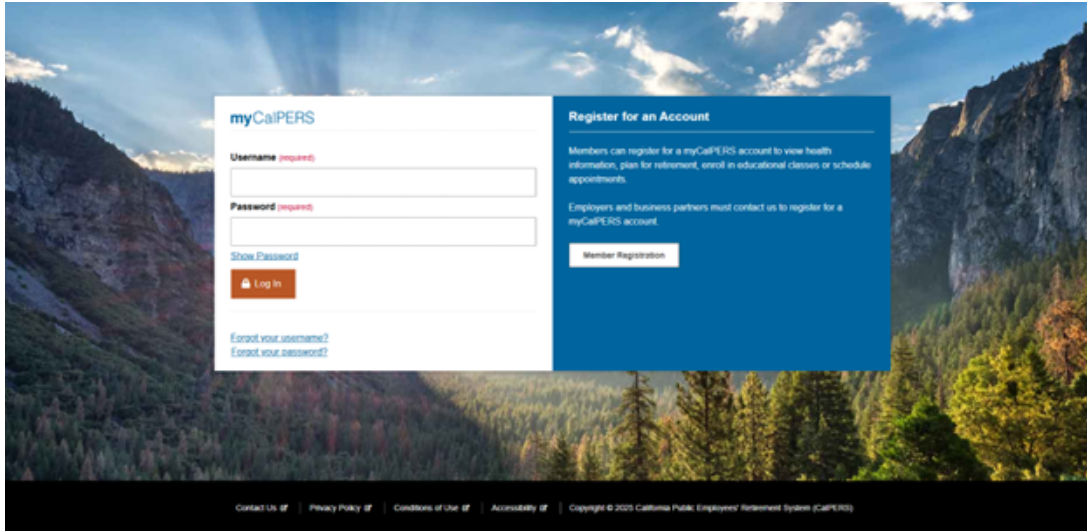
 Number of records displayed: 1

CalPERS ID	SSN-4	Participant Name	Deduction Type	Deduction Amount	Setup Month	Updated By
<input type="checkbox"/> 1494142723		Dale King	Association Dues	\$2.50	02/01/2015	BNF-7022-DD-04 / S 12-12-2014

Select the check-box next to the record you want to delete. Select the Delete button to delete the record. Note an error message will display on the page in a red box if there was a problem with the transaction.

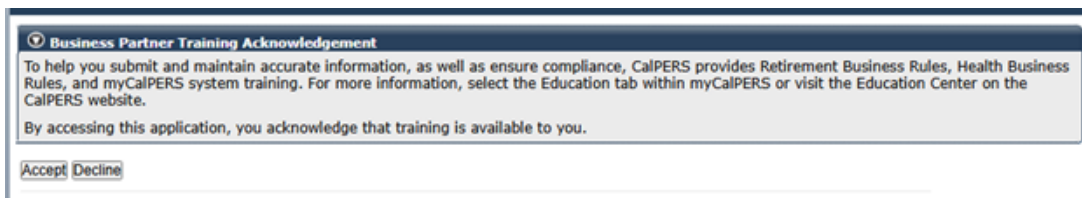
Perform a Global Rate Change

Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS Log In page displays.



Type in your Username and Password and select Log In to continue.

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



The Conditions of Use for Business Partners (Employers) page displays.

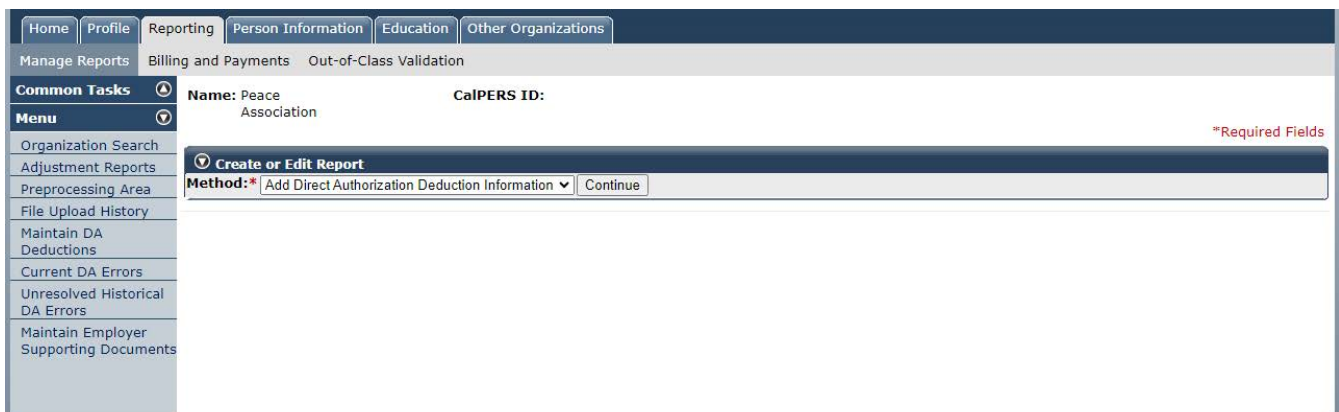
Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.



Select the **Reporting** global navigation tab.

The *Manage Reports* page displays.



Select **Add Direct Authorization Deduction Information** from the Method drop-down. Select **Continue** button.

The *Rate Change/ Dues Recalculation* page displays.

Name: Peace Association CalPERS ID: _____

*Required Fields

Rate Change / Dues Recalculation

Submitter Name: Peace Event: * Global Rate Change ▼

Business Month: 07/2023

Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001050	Association Dues	California Public Employees' Retirement System				

Select **Global Rate Change** from the **Event** drop-down and select the appropriate *business month* from the **Business Month** drop-down within the Create Direct Authorization Report section.

Name: California CalPERS ID: _____

Deduction Information

Business Month: 07/2023 Program: California Public Employees' Retirement System

Deduction Type: Association Dues Sponsor: California State Retirees

Carrier: _____ Agreement ID: _____

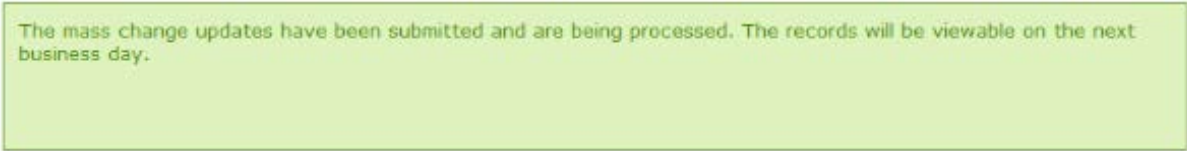
Dollar Amount Deduction Range

For Gross benefit Allowance Range:		Deduction Amount:
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$

You can enter up to four global rate changes per page. Enter the current deduction amounts in the **Existing Deduction Amount** fields(s) and enter the new deduction amounts in the corresponding **New Deduction Amount** fields(s) within the Global Rate Change section. Note the amounts must be greater than zero.

There is no limit to the total number of global rate changes which can be entered as you can select the **Add More Changes** button to add more rates. When you have finished entering global rate changes, select the **Create Records** button.

The *Manage Report* page displays the confirmation message "The mass change updates have been submitted and are being processed. The records will be viewable on the next business day."



The mass change updates have been submitted and are being processed. The records will be viewable on the next business day.

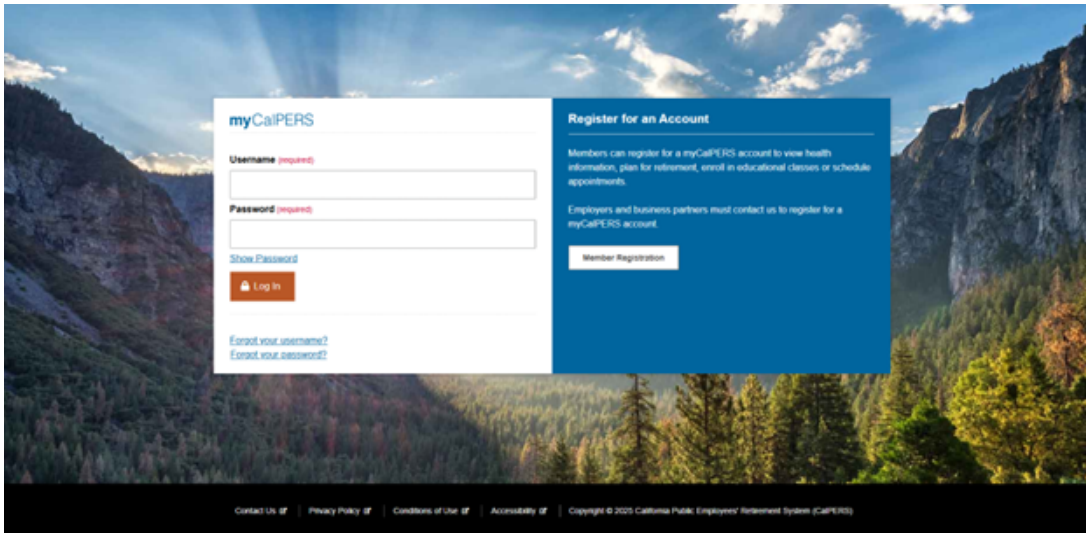
The next business day you will need to login and select **Maintain DA Deductions** or **Current DA Errors** link from the left hand navigation menu to search for successful records or view any errors which may have resulted from the update of the global rate change. See **Deduction Request Errors** section of this user guide.

Perform Dues Recalculation

The Dues Recalculation is a batch process designed to update dues payments for association organizations that have their dues structured based on a range of retiree benefit allowances.

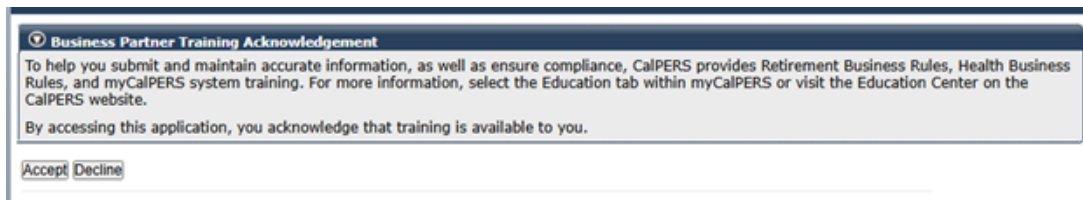
Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS **Log In** page displays.

myCalPERS Direct Authorization Vendor User Guide



Type in your Username and Password and select Log In to continue.

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



The Conditions of Use for Business Partners (Employers) page displays.

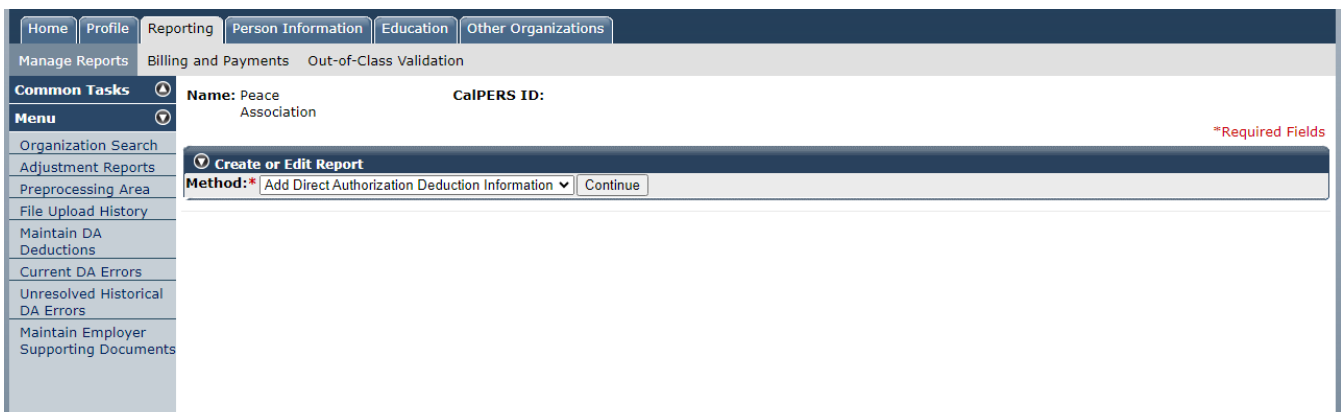
Review the conditions of use statement and then select the Accept button.

my|CalPERS Direct Authorization Vendor User Guide



Select the **Reporting** global navigation tab.

The *Manage Reports* page displays.



Select **Add Direct Authorization Deduction Information** from the Method drop-down. Select **Continue** button.

The *Rate Change/ Dues Recalculation* page displays.

Name: Peace Association CalPERS ID:

*Required Fields

Rate Change / Dues Recalculation

Submitter Name: Peace Event:* Dues Recalculation

Business Month: 07/2023

Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
<input type="radio"/> 1000001050	Association Dues	California Public Employees' Retirement System	Peace			

Select Dues Recalculation from the **Event** drop-down and select the appropriate business month from the **Business Month** drop-down.

Select the radio button of the Agreement ID for the dues recalculation update. Select Update button.

The *Dues Recalculation* page displays.

Name: California CalPERS ID:

Deduction Information

Business Month: 07/2023 Program: California Public Employees' Retirement System

Deduction Type: Association Dues Sponsor: California State Retirees

Carrier: Agreement ID:

Dollar Amount Deduction Range

For Gross benefit Allowance Range:		Deduction Amount:
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$
Start: \$	End: \$	\$

You can enter up to four benefit allowance ranges per page. Enter the **Start** and **End** amounts of the benefit allowance in the fields **For Gross benefit Allowance Range** and enter the dues amounts in the corresponding **Deduction Amount** field(s) within the Dollar amount Deduction Range section, Note the amounts must be greater than zero.

There is no limit to the number of benefit ranges and corresponding deduction amounts which can be entered, as you can select the **Add More Range** button to add more benefit ranges and deduction amounts. When you have finished entering the dues recalculation amounts, select the **Create Records** button.

Deductions Request File Submission

Submit a Deductions Request file using file upload

Direct authorization agreement deduction records can be entered manually into my|CalPERS using the online reporting method, or deduction record reports can be submitted using File Upload or File Transfer Protocol (FTP). The deduction record contains a list of the participants associated with the direct authorization deduction.

You can view existing reports listed by the earned period or adjustment date or you can create, upload, or edit direct authorization processing reports.

Extensible Markup Language (XML) direct authorization reports can be either uploaded to my|CalPERS or submitted using File Transfer Protocol (FTP). Reports submitted using FTP do not require login to my|CalPERS to submit the information.

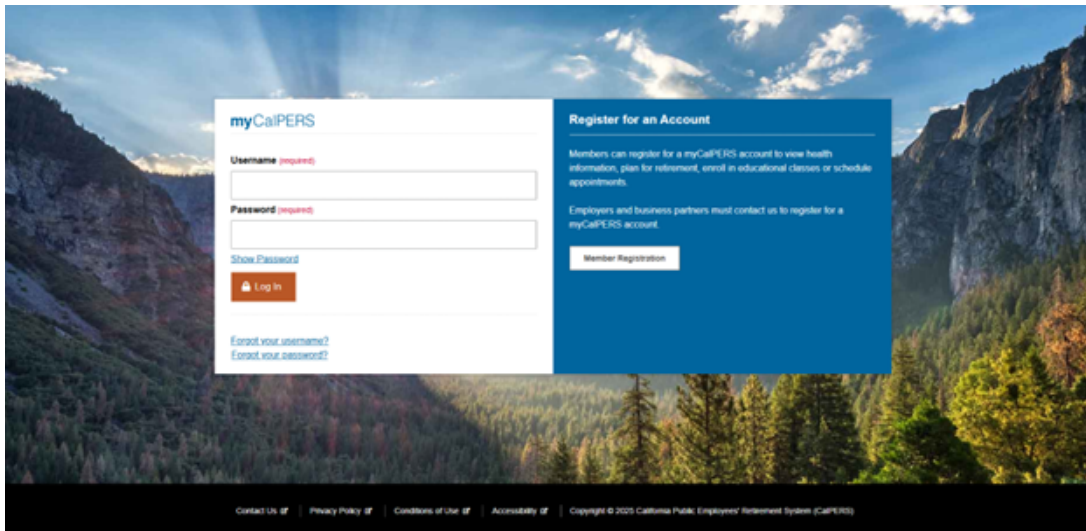
Electronically uploaded direct authorization deduction report files are automatically checked by my|CalPERS against numerous criteria to ensure the completeness of the listed participant records. Common required information types include Business Partners (CalPERS ID), Participant (CalPERS ID) and Retirement Program ID.

If there are no errors, then all of the direct authorization deduction records are submitted to my|CalPERS automatically. If the criteria are not met, my|CalPERS indicates which deduction records have identified errors and return them to the business partner for resolution. Once errors are corrected, the record is automatically submitted for direct authorization deduction without any further manual intervention.

my|CalPERS Direct Authorization Vendor User Guide

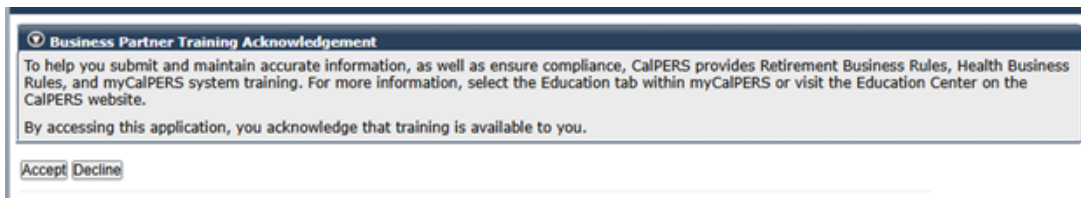
From the my|CalPERS *Log In* page, select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays.



Type in your Username and Password and select Log In to continue.

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



The Conditions of Use for Business Partners (Employers) page displays.

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.



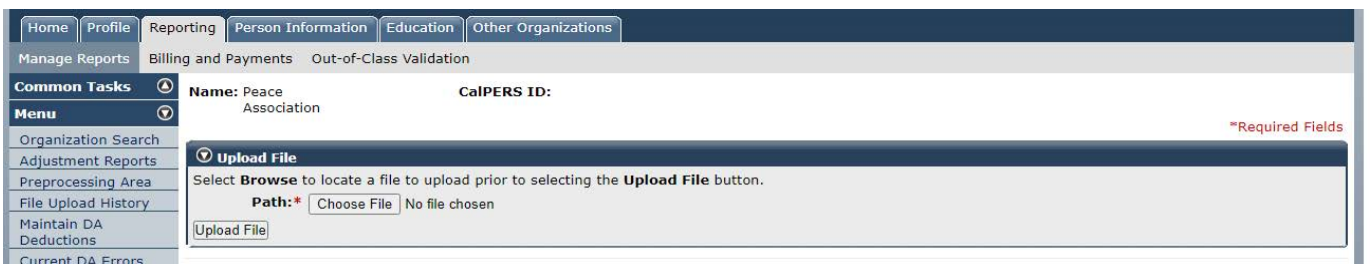
Select the **Reporting** global navigation tab.

The *Manage Report* page displays.



To submit a file by using the File Upload reporting method, select “Upload File” from the **Method** drop-down and select the **Continue** button within the Create or Edit Report section.

The Upload File section displays and provides a window that will allow you to browse for the file for upload.



Select the **Browse** button and follow the path to the location where the file is located within your organization's shared file directory or your individual personal computer. Once you have located the file select the **Upload File** button.

The *File Upload History* page displays. You can display your organization’s file upload history by selecting **File Upload History** from the left-side navigation Menu. You can review the File Type, Upload Date, File Status, Batch Job Status, File Name, Valid records, Error records and Total records.

Select the **File Upload History** link from the left-side navigation menu. Once the file is in the process of uploading, the screen will indicate that the upload is In Progress, as shown under the File Status column within the File Upload History section.

Once my|CalPERS receives the file, the File Status changes from “In Progress” to “Accepted”. Note that the Batch Job Status now shows as “In Progress”. You can refresh the screen to check the status. The File Status would display “Rejected” if the same file, or same filename, were submitted, as my|CalPERS only accepts a file one time.

After the upload is complete, my|CalPERS displays the status of “Accepted” under the File Status column and indicates the number of records that were validated and the count of those that were found to have errors within the File Upload History section. In this example, we have processed 16 valid records with no error records.

File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
Retirement Enrollment	06/16/2023	Accepted	Completed	20230616142207_000_00007.xml	5	0	5
Payroll Reporting	06/16/2023	Accepted	Completed	20230616202818_000_10006.xml	2355	296	2651
Payroll Reporting	06/05/2023	Accepted	Completed	20230605161644_000_10006.xml	2407	0	2407

my|CalPERS runs Level 1 validations to check the XML file structure, and if the file did not pass the Level 1 validation, the Batch Job Status would show as “Failed”, as shown below.

File Upload History								
File Type:	<input type="text"/>	Fiscal Year:	<input type="text"/>	Batch Job Status:	<input type="text"/>	Display	Clear	
File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total	
Payroll Reporting	06/24/2020	Accepted	Completed	20200624135810_000_10006.xml	2343	0	2343	
Payroll Reporting	06/24/2020	Rejected	Failed	20200624132640_000_10006.xml				
Retirement Enrollment	06/17/2020	Accepted	Completed	20200617184532_000_00007.xml	10	3	13	

This is an example of a Level 1 error message:

Home | Profile | Reporting | Person Information | Education | Other Organizations

Manage Reports | Billing and Payments | Out-of-Class Validation

Common Tasks

Menu

- Organization Search
- Adjustment Reports
- Preprocessing Area
- File Upload History
- Maintain DA Deductions
- Current DA Errors
- Unresolved Historical DA Errors
- Maintain Employer Supporting Documents

Name: SEIU Local
CalPERS ID:

The File is empty.
 The file name should be of the following format: yyyyymmddhhmiss_sss_XXXXX.xml where yyyyymmddhhmiss_sss is the date and time of upload and XXXXX is the interface type id.
 Upload functionality for this file type is not currently supported. Check the file being submitted and try again.

Upload File

Select **Browse** to locate a file to upload prior to selecting the **Upload File** button.

Path:* No file chosen

*Required Fields

Skip to: Content | Footer | Welcome Walter | Customize | Help | Contact Us | CalPERS On-Line | Log out **May 25, 2011**

my|CalPERS

Home | Profile | **Reporting** | Person Information | Other Organizations

Manage Reports

Common Tasks ▲

Menu ▼

Preprocessing Area

File Upload History

The file is rejected due to the following reason: Submission Date must be today or a future date and cannot be more than one year in the future.

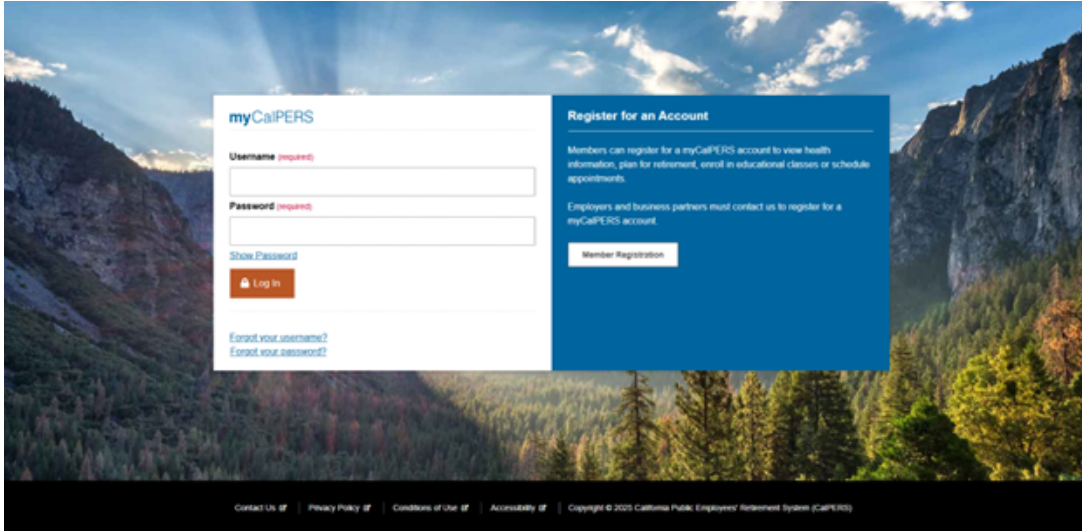
File Upload History								
File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total	
20016	05/25/2011	Accepted	Completed	20110112155528_005_20016.xml	0	0	0	
20016	05/25/2011	In Progress		20110112155528_007_20016.xml				
20016	05/25/2011	Rejected	Completed	20110112155528_006_20016.xml				
20016	05/25/2011	Rejected	Completed	20110112155528_004_20016.xml				
20016	05/25/2011	Rejected	Completed	20110112155528_003_20016.xml				

[View Preprocessing Areas](#)

This file submission was rejected and the error message “The file is rejected due to the following reason: Submission Date must be today or a future date and cannot be more than one year in the future.” displays on the *File Upload History* page.

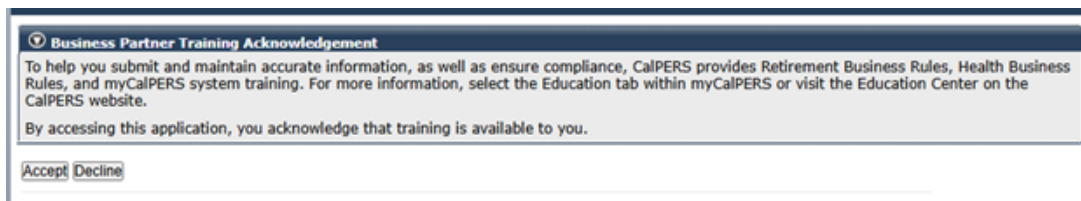
Manage Deductions Request File Errors

Review deduction records in staging area



Type in your Username and Password and select Log In to continue.

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



The Conditions of Use for Business Partners (Employers) page displays.

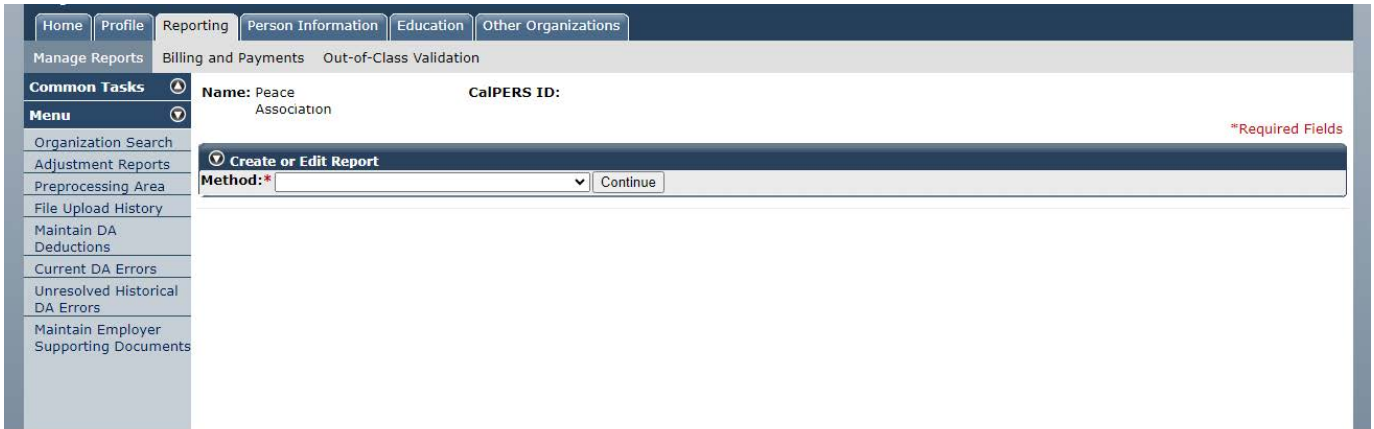
Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.



Select the **Reporting** global navigation tab.

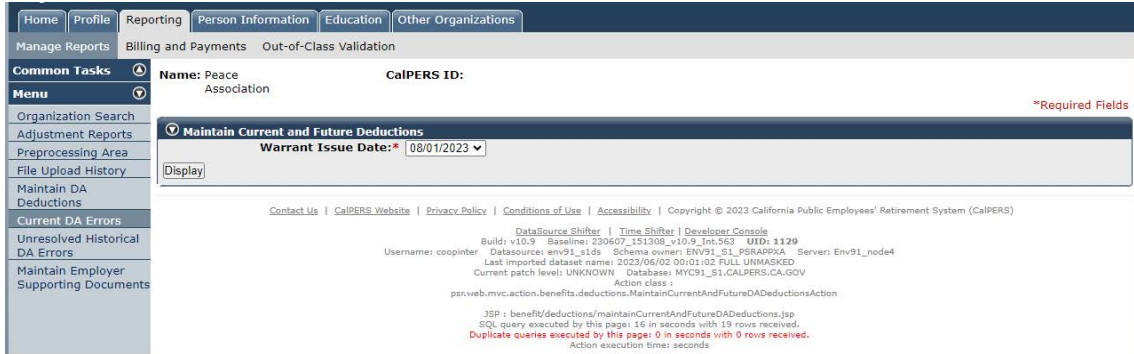
The *Manage Report* page displays.



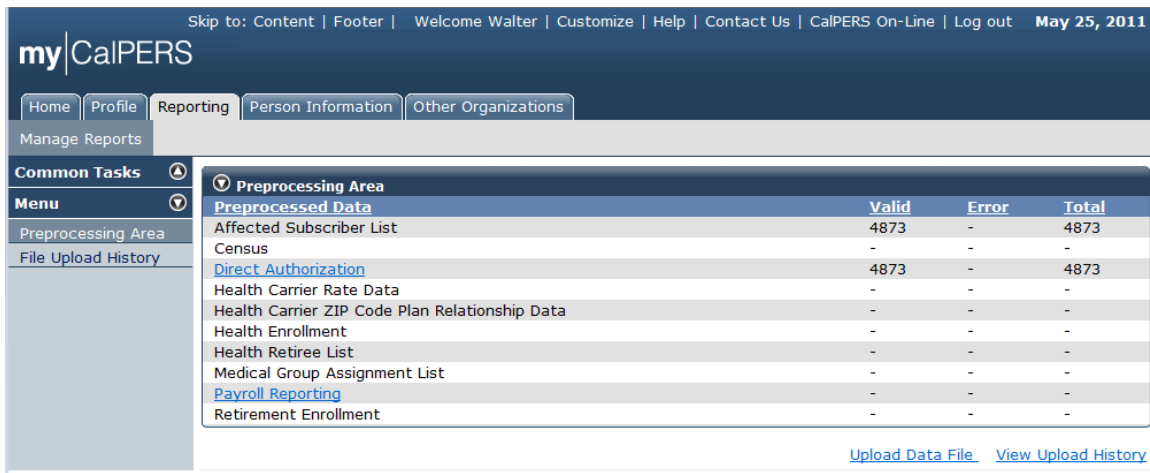
Select the **Current DA Errors** or **Unresolved Historical DA Errors** link from the left-side navigation menu to review, print or clear the errors. The Errors are a result from an upload or FTP XML file of the current or past business month and have not been resolved. In this example, we have selected **Current DA Errors**. The steps are the same for **Unresolved Historical DA Errors**.

my|CalPERS Direct Authorization Vendor User Guide

The *Maintain Current and Future Deductions* page displays.



The Preprocessing Area section displays. Note the Direct Authorization link under the Preprocessed Data column. There are no errors in this file. You can select file link for more detailed information.



Resolution of errors is the responsibility of the business partner. You may need to contact the participant to verify: their SSN or CalPERS ID number; they are receiving retirement warrants; or inform the participant of other arrangements for payment if a Deductions Exceed Gross error is resulted. The Benefit Services Division; Direct Authorization Program staff is available to assist you with any questions you have. Please direct your inquiries to RBSD_Direct_Authorization@calpers.ca.gov

Clearing Errors

Once an error has been resolved, it can be cleared from the report. If you need to preform deduction processioning, access the **Maintain DA Deductions** link on the left hand navigation menu. Note errors not cleared from the Current DA Errors report will move to the Unresolved DA Errors report after the warrant it was submitted for has been processed. The Unresolved DA Errors will continue to accumulate and the count is cumulative.

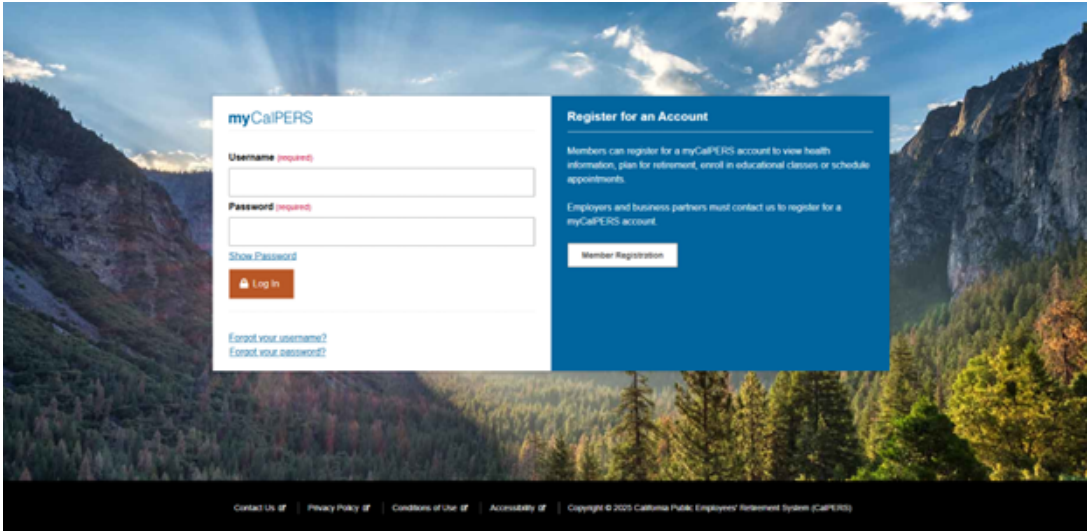
The screenshot shows the 'Direct Authorization Records' section of the application. At the top, there are navigation tabs: Home, Participant, Business Partner, Reporting, Admin, Workflow, and my Toolbox. Below these are various report links like 'Manage Reports', 'Billing and Payment Summary', etc. The main content area is titled 'Name: Univita CalPERS ID:'. It features a search form with fields for 'CalPERS ID', 'Last Name', 'Deduction Amount', and 'Error Month', along with an 'Error Message' dropdown and 'Search' and 'Clear' buttons. Below the search form is a table of 'Direct Authorization Records' with columns for CalPERS ID, SSN-4, Participant Name, Program, Sponsor/ Employer, Transaction Type, Deduction Amount, Error Month, and Error Message. Each row has a checkbox in the first column. At the bottom of the table, there are buttons for 'Select All', 'Clear Error', and 'Print Report', and a summary 'Number of Errors: 21123'.

CalPERS ID	SSN-4	Participant Name	Program	Sponsor/ Employer	Transaction Type	Deduction Amount	Error Month	Error Message
<input type="checkbox"/> 1064528123	1879	Mary Henderson	CalPERS		Add	206.65	12/2012	There were multiple participants found for the Social Security Number provided.
<input type="checkbox"/> 1133815941	6153	Jimmie Thompson	CalPERS		Add	162.75	12/2012	Exited Payee.
<input type="checkbox"/> 1283222556	7430	Rosalie Lindsey	CalPERS		Add	66.50	12/2012	Exited Payee.
<input type="checkbox"/> 1322472284	1717	Debbie Johnson	CalPERS		Add	72.34	12/2012	Payee has not yet been released.
<input type="checkbox"/> 1340767274	6585	Tremain Downey	CalPERS		Add	133.67	12/2012	Payee has not yet been released.
<input type="checkbox"/> 1362264364	9509	Edward Jeffries	CalPERS		Delete	0.00	12/2012	Exited Payee.

Select the check-box for the record you want to clear. Select the **Clear Error** button.

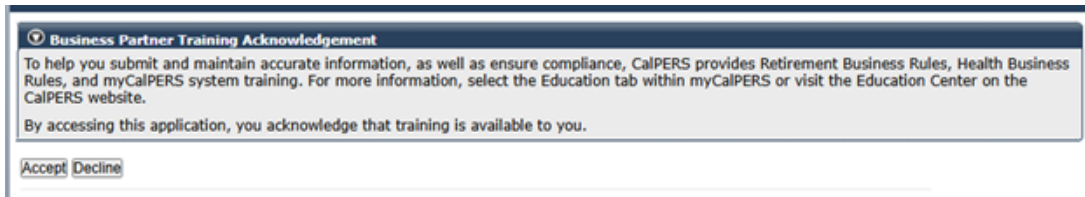
Deduction Payments

Business Partners can view the warrants issued to them from retiree deductions. A stop payment and/or photocopy request can also be requested on-line in the event the warrant has not been received.



Type in your Username and Password and select Log In to continue.

The Business Partner Login page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



The Conditions of Use for Business Partners (Employers) page displays.

Review the conditions of use statement and then select the Accept button.

my|CalPERS Direct Authorization Vendor User Guide

The my|CalPERS Home page displays. Select the Reporting global navigation tab. The Manage Report page displays.

The screenshot shows the my|CalPERS Home page with the Reporting tab selected. The main content area displays a form titled "Health Plan Search by ZIP Code". The form includes a search year dropdown, member category radio buttons (State/CSU and Public Agency/School), and a zip code input field. A "Search" button is located at the bottom of the form. A red asterisk indicates required fields.

Select the **Profile** global navigation link.

The Business Partner Summary page displays.

The screenshot displays the Business Partner Summary page. The Profile section shows the following information:

- CalPERS ID:
- Federal Tax ID:
- Category: Direct Authorization Organization
- Status: Active
- Name: SEIU Local
- Merged Agency: No

The Addresses section includes:

- Physical:
- Mailing: 3946 Surber Drive, COVINA, CA 91724-4049
- Undeliverable: No

The Communication Information section shows:

- Preferred Communication: Mail
- Primary Email:
- Primary Phone Number: (999) 888-7777

The Contacts section lists the following contacts:

Contact Type	Name	System Admin	Primary	Phone Number
General	Mariano Engra	Y	N	(559) 877-4837
General	Dario Littow		N	(714) 290-9201
General	Hunt Stevenson		N	

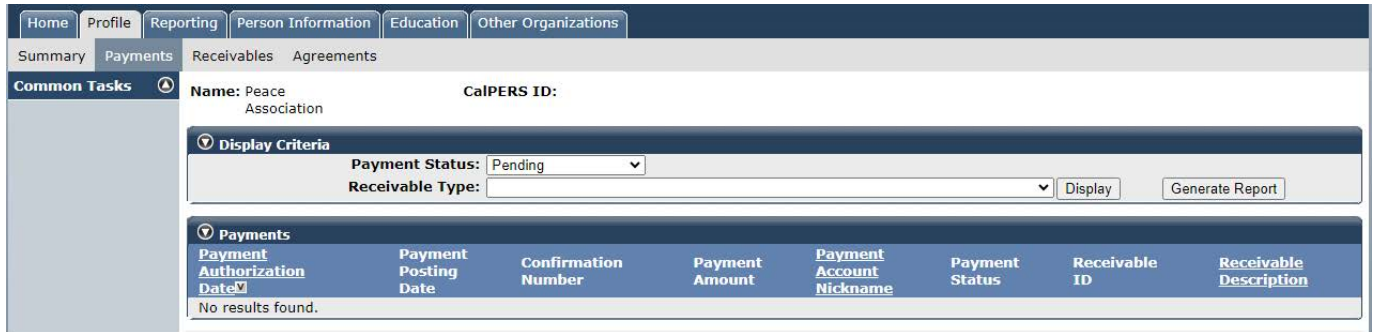
The Business Relationships section shows no results found.

The Contracts/Agreements section lists the following contracts:

Contract/Agreement Type	Contract/Agreement ID	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement		Active	03/01/2023	03/01/2023		California, Zenith American Solutions
Direct Authorization Agreement		Active	03/01/2023	03/01/2023		Zenith American Solutions
Direct Authorization Agreement		Active	03/01/2023	03/01/2023		Zenith American Solutions
Direct Authorization Agreement		Active	03/01/2023	03/01/2023		Zenith American Solutions

Select the **Payments** Local navigation link.

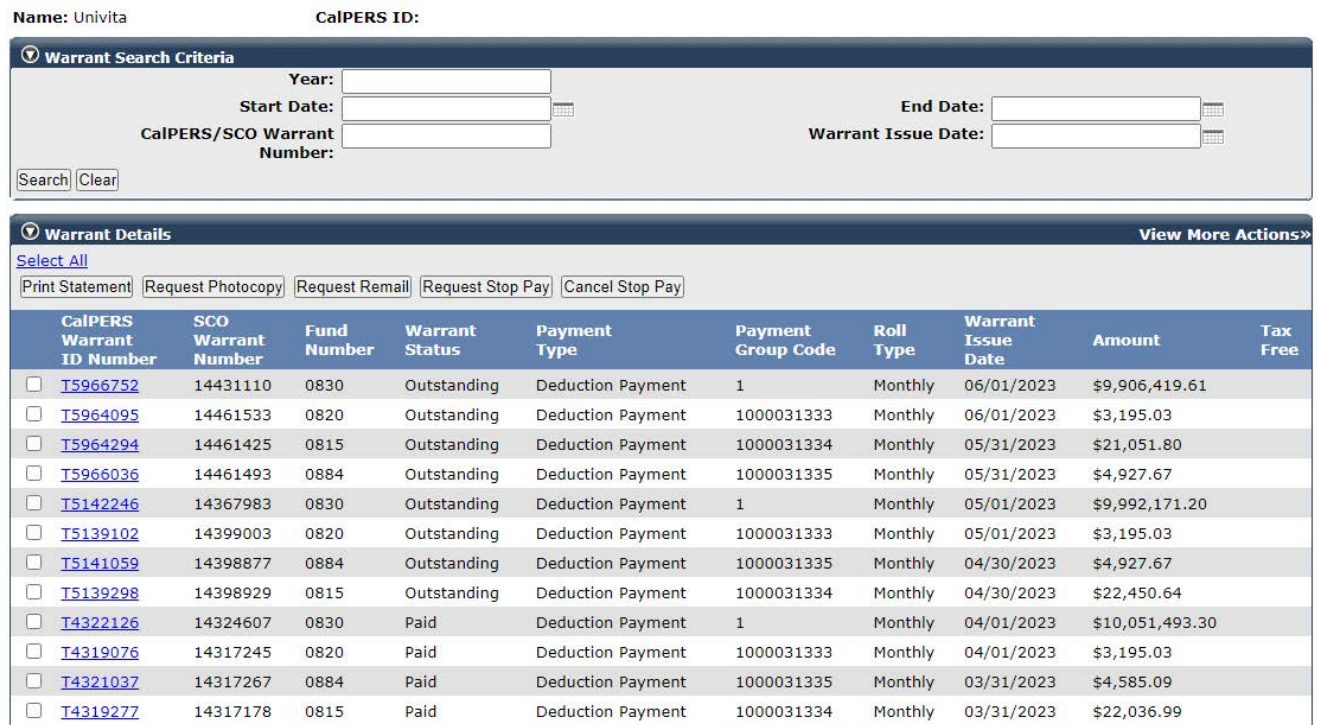
The **Payments** page displays.



Select the **Warrant Browser** link on the left hand navigation menu.



Select the **Search** button.



CalPERS Warrant ID Number	SCO Warrant Number	Fund Number	Warrant Status	Payment Type	Payment Group Code	Roll Type	Warrant Issue Date	Amount	Tax Free
<input type="checkbox"/> T5966752	14431110	0830	Outstanding	Deduction Payment	1	Monthly	06/01/2023	\$9,906,419.61	
<input type="checkbox"/> T5964095	14461533	0820	Outstanding	Deduction Payment	1000031333	Monthly	06/01/2023	\$3,195.03	
<input type="checkbox"/> T5964294	14461425	0815	Outstanding	Deduction Payment	1000031334	Monthly	05/31/2023	\$21,051.80	
<input type="checkbox"/> T5966036	14461493	0884	Outstanding	Deduction Payment	1000031335	Monthly	05/31/2023	\$4,927.67	
<input type="checkbox"/> T5142246	14367983	0830	Outstanding	Deduction Payment	1	Monthly	05/01/2023	\$9,992,171.20	
<input type="checkbox"/> T5139102	14399003	0820	Outstanding	Deduction Payment	1000031333	Monthly	05/01/2023	\$3,195.03	
<input type="checkbox"/> T5141059	14398877	0884	Outstanding	Deduction Payment	1000031335	Monthly	04/30/2023	\$4,927.67	
<input type="checkbox"/> T5139298	14398929	0815	Outstanding	Deduction Payment	1000031334	Monthly	04/30/2023	\$22,450.64	
<input type="checkbox"/> T4322126	14324607	0830	Paid	Deduction Payment	1	Monthly	04/01/2023	\$10,051,493.30	
<input type="checkbox"/> T4319076	14317245	0820	Paid	Deduction Payment	1000031333	Monthly	04/01/2023	\$3,195.03	
<input type="checkbox"/> T4321037	14317267	0884	Paid	Deduction Payment	1000031335	Monthly	03/31/2023	\$4,585.09	
<input type="checkbox"/> T4319277	14317178	0815	Paid	Deduction Payment	1000031334	Monthly	03/31/2023	\$22,036.99	

my|CalPERS Direct Authorization Vendor User Guide

Select the CalPERS Warrant ID Number link to view the payment address details for the warrant.

The Destination Details panel displays. The address displayed is where the payment has been or will be sent. If this address needs to be updated you will need to contact RBSD Direct Authorization Program staff.

Name: Univita CalPERS ID:

Session Details		
CalPERS ID:	Name:	Federal Tax ID:
Search for Other Related Warrants		
Next or Previous Warrant Issue Date: <input type="text"/>	Display <input type="button" value="Display"/>	
Warrant Status		
Update Status Warrant Status History View Allowance Distribution		
Warrant Issue Date: 06/30/2023	Warrant Status: Outstanding	Date: 06/30/2023
BRF/SCO Warrant Number: 14485891	Warrant Action:	Date:
CalPERS Warrant ID Number: T6787236	Warrant Disposition:	Date:
Roll Type: Monthly	Remittance Advice (RA) Number:	Date:
Payment Type: Deduction Payment	Related Warrant Number:	Date:
Claim Schedule: Q8914	Payment Group Code:	
	Fund Number: 0815	
Destination Details		
Payee Name: PERS		
Address:		
ZIP Code:		
Payment Summary		
Long Term Care Deduction:		Payment Amount
		\$21,751.22

[Print Statement](#) | [Request Photocopy](#) | [Request Stop Payment](#)

There are some actions a business partner may make on-line for their warrants.

A business partner may **Request Stop Payment** for a warrant not received that is in an Outstanding status. Select the **Request Stop Payment** button. A duplicate warrant will be issued out in 12-15 business days.

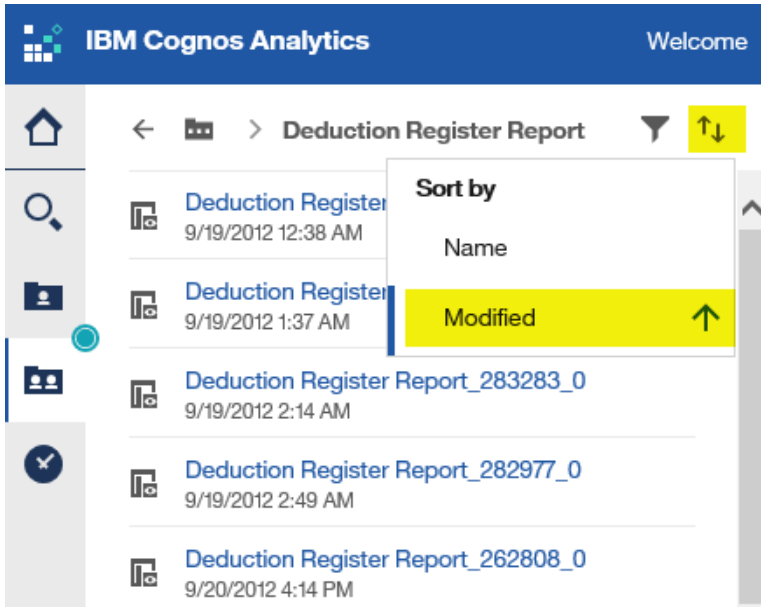
A **Photocopy** of a Paid warrant can also be requested. Select the **Photocopy Request** button. You may send a notification e-mail to RBSD_Direct_Authorization@calpers.ca.gov upon your submitted request.

Menu	Search Direct Authorization Records																		
<ul style="list-style-type: none"> Adjustment Reports Preprocessing Area File Upload History Retirement Contract Summary 	<p style="text-align: center;">CalPERS ID: <input type="text"/></p> <p>Sponsor/Employer: <input type="text" value="DAV Credit Union"/></p> <p>Error Message: <input type="text"/></p> <p>Search <input type="button" value="Search"/> Clear <input type="button" value="Clear"/></p>																		
	<p style="text-align: center;">Direct Authorization Records <input type="button" value="Add New"/></p> <p style="text-align: right;">Number of Records Submitted: 0 Number of Errors: 0</p> <p style="text-align: left;">Select All <input type="button" value="Delete"/></p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #2c4e64; color: white;"> <th>CalPERS ID</th> <th>SSN-4</th> <th>Participant Name</th> <th>Transaction Type</th> <th>Program</th> <th>Sponsor/ Employer</th> <th>Deduction Type</th> <th>Deduction Amount</th> <th>Error Message</th> </tr> </thead> <tbody> <tr> <td colspan="9">No results found.</td> </tr> </tbody> </table> <p style="text-align: left;">Select All <input type="button" value="Delete"/></p>	CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message	No results found.								
CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message											
No results found.																			

Generating the Deduction Register Report

Navigation:

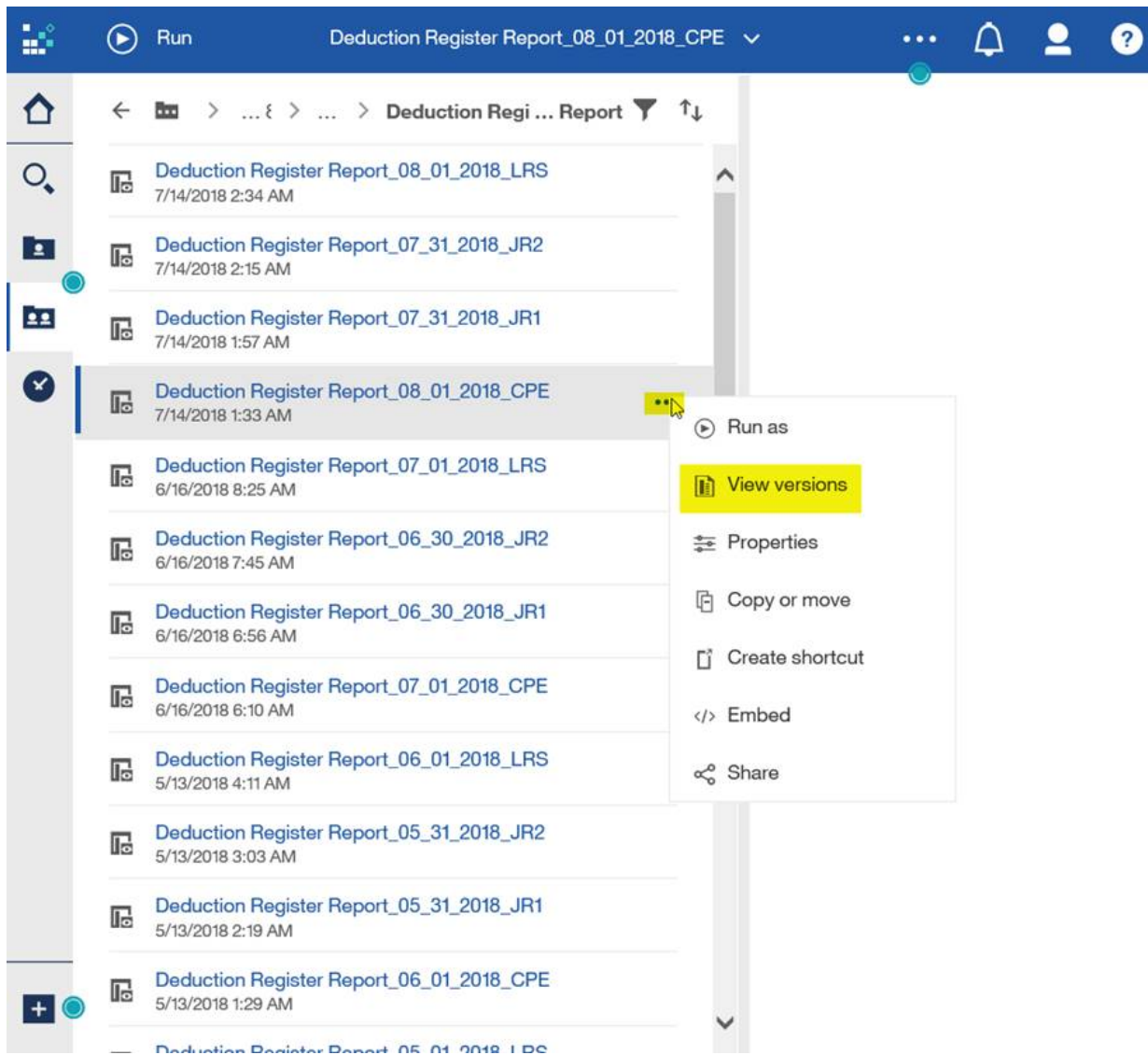
1. From Profile tab
2. Common Tasks
3. Reports
4. Team Content (folder with 2 persons)
5. PSR_REPORTS_ENV98
6. SAVED_REPORTS
7. Deduction Register Report
8. click this and 'Modified' twice to sort the most recent report on top
8. click the Up/Down arrows and 'Modified' twice to sort the most recent report on top



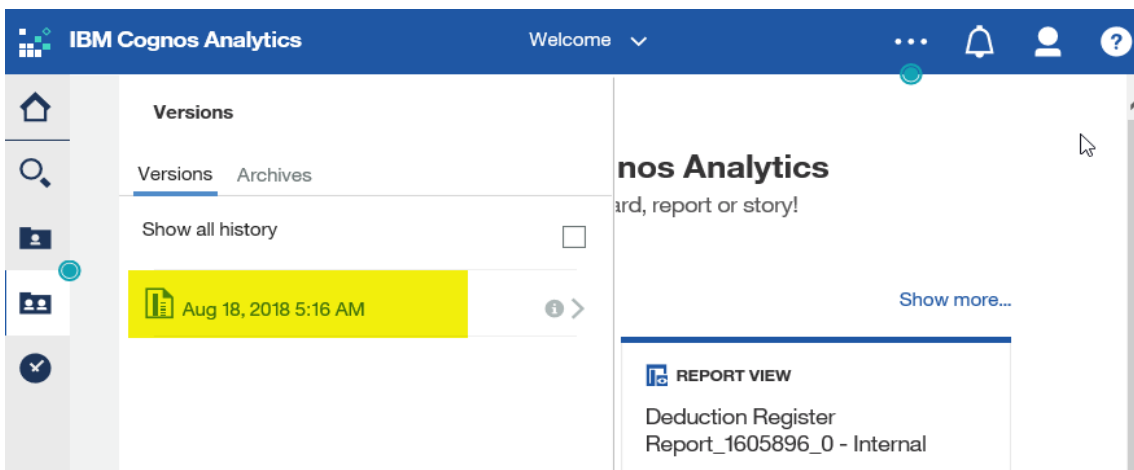
See screenshot below for the following steps:

9. Highlight the report you want to view (different date, but always CPE), hover over it until the ... (ellipses) shows which will provide more options.

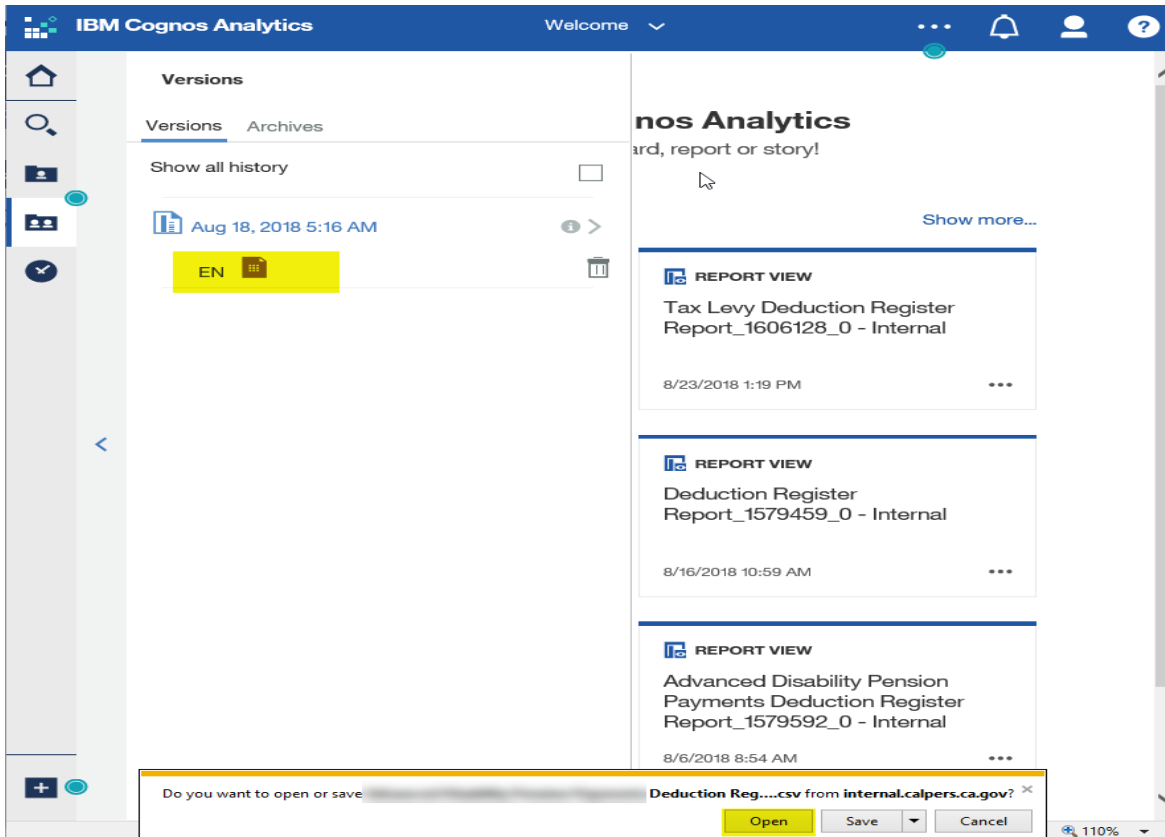
10. Select View Versions; the window for the output versions will appear.



11. Click on the date displayed



12. Click on the EN icon and then click Open at the bottom of the page.



13. The report will open in Excel.