

myCalPERS Health Enrollment Supplement

Student Guide

August 28, 2026



Introduction

This guide contains additional health enrollment transactions that you may process in myCalPERS. For step actions on more common transactions, refer to the [myCalPERS Health Enrollment \(PDF\)](#) student guide.

For confirming employee-submitted transactions in myCalPERS, refer to the [myCalPERS Health Transaction Verification student guide \(PDF\)](#).

Disclaimer

- Business partner and participant information has been masked in this procedure guide.
- We strive to provide accurate information within this guide; however, the Public Employees' Retirement Law is the authoritative source for CalPERS policies.

System Access

If you are unable to process these scenarios, contact your agency's [system access administrator](#) to update your myCalPERS access.

Training Opportunities

We offer self-paced online classes based on this guide. Follow these steps to ensure your CalPERS education experience is comprehensive and well-structured:

1. Take [Business Rules](#) instructor-led classes.
2. Review the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide.
3. Attend a [myCalPERS](#) instructor-led class.
4. Refresh your knowledge with [self-paced online classes](#) as needed.

Log in to your [myCalPERS](#) business partner account and then select the **Education** tab.

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Unit 1: Affidavit of Parent-Child Relationship (HBD-40)

In this unit, you will learn how to recertify a parent-child relationship and how to verify a parent-child relationship expiration date. The employee must provide a new HBD-40 and supporting documents for each dependent in a parent-child relationship.

For steps on adding a parent-child relationship dependent, refer to the [myCalPERS Health Enrollment \(PDF\)](#) student guide, Unit 1, Scenario 2: Add Dependent.

Expiration Date

If the parent-child relationship dependent is not recertified before the first of the month of the subscriber's birthday, then the system will automatically delete the dependent from the health benefits effective the first of the month following the subscriber's birthday.

Health Reports

- *Parent-Child Relationship Dependent With Expiring Certification Report*
- *Employer Health Enrollee Report-Ext* includes a Parent-Child Relationship Certification End Date column for all dependents in a parent-child relationship

Timeframes

90 Days

Recertify no earlier than 90 days before the parent-child relationship certification renewal date.

30 days

- If recertification is not completed at least 30 days before the parent-child relationship certification renewal date, the system will apply a termination date.
- If you approve the employee's recertification after the system applies a termination with a future date, you can rescind the termination, then recertify the dependent.
- If the termination date has recently passed and you approve the recertification, you must contact CalPERS to request a rescission, then recertify the dependent.

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Scenario 1: Recertify a Dependent in a Parent-Child Relationship

Step Actions (13 steps)

Add Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.



Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation Memb

Common Tasks Name: City Name CalPERS ID: 9876543210

Menu

Organization Search

Adjustment Reports

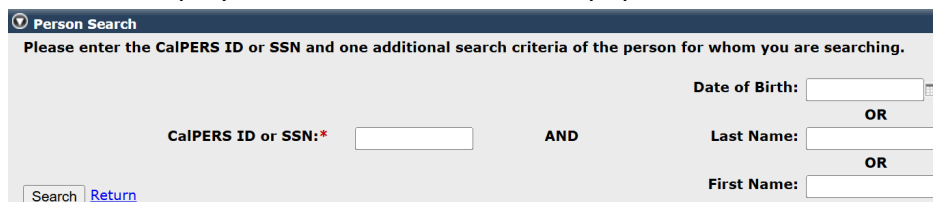
Create or Edit Report

Method: Add or Edit Health Enrollment Continue

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Enter the employee's CalPERS ID or SSN and populate one field on the right.



Person Search

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN: AND Date of Birth: OR Last Name: OR First Name:

Search Return

Step 5 Select the **Search** button.

Step 6 Are you recertifying more than 30 days prior to the first of the month of the subscriber's birthday (dependent hasn't been deleted)?

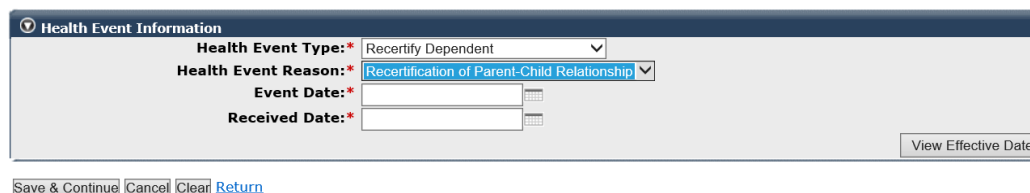
Yes: Continue to step 7.

No: Rescind the deletion before recertifying the dependent. For step actions, refer to the [myCalPERS Health Enrollment \(PDF\)](#) student guide, Unit 2: Rescission.

Recertify Parent Child Relationship

Step 7 Complete the Health Event Information section.

Event Date: 1st of the month following the subscriber's birth date.



Health Event Information

Health Event Type: Recertify Dependent

Health Event Reason: Recertification of Parent-Child Relationship

Event Date: Received Date:

View Effective Date

Save & Continue Cancel Clear Return

Step 8 Select the **View Effective Date** button at bottom right.

Step 9 Select the **Save & Continue** button.

Step 10 Within the Parent-Child Relationship Certification section, select the Certify Dependent check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
FIONA PHAM	07/31/2021	☒ Certify Dependent

Step 11 Select the disclaimer check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kitty Kooper	03/31/2025	☒ Certify Dependent

☒ * I am a duly appointed and qualified representative of the agency/department.

I have reviewed the above affidavit, supporting documentation, and verified the identity of the subscriber submitting this affidavit.

I retained copies of the subscriber's health and dental enrollment form(s) and all supporting documents to enroll/recertify the eligibility of the employee's dependent in a PCR.

Based on the review of the documentation and information provided I recommend enrolling/recertifying this dependent in a PCR based on the information provided and documentation attached [per CCR §599.500(o)].

Step 12 Select the **Save & Continue** button.

Step 13 Select the first link in the health transaction confirmation to verify the transaction updated correctly.

Health Transaction Confirmation

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

You have completed this scenario.

Scenario 2: Review Parent-Child Relationship and Certification Expiration Date

Verify the parent-child certification expiration date for the dependent.

Step Actions (8 steps)

Step 1 From the homepage, select the **Person Information** global navigation tab.

Step 2 Enter the employee's CalPERS ID or SSN and populate one field on the right.

Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:*		AND	Date of Birth:
			OR
			Last Name:
			OR
			First Name:

Step 3 Select the **Search** button.

Step 4 Select the **Health Enrollment** local navigation link.

Step 5 Select the **CalPERS Employment** link.

Summary Health Enrollment

Common Tasks

Menu

Premium Search Tool

Select Health Account

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	JOE JONES	0123456789

[Health Account Summary](#)

Step 6 Within the Covered Persons Summary section, is the dependent listed?

Yes: Continue to step 7.

No: Within the Covered Persons Summary section, select the **View More Actions** link to display the full list of dependents.

Covered Persons Summary [View More Actions»](#)

Below are your covered persons for health.
Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
JOE JONES	05/02/1958	Self	NA	Basic	No	No
SUEZENGKY MODERWELL	10/18/1965	Spouse	No	Basic	No	No

Step 7 Select the **name** link for the dependent that has a parent-child relationship.

Step 8 Confirm the Parent-Child Relationship Certification Expiration date is updated.

Health Coverage Information

Parent-Child Relationship Certification Expiration Date: 05/31/2018

Medical Coverage: Yes	Dental Coverage: No	Vision Coverage: No
Enrolled in Medical Since: 06/01/2017	Enrolled in Dental Since:	Enrolled in Vision Since:
Medical Coverage Type: Basic		
Medical COBRA Start Date:	Dental COBRA Start Date:	Vision COBRA Start Date:
Medical COBRA End Date:	Dental COBRA End Date:	Vision COBRA End Date:

You have completed this scenario.

Unit 2: Change Medical Group

This unit is for public agencies and schools that have a health contract with CalPERS.

A medical group is the employee group under which an employer contracts for CalPERS health benefits. A medical group may include the entire agency or a specific employee group (such as a bargaining unit or non-represented employees) and determines the applicable employer contribution for health benefits.

It's your responsibility to ensure that your subscribers have the correct medical group attached to their health profiles.

Resource: [Circular Letter 600-005-14 Maintaining Accurate Employee Medical Groups \(PDF\)](#)

Note: Similar step actions can be used for the following Update Enrollment health event types:

- Canceling or changing employer work ZIP code for health eligibility
- Opt in or out of vesting
- Relationship updates, e.g., parent-child relationship to adopted child, domestic partner to spouse, etc.

Scenario

Your agency contracts for a variety of employer contributions. One of your employees changed positions which has a different medical group. You will change your employee's medical group, so when they retire, your agency will be billed for the appropriate employer contribution, and the retiree will have the correct portion of the premium deducted from their warrant.

System Logic

The effective date cannot be more than 90 days in the past.

Step Actions (11 steps)

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

Step 2 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.

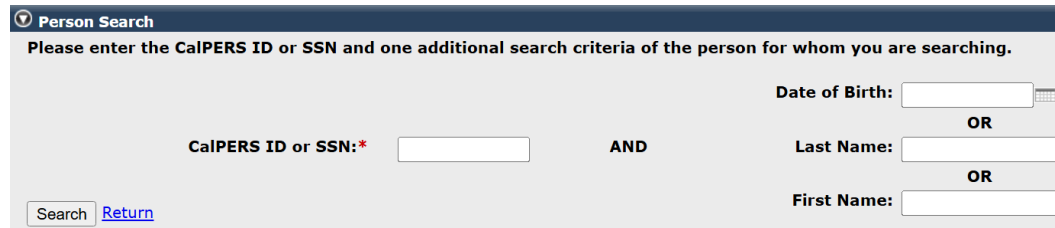


The screenshot shows the CalPERS Reporting interface. At the top, there are navigation tabs: Home, Profile, Reporting (selected), Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Membership. On the left, there is a 'Common Tasks' menu with options: Organization Search and Adjustment Reports. The main content area is titled 'Create or Edit Report' and displays 'Name: City Name' and 'CalPERS ID: 9876543210'. Below this, there is a 'Method:' dropdown menu with 'Add or Edit Health Enrollment' selected, and a 'Continue' button.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Enter the employee's CalPERS ID or SSN and populate one field on the right.



Person Search

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND

Date of Birth: OR

Last Name: OR

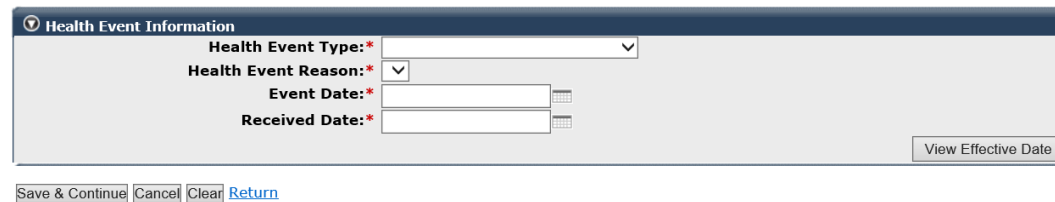
First Name:

[Return](#)

Step 5 Select the **Search** button.

Step 6 Complete the Health Event Information section.

- **Health Event Type:** Update Enrollment
- **Health Event Reason:** Change Medical Group



Health Event Information

Health Event Type:*

Health Event Reason:*

Event Date:*

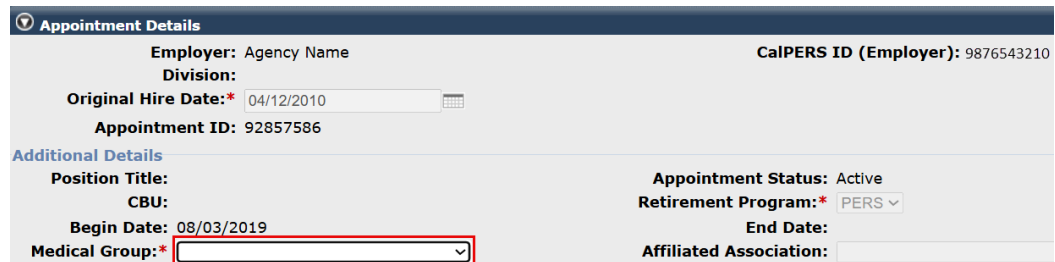
Received Date:*

[Return](#)

Step 7 Select the **View Effective Date** button at bottom right.

Step 8 Select the **Save & Continue** button.

Step 9 At the bottom left of the page, from the Medical Group drop-down list, select the new medical group.



Appointment Details

Employer: Agency Name CalPERS ID (Employer): 9876543210

Division:

Original Hire Date:* 04/12/2010

Appointment ID: 92857586

Additional Details

Position Title:

CBU:

Begin Date: 08/03/2019

Medical Group:*

Appointment Status: Active

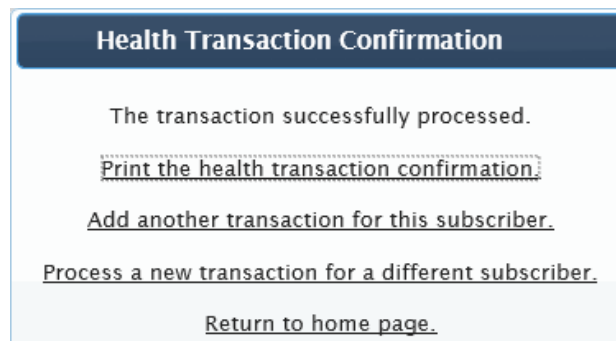
Retirement Program:* PERS

End Date:

Affiliated Association:

Step 10 Select the **Save & Continue** button.

Step 11 Select one of the four option links in the health transaction confirmation.



Health Transaction Confirmation

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

You have completed this scenario.

Unit 3: Direct Payment Authorization (CalPERS-2608)

In this unit, you will learn how to continue a subscriber's health benefits with direct pay. Direct pay is voluntary, and the subscriber is responsible for paying the full monthly premium directly to their health plan. Some examples of when someone may elect to go on direct pay:

- An employee on an unpaid leave of absence
- An enrolled state permanent intermittent or part-time employee has no earnings for one or more months
- A permanently separated employee is pending retirement

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Scenario 1: Direct Pay for an Employee

Your employee is going on an unpaid leave and has elected to go on direct pay.

System Logic

- For *public agencies and schools*, most leaves of absence will automatically cancel health benefits the first day of the second month. For example, if the employee's last day is 12/15/25 before their leave, health benefits will automatically cancel 2/1/26. For *state agencies*, a leave of absence doesn't automatically cancel health benefits.
- Family Medical Leave and Maternity/Paternity Leave do not change the employee's health coverage or employer deductions. Change Premium Payment Method health event type and Chg to deduct-FMLA-Batch health event reason will display in the health enrollment history.
- For a *public agency or school employee with* cancelled health benefits, you must rescind the cancellation prior to processing a direct pay.
- For direct pay employees, if the end leave date is entered prior to the Change Premium Payment Method is processed, the Chg to deduct-Return to Work will not automatically update when the employee returns to work.

All Agencies-Return to Work

Update the employee's appointment to reflect the end of their leave. After their return from leave is reflected in myCalPERS and the employee was:

- On direct pay: myCalPERS will change the subscriber from direct pay to standard deduction.
Note: If your employee's premium payment method isn't automatically changed from direct pay to a standard deduction, process the change.
Health Event Type: Change Premium Payment Method
Health Event Reason: Chg to deduct-Return to Work
- Not on direct pay (health benefits is cancelled): After the employee submits an HBD-12 to enroll, process their re-enrollment.
Health Event Type: New Enrollment
Health Event Reason: Return from Off Pay Status

Step Actions (29 steps)

Leave of Absence

Step 1 Is the employee's leave of absence event reflected in myCalPERS?

Yes: Skip to step 9.

No: Employee's appointment does not reflect a leave of absence.

- Public agencies, schools, and non-central state agencies, continue to step 2.
- Central-state agencies, enter the leave in PIMS, then skip to step 21.

Public Agencies, Schools, and Non-Central State Agencies: Process the Leave of Absence

Step 2 Select the **Person Information** global navigation tab.

Step 3 Complete the Person Search section.

Step 4 Select the **Search** button.

Step 5 Within the Appointment History section, select the **Employer** link that is for the employee's active appointment.

Employer	Division	Appointment Type
City Name		Regular

Step 6 Within the Appointment Event History section, select the **Add New** button.

Step 7 Complete the Appointment Event Details section.

Appointment Event Details

Event: * Begin Leave

Event Date: *

Leave Type: *

Save Clear

Build: 110707_185634

Site Requirements

Student001ds Server: ENV89_node2 UID: 341

Step 8 Select the **Save** button.

Public Agencies & Schools: Rescind the Health Cancellation

Step 9 Select the **Reporting** global navigation tab.

Step 10 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.

Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation Memb

Common Tasks

Menu

Organization Search

Adjustment Reports

Name: City Name CalPERS ID: 9876543210

Create or Edit Report

Method: * Add or Edit Health Enrollment

Continue

Step 11 Select the **Continue** button.

Search for the Subscriber

Step 12 Enter the employee's CalPERS ID or SSN and populate one field on the right.

Person Search

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN: * AND Date of Birth: OR Last Name: OR First Name:

Search Return

Step 13 Select the **Search** button.

Step 14 Within the Demographics Information section, select the **Rescind an Existing Transaction** link.

Demographics Information
CalPERS ID: 0123456789
Prefix: First Name: Ellie Middle Name: E Last Name: Edwards
Suffix: SSN: XXX-XX-9999 Date of Birth: 04/17/1977 Gender: Female
[Rescind an Existing Transaction](#)

Step 15 Within the Health Enrollment History section, select the radio button associated with the future health event to be rescinded.

Health Enrollment History
[Rescind](#)

Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status	Appointment ID	Create Date	Change Date
☒ 08/01/2024	Cancel Coverage	Off Pay Status Cancel	Ellie E Edwards	Medical	Future	495100	06/06/2024 01:23:20 PM	06/06/2024 01:23:20 PM

Step 16 In the upper left, select the **Rescind** button.

Step 17 At the bottom, complete the Rescission Confirmation section.

Rescission Confirmation
Reason for Rescission*: Subscriber Request
Additional Information: Rescinding cancellation to put on direct pay.
[Save and Continue](#)

Step 18 Select the **Save and Continue** button.

Step 19 From the Health Event Information section, select the **Save & Continue** button.

Step 20 Select the **Add another transaction for this subscriber** link, then skip to step 26.

Process the Direct Pay

Step 21 Select the **Reporting** global navigation tab.

Step 22 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.

Reporting
Manage Reports | Billing and Payments | Payroll Schedule | Out-of-Class Validation | Memb
Common Tasks
Menu
Organization Search
Adjustment Reports
Name: City Name CalPERS ID: 9876543210
Create or Edit Report
Method*: Add or Edit Health Enrollment
[Continue](#)

Step 23 Select the **Continue** button.

Search for the Subscriber

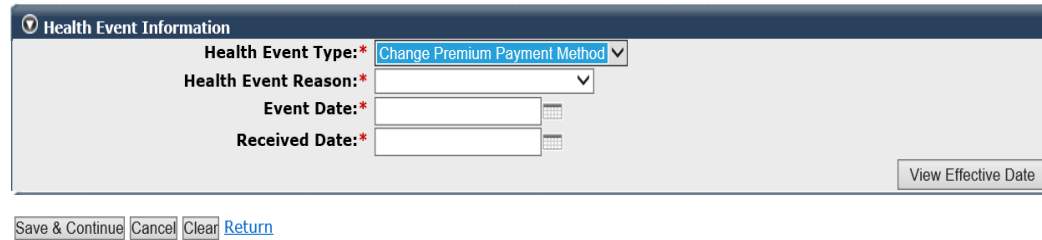
Step 24 Enter the employee's CalPERS ID or SSN and populate one field on the right.

Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.
CalPERS ID or SSN*: AND Date of Birth:
Last Name:
First Name:
[Search](#) [Return](#)

Step 25 Select the **Search** button.

Input Health Event Information

Step 26 Complete the Health Event Information section.

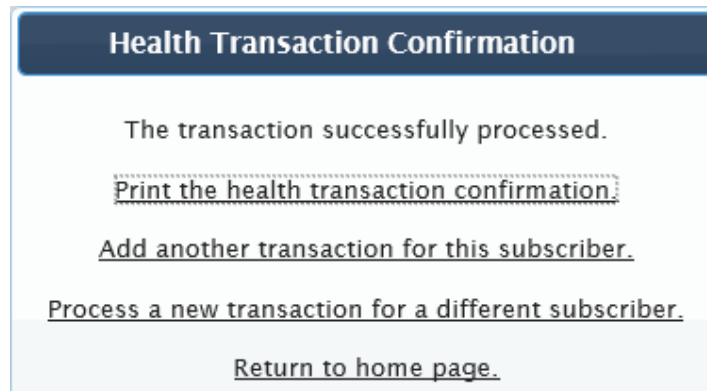


The screenshot shows a form titled "Health Event Information". It contains four required fields: "Health Event Type:" with a dropdown menu showing "Change Premium Payment Method", "Health Event Reason:" with a dropdown menu, "Event Date:" with a date picker, and "Received Date:" with a date picker. At the bottom right of the form is a button labeled "View Effective Date". Below the form are four buttons: "Save & Continue", "Cancel", "Clear", and "Return".

Step 27 Select the **View Effective Date** button at bottom right.

Step 28 Select the **Save & Continue** button.

Step 29 Select one of the four option links in the health transaction confirmation.



The screenshot shows a confirmation screen titled "Health Transaction Confirmation". It displays the message "The transaction successfully processed." followed by four underlined links: "Print the health transaction confirmation.", "Add another transaction for this subscriber.", "Process a new transaction for a different subscriber.", and "Return to home page.".

You have completed this scenario.

Scenario 2: Direct Pay for a Retiring Employee

Your separated employee has elected direct pay because their retirement payments will be delayed. They will make direct payments for their full premium to their health plan, so they will show covered. After they start receiving their retirement payments, they can contact their health plan for reimbursement of their direct payments.

Step Actions (45 steps)

Permanent Separation

Step 1 Is the permanent separation event on the appointment reflected in myCalPERS?

Yes: Skip to step 9.

No: Permanently separate the employee:

- Public agencies, schools, and non-central state agencies, continue to step 2.
- Central-state agencies will enter the separation in PIMS, wait 1-2 days for the permanent separation to update myCalPERS, then skip to step 9.

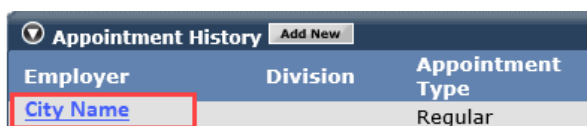
Public Agencies, Schools, and Non-Central State Agencies Process the Permanent Separation

Step 2 Select the **Person Information** global navigation tab.

Step 3 Complete the Person Search section.

Step 4 Select the **Search** button.

Step 5 Within the Appointment History section, select the **Employer** link that is for the employee's active appointment.



Step 6 Within the Appointment Event History section, select the **Add New** button.

Step 7 Complete the Appointment Event Details section.

Step 8 Select the **Save** button.

Process the Direct Pay

Step 9 Select the **Reporting** global navigation tab.

Step 10 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.



Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation Memb

Common Tasks

Menu

Organization Search

Adjustment Reports

Name: City Name CalPERS ID: 9876543210

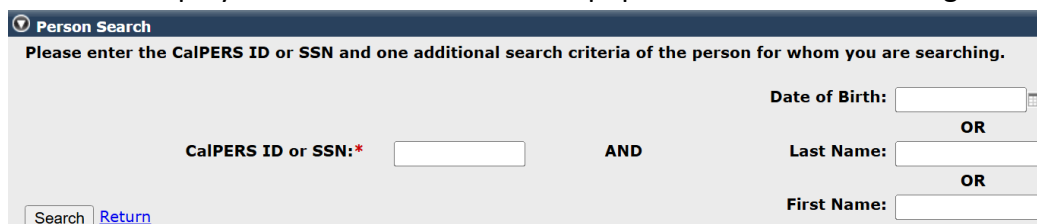
Create or Edit Report

Method:* Add or Edit Health Enrollment Continue

Step 11 Select the **Continue** button.

Search for the Subscriber

Step 12 Enter the employee's CalPERS ID or SSN and populate one field on the right.



Person Search

Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

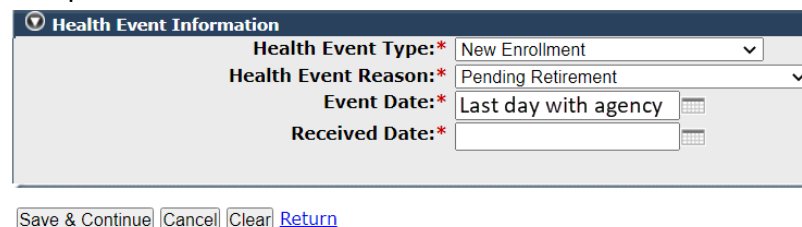
CalPERS ID or SSN:* AND Date of Birth: OR Last Name: OR First Name:

Search Return

Step 13 Select the **Search** button.

Input Health Event Information

Step 14 Complete the Health Event Information section.



Health Event Information

Health Event Type:* New Enrollment

Health Event Reason:* Pending Retirement

Event Date:* Last day with agency

Received Date:*

Save & Continue Cancel Clear Return

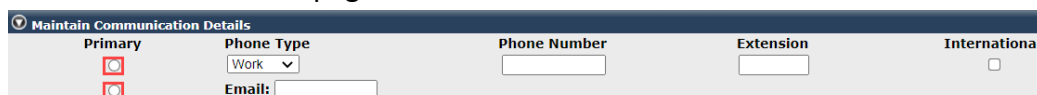
Step 15 Select the **View Effective Date** button at bottom right, and verify the effective date is the same date their coverage ended.

Step 16 Select the **Save & Continue** button.

Update Subscriber Details

Step 17 Update the Maintain Address Details section if needed.

Step 18 **Optional:** If you populate the Maintain Communication Details section, select the **Primary** radio button so the phone number and/or email address displays on the subscriber's Profile page.



Maintain Communication Details

Primary Phone Type Phone Number Extension International

Work Email:

Step 19 Complete the Appointment Details section:

- **Medical Group:** For public agencies and schools, choose the subscriber's medical group based on your agency's health contract.
- **Affiliated Association:** Select if they are a dues-paying member.

Appointment Details

Employer: City Name CalPERS ID (Employer): 9876543210

Division: Original Hire Date:

Appointment ID: Separation Date: Retirement Date:

Additional Details

Position Title: Appointment Status:

CBU: Retirement Program: End Date:

Begin Date: Affiliated Association:

Medical Group:

Step 20 Select the **Save & Continue** button.

Step 21 Did you update the address?

Yes: Select the correct **Entered Address** or **U.S. Postal Service Matches** radio button.

Confirm Address

We have validated your address against U.S. postal records and have provided an alternate choice according to these results. Please choose the address you wish to use or select the Cancel button to return to the address page to change your entry.

Entered Address: ☐ 400 P St., Sacramento, CA 95814

U.S. Postal Service Matches: ☒ 400 P ST, SACRAMENTO, CA 95814-5345

No: Skip to step 24.

Step 22 Select the **Confirm** button.

Step 23 Select the **Save & Continue** button.

Add Dependents

Step 24 Is the employee enrolling dependents?

Yes: Select the **Add New** button.

Covered Person List [Add New](#)

Review the covered person list. To enroll a dependent, select the **Add New** button. Otherwise, select the **Save & Continue** button

Name	Date of Birth	Relationship	Medical
JOE JONES	03/02/1984	Self	Basic

[Save & Continue](#) [Cancel](#) [Return](#)

No: Skip to step 41.

Step 25 Is the dependent listed in the Existing Relationships Eligible for Health section?
Yes: Select the dependent's radio button.

	Name	Date of Birth	Relationship	Medical
☐	Jones, Joey	07/30/2015	Child	No
☐	Jones, Jill	11/03/1983	Spouse	No
☐	Jones, Jake	11/17/2017	Child	No

[Continue](#) [Cancel](#) [Return](#)

No: Skip to step 28.

Step 26 Select the **Continue** button.

Step 27 Skip to step 29.

Step 28 Select the **Add New** button.

[Continue](#) [Cancel](#) [Return](#)

Step 29 Complete or update the Person Details section if necessary. You may update if the dependent is not an active employee with CalPERS retirement or health benefits at another agency.

Step 30 Does the dependent have the same address as your employee?
Yes: Skip to step 34.

No: Deselect the Address is the same as Primary Subscriber check box.

☐ Address is the same as Primary Subscriber
Address Type: * Mailing Address

Step 31 Complete the Address Details section.

Step 32 Select the **Save & Continue** button.

Step 33 Select the **Confirm** button.

Step 34 Select the **Save & Continue** button.

Step 35 Is this dependent in a parent-child relationship?
Yes: Select the **Maintain Certification** link.

Dependent Information		
Parent-Child Relationship Information		
Certification Submitted: No Maintain Certification		
Benefit Type		
Benefit Type	Enrollment	Change Enrollment?
Medical	No	☒

[Save & Continue](#) [Cancel](#) [Clear](#)

No: Skip to step 40.

Step 36 Select the **Certify Dependent** check box.

Step 37 Select the **disclaimer** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kitty Kooper	03/31/2025	☒ Certify Dependent

☒ I am a duly appointed and qualified representative of the agency/department.
I have reviewed the above affidavit, supporting documentation, and verified the identity of the subscriber submitting this affidavit.
I retained copies of the subscriber's health and dental enrollment form(s) and all supporting documents to enroll/recertify the eligibility of the employee's dependent in a PCR.
Based on the review of the documentation and information provided I recommend enrolling/recertifying this dependent in a PCR based on the information provided and documentation attached [per CCR §599.500(a)].

Step 38 Select the **Save & Continue** button.

Step 39 Below the Dependent Information section, select the **Save & Continue** button.

Step 40 Do they have additional dependents?
Yes: Return to step 24.
No: Continue to step 41.

Step 41 Select the **Save & Continue** button.

Select Health Plan

Step 42 Select the **medical plan** radio button.

Medical Plan Selections		
Plan Name	Party	Premium
☒ Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68
☐ Health Net SmartCare - Region 1	Self/B and 1/B	2001.04

Step 43 Enter a medical provider(s) if the employee indicated a primary care physician.

Provider Information		
Name	Dependent Type	Medical Provider
Jane Jones	Self	
Jill Jones	Natural Born Child	

Step 44 Select the **Save & Continue** button.

Step 45 Select one of the four option links in the health transaction confirmation.
You have completed this scenario.

Unit 4: Group Continuation Coverage/COBRA (HBD-85)

In this unit, you will learn how to continue subscriber and dependent(s) health benefits with Consolidated Omnibus Budget Reconciliation Act (COBRA). When an employee is cancelled or a dependent is deleted, a confirmation is sent to them with the HBD-85 and COBRA information. If electing COBRA, the form would be completed and returned to your agency for processing.

COBRA is voluntary. The subscriber is responsible for paying the full monthly premium plus 2% administrative fee directly to their health plan.

Some examples of when an employee or dependent involuntarily loses coverage and may elect COBRA:

- An employee resigns and permanently separates
- A former dependent has been deleted due to divorce
- A child turned 26
- A state permanent-intermittent employee didn't work enough hours in the control periods
- An employee's appointment changes to a reduced time base

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Scenario 1: New COBRA Enrollment for an Employee

Your former employee's health benefits have been cancelled due to permanent separation, and they have elected to enroll in COBRA to continue their health benefits.

Step Actions (32 steps)

Add the COBRA Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.

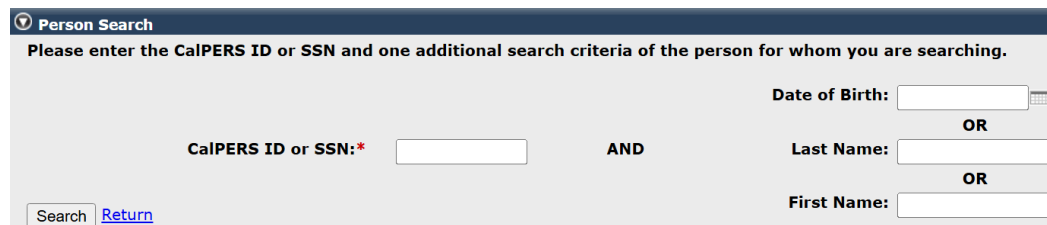


The screenshot shows the 'Reporting' tab selected in the top navigation bar. Below it, the 'Create or Edit Report' section is active. The 'Method' dropdown menu is open, and 'Add or Edit Health Enrollment' is selected. The 'Continue' button is visible next to the dropdown.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section with the COBRA enrollee's information.

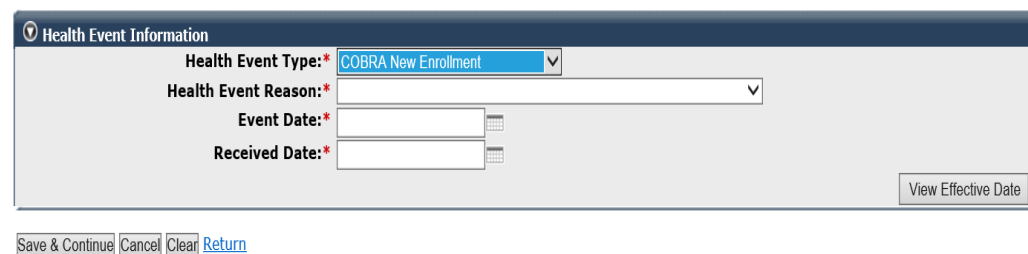


The screenshot shows the 'Person Search' section. It contains fields for 'CalPERS ID or SSN', 'Date of Birth', 'Last Name', and 'First Name'. The 'Search' button is visible at the bottom left.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



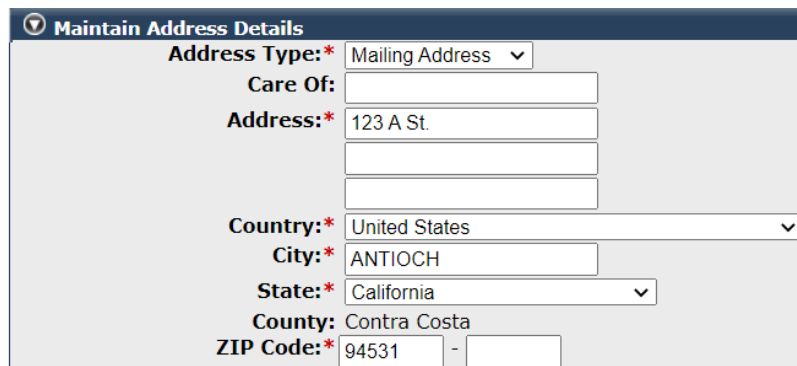
The screenshot shows the 'Health Event Information' section. It contains fields for 'Health Event Type' (set to 'COBRA New Enrollment'), 'Health Event Reason', 'Event Date', and 'Received Date'. The 'View Effective Date' button is visible at the bottom right.

Step 7 Select the **View Effective Date** button at bottom right, and verify the effective date is the same date their coverage ended.

Step 8 Select the **Save & Continue** button.

Update Subscriber Details

Step 9 Complete the Maintain Address Details section if you need to update the subscriber's physical address.



Maintain Address Details

Address Type: * Mailing Address

Care Of:

Address: * 123 A St.

Country: * United States

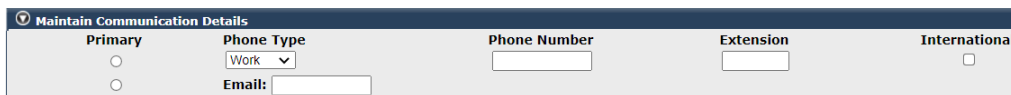
City: * ANTIOCH

State: * California

County: Contra Costa

ZIP Code: * 94531 -

Step 10 **Optional:** If you populate the Maintain Communication Details section, select the **Primary** radio button for the phone number and/or email address.



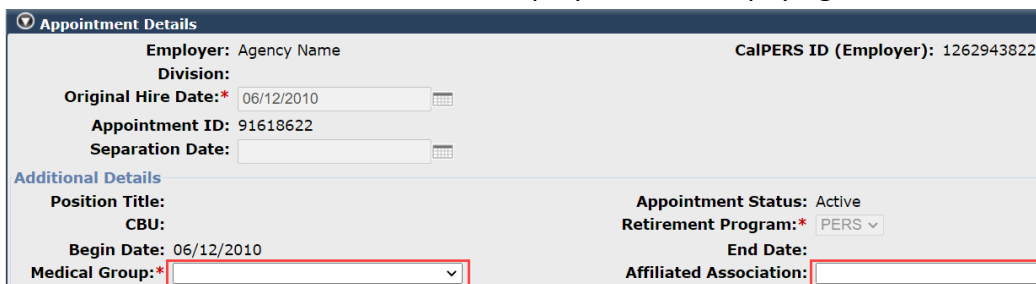
Maintain Communication Details

Primary ☐ Phone Type Phone Number Extension International ☐

☐ Email:

Step 11 Complete the Appointment Details section.

- **Medical Group:** Select for a public agency or school employee.
- **Affiliated Association:** Select if the employee is a dues-paying member.



Appointment Details

Employer: Agency Name CalPERS ID (Employer): 1262943822

Division:

Original Hire Date: * 06/12/2010

Appointment ID: 91618622

Separation Date:

Additional Details

Position Title:

CBU:

Begin Date: 06/12/2010

Medical Group: *

Appointment Status: Active

Retirement Program: * PERS

End Date:

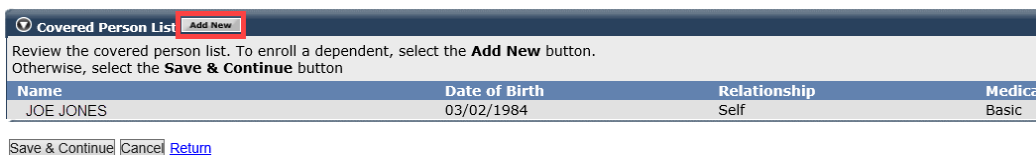
Affiliated Association:

Step 12 Select the **Save & Continue** button.

Add Dependents

Step 13 Is the subscriber enrolling dependents?

Yes: Select the **Add New** button.



Covered Person List [Add New](#)

Review the covered person list. To enroll a dependent, select the **Add New** button. Otherwise, select the **Save & Continue** button

Name	Date of Birth	Relationship	Medical
JOE JONES	03/02/1984	Self	Basic

[Save & Continue](#) [Cancel](#) [Return](#)

No: Skip to step 28.

Step 14 Select the dependent's radio button.

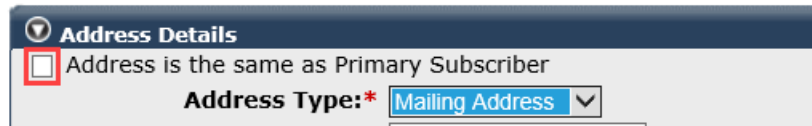
Step 15 Select the **Continue** button.

Step 16 Complete or update the Person Details section. You may change the section if the dependent is not an active employee with CalPERS retirement or health benefits.

Step 17 Is the dependent's address the same as the subscriber's address?

Yes: Skip to step 21.

No: Deselect the **Address is the same as Primary Subscriber** check box.



Step 18 Complete the Address Details section.

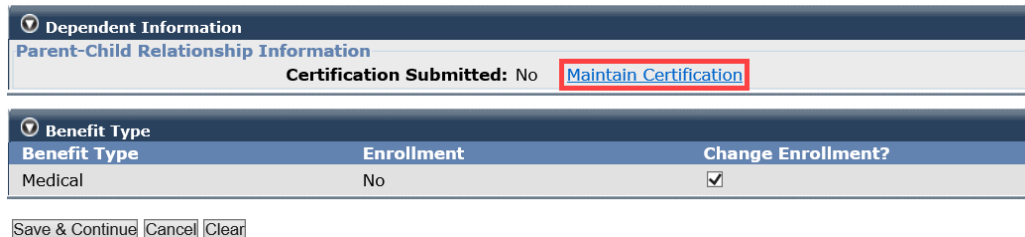
Step 19 Select the **Save & Continue** button.

Step 20 Select the **Confirm** button.

Step 21 Select the **Save & Continue** button.

Step 22 Is this dependent in a parent-child relationship?

Yes: Select the **Maintain Certification** link.



No: Skip to step 27.

Step 23 Select the **Certify Dependent** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
FIONA PHAM	07/31/2021	☒ Certify Dependent

Step 24 Select the **disclaimer** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
FIONA PHAM	07/31/2021	☒ Certify Dependent
☒ * I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any change in my information and further understand the provision of California Government Code 20085, which states in part:		

Step 25 Select the **Save & Continue** button.

Step 26 Below the Dependent Information section, select the **Save & Continue** button.

Step 27 Is the employee adding more dependents?

Yes: Return to step 13.

No: Continue to step 28.

Step 28 Select the **Save & Continue** button.

Select Health Plan

Step 29 Select the **medical plan** radio button.

Medical Plan Selections				
	Plan Name	Party	Premium	COBRA Premium
☒	Anthem Blue Cross Select HMO - Region 1	Self/B and 1/B	1737.96	1772.72
☐	Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68	2417.07
☐	Health Net SmartCare - Region 1	Self/B and 1/B	2001.04	2041.06
☐	Kaiser Permanente California - Region 1	Self/B and 1/B	1536.98	1567.72
☐	PERS Care - Region 1	Self/B and 1/B	2266.28	2311.61
☐	PERS Choice - Region 1	Self/B and 1/B	1722.36	1756.81
☐	PERS Select - Region 1	Self/B and 1/B	1040.58	1061.39

Step 30 Complete Medical Provider field(s) if employee provided physician name(s).

Step 31 Select the **Save & Continue** button.

Step 32 Select one of the four option links in the health transaction confirmation.

Health Transaction Confirmation

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

You have completed this scenario.

Scenario 2: New COBRA Enrollment for a Former Dependent

Your employee's ex-spouse and stepchild were deleted from health benefits due to divorce and have elected to enroll in COBRA to continue their health benefits.

Step Actions (38 steps)

Add the COBRA Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.

The screenshot shows the 'Reporting' tab selected in the top navigation bar. Below it, the 'Common Tasks' menu is open, and the 'Create or Edit Report' section is visible. The 'Method' dropdown is set to 'Add or Edit Health Enrollment', which is highlighted with a red box. The 'Continue' button is also visible.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section with the COBRA enrollee's information.

The screenshot shows the 'Person Search' section. It includes a search criteria dropdown set to 'Person Search'. Below it, there are input fields for 'CalPERS ID or SSN', 'Date of Birth', 'Last Name', and 'First Name'. A 'Search' button is located at the bottom left, and a 'Return' link is at the bottom right.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.

The screenshot shows the 'Health Event Information' section. It includes a 'Health Event Type' dropdown set to 'COBRA New Enrollment', a 'Health Event Reason' dropdown, and input fields for 'Event Date' and 'Received Date'. A 'View Effective Date' button is located at the bottom right. At the bottom left, there are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 7 Select the **View Effective Date** button at bottom right to ensure the effective date is the same date their coverage ended.

Step 8 Select the **Save & Continue** button.

Update Subscriber Details

Step 9 Complete the Maintain Address Details section if you need to update the subscriber's physical address or to choose the employer's ZIP code for eligibility if actively working.

Maintain Address Details

Address Type:* Physical Address ▼

Care Of:

Address:*

Country:*

City:*

Province/Territory:*

Postal Code:*

Note: If a PO Box is used for the mailing address, the subscriber must have a physical address unless they are using their employer ZIP code for health eligibility.

Select the checkbox if subscriber requested to use their Employer ZIP code for Health Eligibility.
NOTE - Overriding the current Health Eligibility Address will create a Change Eligibility ZIP transaction in conjunction with the enrollment transaction

☐ Use Employer ZIP Code for Health Eligibility :

Step 10 **Optional:** If you populate the Maintain Communication Details section, select the **Primary** radio button for the phone number and/or email address.

Maintain Communication Details

Primary ☐ Phone Type: Work ▼ Phone Number: Extension: International: ☐

☐ Email:

Step 11 In the Qualifying Information section, choose the **Select** link.

Qualifying Information

CalPERS ID: [Select](#)

SSN:

First Name:* Last Name:*

Gender:* Date Of Birth:*

Step 12 Complete the Person Search section with the employee's information.

Step 13 Select the **Search** button.

Step 14 After the employee's name displays, choose the **Select** button.

Step 15 For public agencies and schools, in the Appointment Details section, populate the Medical Group field by selecting the employee's medical group.

Medical Group:*

Step 16 Select the **Save & Continue** button.

Add Dependents

Step 17 Is the subscriber enrolling dependents?

Yes: Select the **Add New** button.

Covered Person List **Add New**

Review the covered person list. To enroll a dependent, select the **Add New** button. Otherwise, select the **Save & Continue** button

Name	Date of Birth	Relationship	Medical
JOE JONES	03/02/1984	Self	Basic

Save & Continue **Cancel** [Return](#)

No: Skip to step 34.

Step 18 Is the dependent listed in the Existing Relationships Eligible for Health section?

Yes: Select the dependent's radio button.

Existing Relationships Eligible for Health **Add New**

Select a dependent below. If a dependent is not listed, select the **Add New** button.

	Name	Date of Birth	Relationship	Medical
☒	Jones, Joey	07/30/2015	Child	No
☐	Jones, Jill	11/03/1983	Spouse	No
☐	Jones, Jake	11/17/2017	Child	No

Continue **Cancel** [Return](#)

No: Skip to step 20.

Step 19 Select the **Continue** button, then skip to step 21.

Step 20 Select **Add New** button.

Step 21 Complete or update the Person Details section. You may update if the dependent is not an active employee with CalPERS retirement or health benefits at another agency.

Step 22 Is the dependent's address the same as the subscriber?

Yes: Skip to step 27.

No: Deselect the **Address is the same as Primary Subscriber** check box.

Step 23 Complete the Address Details section.

Step 24 Select the **Save & Continue** button.

Step 25 Verify the selected address or select the radio button for the correct address.

Step 26 Select the **Confirm** button.

Step 27 Select the **Save & Continue** button.

Step 28 Is this dependent in a parent-child relationship?

Yes: Select the **Maintain Certification** link.

Dependent Information		
Parent-Child Relationship Information		
Certification Submitted: No Maintain Certification		

Benefit Type		
Benefit Type	Enrollment	Change Enrollment?
Medical	No	☒

[Save & Continue](#) [Cancel](#) [Clear](#)

No: Skip to step 33.

Step 29 Select the **Certify Dependent** check box.

Step 30 Select the **disclaimer** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
FIONA PHAM	07/31/2021	☒ Certify Dependent

☒ * I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any further understand the provision of California Government Code 20085, which states in part:

Step 31 Select the **Save & Continue** button.

Step 32 Below the Dependent Information section, select the **Save & Continue** button.

Step 33 Is there an additional dependent to add?

Yes: Return to step 17.

No: Continue to step 34.

Step 34 Select the **Save & Continue** button.

Select Health Plan

Step 35 Select the **medical plan** radio button.

Medical Plan Selections			
Plan Name	Party	Premium	COBRA Premium
☒ Anthem Blue Cross Select HMO - Region 1	Self/B and 1/B	2031.62	2072.25
☐ Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2608.00	2660.16

Step 36 Complete the Medical Provider field(s) if employee provided physician name(s).

Step 37 Select the **Save & Continue** button.

Step 38 Select one of the four option links in the health transaction confirmation.

Health Transaction Confirmation

The transaction successfully processed.

[Print the health transaction confirmation](#)

[Add another transaction for this subscriber](#)

[Process a new transaction for a different subscriber](#)

[Return to home page](#)

You have completed this scenario.

Unit 5: Non-PERS and CalSTRS Profile and Appointment Changes for Public Agency & School Employees

In this unit, you will learn how to make the following changes for a non-PERS or CalSTRS employee:

- Demographics: SSN, name, gender, and date of birth
- Communication: Phone number, email address, mailing address, and physical address
- Appointment: Begin and end a leave of absence and permanently separate

System Logic

You need the following access roles:

Business Partner Retirement Enrollment or **Business Partner Supplemental Income Plan** to update an employee name, Social Security number, date of birth, or gender.

Business Partner Appointment Management – Non-Pers and CalSTRS to update an address and appointment change, e.g., leave of absence, permanent separation, etc.

Contents

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Scenario 2: Maintain Appointment Information	30

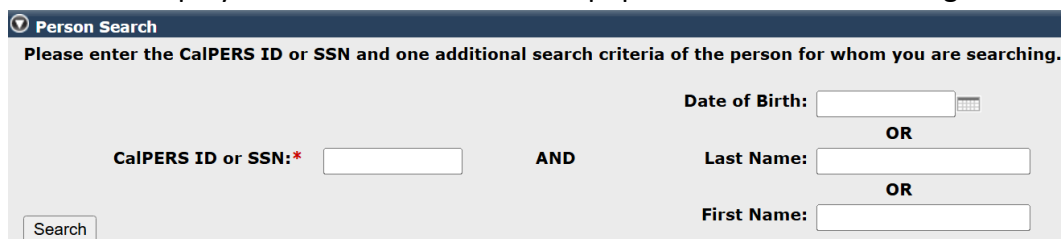
Scenario 1: Maintain Demographic and Address Information

The Health Enrollment section of the [Public Agency & Schools Health Benefits Guide \(PDF\)](#) provides a list of acceptable verification documents for processing a demographic change.

Step Actions (10 steps)

Step 1 From the homepage, select the **Person Information** global navigation tab.

Step 2 Enter the employee's CalPERS ID or SSN and populate one field on the right.

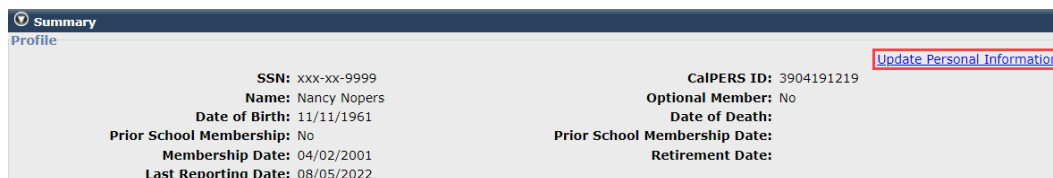


Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:*		AND	Date of Birth:		
			OR	Last Name:	
			OR	First Name:	
Search					

Step 3 Select the **Search** button.

Step 4 Do you want to correct the employee's demographic information?
Yes: Within the Summary section, select the **Update Personal Information** link.



Summary
Profile

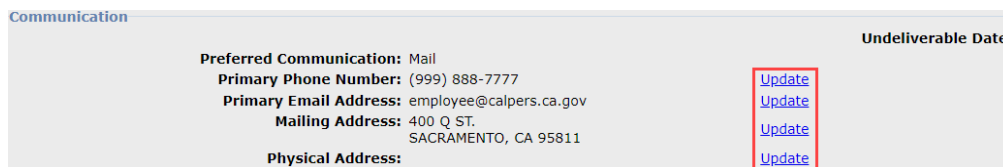
SSN: xxx-xx-9999	CalPERS ID: 3904191219	Update Personal Information
Name: Nancy Nopers	Optional Member: No	
Date of Birth: 11/11/1961	Date of Death:	
Prior School Membership: No	Prior School Membership Date:	
Membership Date: 04/02/2001	Retirement Date:	
Last Reporting Date: 08/05/2022		

No: Skip to step 8

Step 6 Complete the Maintain Personal Information Details section.

Step 7 Select the **Save** button.

Step 8 Do you want to update their communication information?
Yes: Within the Communication sub-section, select the appropriate **Update** link.



Communication

Preferred Communication: Mail	Undeliverable Date
Primary Phone Number: (999) 888-7777	Update
Primary Email Address: employee@calpers.ca.gov	Update
Mailing Address: 400 Q ST. SACRAMENTO, CA 95811	Update
Physical Address:	Update

No: You have completed this scenario.

Step 9 Complete the Maintain Communication Details section.

Step 10 Select the **Save** button.

You have completed this scenario.

Scenario 2: Maintain Appointment Information

System Logic

- Leave of absences, except for FMLA or maternity/paternity leaves, will cancel health benefits.
- All permanent separations will cancel health benefits.
- **CalSTRS-Pending Retirement** separation reason is available when permanently separating a CalSTRS employee for retirement.

Leave of Absence

Begin Leave Event

- **Event Date:** At least one day after the last paid date with your agency.
- **Health benefits cancellation date:** Effective the first day of the second month after their last paid date. myCalPERS will use the day prior to the begin leave event date to determine the health cancellation event date.

End Leave Event

- **Event Date:** First day back to work.
- Active subscriber premiums will return to your agency's health statement if the employee was on a direct pay. Benefits resume the first of the month following their return to work.
- If health benefits were cancelled due to a leave, after updating the end leave, re-enroll the subscriber and dependent(s) in the same health plan they had before the leave after the employee submits an HBD-12.

Permanent Separation

This event should be added when your employee's appointment is permanently separating, e.g., resigns, terminates, retires, etc.

- **Event Date:** Enter at least one day after the last day with your agency.
- **Separation Reason:** If your employee is permanently separating for retirement, select the following in the drop-down list for employees in these retirement systems:
 - Non-PERS: *Retirement*
 - CalSTRS: *CalSTRS – Pending Retirement*
- **Health benefits cancellation date:** Effective the first day of the second month after their last day. myCalPERS will use the day prior to the permanent separation date for the cancel coverage event date.

Example of a permanent separation event date that is the first of the month:

- Permanent Separation Event Date: 04/01/2022
- Health Event Date: 03/31/2022
- Health Cancellation Date: 05/01/2022

Step Actions (7 steps)

Add Appointment Event

Step 1 From the homepage, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

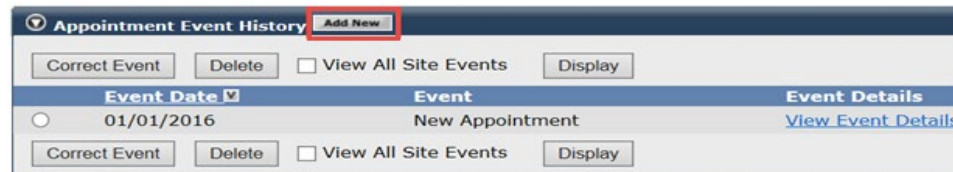
Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the appropriate **employer** link.



Appointment History	Add New	
Employer	Division	Appointment Type
City Name		Regular

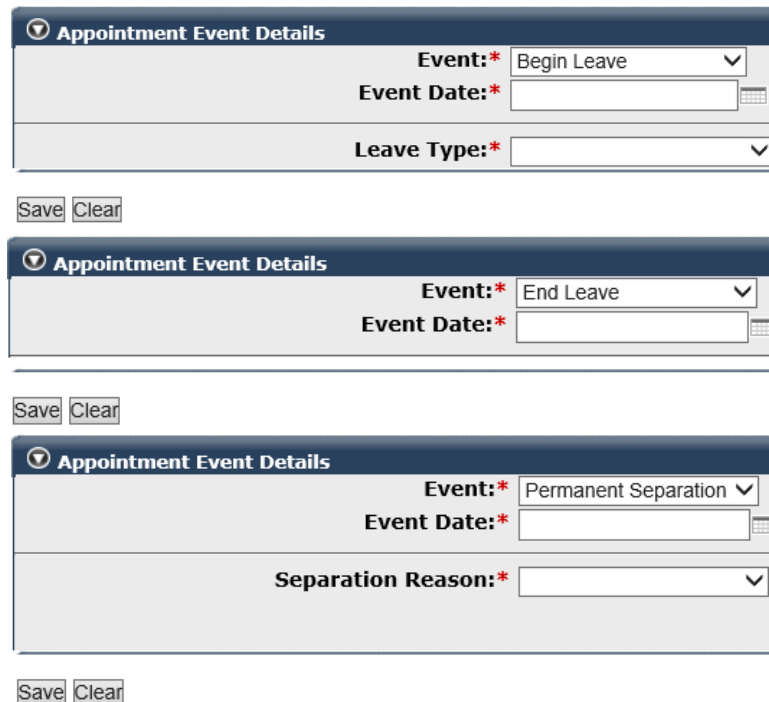
Step 5 Within the Appointment Event History section, select the **Add New** button.



Appointment Event History	Add New		
Correct Event	Delete	☐ View All Site Events	Display
Event Date	Event	Event Details	
☐ 01/01/2016	New Appointment	View Event Details	
Correct Event	Delete	☐ View All Site Events	Display

Step 6 Complete the Appointment Event Details section.

Three examples of different events are listed below.



Appointment Event Details

Event:* Begin Leave

Event Date:*

Leave Type:*

Appointment Event Details

Event:* End Leave

Event Date:*

Appointment Event Details

Event:* Permanent Separation

Event Date:*

Separation Reason:*

Step 7 Select the **Save** button.

You have completed this scenario.

Unit 6: Health Benefits Into Retirement for Public Agency & School Employees

Public agency and school employers will learn the process to enroll a CalSTRS or non-PERS employee, one who never had CalPERS health benefits, in health benefits into retirement. You will also gain knowledge on how to continue non-PERS health benefits into retirement.

Employee Continuing Health Benefits

- For a *PERS* or *CalSTRS* employee, process a permanent separation. If they are enrolled in health and their last day of employment and retirement date are within 30 days of each other, health will automatically continue into retirement. For CalSTRS employees, refer to Unit 5: Non-PERS and CalSTRS Appointment Changes for step actions to process a permanent separation.
- For a *non-PERS* employee, process a permanent separation then process their health into retirement. Refer to scenario 2 within this unit.

Eligibility ZIP Code

If using a work ZIP code for health eligibility, upon retirement, the eligibility ZIP code will be changed to the subscriber's physical address (if no physical then mailing address will be used). The retiree will receive a letter noting this change. If their physical address is outside of the health plan service area, they will receive a letter stating they need to change plans.

Contents

Scenario 1: CalSTRS or Non-PERS Employee (Never Enrolled) Health Into Retirement.....	33
Scenario 2: Non-PERS Employee Continued Health Into Retirement	35

Scenario 1: CalSTRS or Non-PERS Employee (Never Enrolled) Health Into Retirement

For a CalSTRS or non-PERS employee who never had health benefits with your agency and is electing to enroll in health benefits into retirement, follow this three-part process:

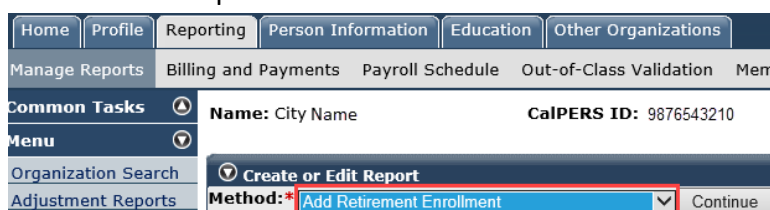
- Part 1: Enter the employee demographics and appointment information in myCalPERS.
 - Your agency must have a retirement contract.
 - You must have the Business Partner Retirement Enrollment access role; otherwise, have the employee submit an HBD-30 to CalPERS instead of these steps.
- Part 2: Permanently separate the employee.
- Part 3: Provide CalPERS with the retirement date, health plan selection, and dependent(s).

Step Actions (16 steps)

Part I: Add New Appointment

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

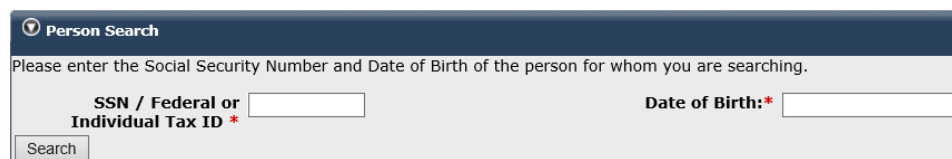
Step 2 Within the Create or Edit Report section, select Add Retirement Enrollment from the Method drop-down list.



Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.

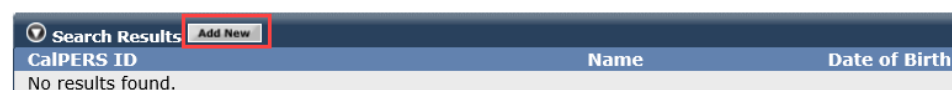


Step 5 Select the **Search** button.

Step 6 Did member details display on the Appointment Details page?

Yes: Skip to step 11.

No: Select the **Add New** button.



-
- Step 7 Complete the Person, Address, and Communication Details sections.
-
- Step 8 Select the radio button for correct **Entered Address** or **U.S. Postal Service Matches**.
-
- Step 9 Select the **Confirm** button.
-
- Step 10 Select the **Save & Continue** button.
-

Input Appointment Details

- Step 11 Complete the Appointment Details section:
- Program: Health
 - Enrollment Eligibility Date: Hire date for this health-eligible position
 - Retirement System: CalSTRS (use Other for non-PERS employees)
 - Original Hire Date: Date employee was originally hired with your agency
 - CBU: Employee's medical group
-
- Step 12 Select the **Save** button.
-

Part II: Add a Permanent Separation Event

- Step 13 Next to Appointment Event History, select the **Add New** button.

Event Date	Event	Event Details
☐ 01/01/2001	New Appointment	View Event Details

-
- Step 14 Complete the Appointment Event Details sections:
- **Event:** Permanent Separation
 - **Event Date:** Separation date is one day after the last day with your agency
 - **Separation Reason:** CalSTRS-Pending Retirement (use Retirement for non-PERS employees)
-
- Step 15 Select the **Save** button.
-
- Step 16 Contact CalPERS to provide the retirement date, health plan selection, and dependent(s) information.
- You have completed this scenario.**
-

Scenario 2: Non-PERS Employee Continued Health Into Retirement

If the employee is eligible and wants to continue health benefits into retirement, follow this two-part process:

- **Part 1:** Process a permanent separation (refer to unit 5, scenario 2). myCalPERS will cancel the health benefits the first day of the second month.
- **Part 2:** Process a new health enrollment unless the employee and/or dependent is eligible for Medicare. Mail the HBD-30 with a copy of their Medicare information to CalPERS.

Step Actions (32 Steps)

Process a New Health Enrollment Into Retirement

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

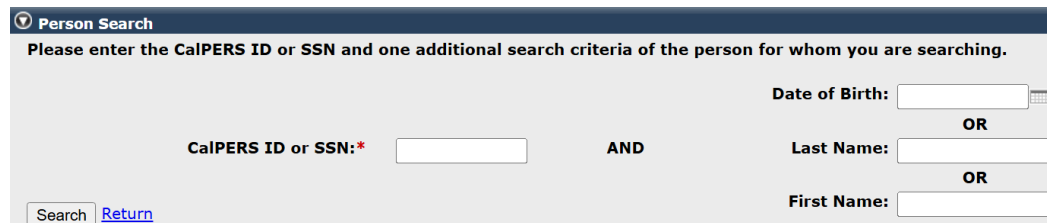
Step 2 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.



Step 3 Select the **Continue** button.

Search for the Subscriber

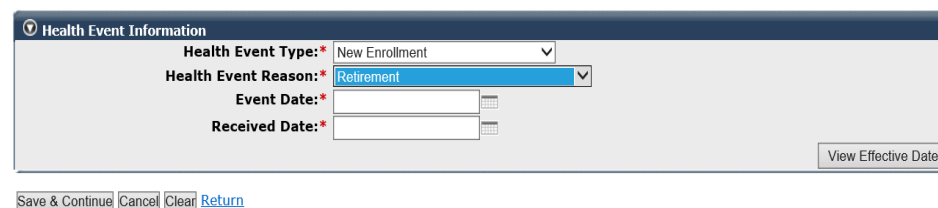
Step 4 Enter the employee's CalPERS ID or SSN and populate one field on the right.



Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.

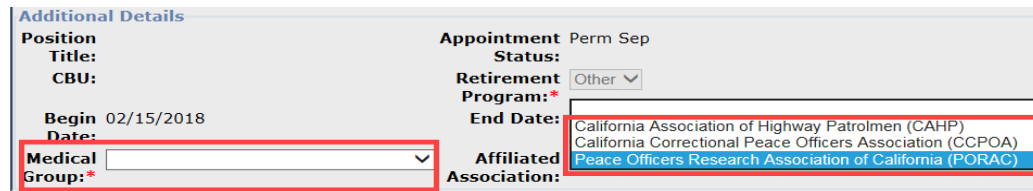


Step 7 Select the **View Effective Date** button at the bottom right to ensure the effective date is the same as their cancellation date.

Step 8 Select the **Save & Continue** button.

Step 9 Update the Address and Communication Details sections if needed.

Step 10 In the Appointment Details section, select a medical group and if necessary, PORAC from the Affiliated Association drop-down list.



Additional Details

Position
Title:
CBU:

Appointment Perm Sep
Status:
Retirement Other
Program:
End Date:

Begin 02/15/2018
Date:

Medical [dropdown]
Group:

Affiliated [dropdown]
Association: California Association of Highway Patrolmen (CAHP)
California Correctional Peace Officers Association (CCPOA)
Peace Officers Research Association of California (PORAC)

Step 11 Select the **Save & Continue** button.

Add Dependents

Step 12 Is the employee enrolling dependents?

Yes: Select the **Add New** button.



Covered Person List Add New

Review the covered person list. To enroll a dependent, select the **Add New** button. Otherwise, select the **Save & Continue** button

Name	Date of Birth	Relationship	Medical
JOE JONES	03/02/1984	Self	Basic

Save & Continue Cancel Return

No: Skip to step 28.

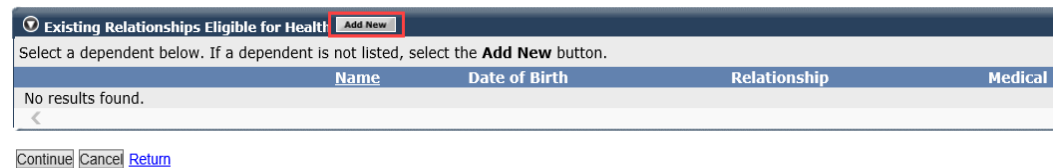
Step 13 Is the dependent listed in the Existing Relationships Eligible for Health section?

Yes: Select the dependent's radio button.

No: Skip to step 16.

Step 14 Select the **Continue** button, then skip to step 16.

Step 15 Select **Add New** button.



Existing Relationships Eligible for Health Add New

Select a dependent below. If a dependent is not listed, select the **Add New** button.

Name	Date of Birth	Relationship	Medical
No results found.			

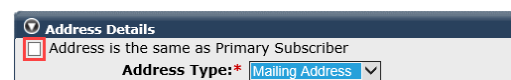
Continue Cancel Return

Step 16 Complete or update the Person Details section. You may update if the dependent is not an active employee with CalPERS retirement or health benefits with another agency.

Step 17 Is the dependent's address the same as the subscriber?

Yes: Skip to step 21.

No: Deselect the Address is the same as Primary Subscriber check box.



Address Details

☐ Address is the same as Primary Subscriber

Address Type: Mailing Address

Step 18 Complete the Address Details section.

Step 19 Select the **Save & Continue** button.

Step 20 Select the **Confirm** button.

Step 21 Select the **Save & Continue** button.

Step 22 Is this dependent in a parent-child relationship?

Yes: Select the **Maintain Certification** link.

No: Skip to step 28.

Step 23 Select the **Certify Dependent** check box.

Step 24 Select the **disclaimer** check box.

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Lilly Lawson	06/30/2018	03/31/2019	☒ Certify Dependent

☒ I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any changes pertaining to this PCR. I further understand the provision of California Government Code 20085, which states in part:

Step 25 Select the **Save & Continue** button.

Step 26 Select the **Save & Continue** button.

Dependent Information

Parent-Child Relationship Information

Parent-Child Relationship Certification Expiration Date: 03/31/2020
Certification Submitted: Yes [Maintain Certification](#)

[Return](#)

Step 27 Do you have an additional dependent to add?

Yes: Return to step 12.

No: Continue to step 28.

Step 28 Select the **Save & Continue** button.

Select Health Plan

Step 29 Select the **medical plan** radio button chosen by the subscriber.

Medical Plan Selections		
Plan Name	Party	Premium
☐ Anthem Blue Cross Select HMO - Region 1	Self/B and 1/B	1737.96
☐ Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68
☐ Health Net SmartCare - Region 1	Self/B and 1/B	2001.04
☐ Kaiser Permanente California - Region 1	Self/B and 1/B	1536.98
☐ PERS Care - Region 1	Self/B and 1/B	2266.28
☐ PERS Choice - Region 1	Self/B and 1/B	1722.36
☐ PERS Select - Region 1	Self/B and 1/B	1040.58

Step 30 Complete the Medical Provider field(s) if employee provided physician name(s).

Step 31 Select the **Save & Continue** button.

Step 32 Select one of the four option links in the health transaction confirmation.

You have completed this scenario.

Unit 7: Dental Benefits Into Retirement for State Employees

State employers will learn how to continue dental benefits for a retiring employee.

After the transaction updates, keep the Dental Plan Enrollment Authorization (STD-692) form on file with your agency. If you are unable to process online, submit the STD-692 to CalPERS.

System Logic

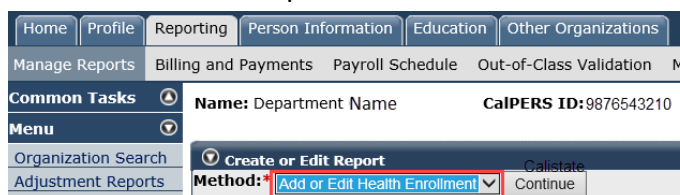
- The state retiree dental enrollment must be processed *prior to the employee permanent separation*.
- A state retired-dental enrollment will display in the Health Enrollment Summary page under the Pending Health Events section until the employee goes on retirement roll.

Step Actions (31 steps)

Add Dental Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.

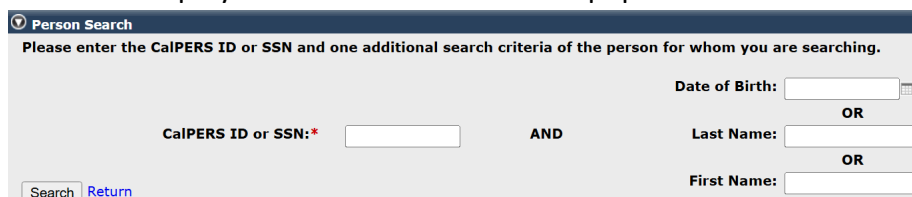


The screenshot shows the CalPERS Reporting interface. The 'Reporting' tab is selected in the top navigation bar. Below it, the 'Create or Edit Report' section is visible. The 'Method' dropdown menu is open, and 'Add or Edit Health Enrollment' is selected. The 'Continue' button is visible next to the dropdown.

Step 3 Select the **Continue** button.

Search for the Subscriber

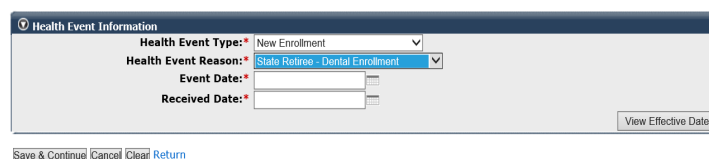
Step 4 Enter the employee's CalPERS ID or SSN and populate one field on the right.



The screenshot shows the 'Person Search' form. It includes a search bar for 'CalPERS ID or SSN' and a dropdown for 'Date of Birth'. There are also fields for 'Last Name' and 'First Name'. The 'Search' button is at the bottom left, and the 'Return' link is at the bottom right.

Step 5 Select the **Search** button.

Step 6 Complete the Health Event Information section.



The screenshot shows the 'Health Event Information' form. It includes fields for 'Health Event Type' (set to 'New Enrollment'), 'Health Event Reason' (set to 'State Retiree - Dental Enrollment'), 'Event Date', and 'Received Date'. The 'View Effective Date' button is at the bottom right.

Step 7 Select the **View Effective Date** button at the bottom right.

Step 8 Select the **Save & Continue** button.

Step 9 In the Appointment Details section, if the subscriber will continue to be a dues-paying member of an association, select CAHP or CCPOA from the **Affiliated Association** drop-down list.

Step 10 Select the **Save & Continue** button.

Add Dependents

Step 11 Is the employee enrolling dependents?

Yes: Select the **Add New** button.

Name	Date of Birth	Relationship	Medical	Dental
ED EVANS	05/10/1984	Self	No	Yes

No: Skip to step 27.

Step 12 Is the dependent listed in the Existing Relationships Eligible for Health section?

Yes: Select the dependent's radio button.

No: Skip to step 14.

Step 13 Select the **Continue** button, then skip to step 15.

Step 14 Within the Existing Relationships Eligible for Health section, select the **Add New** button.

Name	Date of Birth	Relationship	Medical	Dental
------	---------------	--------------	---------	--------

Step 15 Complete or update the Person Details section. You may update if the dependent is not an active employee with CalPERS retirement or health benefits at another agency.

Step 16 Is the dependent's address the same as the employee's address?

Yes: Skip to step 20.

No: Deselect the Address is the same as Primary Subscriber check box.

☐ Address is the same as Primary Subscriber

Address Type: * Mailing Address

Step 17 Complete the Address Details section.

Step 18 Select the **Save & Continue** button.

Step 19 Select the **Confirm** button.

Step 20 Select the **Save & Continue** button.

Step 21 Is this dependent in a parent-child relationship?

Yes: Select the **Maintain Certification** link.

No: Skip to step 26.

Step 22 Select the Certify Dependent check box.

Step 23 Select the disclaimer check box.

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kevin Kooper	06/30/2018	03/31/2019	☒ Certify Dependent

☒ * I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any changes pertaining to this PCR. I further understand the provision of California Government Code 20085, which states in part:

Step 24 Select the **Save & Continue** button.

Step 25 Select the next **Save & Continue** button.

Dependent Information

Parent-Child Relationship Information

Parent-Child Relationship Certification Expiration Date: 05/31/2020
Certification Submitted: Yes [Maintain Certification](#)

Save & Continue Cancel Clear Return

Step 26 Do you have additional dependents to add?

Yes: Return to step 11.

No: Continue to step 27.

Step 27 Select the **Save & Continue** button.

Select Dental Plan

Step 28 In the Dental Plan Selections section, select the **dental plan radio** button.

Dental Plan Selections		
Plan Name	Party	Premium
☒ Delta PPO Plus Premier	Self and 1	88.75
☐ Delta Preferred Opt	Self and 1	90.31
☐ DeltaCare USA	Self and 1	31.90
☐ MetLife Enhanced	Self and 1	27.18
☐ Premier Access	Self and 1	22.57
☐ Western Dental	Self and 1	26.02

Step 29 Complete the Dental Provider field(s) if employee provided dentist name(s).

Provider Information			
Name	Dependent Type	Medical Provider	Dental Provider
ED EVANS	Self		
Kevin Kooper	Parent-Child		

Save & Continue Cancel Clear Return

Step 30 Select the **Save & Continue** button.

Step 31 Select one of the four option links in the health transaction confirmation.

You have completed this scenario.

Unit 8: Discontinue Health Benefits Before Retirement

If an enrolled employee does not want their health benefits into retirement, they must request a cancellation.

CalPERS, CalSTRS, or non-PERS employees: You must process the cancellation *prior to updating the permanent separation*. This will ensure the health benefits don't automatically continue for CalPERS and CalSTRS retirees. It also clarifies a voluntary cancellation for non-PERS retirees.

CalSTRS employees: You do not need to process a health cancellation. When processing a permanent separation with the reason of CalSTRS-Pending Retirement, select the **CalSTRS member wishes to decline continuation of CalPERS health coverage into retirement** check box. Refer to unit 5, scenario 2 for step actions on how to process a permanent separation.

Appointment Event Details

Event: * Permanent Separation

Event Date: * #####

Separation Reason: * CalSTRS - Pending Retirement

STRS Health Into Retirement

If STRS member doesn't want health coverage into retirement, then decline his/her retiree health coverage below.

☒ STRS member wishes to decline continuation of CalPERS health coverage into retirement.

Note: If no selection is made above, the member will automatically continue health into retirement if he/she meets the health eligibility criteria.

Scenario: Cancel Coverage

Your CalPERS employee does not want their health benefits to continue into retirement. They submitted an HBD-12 to cancel their health benefits, so you will process the cancellation.

Step Actions (9 steps)

Add Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select Add or Edit Health Enrollment from the Method drop-down list.

Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation Membership

Common Tasks Name: City Name CalPERS ID: 9876543210

Menu

Organization Search

Adjustment Reports

Create or Edit Report

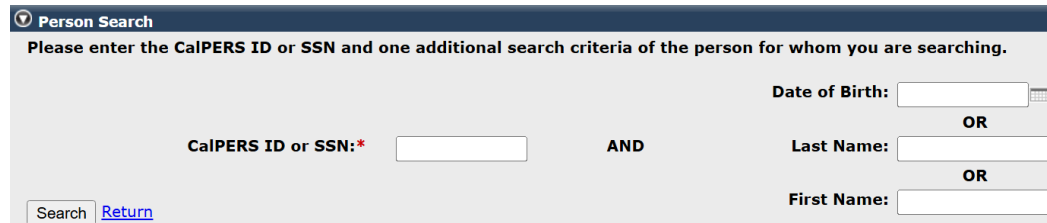
Method: * Add or Edit Health Enrollment

Continue

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Enter the employee's CalPERS ID or SSN and populate one field on the right.



Person Search
Please enter the CalPERS ID or SSN and one additional search criteria of the person for whom you are searching.

CalPERS ID or SSN:* AND

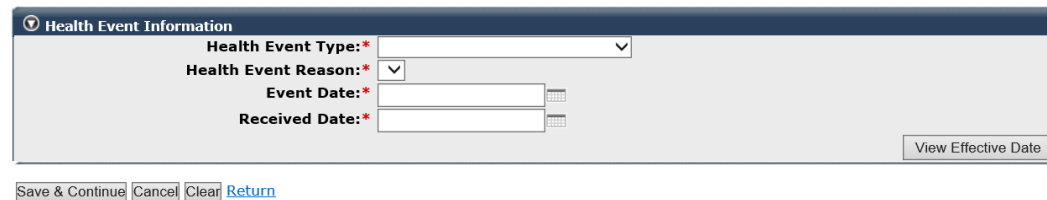
Date of Birth: [OR](#)
Last Name: [OR](#)
First Name:

[Return](#)

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



Health Event Information

Health Event Type:*

Health Event Reason:*

Event Date:*

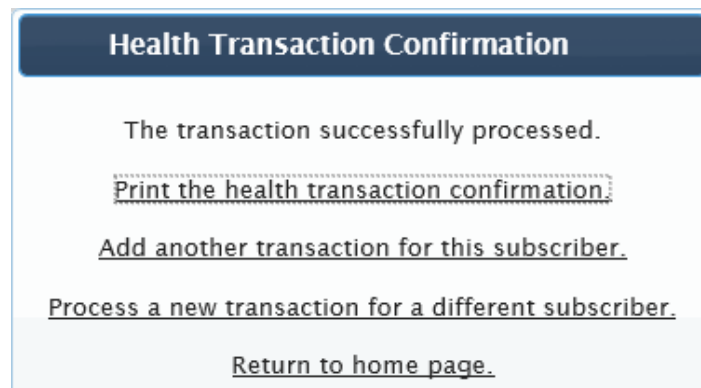
Received Date:*

[Return](#)

Step 7 Select the **View Effective Date** button at bottom right.

Step 8 Select the **Save & Continue** button.

Step 9 Select one of the four option links in the health transaction confirmation.



Health Transaction Confirmation

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](http://www.calpers.ca.gov) at www.calpers.ca.gov.

- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > Employer Education > Business Rules & myCalPERS Classes
- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > Employer Education > (On the right side under Resources) myCalPERS Student Guides & Resources
- [Policies & Procedures](#)
Pathway: CalPERS website > Employers > Policies & Procedures
- [Public Agency & Schools Health Benefits Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Health Benefits Guide (PDF)
- [State Health Benefits Guide \(PDF\)](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Health Benefits Guide (PDF)
- [Health Program Guide \(HBD-120\) \(PDF\)](#) (Member publication)
Pathway: CalPERS website > In the search box at top right, enter HBD-120 > CalPERS Health Program Guide
- [System Enhancements](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Enhancements
- [Circular Letters](#)
Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law \(PERL\)](#)
Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)
- [myCalPERS Reports Catalog](#)
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Reports Catalog
 - Run from the **Reports** left-side link under the Common Tasks folder:
 - CalPERS Health Subscriber Out of Service Population – Employer
 - Chancellor's Office Parent – Child Recertification Report CSU Campuses
 - Dental Retirees OE Report – CalHR
 - Dental Retirees OE Report – CSU
 - Dependent Enrollment Report
 - Employer Health Enrollee Report – Ext

- Employer Health Event Notification Report
- Employer Health Event Transaction Report (**Note:** The 26-year-old deletion batch runs the first business day of the month.)
- Health Plan Statement Employer Report
- Health Subscriber PA Billing Report
- Health ZIP Code Yes-No Report - HMO for Public Agency/School
- Health ZIP Code Yes-No Report - PPO for Public Agency/School
- Health ZIP Code Yes-No Report - State/CSU
- Non-PERS Health Eligibility and Appointment Data Submission Report
- Parent-Child Relationship Dependent with Expiring Certification Report
- State Active Health Enrollment and SCO Health Deduction Discrepancy Report
- Run via the myCalPERS pages (not the **Reports** left-side link):
 - For state agencies:
 - Dependent Verification End Date Employer Report
 - Dependent Verification Health Event Employer Report
 - Dependent Verification with Past Due or No End Dates Active Health Report
 - For public agencies, schools, and non-central state agencies:
 - Monthly Employer Billing Roster Report
- [Self-Paced Online Classes](#) (log in to myCalPERS, select the **Education** global navigation tab)
 - Business Rules
 - Health Plan Options
 - Health Benefits Officer Roles & Responsibilities
 - Health Eligibility Requirements
 - Health Enrollment
 - Contracting Agency Health Billing (public agencies and schools)
 - myCalPERS
 - New Enrollment, Non-PERS and CalSTRS New Enrollment
 - Change Plan
 - Cancellation
 - Rescission
 - Add a Dependent
 - Delete Dependent
 - COBRA Enrollment for Deleted Dependents
 - COBRA Enrollment for Employees
 - Set Up Direct Pay
 - Non-PERS Continued Health Into Retirement
 - Reconcile State-Active Premiums (central-state agencies)
 - Billing Reconciliation (public agencies and schools)

CalPERS Contacts

Email

- To contact [employer educators](#) for questions and requests, email **calpers_employer_communications@calpers.ca.gov**.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.
- To [request a custom health report](#), email **hamd_data_services@calpers.ca.gov**. It can take 6-10 weeks to fulfill each request. Additional information and approval may be required.

Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls.)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

Submit Inquiry

You can send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation folder, then select the **Submit Inquiry** link to submit a question or request. Refer to the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide for details.