Introduction to myCalPERS for Business Partners

Student Guide

August 28, 2026

CalPERS

Introduction

myCalPERS is an online system that business partners use to access information, process transactions, and generate reports. This guide contains information to help new business partner contacts get started with myCalPERS.

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 myCalPERS does not allow you to do these scenarios, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

We offer instructor-led and self-paced online classes. Find training opportunities for your contact type on the Classes & Webinars for Employers webpage.

Follow these steps to ensure your CalPERS education experience is well-structured:

1. Take Business Rules instructor-led classes.
2. Attend a myCalPERS instructor-led class.
3. Refresh your knowledge with self-paced online classes as needed.

To access the classes, log in to your myCalPERS business partner account and then select the **Education** tab.

Contents

Unit 1: New User Password Setup, Log In, Reset Password, and Authentication Methods.....3

Unit 2: myCalPERS Navigation.....14

Unit 3: myCalPERS & Windows Tips.....25

Unit 4: Employer Classes.....26

Unit 5: Submit Inquiry & Inquiry List.....37

Unit 6: Resources.....39

CalPERS Contacts.....44

Unit 1: New User Password Setup, Log In, Reset Password, and Authentication Methods

To begin using myCalPERS, your agency's System Access Administrator (SAA) will need to add you as a contact.

For new contracting agencies or if your only SAA left, contact CalPERS to set up your access.

System Logic

- Changes to password recovery options will not update communication details.
- We recommend using an individual work email address for security settings.
- You may set your authorization method as Authenticator, text message, phone call, or email.

Security Agreement

Safeguard your agency and employee confidential data by not revealing your username or password to anyone. CalPERS will never ask for your password. It is a violation of the CalPERS Security Agreement to share log-in information. Review CalPERS website's Business Partner Conditions of Use and Privacy Policy for additional information.

Locked Account

Your account will lock after six unsuccessful password attempts. Use one of the following options to unlock your account:

- Use the **Forgot your Password?** link in myCalPERS (scenario 2)
- Contact your agency's System Access Administrator (SAA)
- Call CalPERS at **888 CalPERS** (or **888**-225-7377)

Contents

Scenario 1: New User Password Setup 4

Scenario 2: Log In 6

Scenario 3: Reset Your Password 8

Scenario 4: Change Your Password 10

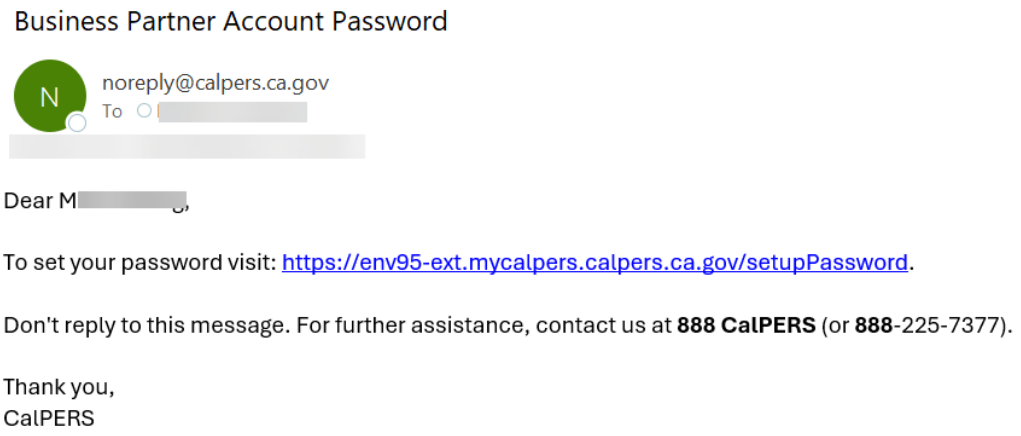
Scenario 5: Change Multifactor Authentication (MFA) Methods 11

Scenario 1: New User Password Setup

New myCalPERS contacts complete registration by creating a password.

Step Actions (9 steps)

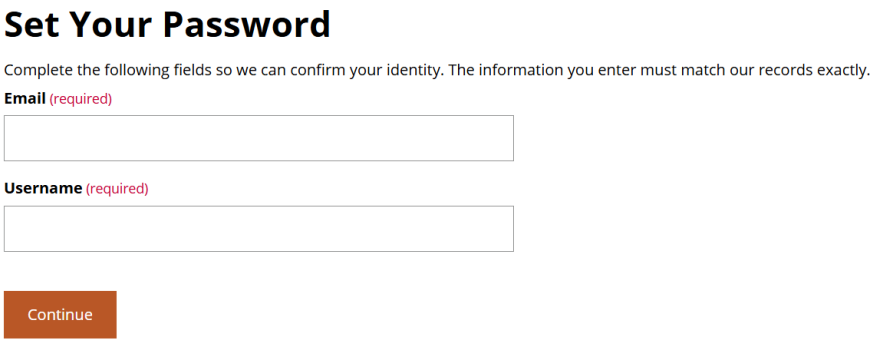
Step 1 Retrieve the Business Partner Account Password email.



Note: If you do not have access to the email, please contact your System Access Administrator.

Step 2 Select the link in the message to create a password.

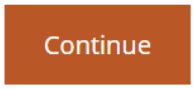
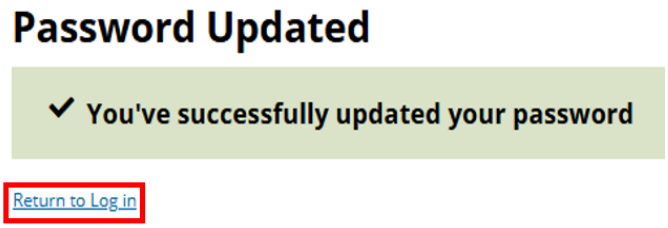
Step 3 Enter your email and username.



Step 4 Select the **Continue** button.

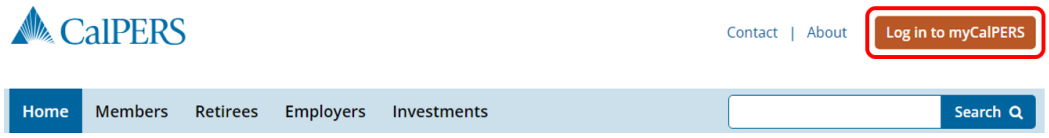
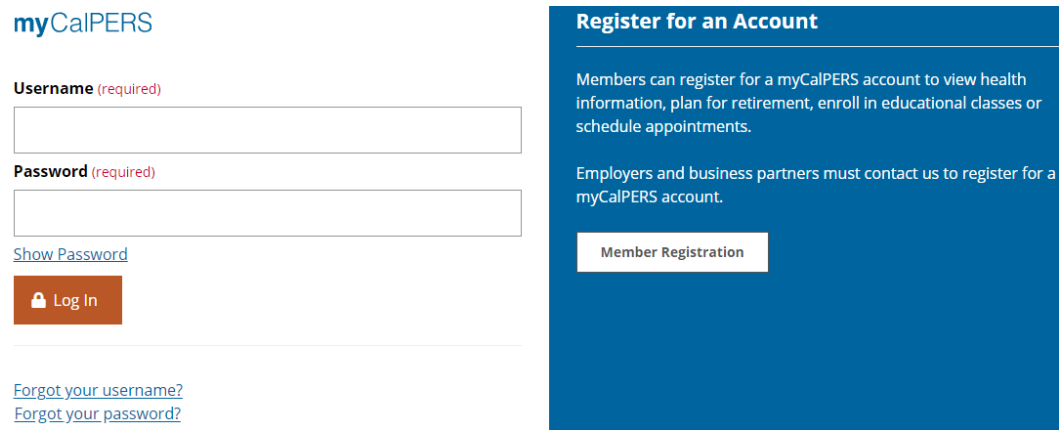
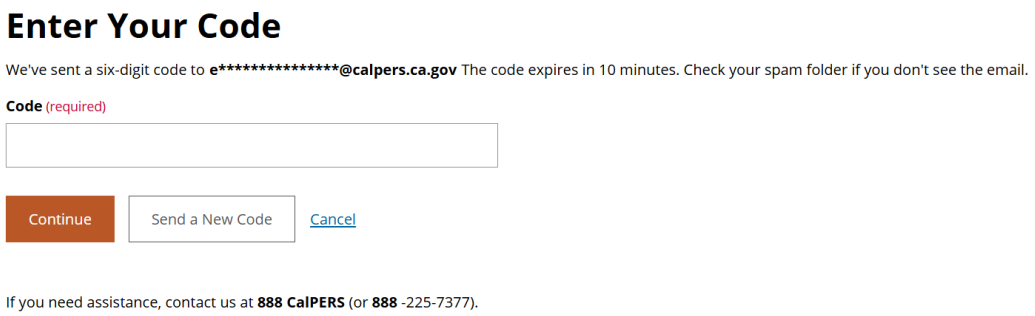
Step 5 Enter the six-digit code in the Code field.



Step 6	Select the **Continue** button.
Step 7	Create your password. Your new password must have: • 8 characters minimum • 1 uppercase letter • 1 lowercase letter • 1 number • no spaces **Password** (required)  Show Password 
Step 8	Select the **Continue** button.
Step 9	Select the **Return to Log in** link, then skip to step 13.  **You have completed this scenario.**

Scenario 2: Log In

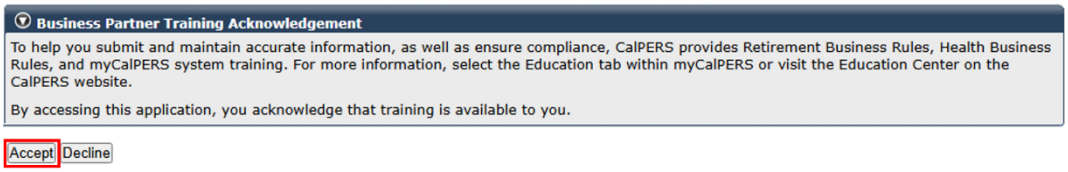
Step Actions (10 steps)

Step 1	Go to the CalPERS website at www.calpers.ca.gov.
Step 2	Select the **Log in to myCalPERS** button. 
Step 3	Enter your username and password. 
Step 4	Select the **Continue** button.
Step 5	Retrieve your six-digit code, and enter it in the Code field 
Step 6	Select the **Continue** button.
Step 7	Read the security agreement.
Step 8	If you agree with this statement, select the **I Accept** button at the bottom left.
Step 9	Read the Business Partner Training Acknowledgement section.

Step 10 Do you agree to the Business Partner Training Acknowledgement?

Yes: Select the **Accept** button.

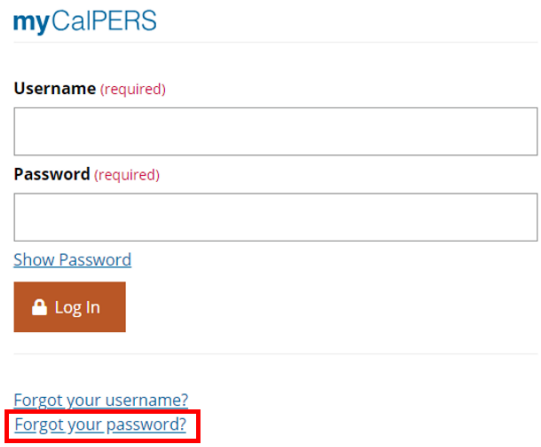
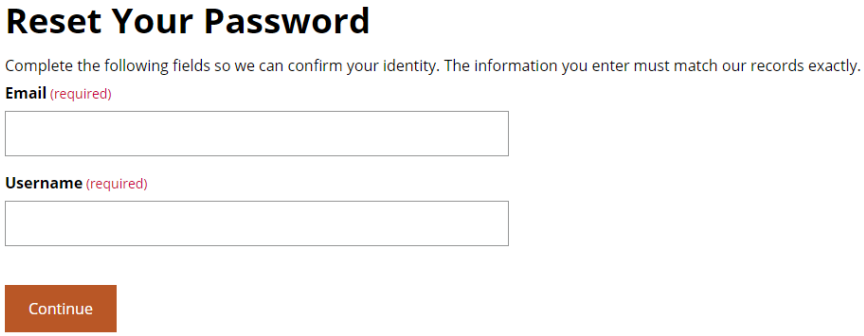
No: Select the **Decline** button, and then you will not continue.



You have completed this scenario.

Scenario 3: Reset Your Password

Step Actions (9 steps)

Step 1	Go to the CalPERS website at www.calpers.ca.gov.
Step 2	Select the **Log in to myCalPERS** button. 
Step 3	At the Log In page, select the **Forgot your password?** link. 
Step 4	Enter your email and username. 
Step 5	Select the **Continue** button. A verification code will be sent to you through a predetermined verification method. By default, this method is by email for business partners.

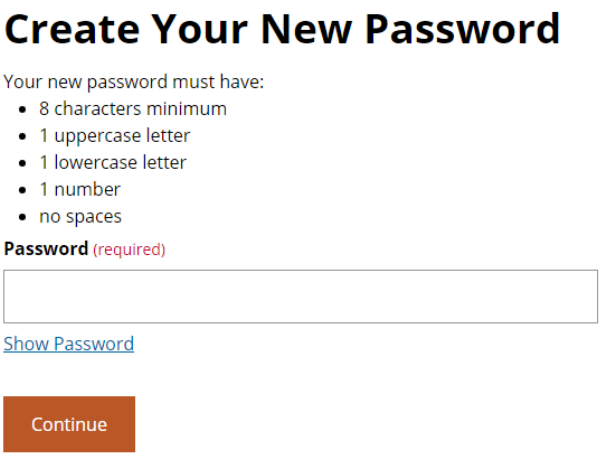
Step 6 After you receive your six-digit code, enter it in the Code field.



Step 7 Select the **Continue** button.

Create Your New Password

Step 8 Enter a new password.

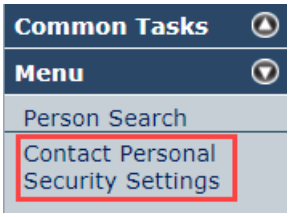
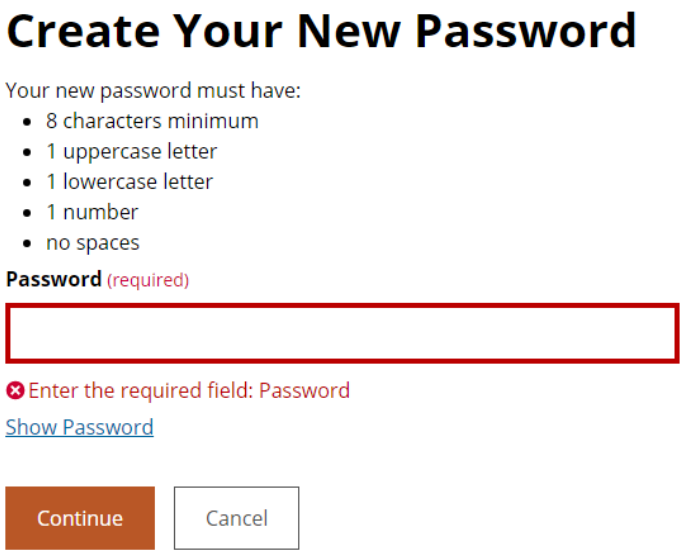


Step 9 Select the **Continue** button.

You have completed this scenario.

Scenario 4: Change Your Password

Step Actions (5 steps)

Step 1	Log in to myCalPERS with your business partner credentials.
Step 2	On the left-side navigation, select the **Contact Personal Security Settings** link. 
Step 3	Within the Username and Password section, select the **Edit password** link.
Step 4	Enter a new password. 
Step 5	Select the **Continue** button. **You have completed this scenario.**

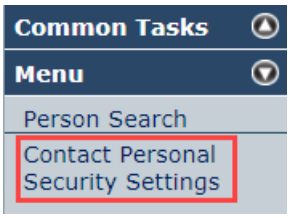
Scenario 5: Change Multifactor Authentication (MFA) Methods

Step Actions (13 steps)

Email or Phone Number

Step 1 — Log in to myCalPERS with your business partner credentials.

Step 2 — On the left-side navigation, select the **Contact Personal Security Settings** link.



Step 3 — What would you like to update?

Email or Phone Number: Continue to step 4

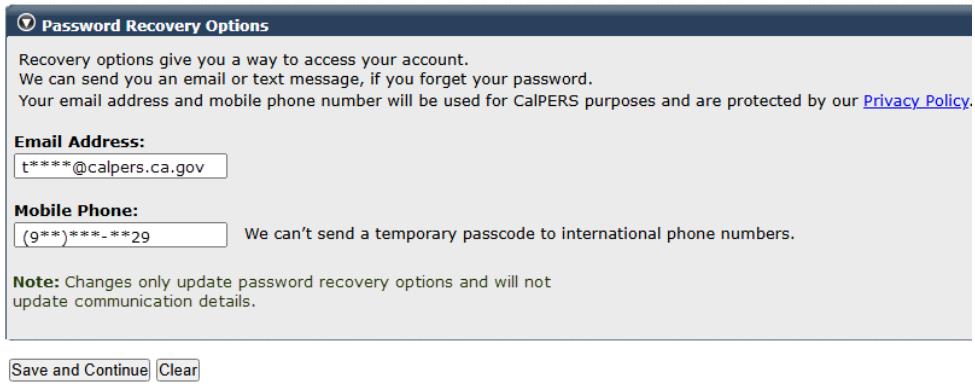
MFA Method: Skip to step 8

Note: Updating this email or phone will not impact your contact communication details. We recommend using your work email address for security settings.

Step 4 — Within the Multifactor Authentication (MFA) Methods section, select the **Update email or phone** link.

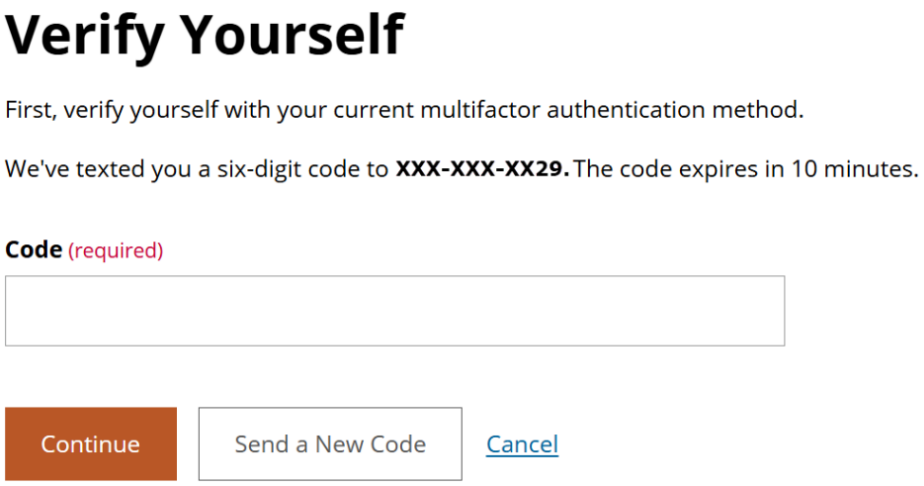


Step 5 — Update your email address and/or phone number

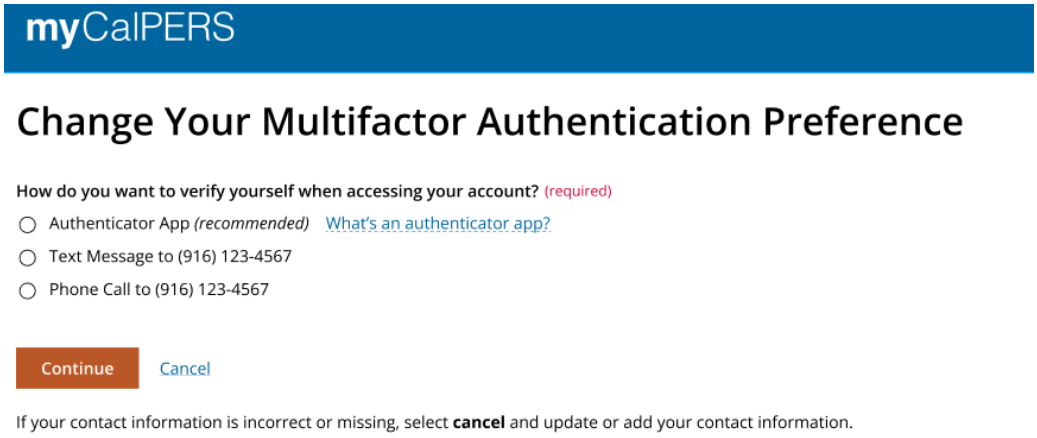


Step 6	Select the **Save and Continue** button.
Step 7	Did you need to make additional updates? **Yes**: Return to step 3 **No**: **You have completed this scenario.**

MFA Method

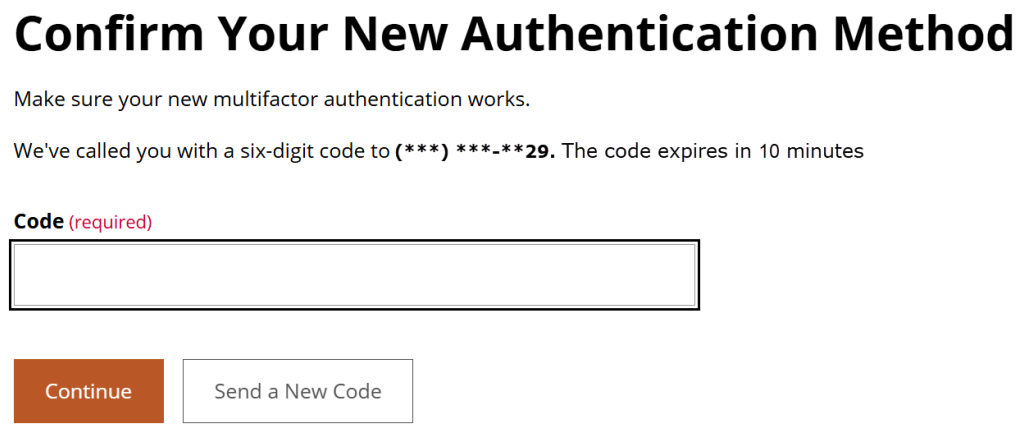
Step 8	Within the Multifactor Authentication (MFA) Methods section, select the **Change current MFA method** link.
Step 9	Select an MFA method.  You will be sent a six-digit code to the current authentication method.
Step 10	After you receive your six-digit code, enter it in the Code field. 
Step 11	Select the **Continue** button.

Step 12 Select the new authentication preference from the options listed, then select the **Continue** button.



You will be sent a six-digit code to the current method.

Step 13 After you receive your six-digit code, enter it in the Code field, then select the **Continue** button.



You have completed this scenario.

Unit 2: myCalPERS Navigation

myCalPERS has global navigation tabs, local navigation links, and left-side navigation links to access information, process transactions, and run reports. Your system access determines what information you can access and which transactions you can process in myCalPERS. This unit has descriptions of commonly used tools.

Contents

myCalPERS Homepage 15

Global Navigation Tabs 16

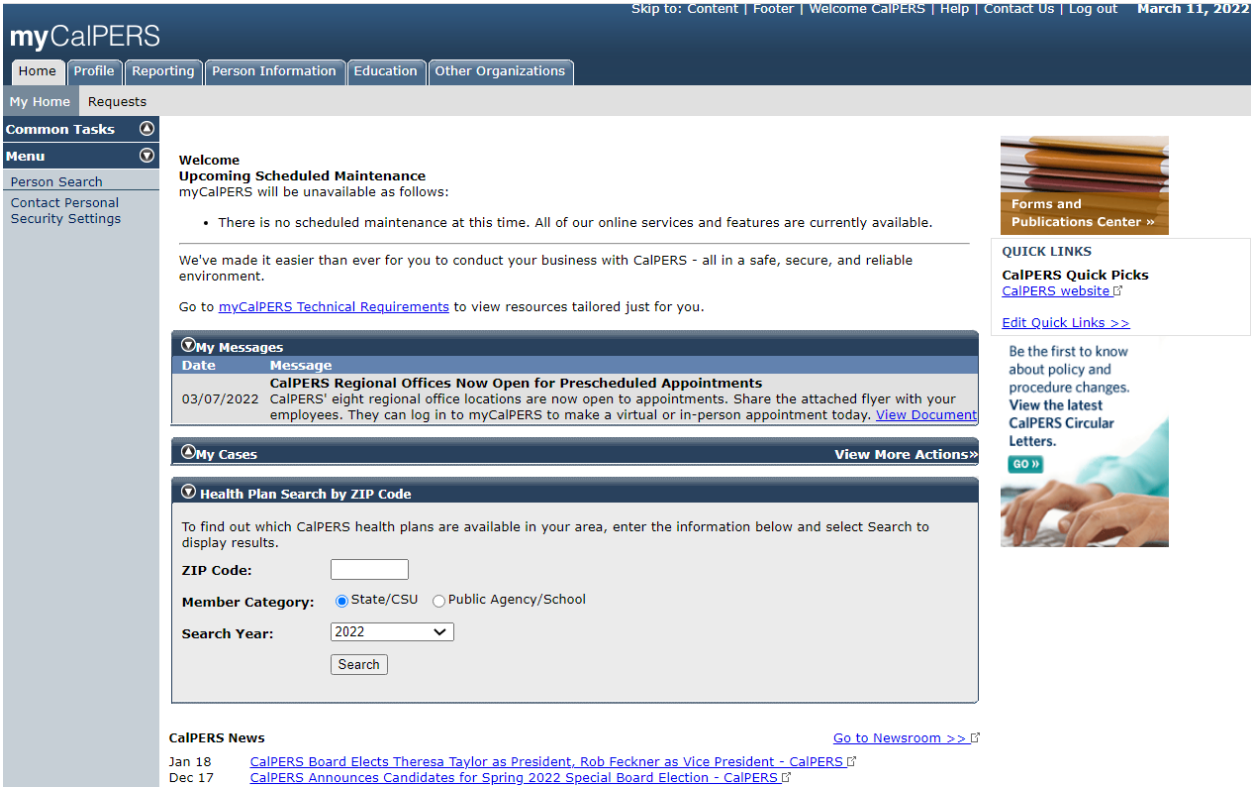
Local Navigation Links 17

Left-Side Navigation Links 19

myCalPERS Homepage

Below shows the myCalPERS homepage followed by descriptions of the main features.

- **Maintain Health Enrollment Requests**: This section displays if there is a new employee-submitted health transaction or document to review. For more information, refer to the myCalPERS Health Transaction Verification student guide (PDF).
- **My Messages**: Review these to become informed on CalPERS issues, events, and updates such as upcoming training classes in your area, new student guides, new services, billing cutoff dates, etc.
- **My Cases** or **View More Actions>>**: Select these to open and review the progress and status of your contract(s) with CalPERS.
- **Health Plan Search by ZIP Code**: Use this to find CalPERS health plans in an area.



myCalPERS Logo

The myCalPERS logo at the top left will refresh myCalPERS and return you to the homepage. Use it to clear a previous employee/member/retiree query or to reset your navigation status.

Global Navigation Tabs

The global navigation tabs are the primary ways to navigate in myCalPERS.



Home

- Refresh myCalPERS and return to the homepage.
- Clear a previous employee/retiree query before another person search.

Profile

- Access your agency's address and communication information, contacts, business partner relationships, and contracts/agreements.
- Clear a previous employee, member, or retiree query before another person search.

Reporting

- Process retirement and health enrollments, employment certifications, and payroll.
- Access billing and payments.
- Request a new payroll schedule or extension.
- Report out-of-class appointments.
- Reconcile retirement appointments with unposted payroll.

Person Information

Query employee and retiree retirement and health information.

- Check membership status of a new employee.
- Verify or update an employee's demographics and addresses.
- Access a retiree's retirement date.
- Review member contributions and service credit totals for your CalPERS-covered employees.
- Access a subscriber's health benefit information.
- Review appointment history or add a new appointment for an employee who previously worked with your agency. You may also review or add/correct appointment events, e.g., add/end a leave of absence, permanently separate, change a member category, etc.

Education

Register for employer instructor-led training classes or take self-paced online classes. Edit or cancel an enrollment. Review your training history or access training certificates.

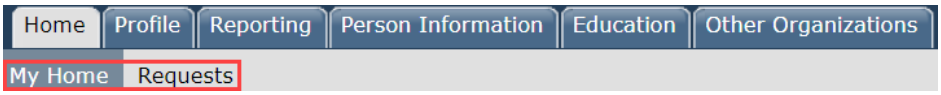
Other Organizations

Access other CalPERS employer contact information (e.g., names, emails, and phone numbers).

Local Navigation Links

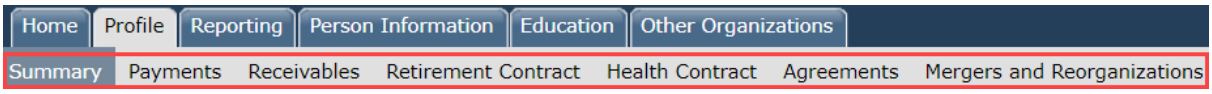
The local navigation links are right below the global navigation tabs and change depending on which global tab is selected. If your agency contracts for both retirement and health benefits, the following links in myCalPERS will display.

Home Global Navigation Tab, Local Navigation Links



- **My Home:** My Messages, My Cases, and Health Plan Search by ZIP Code sections and CalPERS News.
- **Requests:** Order up to three publications (maximum of 150 copies for each) at no cost.

Profile Global Navigation Tab Local Navigation Links



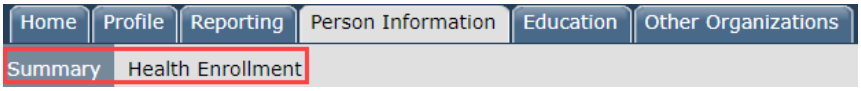
- **Summary:** Access your agency's main address(es) and phone numbers, contacts, business partner relationships, and contracts/agreements. System access administrators can make updates to this page such as adding and maintaining contacts.
  State agencies: Select a program link within the Statutory Plan section to review the retirement program event summary, base benefits, special provisions, and member rate summaries.
- **Payments:** Check the status of payments (e.g., Pending, Posted, Canceled, In Process, etc.). You may also generate an Employer Payment Report.
- **Receivables:** Access open and closed receivables, due dates and amounts, receivable balance, and receivable description. You may also generate an Employer Receivable report.
- **Retirement Contract:** Public agencies and schools can access, add, or modify a resolution, submit a valuation request, or request an amendment to your agency's CalPERS contract.
  State agencies: Refer to the first bullet for retirement contract information.
- **Health Contract:** Access your agency's health contract(s) and effective dates.
- **Agreements:** Review your agency's list of agreements with CalPERS.
- **Mergers and Reorganizations:** Access pending and completed agency mergers and school district reorganizations. You may also initiate and add new merger requests.

Reporting Global Navigation Tab, Local Navigation Links



- **Manage Reports:** Upload files, manually process retirement and health enrollments, copy forward a posted payroll report, or maintain health enrollment requests that were submitted by active employees online. File upload reporters who submit service period payroll details for the service credit purchase requests can access a list of their reports and report status. They can also correct errors.
- **Billing and Payments:** Access year-to-date billing and payments, receivable history, and health billing roster.
- **Payroll Schedule:** Add a new schedule or request an extension or exemption. You may also reconcile employees with unposted payroll by earned period.
- **Out-of-Class Validation:** Create, add, or search Out-of-Class records within a report or upload a CSV file. You may select a record to review, update, or delete from the report.
- **Member Requests:** Update the status of an employment certification request, access historical certification information, provide employment certification for a period of service that is not listed, or add a new employment service period.
  - SCO and non-central state agency employers can also review and process state tier election transactions requests.
- **Health Reconciliation:** Health carriers remit enrollment discrepancy reports to CalPERS.
- **Retirement Appointment Reconciliation:** Review and reconcile employees with unposted payroll, confirm earned periods that should not have payroll, and update appointments.

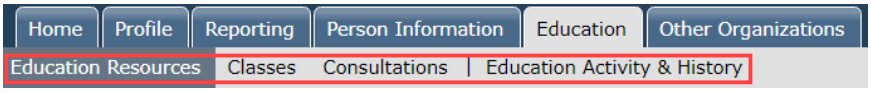
Person Information Global Navigation Tab, Local Navigation Links



Displays after you retrieve your employee's or retiree's profile page.

- **Summary:** Review profile, communication, pre-retirement benefit information, and access appointment details.
- **Health Enrollment:** Access health account summary.

Education Global Navigation Tab, Local Navigation Links



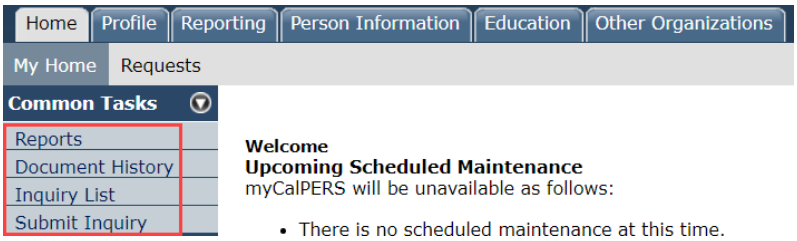
- **Education Resources:** Enroll in a class, request an Educational Forum consultation, review education training activity and history, and access resources.
- **Classes:** Review instructor-led class dates and enroll. You may also take online classes.
- **Consultations:** Request a one-on-one consultation with an employer educator.
- **Education Activity & History:** Access your upcoming, past, enrolled, and canceled classes and consultations. You may reschedule and cancel classes.

Left-Side Navigation Links

The left-side navigation links change depending on which global navigation tab or local navigation link is selected. If your agency contracts for both retirement and health benefits, the following links are available in myCalPERS.

Common Tasks Folder

The Common Tasks folder is available via the **Home**, **Profile**, **Reporting**, or **Education** global navigation tabs. Select Common Tasks to access these static links:

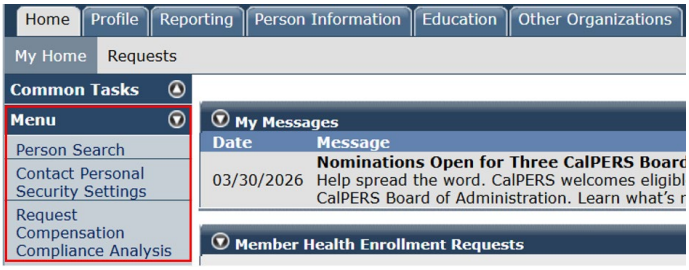


- **Reports:** Run reports that query data from myCalPERS via myCalPERS Reports.
- **Document History:** Access documents that you sent or received from CalPERS.
- **Inquiry List:** Review inquiry and response history.
- **Submit Inquiry:** Securely submit a question or information to CalPERS (refer to unit 5).

Home Global Navigation Tab, Left-Side Navigation Links

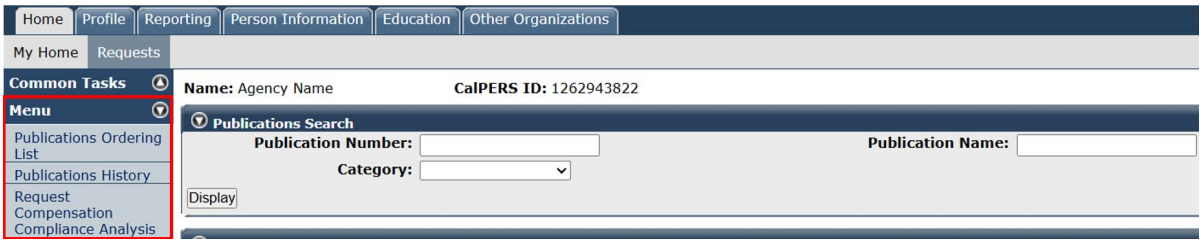
From the **Home** tab, **My Home** and **Requests** local links, these Menu left-side links display:

- Select **My Home** local navigation link to display its left-side navigation menu links:



  - **Person Search:** Query employee and retiree information.
  - **Contact Personal Security Settings:** Change your password, challenge questions, security image and message, phone number, and/or email address.
  - **Request Compensation Compliance Analysis:** Submit and upload documents to have a CalPERS analyst review your labor agreement. This link can also be accessed from the **Home**, **Profile**, and **Reporting** global navigation tabs.

- Select **Requests** local navigation link to display its left-side navigation links:

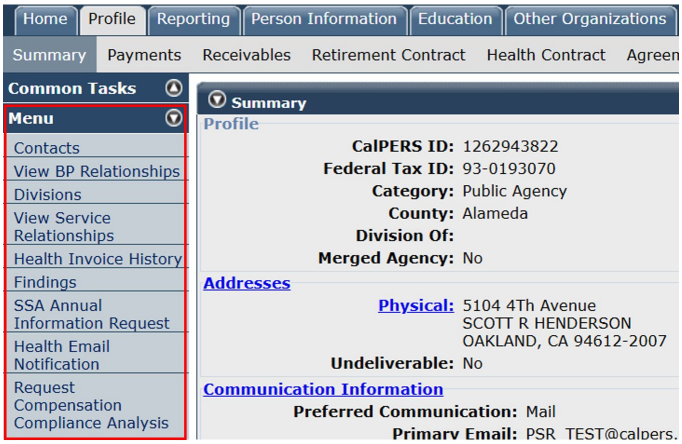


  - **Publications Ordering List:** Order up to three publications with a maximum of 150 copies for each at no cost.
  - **Publications History:** Review your publication order history.

Profile Global Navigation Tab, Left-Side Navigation Links

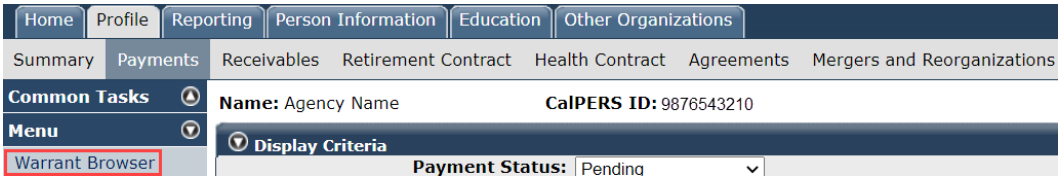
From the **Profile** tab, **Summary**, **Payments**, **Receivables**, **Retirement Contract**, **Health Contract**, **Agreements**, **Mergers and Reorganizations** local links, these Menu left-side links display:

- Select **Summary** local navigation link to display its left-side navigation links:



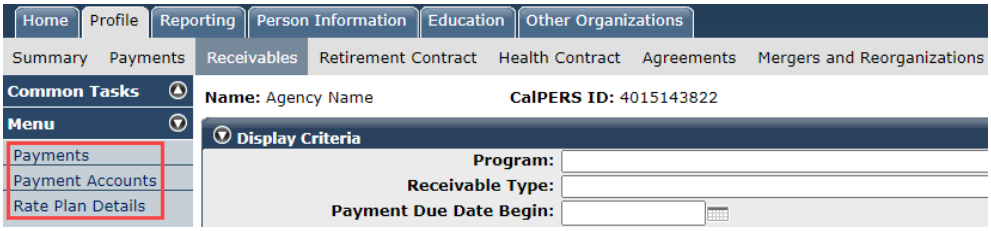
  - **Contacts:** Review current and former myCalPERS contacts for your agency.
  - **View BP Relationships:** Review business partner relationships that your agency established with a third party to do business on your agency's behalf.
  - **Divisions:** Access a list of agencies under the umbrella of your agency, e.g., a school district is a division of a county office of education.
  - **View Service Relationships:** Review a list of agencies for which your agency provides service.
  - **Health Invoice History:** Access a list of your health receivables.
  - **Findings:** Review the CalPERS auditor's compliance review findings for your agency.
  - **SSA Annual Information Request:** Review a list of the responses to the Annual Information Request (AIR) questionnaire.
  - **Health Email Notification:** Create a list of contacts who will also receive an email notification for employee-submitted health transactions or documents in myCalPERS.

- Select **Payments** local navigation link to display its left-side navigation link:



  – **Warrant Browser:** Search for a payment sent to your agency from CalPERS such as Advanced Disability Pension Payments (ADPP) reimbursements.

- Select **Receivables** local navigation link to access its left-side navigation links:



  – **Payments:** Check the status of payments (e.g., pending, posted, Canceled etc.).
  – **Payment Accounts:** Add or delete bank accounts used for EFT payments.
  – **Rate Plan Details:** Review your year-to-date PERS contributions.

- Select **Retirement Contract** local navigation link to access its left-side navigation links. *State agencies:* Select the **Profile** global navigation tab, **Summary** local navigation link for retirement contract information (review page 13).



  – **View Benefits:** Review benefit levels and provisions.
  – **Maintain Positions:** Add or update codes and names for positions. Each agency determines the codes and position names.
  – **View Merger History:** Review business partner merger history and dates.
  – **View Special Provisions:** Access summarized information for special provisions.
  – **Maintain CBU:** Review a list of collective bargaining units (CBUs) or add a new CBU.
  – **GASB Information:** Public agency employers can request, pay for, and download their Governmental Accounting Standards Board (GASB) 68 accounting valuation reports. Agents with multiple-employer plans will also be able to obtain their census data.

- Select **Health Contract** local navigation link to access its left-side navigation links:



  – **OPEB Data Extract:** Request and access Other Post-Employment Benefits (OPEB) health census data. Review information on active and retired employees covered and those eligible but not enrolled in a health plan by your agency. This information may be used to support an agency's requirements to report OPEB liability under Governmental Accounting Standards Board (GASB) Statement No. 75 for financial reporting.

- Select a **Health Contract name** link, then access its left-side navigation links:

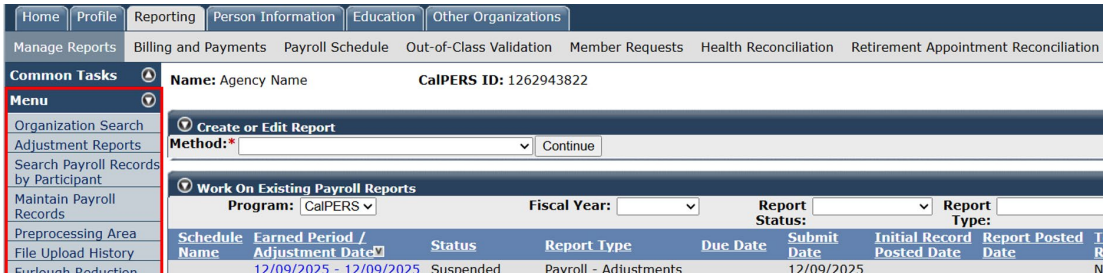


  – **Group Summary:** Review medical groups for your agency.
  – **Contribution Preview:** Review your agency's contribution toward enrollees' health premiums and vesting information.
  – **Subscriber List:** Access your agency's health enrollees and number of covered people.
  – **Contract History:** Check your agency's health contract's type and status.

Reporting Global Navigation Tab, Left-Side Navigation Links

From the **Reporting** tab, **Manage Reports**, **Billing and Payments**, **Payroll Schedule**, **Out-of-Class Validation**, **Member Requests**, **Health Reconciliation**, **Retirement Appointment Reconciliation** local links, these Menu left-side links display:

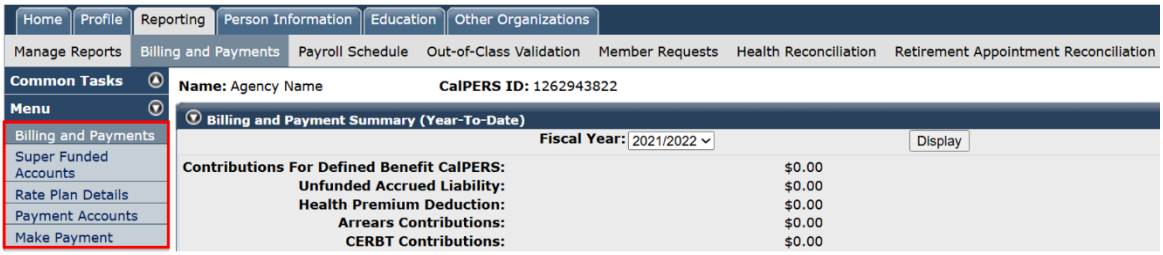
- Select **Manage Reports** local navigation link to display its left-side navigation links. The following descriptions are the main left-side links used by employers:



  – **Adjustment Reports:** Create a payroll adjustment report to adjust posted payroll records.

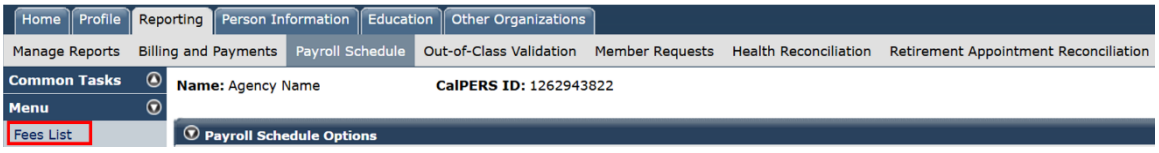
- **Search Payroll Records by Participant:** Search for posted or unposted payroll records for a specific employee for your agency.
- **Maintain Payroll Records:** Reverse and/or modify posted payroll records.
- **Preprocessing Area:** Review XML or CSV reports for retirement, payroll, or health files that passed level 1 validation but may have data errors that need to be corrected. Files will remain in a pending status until records are cleared from the preprocessing area. If the Errors column displays Yes, access the preprocessing data link to review errors.
- **File Upload History:** Check if the uploaded file was accepted or rejected.
- **Disability Retirement Certification:** Allows employers to provide details for disability retirement, including determination for local safety cases. Internal users can review the details provided by employers using the same page.

- Select **Billing and Payments** local link to display its left-side navigation links:



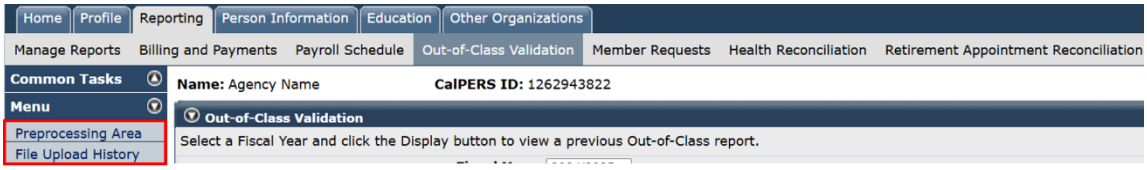
- **Billing and Payments:** Access a summary of your financials at the current time. Review contributions reported and paid for each rate plan, arrears, CERBT, and supplemental income plan, billing for health premium deductions, fees, and amount owed to CalPERS.
- **Super Funded Accounts:** Review the details of your super funded rate plans.
- **Rate Plan Details:** Review year-to-date contributions by rate plan.
- **Payment Accounts:** Add, modify, or delete bank accounts for online payments.
- **Make Payment:** Make an online payment to one or more receivables.

- Select **Payroll Schedule** local navigation link to display its left-side navigation link:



- **Fees List:** Review your agency's assessed and waived fees.

- Select **Out-of-Class Validation** local navigation link to display its left-side navigation links:



- **Preprocessing Area:** Review XML or CSV reports for retirement, payroll, or health files that have passed level 1 validation but may have data errors that need to be corrected. Files will remain in a pending status until records are cleared from the preprocessing area. If the Errors column displays Yes, access the preprocessing data link to review errors.
- **File Upload History:** Check if an uploaded file was accepted or rejected.

Person Information Global Navigation Tab

From the **Person Information** tab, search for your employee or retiree. From the **Summary** and **Health Enrollment** local links, several Menu left-side links display.

Refer to the myCalPERS student guides for retirement, health, and payroll left-side link information for your employees and retirees.

Note: No left-side links display until you access an employee's or retiree's profile page.

Unit 3: myCalPERS & Windows Tips

Zoom

- Press and hold the **Ctrl** key to scroll up and down with your mouse wheel.
- Press and hold the **Ctrl** key and use the **+** or **–** key.

Open Multiple Tabs to Multi-Task

Hover your cursor over any tab or link and press your mouse wheel or right click and select **Open in new tab** (or Open link in new tab) to open item in a new tab.

Open Multiple Windows to Multi-Task

- Right click on any tab or link, then select *Open in new window* or *Open link in new window*.
- Use the **Windows** key (between **Ctrl** & **Alt** keys) and select the **left** or **right arrow** keys to evenly split the multiple windows.
- Select the top of the window and drag it to the side of the screen. Let go when the window shaded area is in the desired position. Repeat to split the remaining windows.

Keyboard Shortcuts

- Press the **Tab** key to move to the next field on the page, press **Shift**+**Tab** to go back.
- Enter dates and phone numbers without / - or ( ).
- Press the **Enter** key to select the button if the cursor is on a button (button is highlighted).
- Press the **spacebar** to select the radio button if the cursor is on a radio button.
- Enter the first letter or number to populate that item from a drop-down list, e.g., “f” for female, “h” for hourly, etc.

Refresh myCalPERS

Select the **myCalPERS** logo or **Home** global navigation tab to refresh the page if you receive an error page or if the global tabs aren’t displayed.

Clear a Previous Person Search

- Select the **myCalPERS** logo or **Home** or **Profile** global navigation tabs.
- Select the **Person Search** left-side link if you’re on the employee’s Profile page.

Return to Previous Page

Avoid using the browser **back** arrow or **Backspace** key. If there are no return links, use the navigation tabs or links to return to the previous page.

Unit 4: Employer Classes

Our instructor-led and self-paced classes support you in all your CalPERS business. If you have recently been added as myCalPERS user for your agency, refer to the Classes & Webinars for Employers page to start your employer education.

Instructor-Led Classes

Our Business Rules & myCalPERS classes will help you understand the importance of your business-related reporting responsibilities, how to use myCalPERS, and how to avoid late fees and administrative costs. Attend an in-person or virtual class for a hands-on learning experience where you can complete transactions from our student guides in a training environment with an instructor.

Business Rules Classes

Gain a better understanding of the laws and rules associated with your agency's retirement and/or health contract. Our classes are employer-specific and customized to your employer type: school, public agency, or state.

myCalPERS Classes

After attending a Business Rules class, attend myCalPERS classes to learn how to navigate and process transactions in myCalPERS.

Self-Paced Online Classes

You may take our online classes anytime 24 hours a day. We offer classes to help you understand retirement and health business rules, navigate myCalPERS, and perform transactions.

Contents

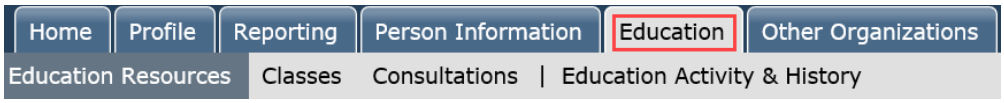
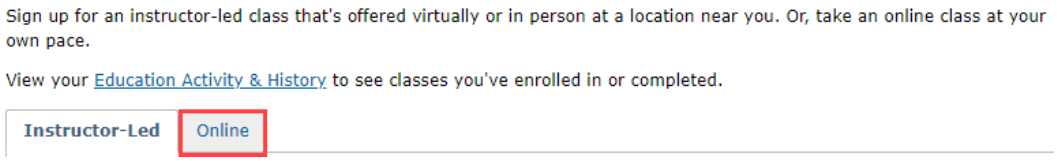
Scenario 1: Register for an Employer Class 27
Scenario 2: Modify Enrollment 29
Scenario 3: Review Education Activity & History 31
Scenario 4: Print Class Completion Certificate 32
Scenario 5: Enroll a Division Employee in a Class 33
Scenario 6: Register Employees for a Member Education Class 35

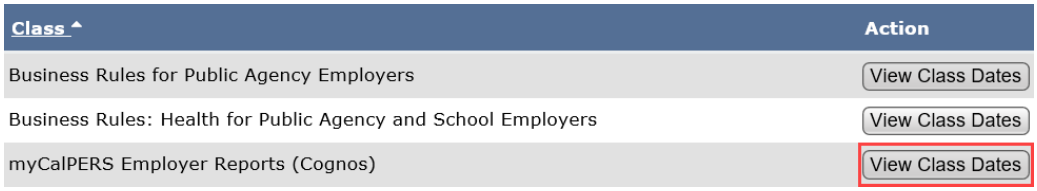
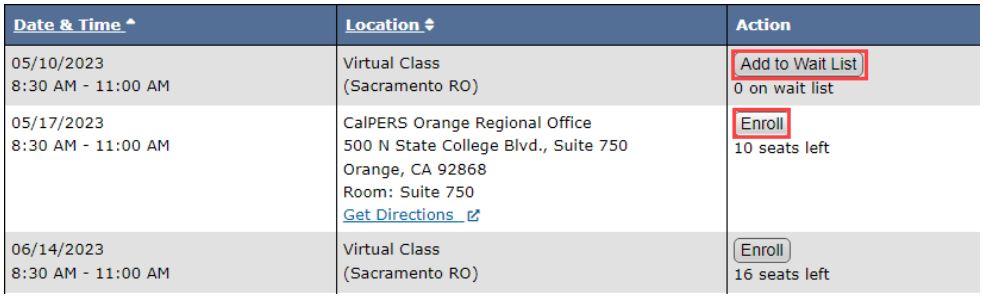
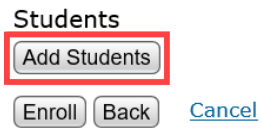
Scenario 1: Register for an Employer Class

System logic

- For virtual classes, select Sacramento as your regional office.
- After registering for a class, you will receive an email confirmation.
- If the class is full, you can select the **Add to Wait List** button. You will receive an email if a seat becomes available.
- To request free training at your agency, email the employer educators at **calpers_employer_communications@calpers.ca.gov**.

Step Actions (15 steps)

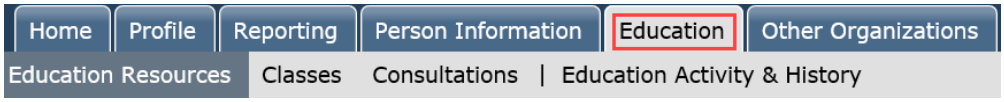
Step 1	Select the **Education** global navigation tab. 
Step 2	Select the **Classes** local link or the **Enroll in a Class** hyperlink on the dashboard.
Step 3	Which type of class do you want to register or take? **Instructor-led (in-person or virtual):** Skip to step 7 **Online:** Continue to step 4
Step 4	Select the **Online** tab. 
Step 5	Select the **Start** button next to the class you want to take. 
Step 6	Select the name of the class topic and the online class will launch. **You have completed launching an online class.**

Step 7	Ensure that the **Instructor-Led** tab is selected, then select the **View Class Dates** button for the class you wish to enroll. 
Step 8	You may use the Regional Office and Delivery Method drop-down lists to narrow your search.
Step 9	Select the **Enroll** or **Add to Wait List** button next to the class date and location. 
Step 10	On the Enroll in Class page, verify and update contact information (select the **Needs Special Assistance** check box if necessary). **Note**: Visual or auditory aid requires four weeks' notice.
Step 11	Do you want to enroll other students? **Yes:** Continue to step 12. **No:** Skip to step 15.
Step 12	At the bottom, select the **Add Students** button. 
Step 13	Update the Add Student page (select **Needs Special Assistance** check box if necessary).
Step 14	Select the **Save & Finish** button.
Step 15	At the bottom of the page, select the **Enroll** button. **You have completed this scenario.**

Scenario 2: Modify Enrollment

Step Actions (11 steps)

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



Step 2 Select the **Education Activity & History** local navigation link.

Step 3 What change to your enrollment would you like to do?

Reschedule: Continue to step 4.

Edit Enrollment: Skip to step 7.

Cancel Enrollment: Skip to step 10.

Reschedule

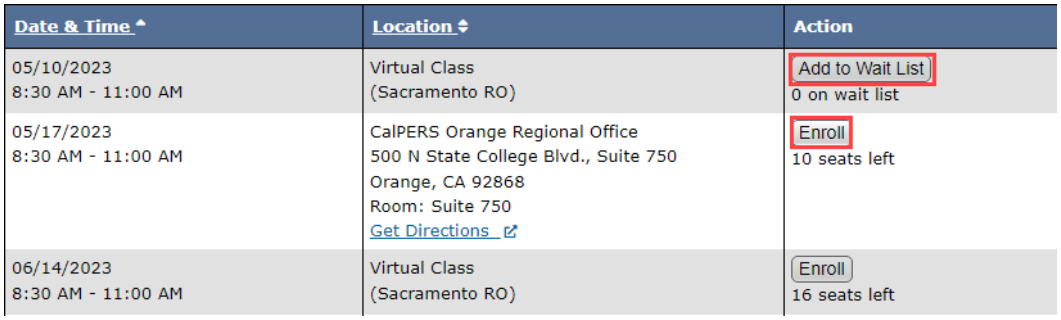
Step 4 Select the **Reschedule** link.



Date & Time	Class	Location	Status	Action
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class Meeting ID: 894 3333 7805 Password: 667415	Enrolled	Reschedule Edit Enrollment Cancel Enrollment

Step 5 Adjust the Regional Office and Delivery Method if necessary.

Step 6 Select the **Enroll** or **Add to Wait List** button next to the class date and location.

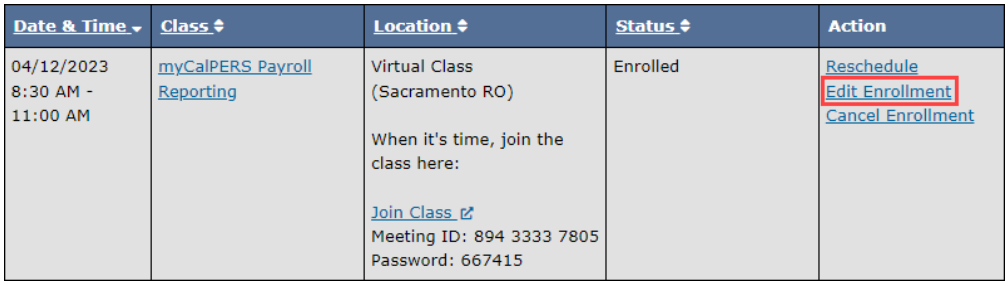


Date & Time	Location	Action
05/10/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	Add to Wait List 0 on wait list
05/17/2023 8:30 AM - 11:00 AM	CalPERS Orange Regional Office 500 N State College Blvd., Suite 750 Orange, CA 92868 Room: Suite 750 Get Directions	Enroll 10 seats left
06/14/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	Enroll 16 seats left

You have completed rescheduling your enrollment.

Edit Enrollment

Step 7 Select the **Edit Enrollment** link.



Date & Time	Class	Location	Status	Action
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class Meeting ID: 894 3333 7805 Password: 667415	Enrolled	Reschedule Edit Enrollment Cancel Enrollment

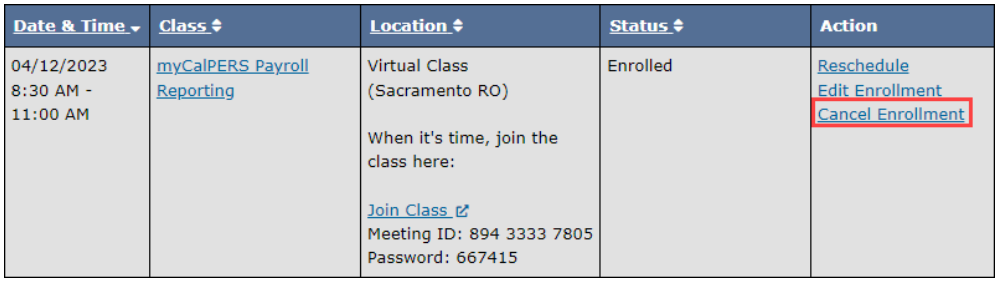
Step 8 Modify your enrollment information.

Step 9 Select the **Save Change** button.

You have completed editing your enrollment.

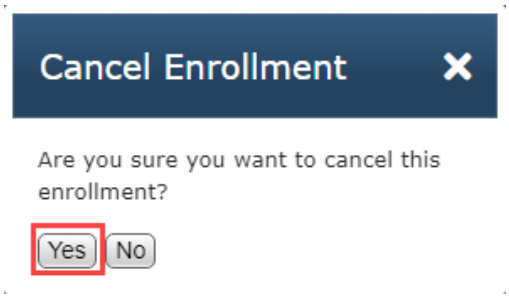
Cancel Enrollment

Step 10 Select the **Cancel Enrollment** link.



Date & Time	Class	Location	Status	Action
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO) When it's time, join the class here: Join Class Meeting ID: 894 3333 7805 Password: 667415	Enrolled	Reschedule Edit Enrollment Cancel Enrollment

Step 11 Select the **Yes** button to confirm your enrollment cancellation.

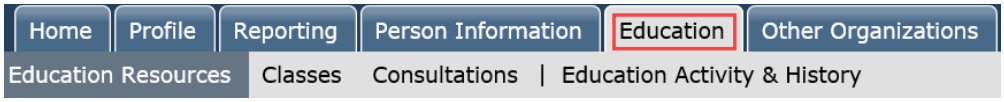


You have completed cancelling your enrollment and this scenario.

Scenario 3: Review Education Activity & History

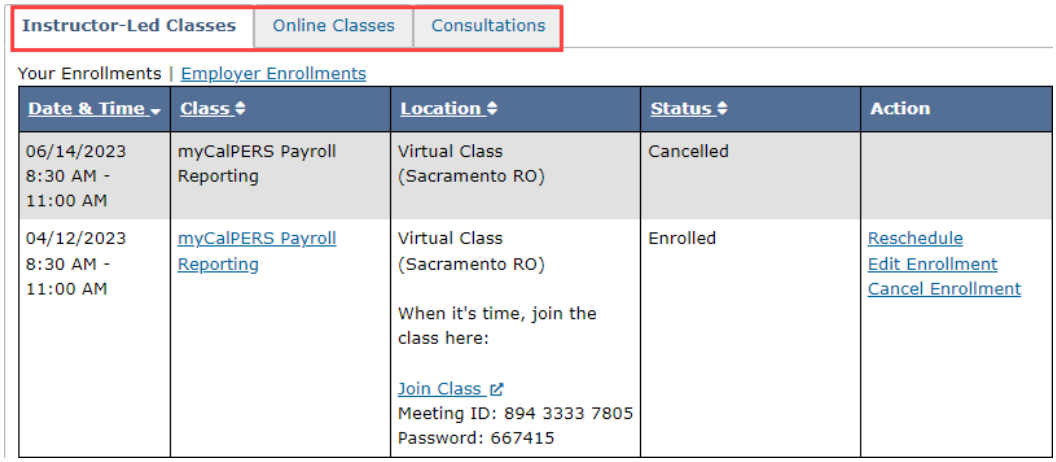
Step Actions (4 steps)

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

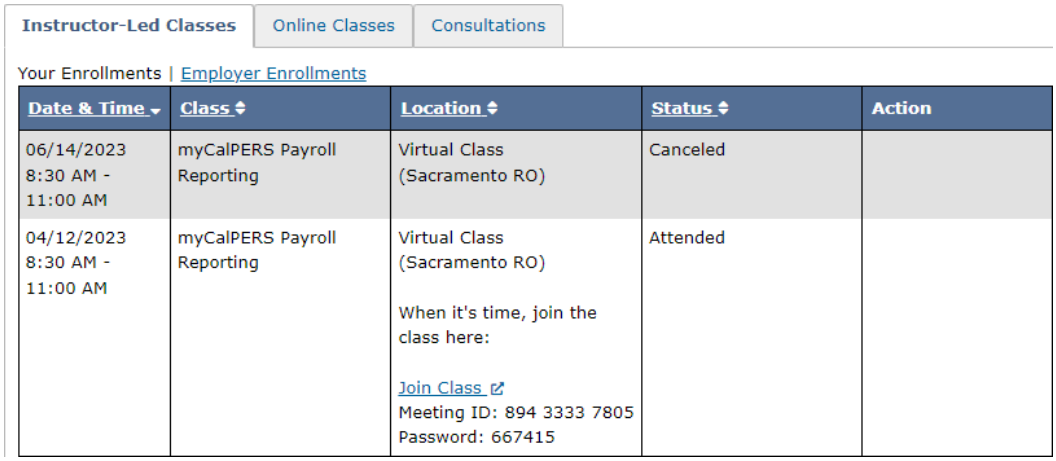


Step 2 Select the **Education Activity & History** local navigation link.

Step 3 Select the **Instructor-Led Classes**, **Online Classes**, or **Consultations** tab.



Step 4 Review your activity.

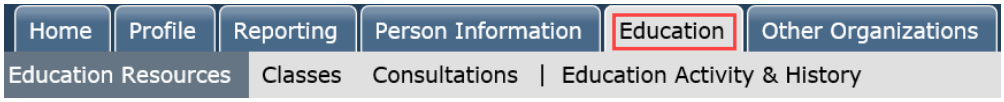


You have completed this scenario.

Scenario 4: Print Class Completion Certificate

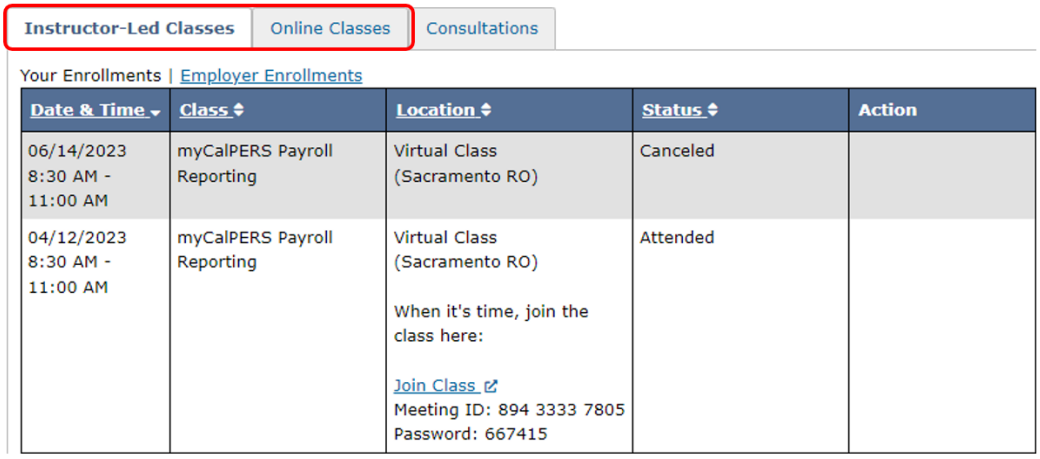
Step Actions (4 steps)

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



Step 2 Select the **Education Activity & History** local navigation link.

Step 3 Select either the **Instructor-Led Classes** or **Online Classes** tab.



Step 4 Select the **Print Certificate (PDF)** link.



You have completed this scenario.

Scenario 5: Enroll a Division Employee in a Class

You work for a County Office of Education (COE), and you need to enroll a school district employee in a class. A county office typically holds the CalPERS contract, and the school districts are called divisions under the county.

Refer to the myCalPERS System Access Administrator (PDF) student guide for more information regarding adding and maintaining contacts, granting contacts system access and user roles, and enrolling employees in classes.

Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides

System Logic

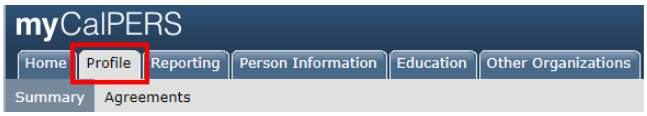
- You must be a system access administrator with the Business Partner Employer Maintenance access role. If you do not have the role, assign it to yourself, log out, then log in to myCalPERS for the change in role to take effect.
- You only need to add yourself as a contact for a division once (steps 1-7). Complete steps 8-9 for any future class enrollments for that division's employees.

Step Actions (11 steps)

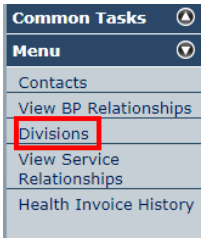
Add Yourself as a Contact at the Division

Step 1 Log in to myCalPERS with your COE credentials.

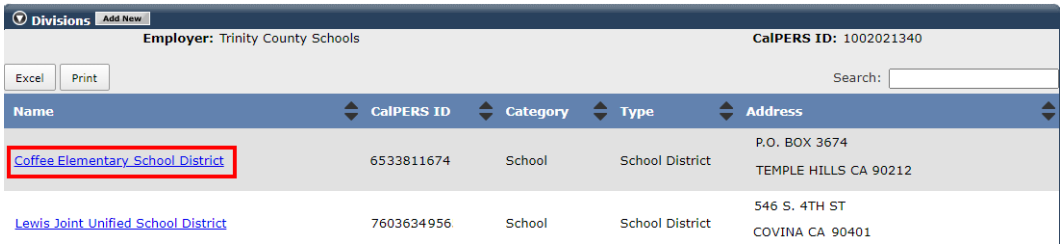
Step 2 Select the **Profile** global navigation tab.

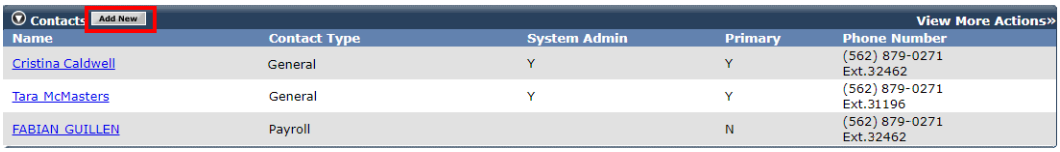
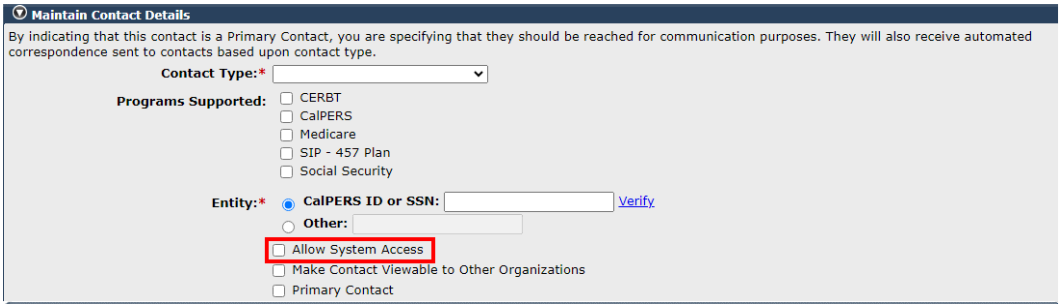


Step 3 Select the **Divisions** left-side link.



Step 4 Select the name link for the division from which you will enroll students.



Step 5	Within the division's Contacts section, select the **Add New** button. 
Step 6	Complete the Maintain Contact Details and remaining sections to add yourself as a contact at the division.  **Note the following**: • Ensure you select the Allow System Access check box. • You must have a unique username for each division where you designate yourself as a contact. Your password can be the same. • You do not need to assign any additional access roles for yourself at the division level. • You may need to select the **System Access** link after adding yourself as a contact and uncheck the *Prevent the user from accessing the site* check box.
Step 7	At the bottom, select the **Save** button.
Step 8	At the top right of the page, select the **Log Out** link to log out under your agency.

Enroll a Division Employee in a Class

Step 9	Log in to myCalPERS with the username you created for the division.
Step 10	Select the **Education** global navigation tab to search for the class and enroll the division employee(s). 
Step 11	Do you want to enroll a different division's employee in a class? **Yes:** Return to step 1 to add yourself as a contact for the other division, then enroll that division's employee in a class. **No: You have completed this scenario.**

Scenario 6: Register Employees for a Member Education Class

To request an instructor-led member education class for your employees, call our CalPERS contact center at **888 CalPERS** (or **888**-225-7377). A CalPERS Regional Office team member will contact you to arrange your agency's virtual or in-person member class.

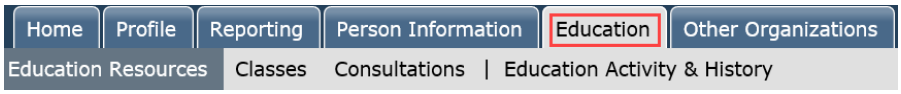
Scenario: Your agency is hosting a Planning Your Retirement class for your employees. You will register your employees who want to attend.

System logic

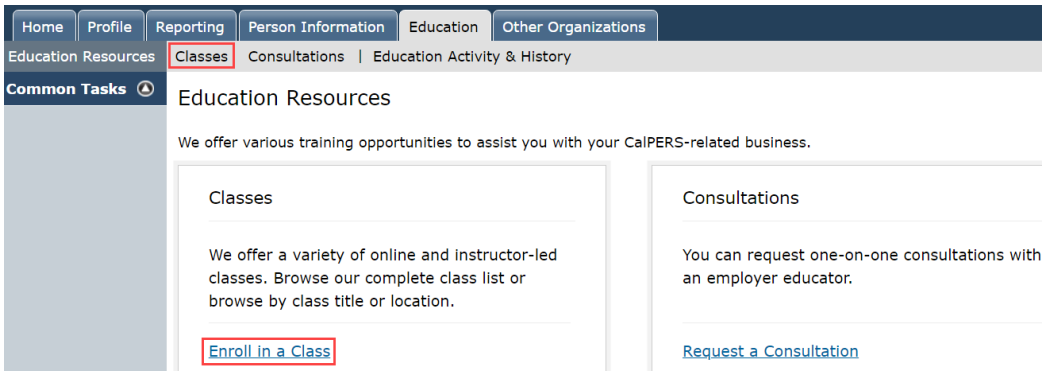
- The *Needs Special Assistance* check box should be selected for anyone who needs visual or auditory aid (requires four weeks' notice).
- After registering your employees for a class, those registered will receive an emailed confirmation with the training details, e.g., date, time, location, Zoom link, etc.

Step Actions (11 steps)

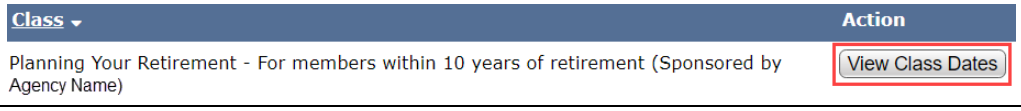
Step 1 From the homepage, select the **Education** global navigation tab.



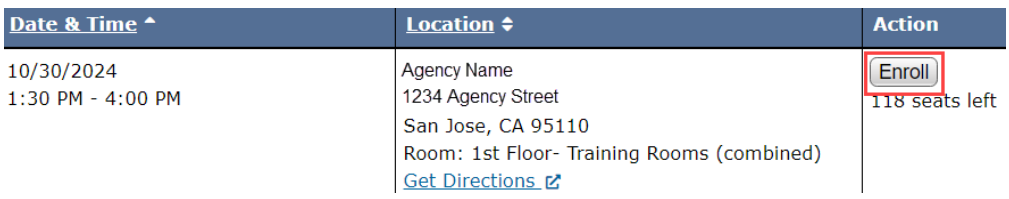
Step 2 Select the **Classes** local navigation link or the **Enroll in a Class** hyperlink on the dashboard.

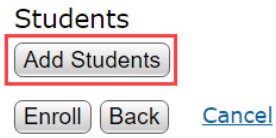
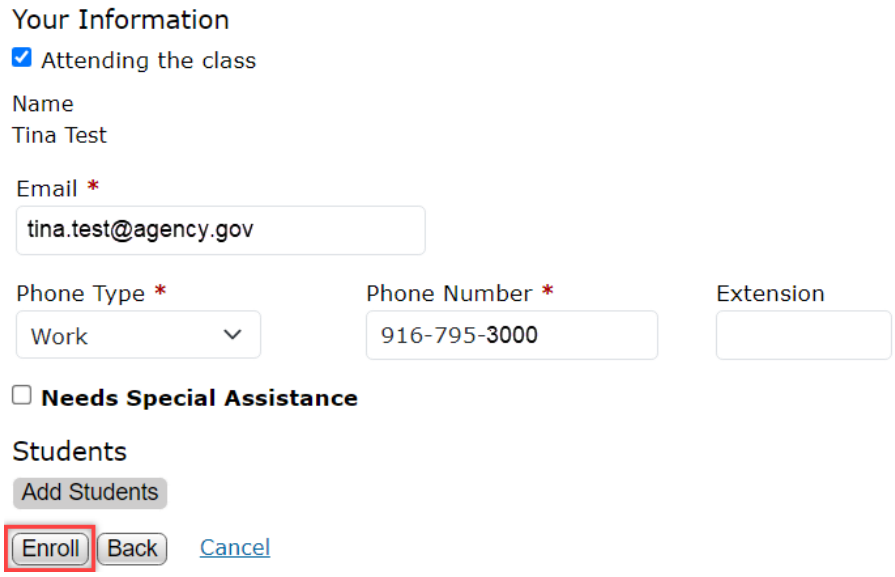


Step 3 ext to the class, Select the **View Class Dates** button.



Step 4 Next to the class date and location, select the **Enroll** button.



Step 5	Are you attending this class? **Yes:** Leave the *Attending the class* check box selected. **No:** Deselect the *Attending the class* check box.
Step 6	Near the bottom left, select the **Add Students** button. 
Step 7	Enter the employee's name and email address.
Step 8	If the employee has an appointment with your agency, their name will be displayed for you to select.
Step 9	Select the **Save & Add Another** button to register another employee or the **Save & Finish** button. 
Step 10	Repeat steps 8 and 9 until you are done registering all employees.
Step 11	At the bottom left, select the **Enroll** button.  **You have completed this scenario.**

Unit 5: Submit Inquiry & Inquiry List

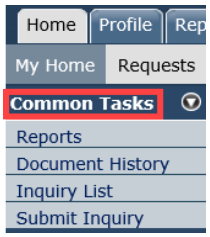
Submit Inquiry

This feature allows you to send a question or information online to CalPERS in a secure environment. When submitting an inquiry, follow the guidelines below.

- For privacy and security, do not include any Social Security numbers or HIPAA information.
- If your inquiry is for an individual employee, be sure to include their full name, date of birth, and CalPERS ID.
- If you are requesting demographic changes, include which type of documented proof you have, e.g., driver license, birth certificate, Social Security card, etc.

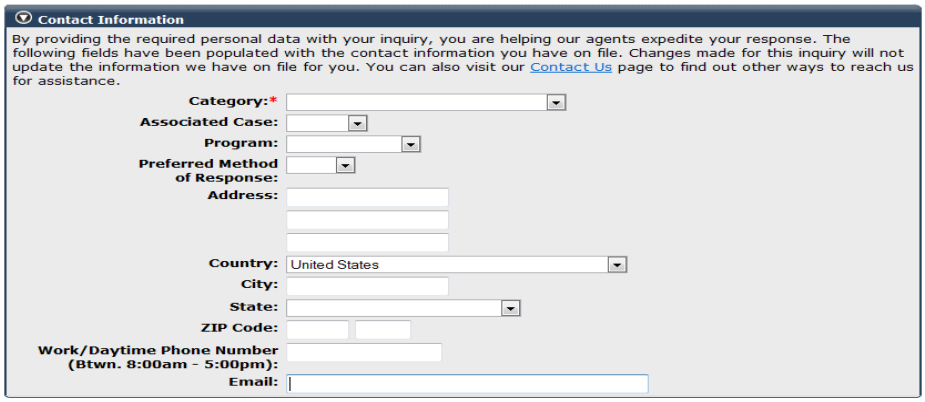
Step Actions (5 steps)

Step 1 From the homepage, select the Common Tasks left-side navigation folder.



Step 2 Select the **Submit Inquiry** link from the left-side navigation menu.

Step 3 Complete the Contact Information section.



Step 4 At the bottom, enter your question or information in the Inquiry field.



Step 5 At the bottom left, select the **Submit** button.

You have completed this scenario.

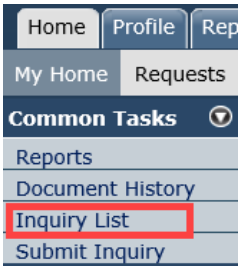
Inquiry List

Within five business days, you will receive an email that indicates a response to your inquiry is available. The Inquiry List displays all inquiries submitted by your agency's contacts. Your list of inquiries and responses is retained for future reference.

Step Actions (4 steps)

Step 1 From the homepage, select the **Common Tasks** left-side navigation folder.

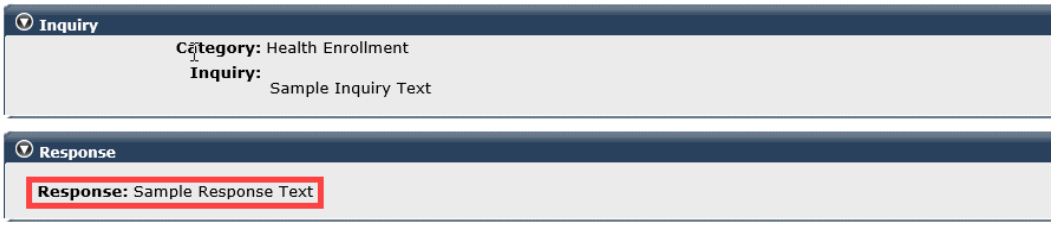
Step 2 Select the **Inquiry List** link from the left-side navigation menu.



Step 3 Select the **Inquiry ID** number for your inquiry. You may sort by column headers to find submitted inquiries.



Step 4 Within the Response section, review the response from a CalPERS team member.



You have completed this scenario.

Unit 6: Resources

Contents

myCalPERS Student Guides & Resources 40
Retirement Reference & Health Benefits Guides 40
Forms & Publications 40
Email Subscriptions & Circular Letters 41
myCalPERS Technical Requirements 42

myCalPERS Student Guides & Resources

The myCalPERS Student Guides & Resources page contains resources to help you navigate and process transactions through myCalPERS. The student guides will assist you with myCalPERS functionality related to job functions and correspond with the myCalPERS employer training classes. Check back often for the most updated versions.

Pathway: CalPERS website > Employers > Employer Education > (On the right side under Resources) myCalPERS Student Guides & Resources

Reference & Health Benefits Guides

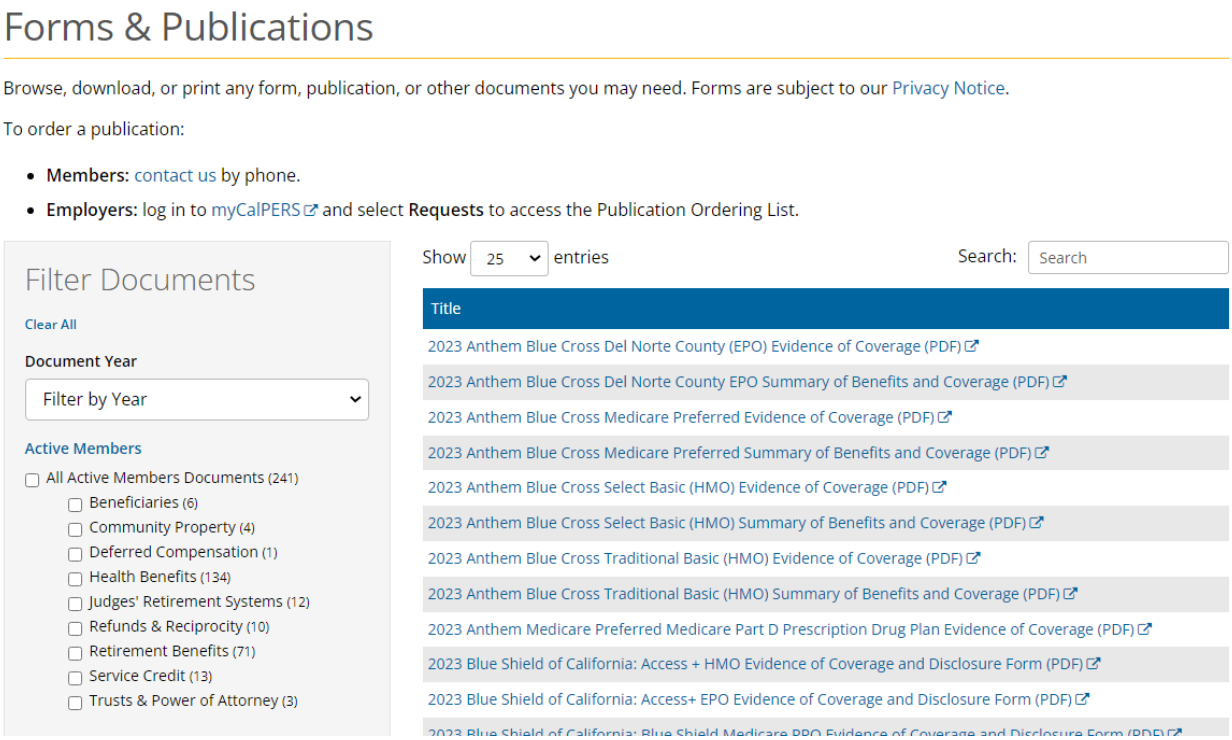
The Reference & Health Guides will help you understand the retirement and health rules, policies, laws, requirements, deadlines, etc. All contacts who process enrollments or convey retirement and/or health benefits information to employees should refer to these resources.

Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides

Forms & Publications

The Forms & Publications page allows you to browse, download, or print any form, publication, and other documents for members and employers.

Pathway: CalPERS website > Employers > Forms & Publications



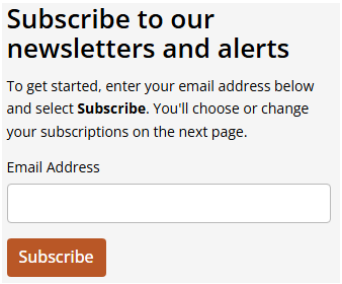
Email Subscriptions & Circular Letters

Email Subscriptions

Pathway: CalPERS website > Email subscriptions

Subscribe to receive the latest information about board meetings, legislative news, CalPERS Long-Term Care program, CalPERS news, employer bulletins, member education bulletins, Circular Letters, and State Social Security Administrator program newsletters.

Visit the Email Subscriptions page to subscribe.

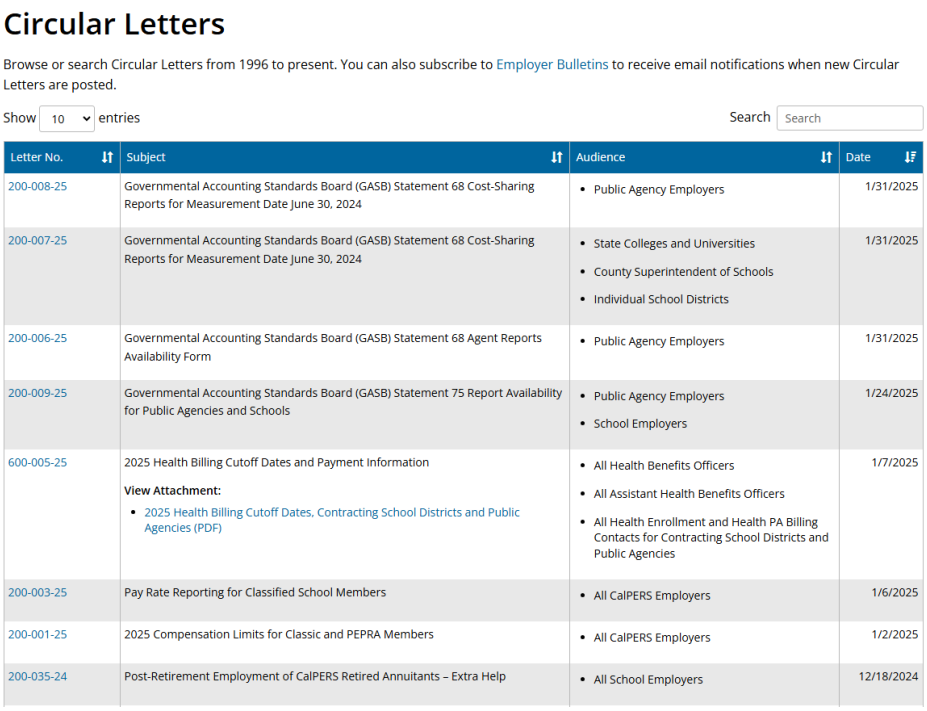


Circular Letters

Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters

Circular Letters notify employers of changes in laws, procedures, Employer News, health billing cutoff dates, etc. Subscribe to the Employer Bulletins to get Circular Letters emailed to you (refer to the Email Subscriptions information in the previous section).

Browse or search for Circular Letters from 1996 to the present.



Letter No.	Subject	Audience	Date
200-008-25	Governmental Accounting Standards Board (GASB) Statement 68 Cost-Sharing Reports for Measurement Date June 30, 2024	• Public Agency Employers	1/31/2025
200-007-25	Governmental Accounting Standards Board (GASB) Statement 68 Cost-Sharing Reports for Measurement Date June 30, 2024	• State Colleges and Universities • County Superintendent of Schools • Individual School Districts	1/31/2025
200-006-25	Governmental Accounting Standards Board (GASB) Statement 68 Agent Reports Availability Form	• Public Agency Employers	1/31/2025
200-009-25	Governmental Accounting Standards Board (GASB) Statement 75 Report Availability for Public Agencies and Schools	• Public Agency Employers • School Employers	1/24/2025
600-005-25	2025 Health Billing Cutoff Dates and Payment Information **View Attachment:** • 2025 Health Billing Cutoff Dates, Contracting School Districts and Public Agencies (PDF)	• All Health Benefits Officers • All Assistant Health Benefits Officers • All Health Enrollment and Health PA Billing Contacts for Contracting School Districts and Public Agencies	1/7/2025
200-003-25	Pay Rate Reporting for Classified School Members	• All CalPERS Employers	1/6/2025
200-001-25	2025 Compensation Limits for Classic and PEPRA Members	• All CalPERS Employers	1/2/2025
200-035-24	Post-Retirement Employment of CalPERS Retired Annuitants – Extra Help	• All School Employers	12/18/2024

myCalPERS Technical Requirements

The following five business partner page links are displayed:

myCalPERS Reports Catalog

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Reports Catalog

- myCalPERS Reports student guide
- List of employer reports and descriptions
- Type of reports (Benefits, Contributions, Financials, Health, Payroll, Retirement Enrollment, Retirement Contracts, and System Access Administration)
- User role needed to run each report

Special Compensation Reportability Table

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > Special Compensation Reportability Table

This is a table of reportability details for each member category within the identified special compensation category and type.

System Access Administrators

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators

- myCalPERS System Access Administration student guide
- myCalPERS System Privileges for Business Partner Roles supplemental guide
- New Contact Checklist, User Access Role Change and Exit Checklist

System Enhancements

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Enhancements

Access this link for added myCalPERS system enhancements that improve functionalities and efficiencies when conducting business with CalPERS.

Technical Resources

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > Technical Resources

You may also log in to a file readiness test environment on this page. Transactions processed in this environment will not update your agency's actual myCalPERS data.

- **Employers:**
  – Information for file uploading transactions in myCalPERS
  – Reporting Out-of-Class Hours Worked section (Data element definitions, sample CSV file, student guide, frequently asked questions, and Circular Letter)
- **Direct Authorization Vendors:** Information for organizations authorized to receive monthly deductions from a retirement warrant to pay a sponsored company
- **Making Payments:** Electronic Funds Transfer (EFT) and the CalPERS ACH ID number

CalPERS Contacts

Email

- To contact the employer educators for training 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 contact CalPERS Membership Unit for questions regarding membership eligibility and/or enrolling an employee, email **membership_reporting@calpers.ca.gov**.
- To contact the Cashiers Unit for questions about your agency's online payments, email **fcsd_cashiers@calpers.ca.gov**.
- To contact the myCalPERS System Support team for questions regarding the Retirement Appointment Reconciliation tool, email **EmployerTechnicalSupport@calpers.ca.gov**.
- To order large quantities of health publications, email **ossd_public_agency_requests_publication_fulfillment@calpers.ca.gov**.

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. Save time by having your employer myCalPERS account open before calling.

- 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

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. Review unit 5 for full instructions.