

myCalPERS Business Partner Relationships

Student Guide

August 22, 2025



Business Partner Relationships

This guide will assist your agency with the process of establishing, modifying, and ending business partner relationships.

Disclaimer

Business partner and participant information has been masked in this procedure guide.

System Access

To process these scenarios, you must have at least one of these myCalPERS user roles:

- Business Partner Employer Maintenance
- Business Partner Direct Authorization
- Business Partner Authorized Personal Loan Representative
- Business Partner Reciprocal
- Carrier
- System Access Administrator

If you are unable to process these scenarios, contact your agency's system access administrator (SAA) to update your myCalPERS access. You can identify your SAA(s) by navigating to the **Profile** global navigation tab. Within the Contacts section, the System Admin column has a Y for your SAA(s). If your agency does not have an SAA, call the CalPERS customer contact center at **888 CalPERS** (or **888-225-7377**).

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Introduction

A business partner relationship is an agreement between two agencies or between an agency and a company authorizing services to be performed on your agency's behalf. When a business partner relationship is established, the agency or company acting on behalf of your agency can perform services such as submitting payroll, processing retirement and health enrollments, or processing payments.

Services Provided

Business partner relationships can be established for each CalPERS contract or agreement type to perform the following services:

- Enrollment
- Billing
- Payroll

Notifications

CalPERS will send a letter to your agency and the agency you have a business partner relationship with when the business partner relationship:

- Has been approved or rejected by CalPERS
- Has had their begin or end dates modified
- Has ended

Scenario 1: Establish a Business Partner Relationship

System Logic

- If you add the business partner to myCalPERS, advise the contact entered in step 4 to call CalPERS to activate their account and establish their agency's myCalPERS access.
- The relationship start date can be backdated up to 60 days.
- Your agency can establish multiple relationships for the same services.
- If the relationship is between two state agencies, before submitting the request in myCalPERS, please email the [State Controller's Office](#) (SCO) at ppsdsacs@sco.ca.gov with the following information indicating that your agency is transferring personnel and payroll services. SCO will provide confirmation to CalPERS upon approval of your request.
 - Name of agency that will perform services
 - Agency code of the agency that will perform services
 - Name of agency that will no longer perform services
 - Agency code of the agency that will no longer perform services
 - Effective date of change
 - Address of agency that will perform services
 - Contact information for agency that will perform services

Step Actions (24 steps)

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

Step 2 Select the **View BP Relationships** left-side navigation link.

Step 3 Within the Business Relationships section, select the **Add New** button.

Step 4 Within the Maintain Business Relationship Details section, choose the **Select** link.

Maintain Business Relationship Details

Business Partner Name: * [Select](#)

Address: *

Contact Name: *

Phone Number: *

Programs Supported

☐ California Public Employees' Retirement System

☐ PEMHCA Non-CalPERS Health Contract

☐ PEMHCA CalPERS Health Contract

☐ * I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.

Step 5 Within the Organization Search section, enter the business partner name, Federal Tax ID, or CalPERS ID.

Organization Search

Name:

Federal Tax ID:

CalPERS ID:

[Person Search](#)

Step 6 Select the **Search** button.

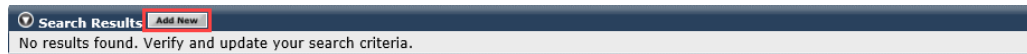
Step 7 Is the business partner displayed in the Search Results section?

Yes: Skip to step 16

No: Continue to step 8

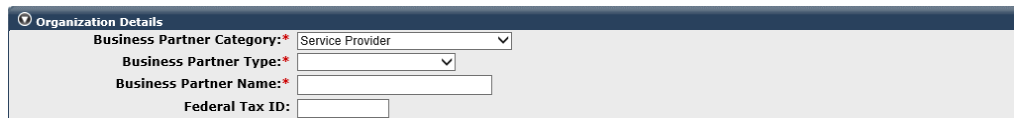
Note: Confirm the agency's Federal Tax ID or CID before selecting the **Add New** button. If multiple results are displayed, contact the agency to confirm the Federal Tax ID and CalPERS ID.

Step 8 Within the Search Results section, select the **Add New** button.



The screenshot shows a dark blue header bar with a magnifying glass icon, the text 'Search Results', and a red-outlined 'Add New' button. Below the header, a light gray box contains the text 'No results found. Verify and update your search criteria.'

Step 9 Complete the Organization Details section.



The screenshot shows a form titled 'Organization Details' with a dark blue header. The form contains four fields: 'Business Partner Category:*' with a dropdown menu showing 'Service Provider', 'Business Partner Type:*' with a dropdown menu, 'Business Partner Name:*' with a text input field, and 'Federal Tax ID:' with a text input field.

Step 10 Complete the Address & Communication Details section.

Step 11 Complete the General Contact Information section.

Step 12 Select the **Submit** button.

Step 13 Verify the U.S. Postal Service Match is correct.

Step 14 Select the **Confirm** button.

Step 15 Select the **Submit** button.

Step 16 Within the Search Results section, select the radio button for the appropriate business partner.

Step 17 Select the **Select** button.

Step 18 Within the Maintain Business Relationship Details section, enter the contact's name and phone number for the business partner selected in step 4.

Note: The Contact Name field must contain the name of an individual from the third-party agency responsible for providing services.



The screenshot shows a form titled 'Maintain Business Relationship Details' with a dark blue header. The form contains several fields: 'Business Partner Name:*' with a text input field, 'Address:*' with a text input field, 'Contact Name:*' with a text input field, and 'Phone Number:*' with a text input field. Below these fields, there is a section titled 'Programs Supported' with two checkboxes: 'California Public Employees' Retirement System -30366' and 'PEMHCA CalPERS Health Contract -33932'. At the bottom, there is a checkbox labeled 'I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.'

Step 19 Within the Programs Supported area, select the specific contract(s) or agreement(s) for which the business partner will be responsible for providing services.

Maintain Business Relationship Details

Business Partner Name: Company Payroll Services [Select](#) **CalPERS ID:** 0123456789

Address: PO Box 123
Sacramento, CA 95816

Contact Name: Arthur Reed **Phone Number:** 916-795-3000

Programs Supported

☒ California Public Employees' Retirement System -30366 ☐ PEMHCA CalPERS Health Contract -33932

☐ PEMHCA Non-CalPERS Health Contract -34432

☐ * I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.

Step 20 Under each contract, select the check box for the service the business partner will provide.

Maintain Business Relationship Details

Business Partner Name: Company Payroll Services [Select](#) **CalPERS ID:** 0123456789

Address: PO Box 123
Sacramento, CA 95816

Contact Name: Arthur Reed **Phone Number:** 916-795-3000

Programs Supported

☒ California Public Employees' Retirement System -30366 ☒ PEMHCA CalPERS Health Contract -33932

☒ PEMHCA Non-CalPERS Health Contract -34432

California Public Employees' Retirement System - 30366

☒ Enrollment Services
☒ Billing Services
☒ Payroll Services

PEMHCA CalPERS Health Contract - 33932

☒ Enrollment Services
☒ Billing Services
☒ Payroll Services

PEMHCA Non-CalPERS Health Contract - 34432

☒ Enrollment Services
☒ Billing Services
☒ Payroll Services

☐ * I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.

Step 21 For each service, complete the Relationship Start Date field.

Maintain Business Relationship Details

Business Partner Name: Company Payroll Services [Select](#) **CalPERS ID:** 0123456789

Address: PO Box 123
Sacramento, CA 95816

Contact Name: Arthur Reed **Phone Number:** 916-795-3000

Programs Supported

☒ California Public Employees' Retirement System -30366 ☐ PEMHCA CalPERS Health Contract -33932

☐ PEMHCA Non-CalPERS Health Contract -34432

California Public Employees' Retirement System - 30366

☐ Enrollment Services
☐ Billing Services
☒ Payroll Services

Relationship Start Date: 03/01/2021 **Relationship End Date:**

☐ * I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.

Step 22 If applicable, complete the Relationship End Date field for each service.

Step 23 Select the certification check box at the bottom.

Step 24 Select the **Establish Relationship** button.

You have completed this scenario.

Scenario 2: Modify or End a Business Partner Relationship

System Logic

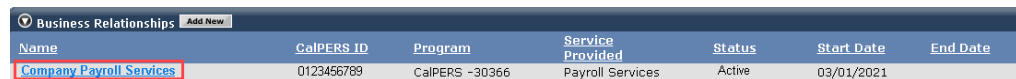
- End dates can only be entered or updated by the CalPERS contracting agency.
- If the current date is used as the end date, allow 24 hours for myCalPERS to terminate the relationship.

Step Actions (5 steps)

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

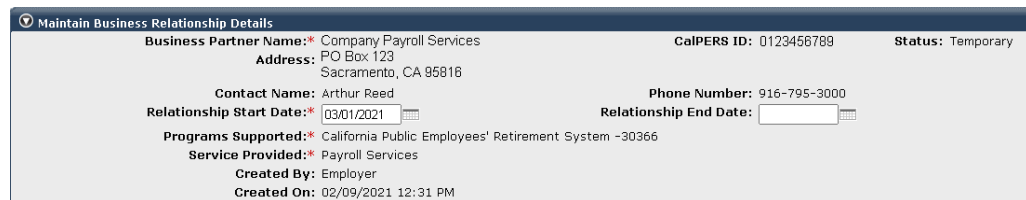
Step 2 Select the **View BP Relationships** left-side navigation link.

Step 3 Within the Business Relationships section, select the name of the business partner name associated with the service you want to terminate.



Business Relationships <small>Add New</small>						
Name	CalPERS ID	Program	Service Provided	Status	Start Date	End Date
Company Payroll Services	0123456789	CalPERS -30366	Payroll Services	Active	03/01/2021	

Step 4 Within the Maintain Business Relationship Details section, modify the relationship as necessary.



Business Partner Name: * Company Payroll Services		CalPERS ID: 0123456789	Status: Temporary
Address: PO Box 123 Sacramento, CA 95818			
Contact Name: Arthur Reed		Phone Number: 916-795-3000	
Relationship Start Date: * 03/01/2021		Relationship End Date: <input type="text"/>	
Programs Supported: * California Public Employees' Retirement System -30366			
Service Provided: * Payroll Services			
Created By: Employer			
Created On: 02/09/2021 12:31 PM			

Step 5 Select the **Save** button.

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.

- [myCalPERS Student Guides & Resources](#)
Pathway: CalPERS website > Employers > Employer Education > myCalPERS Student Guides & Resources (*under Resources heading*)
- [Business Rules & myCalPERS Classes](#)
Pathway: CalPERS website > Employers > Employer Education > Business Rules & myCalPERS Classes

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**.

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 and select the **Submit Inquiry** link to submit a question or request.