

myCalPERS Primary Contact Types & Documents

Supplemental Guide

March 7, 2026



Introduction

This supplemental guide lists which CalPERS documents are sent to each myCalPERS primary contact type. Review this information before you assign a primary contact to ensure documents are delivered to the appropriate individuals.

How to Use This Guide

This guide lists:

- Each myCalPERS contact type
- CalPERS documents that may be sent to each primary contact type

Use this guide to:

- Understand what documents are associated with each contact type
- Assign primary contact types based on the information each individual needs to receive
- Ensure critical documents are delivered on time

Document Delivery

Documents are delivered based on the primary contact's preferred communication in myCalPERS:

- Mail – Documents are mailed directly to the contact.
- Email – The contact receives an email notification at the end of each business day when new documents are added to your agency's **Document History** in myCalPERS for review.

Unassigned Contact Type

If you do not assign a specific primary contact, documents are sent in the following order:

1. General primary contact
2. Any primary contact
3. Any General contact
4. Any contact
5. Your agency's mailing address

Note: This is a general distribution rule. Individual documents may follow a different hierarchy.

Important Notes

- Contact types do not define job roles or responsibilities.
- Documents are delivered based on contact type, not system access.
- Only your system access administrator (SAA) can update contact types and preferred communication in myCalPERS.

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Agency Election Officer

The Agency Election Officer primary contact may receive the following 14 documents:

- **Board Election**
 - Certificate of Delivery - Member - At - Large
 - Certificate of Delivery - Member - At - Large - Position B – Special
 - Certification of Delivery - Public Agency
 - Certification of Delivery - Public Agency - Special
 - Certification of Delivery - Retired - Special
 - Certification of Delivery - School - Special
 - Certification of Delivery - State - Special
 - Election Officer Designation & Certification Designation - Member - At – Large
 - Election Officer Designation & Certification Designation - Member - At - Large - Position B - Special
 - Election Officer Designation & Certification Designation - Public Agency – Special
 - Election Officer Designation & Certification Designation - Retired – Special
 - Election Officer Designation & Certification Designation - School – Special
 - Election Officer Designation & Certification Designation - State - Special
- **Correspondence** - Employer Election Correspondence

Arrears Administrator

The Arrears Administrator primary contact may receive the following three documents:

- **Financial**
 - Arrears Adjustment Notice
 - Arrears Invoice
- **Retirement Enrollment** - No Cost Member Paid Arrears Cancellation Letter

Contract Services

The Contract Services primary contact may receive the following 115 documents:

- **Business Partner Administration**
 - Certificate of Annexation Action
 - Certificate of Lapsation Action
 - Certificate of Unification Action
 - Confirmation of Modification Agreement Approval
 - Contract-Agreement Qualifications Approval
 - Contract-Agreement Qualifications Rejection
 - Insufficient Information for Business Partner Qualification
 - Medical Group Assignment Notice
 - Request for Business Partner Information Change
 - Request for School District Organization Changes
- **Contracts**
 - Certification of Governing Bodies Action
 - Business Partner Welcome Letter
- **Health Contract**
 - Employer Acknowledgement Letter
 - Health Resolution - Change
 - Health Resolution - Domestic Partner
 - Health Resolution - Less Than Half Time
 - Health Resolution - New
 - Health Resolution - Rescind Optional Provision
 - Health Resolution - Survivor
 - Health Resolution - Termination
 - Health Resolution - Vesting
 - Participant Notification of Employer Health Contribution Change
- **Retirement Contract**
 - 4th Level 59 Survivor Ballot
 - 59 Survivor Certification
 - 59 Survivor Fact Sheet for Indexed Level
 - 59 Survivor Fact Sheet for Fourth Level
 - 59 Survivor Second Election Letter
 - 59 Survivor Second Opportunity Ballot

- Agreement for Reciprocal Benefits Document
- Amendment Activation Document
- Amendment Ballots
- Amendment Final Cover Letter
- Amendment Resolution of Intention
- Amendment Resolution of Intention Letter
- Amendment To Contract
- Business Partner Execution Letter
- Cancel Retirement Termination Notification
- Certification of Compliance with 7507
- Certification of Cost Share Form
- Certification of Different Level
- Certification of Employee Election - Cost Share
- Certification of Employee Election - General Election
- Certification of Employee Election - LST
- Certification of Final Action
- Certification of Final Action (COE)
- Certification of Government Code Section 21031
- Certification of Joining a Risk Pool
- Certification of PA Compliance With 20903
- Certification of School Compliance with 20904
- Certification of Pension Plan Administrator
- Certification of School Governing Body's Action
- Contract-Agreement Cancellation Notice
- Copy of the Contract
- Cost Info for 2yr Additional Service Credit - Section 20903
- Cost Info for 2yr Additional Service Credit - Section 20904
- Cost Share as Part of a Formula Change
- Cost Share Ballot
- Cost Share Ballot for Amendment
- CSUC Ballot
- Disclosure of Costs (7507)
- Eligible Classifications List
- Employee Ballot
- EPMC Letter of Compliance
- Final Compensation at Retirement Letter
- Final Compensation at Termination Letter
- Final Cover Letter

- Formula Benefit Factor Fact Sheet
- Granting Two Years Additional Service Credit Cover Letter
- Index Level 59 Survivor Ballot
- Info for 2yr Additional Service Credit - Section 20903
- Info for 2yr Additional Service Credit - Section 20904
- Information Practices Statement
- Initial Enrollment Notification
- LST Ballot
- Merger Processing Complete
- Modified or Supplemental Formula Ballot
- New Member Category Amendment R of I Letter
- Notification to Select Final Provisions
- Options at Termination Notification
- Ordinance
- Outstanding Receivable Notification
- Public Agencies Maintaining Reciprocal Retirement Systems
- Report for Final Cost of Termination
- Report for Preliminary Cost of Termination
- Reclassifications Ballot
- Reciprocity Cover Letter
- Reciprocity Final Cover Letter
- Resolution Authorizing Contract
- Resolution for EPMC
- Resolution for Paying and Reporting EPMC
- Resolution for Time-in-Grade EPMC
- Resolution for Paying and Reporting Time-in-Grade EPMC
- Resolution of Intention
- Resolution of Intention Letter
- Resolution to Amend
- Resolution to Terminate
- Retirement Termination Confirmation Letter
- Retirement Termination Cover Letter
- Retirement Termination Final Action
- Retirement Termination Guidelines
- Retirement Termination Valuations Notification
- Request Additional Costing or Census Data
- Special Compensation Written Labor Agreement Approval Letter
- SSA Confirmation Letter

- State Reclassification Letter
- Summary of Major Provisions
- Tax Deferred Member Contributions
- Tax Deferred Service Credit Purchases
- Tax-Deferred Service Credit Purchase Approval
- Two Years Additional Service Credit Approval Letter
- Two Years Additional Service Credit Resolution
- Uniform Reciprocal Provisions
- Uploaded Documentation Notification
- Waiting for Required Document for an Agreement Notification
- Waiver of Rights Form (LST)

Enrollment

The Enrollment primary contact may receive the following five documents:

- **Disability** - Disability Reciprocity Form BSD 923s Cover Letter
- **Participant Administration**
 - Reclassification Notification for the SCO
 - State ARP Confirmation Notice to Reciprocal System
- **Refunds** - Reciprocal Agency Refund Notice
- **Service Retirement** - Reclassification Notification for the SCO

Financials

The Financial primary contact may receive the following 19 documents:

- **Financial**
 - 1959 Survivor Billing Invoice
 - Employer Transfer of Overpayment Liability Invoice
 - GASB 68 Invoice
 - Golden Handshake Interest Notification
 - Golden Handshake Invoice
 - Golden Handshake Monthly Statement
 - Interest Assessment on Unfunded Accrued Liability Notification
 - JLRS GASB 68 Report Invoice
 - Notification of Offset to Reserves
 - OPEB Data Extract
 - Out-of-Class Admin Fee Invoice
 - Out-of-Class Penalty Fee Invoice
 - SB 278 Employer Transfer of Overpayment Liability Invoice
 - Retired Annuitant Late Fee Adjustment Notice
 - Retired Annuitant Late Fee Invoice
 - Underpayment of Employer Contribution Notification
 - Unfunded Accrued Liability Invoice
- **Payroll Reporting** - Interest Assessment on Underpayment of Employer Contribution Notification
- **Replacement Benefit Plan** - IRS to Delegate CalPERS as Tax Authority

General

The General primary contact may receive the following 40 documents:

- **Benefit Payments**
 - Manual Claims Schedule for Contingency Reserve Fund
 - Remittance Advice for RBF Warrant
 - Request Warrant Photocopy
 - SCO Claims Schedule
 - SCO Claims Schedule Paper Warrant
 - SCO Claims Schedule for RBF
 - SCO Claims Schedule for Tax Payment
 - SCO Payee List for RBF
- **Business Partner Administration**
 - Document Cover Sheet
 - Employer Report of Member Statements (PERS)
 - Notification of Business Partner Relationship Change
- **Direct Authorization Agreement**
 - DA Payment Address Confirmation
 - DA Termination Notification
- **Disability Retirement**
 - Disability Incomplete Info Letter
 - Disability Request Additional Info – Employer
 - Disability Request Additional Info - Worker's Comp
 - Disability Request for Supplemental Report
 - Notification to Independent Medical Physician
 - Request Additional Information-Medical (Death)
- **Employer Review**
 - Compliance Acknowledgement Letter
 - First Review Letter
- **Financial**
 - CERBT and CEPPT Investment Claim Schedule
 - Miscellaneous Claim Schedule
- **Participant Administration** - Member Record Request

- **Payroll Reporting** - Warning of Potential Underpayment of Employer Contribution Notification
- **Health Appeal**
 - Health Appeal Plan Sponsor Request
 - Notification to Health Carrier
 - Request For Additional MSP Information
 - Request for Health Plan Information
- **Health Enrollment**
 - Carrier Claim Reminder
 - Carrier MSP Claim Cover Letter
 - Employer Response Letter to Initial Request
 - Employer MSP Claim Notification
 - Health Enrollment Employer Statement Form
 - Request for Health Plan Information
- **Member Elections** - Reciprocal Service Verification
- **Retirement Contract** - Readiness to Report Letter for Taxed and Tax Deferred Service Credit Purchases
- **Service Retirement** - Inform Entities of Judges' Retirement
- **Service Credit Purchase**
 - Reciprocal Payroll Deduction Agreement Form
 - SCP Election Confirmation to Reciprocal System

Health Benefit Officer

The Health Benefit Officer primary contact may receive the following two documents:

- Initial and Recertification Disabled Dependent Approval Letter – Employer
- Denial Notification Disabled Dependent ER

Health Enrollment

The Health Enrollment primary contact may receive the Employer Report Notification document.

Health PA Billing – Non - PERS

The Health PA Billing – Non – PERS primary contact may receive the Health Premium Statement - Non-PERS document.

Health PA Billing – PERS

The Health PA Billing – PERS primary contact may receive the Health Premium Statement – PERS document.

Human Resources

The Human Resources primary contact may receive the following 19 documents:

- **Benefit Payments**
 - Disability Recertification Letter to Employer
 - Retirement Acknowledgement Letter for Employers
- **Business Partner Administration** - Notification to Employer of Merged CalPERS ID
- **Disability**
 - Disability LS Employer Follow-up
 - Disability LS Determination Incomplete
 - Disability LS Finding of Fact and Member Appeal Status
- **Health Enrollment**
 - Invalid Claim Notification
 - Notification of Continued Eligibility
 - Notify Employers of New Health Rates
 - Pay Entity Health Benefits Enrollment Form
- **Member Elections**
 - Invalid Classic Benefit Enrollment Level (PA and School)
 - Invalid Classic Benefit Enrollment Level (State)
- **Participant Administration**
 - Appointment Change Notification for the Employer
 - Employer Reclassification Notification
- **Service Credit Purchase**
 - Request for Employer Information to process SCP Request
 - SCP Request Reciprocal System Certification Form
 - SCP Request Reciprocal System Salary Information Form
- **Service Retirement**
 - Partial Service Retirement Certification
 - Request for Information on FTE Schedule

Independent Medical Examiner

The Independent Medical Examiner primary contact will receive the following five documents:

- Disability: DR Letter to IME

- IME-JA Agreement
 - IME Application Document
 - Independent Medical Examiner Renewal Letter
 - Independent Medical Examiner Termination Letter
 - Payee Data Record Document

Local Administrator

The Local Administrator primary contact will receive the following two documents:

- Approval of New Business Partner Relationship Request
- Business Partner Access Registration Notice

Payroll

The Payroll primary contact may receive the following 50 documents:

- **ACTO**
 - ACTO Correspondence
 - Amendment Valuation Report
 - Amendment Valuation Working Papers
 - Annual Valuation Report
 - Annual Valuation Working Papers
 - AVS Supporting Document
 - Employer/Employee Rate Notification
 - New Agency Valuation Report
 - New Agency Valuation Working Papers
 - Termination Valuation Working Papers
- **Benefit Payments** -Notification to Employer of Payment Plan for Overpayment Receivable
- **Compliance Review**
 - Annual Out-of-Class Validation Notice
 - Missed Out-of-Class Validation Notice
 - Out of Class Frequently Asked Questions
- **Death** - Report of Separation for Death - Request for Payroll Info
- **Disability**
 - LS CP and ADPP Correspondence
 - Notification to Employer to Terminate ADPP
- **Employer Review**
 - Pension Audit Denial Letter
 - Pension Audit Interim Letter
 - Third Review Letter
- **Participant Administration** - Request Information for Compensation Review
- **Payroll Reporting**
 - Certificated Member - Missing Full Year of Service Credit
 - Employer Fee Appeal Status Notification
 - Furlough Reduction Implementation Inquiry
 - Furlough Reduction Implementation Inquiry Second Request
 - Late Payroll Report Correction Fee Notification

- Late Payroll Reporting Fee Notification
- Notification of Appointment Contributory Status
- Notification of Missing or Un-posted Payroll Report
- Payroll Report Validation and Posting Results
- Payroll Report Approaching Due Date Notification
- Payroll Schedule Change Notification
- Payroll Schedule Change Requires Approval Notification
- Payroll Schedule Extension Notification
- Request Exemption for Non-Reportable Earned Period Report Exemption Notification
- Request For Lost Earnings Information
- **Retirement Contract**
 - Latest Actuarial Valuation Report
 - Name and Telephone Number of Actuary and Firm
- **Retirement Enrollment** - Overtime/ Non-Contributing Letter
- **Refund** - Reciprocity Information Needed for Refund
- **Service Credit Purchase**
 - Employer Notification of Payroll Change
 - Incorrect SCP Payroll Deduction Letter
 - Notification to Employer to Discontinue Taking Payment Deductions
 - Notification to Employer for Payroll Deduction
 - SCP Payroll Deduction Error Letter – Employer
 - SCP Payroll Delinquency Notice – Employer
 - SCP Stop Payroll Deduction Letter – Employer
 - Start and Stop SCP Payroll Deduction Letter
 - Start Payroll Deduction for SCP Letter
 - Stop Payroll Deduction for SCP Letter

Social Security Administrator

The Social Security Administrator primary contact may receive the following 44 documents:

- **Financial**
 - SSA Fee Invoice
 - SSA Interest and Penalty Fee Notification

- **Social Security Administrator**
 - SSA - 218 Agreement - Medicare
 - SSA - 218 Agreement - Misc
 - SSA - 218 Agreement - Safety
 - SSA - 218 Ballots
 - SSA - 218 Ballots - Medicare
 - SSA - 218 Modification - Medicare
 - SSA - 218 Modification - Misc
 - SSA - 218 Modification - Safety
 - SSA - 218 Summary
 - SSA - 2nd Chance Modifications
 - SSA - 2nd Chance Modifications - Medicare
 - SSA - Annual Information
 - SSA - Annual Information Request Letter
 - SSA - Correspondence
 - SSA - Correspondence - AIR
 - SSA - Dissolution
 - SSA - Error Modification - Medicare
 - SSA - Error Modification - Misc
 - SSA - Error Modification - Safety
 - SSA - Final Resolution
 - SSA - Final Resolution - Medicare
 - SSA - Form 1945 Statement of Non Social Security Position
 - SSA - Formation Documents
 - SSA - IRS - Tax information Authorization
 - SSA - Resolution
 - SSA - Resolution - Medicare
 - SSA - Statement of Intent
 - SSA - Step 1 - Medicare Packet
 - SSA - Step 1 - Social Security Packet
 - SSA - Step 2 - Medicare Packet

- SSA - Step 2 - Social Security Packet
- SSA - Step 3 - Medicare Packet
- SSA - Step 3 - Social Security Packet
- SSA - Step 4 - Medicare Packet
- SSA - Step 4 - Social Security Packet
- SSA - Step 5 - Medicare Packet
- SSA - Step 5 - Social Security Packet
- SSA - Step 6 - Medicare Packet
- SSA - Step 6 - Social Security Packet
- SSA Agreement Termination
- Step 1 Social Security Divided Vote Resolution
- Step 1 Social Security Majority Vote Resolution

Contact Types That Do Not Receive Documents

Primary contacts for the following contact types do not receive documents unless your agency does not have a General primary contact:

- Contract Services - Actuarial
- Delegated Authority
- Executive
- Health Benefit Assistant
- Human Resources Benefit Officer
- Human Resources Personnel
- Member Contacts
- Replacement Benefit Fund Admin
- System Support