myCalPERS Reports

Student Guide

March 7, 2026

CalPERS

Introduction

The myCalPERS Reports tool queries your agency's data in myCalPERS and generates predefined reports with your chosen parameters in HTML, CSV, or Excel formats.

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

Your myCalPERS access roles determine which report you can run. If you are unable to run a report, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

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

1. Take Business Rules classes.

2. Review the Introduction to myCalPERS for Business Partners (PDF) student guide.

3. Attend a myCalPERS instructor-led class.

4. Review the self-paced online classes.

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

Contents

myCalPERS Reports Catalog

The [myCalPERS Reports Catalog](#) provides a list of available reports, samples of the reports, descriptions, and user roles needed to generate each report. Before running a report, you may want to review the samples to determine if the report meets your needs.

You can filter reports by one of the following report types:

- Benefits
- Contributions
- Financials
- Health
- Payroll
- Retirement Contracts
- Retirement Enrollment
- System Access Administration

Scenario 1: myCalPERS Reports Home

You will access myCalPERS Reports and review the home page.

Step Actions (4 steps)

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

Step 2   Select the **Reports** left-side navigation link.

Step 3   Review the myCalPERS Reports homepage.

Step 4   Locate the Recent Activity and Frequent Reports sections.

Note: You may select a report Title from the *Recent Activity* or *Frequent Reports* tables to open the criteria page and rerun the report.

- **Recent Activity**: Displays the last 10 reports you ran.
  - If the report's Format column indicates .xls (Excel) or .csv (CSV), you can select the **Generated** link in the Status column to download the report.
  - If the Format indicates Save Online (HTML), select the **Generated** link to open the report in HTML.
  - If the Format indicates View Online (HTML), you must rerun the report.
- **Frequent Reports**: Displays the five reports you run most often.

**You have completed this scenario.**

Scenario 2: Run Reports

You will run a report in HTML or download it in Excel or CSV format.

System Logic

- The Report Run Status page displays when you download a report in XLS or CSV format and when reports run automatically in the background. Large HTML reports run in the background.
- While a report is processing, the status shows *Running* with a message indicating it is generating in the background. You may safely navigate away from this page. These reports are automatically saved to the Generated Reports page.
- When the report is complete, the status changes to *Generated*. You can access the report from the Generated link on the Run Status page, the Home page, or the Generated Reports page.
- Online (.html) is a view-only format. You can download the report from the HTML view as CSV or XML files.

Step Actions (17 steps)

Step 1   From the homepage, select **Common Tasks** from the left-side navigation.
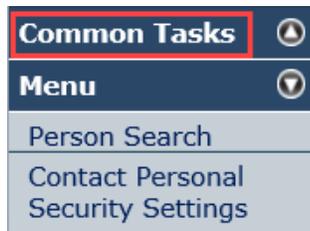
Step 2   Select **Reports** from the left-side navigation link.

Step 3   From the top navigation, select **Run Report**.

Step 4   Search by report name or scroll through the list.

Search by Report Name:

🔍 participant retirement pl

Participant Retirement Planning Report

Step 5   Select the report name link.

Step 6   Complete the report parameters.

Participant Retirement Planning Report ⓘ

The purpose of the report is to provide employers with retirement planning
information based on members' age group and member category.

MCP Release: 12.7.1
Report Version: 12.3.6
SPS Number: SPS2763

Business Partner CalPERS ID *

☑ **Agency Name - 1262943822**
☐ **Division Name - 1262943822**

Select All   Deselect All

Next

Note: Report parameters vary and may include multiple pages.

Step 7   Select the **Next** button.

Step 8   Within the Report Parameters section, are the parameters correct?

Report Parameters	︿
Business Partner Name:	Agency Name - 1262943822
Subscriber CalPERS ID:	
Statement Generation Month:	
Coverage Month Date From:	09/01/2025
Coverage Month Date To:	11/30/2025

Yes: Continue to step 9.

No: Select the **Back** button, then return to step 6.

|	
Step 9	Select a Run Option (format). Run Option: ⓘ ○ **Download (.xls)** ○ **Download (.csv)** ⦿ **Online (.html)** **Run Report** **Back** **Note:** Large reports that automatically run in the background will display a fourth run option of Save Online (.html).
Step 10	Select the **Run Report** button.
Step 11	Did you select Online (.html) as the Run Option? **Yes:** The report will display. Continue to Step 12. **No:** Skip to Step 15.
Step 12	Do you want to change the report parameters? **Yes**: Select the **Start Over** button located in the bottom toolbar, then return to step 6. ↻ **Start Over** **No**: Continue to step 13.
Step 13	Do you want to download the report? **Yes:** Select the **Download** button located in the bottom toolbar, then continue to step 14. ↓ **Download** **No: You have completed this scenario.**
Step 14	Select the format you want to download. CSV Excel ↓ Download

Step 15   Select the **Generated** link to download the report.

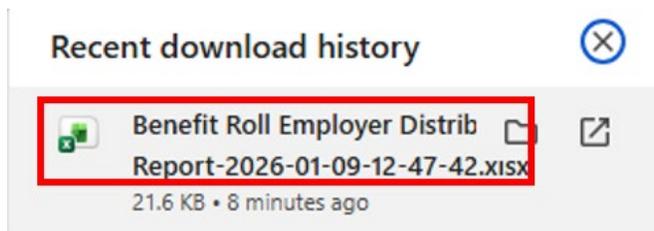## Report Run Status

Report Name	Participant Retirement Planning Report
Submitted	January 09, 2026 12:36 PM
Run Option	Download (.csv)
Status	Generated
Status Last Updated	January 09, 2026 12:36:47 PM

Step 16   Locate the report by selecting the **Download icon** located at the top right of your browser window.
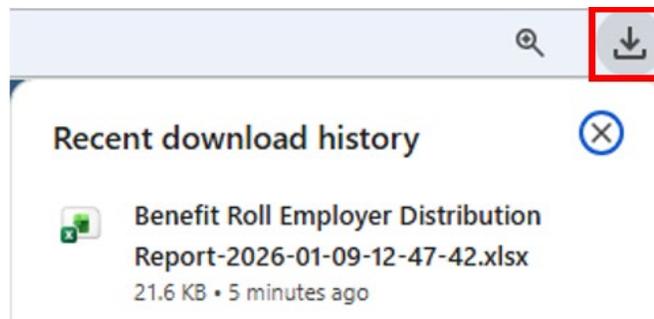
Step 17   Open the report.

You have completed this scenario.

Scenario 3: Locate Generated Reports

A generated report is created when a report is run in XLS or CSV format, or when a large HTML report runs in the background and does not automatically display.

You will locate a previously generated report.

System Logic

You can filter generated reports by the following options (with "User" as the default):

- **User**: Reports you generated. These reports remain available for 5 days.

- **System**: Reports that were generated automatically by background processes. These reports are typically available for one year or longer.

- **All**: Both user-generated and system-generated reports.

Step Actions (5 Steps)

Step 1   Select the **Generated Reports** tab.

Step 2   Do you want to download the report in the format indicated and for the same parameters it was run for on the Submit Date?

Yes: Select the **Generated** link, then continue to step 4.

Format ⓘ	Status	Last Submit Date
Download (.csv)	Generated	Nov 18, 2025 10:27 AM

No: Select the **View History** link, then continue to step 3.

Status	Last Submit Date	Run History
Generated	Nov 18, 2025 10:27 AM	View History

Step 3   Select the **Generated** link for the report you want to download.

| Format	Status	Submit Date	Available Until ⓘ
Download (.csv)	Generated	Nov 18, 2025 10:27 AM	Dec 02, 2025
Download (.xls)	Generated	Nov 18, 2025 09:02 AM	Dec 02, 2025
Download (.xls)	Generated	Nov 18, 2025 09:01 AM	Dec 02, 2025
Save Online (.html)	Generated	Nov 18, 2025 08:58 AM	Dec 02, 2025

Step 4   Is HTML the format you wanted?

Yes: **You have accessed your report and have completed this scenario.**

No: Locate the report by selecting the **Download icon** located at the top right of your browser window.
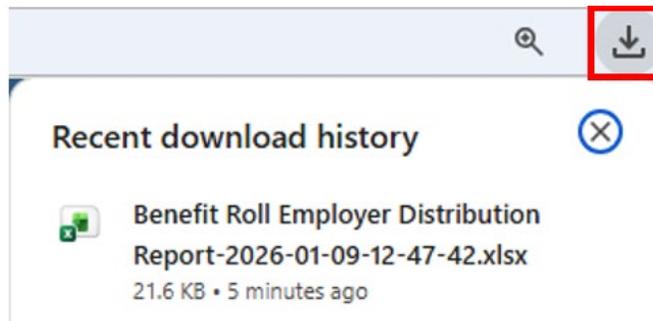
Step 5   Open the report.
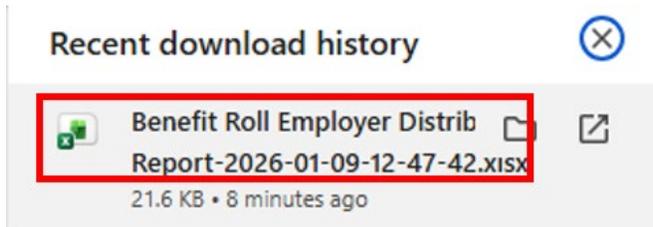
You have completed this scenario.

CalPERS Resources

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

- [myCalPERS Student Guides & Resources](#)
  Pathway: CalPERS website > Employers > Employer Education > myCalPERS Student Guides (under Resources on the right-side links)
- [Business Rules & myCalPERS Classes](#)
  Pathway: CalPERS website > Employers > Employer Education > Business Rules & myCalPERS Classes (under Classes & Workshops)
- [myCalPERS Reports Catalog](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Reports Catalog
- [myCalPERS Technical Requirements](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [System Access Administrators](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators

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.

Report Requests

In the event a report does not provide the information you need, you may request a custom report. Allow 6-10 weeks to fulfill each request. Additional paperwork and approval may be required for each request.

- For payroll or retirement reports, email [EmployerTechnicalSupport@calpers.ca.gov](#).
- For health reports, email [hamd_data_services@calpers.ca.gov](#).