

# myCalPERS Reports

Student Guide

**February 4, 2026**

# 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.....	3
Scenario 1: myCalPERS Reports Home .....	4
Scenario 2: Run Reports.....	5
Scenario 3: Locate Generated Reports .....	9
CalPERS Resources .....	11
CalPERS Contacts .....	12

## 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:

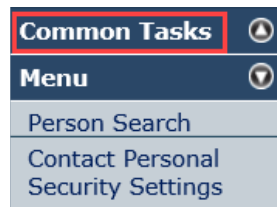
- Benefits
- Contributions
- Financials
- Health
- Payroll
- Retirement Contracts
- Retirement Enrollments
- System Access Administration

## Scenario 1: myCalPERS Reports Home

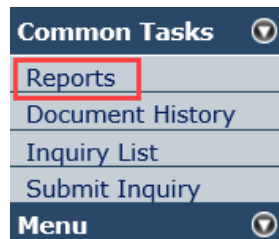
You will access myCalPERS Reports and review the home page.

### 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.

#### Recent Activity<sup>①</sup>

Title	Format <sup>①</sup>	Status	Submit Date
<a href="#">Business Partner Contact Info Report</a>	Download (.xls)	<a href="#">Generated</a>	December 16, 2025 10:18 AM
<a href="#">Business Partner Contact Info Report</a>	Save Online (.html)	<a href="#">Generated</a>	December 16, 2025 9:35 AM

#### Frequent Reports

Title
<a href="#">Business Partner Contact Info Report</a>
<a href="#">Retired Annuitant Hours Worked Report</a>

**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

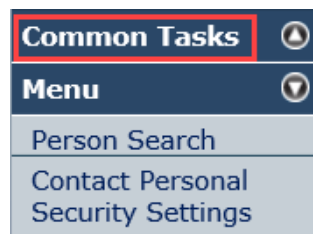
You will run a report in HTML or download it in Excel or CSV format.

### System Logic

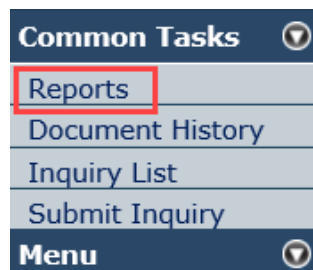
- The Report Run Status page displays when you download a report in XLS or CSV format and when reports run automatically in the background. Large HTML reports run in the background.
- While a report is processing, the status shows *Running* with a message indicating it is generating in the background. 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)

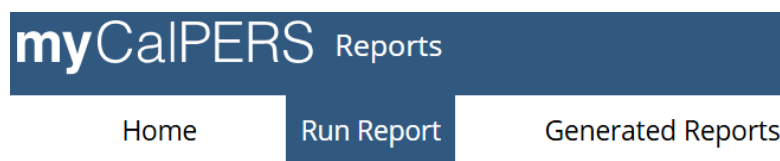
Step 1 From the homepage, select **Common Tasks** from the left-side navigation.



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.

Report Version: 12.3.6  
SPS Number: SPS2763

**Business Partner CalPERS ID \***

☒ **Agency Name - 1262943822**  
☐ **Division Name - 4314508017**

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 and 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, then continue to step 14.

 **Download**

**No:** You have completed this scenario.

---

Step 14 Select the format you want to download.

**CSV**

**Excel**

 **Download**

---

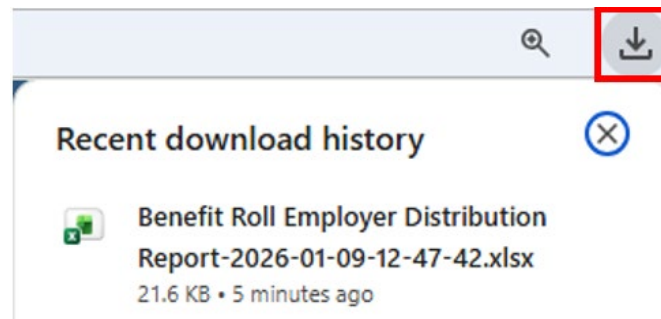
Step 15 Select the **Generated** link to download the report.

#### Report Run Status

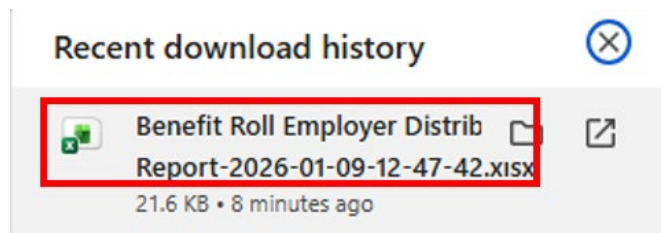
Report Name	Participant Retirement Planning Report
Submitted	January 09, 2026 12:36 PM
Run Option	Download (.csv)
Status	<a href="#">Generated</a>
Status Last Updated	January 09, 2026 12:36:47 PM

---

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.

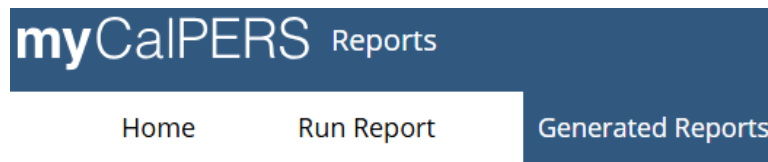
### System Logic

You can filter generated reports by the following options:

- **User:** Reports you generated. These reports remain available for 14 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)	<a href="#">Generated</a>	Nov 18, 2025 10:27 AM

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

Status	Last Submit Date	Run History
<a href="#">Generated</a>	Nov 18, 2025 10:27 AM	<a href="#">View History</a>

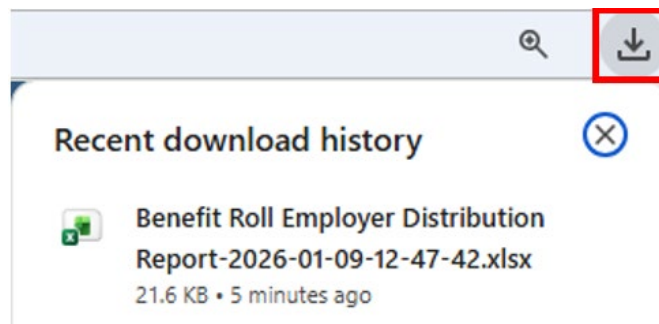
Step 3 Select the **Generated** link for the report you want to download.

Format	Status	Submit Date	Available Until <sup>i</sup>
Download (.csv)	<a href="#">Generated</a>	Nov 18, 2025 10:27 AM	Dec 02, 2025
Download (.xls)	<a href="#">Generated</a>	Nov 18, 2025 09:02 AM	Dec 02, 2025
Download (.xls)	<a href="#">Generated</a>	Nov 18, 2025 09:01 AM	Dec 02, 2025
Save Online (.html)	<a href="#">Generated</a>	Nov 18, 2025 08:58 AM	Dec 02, 2025

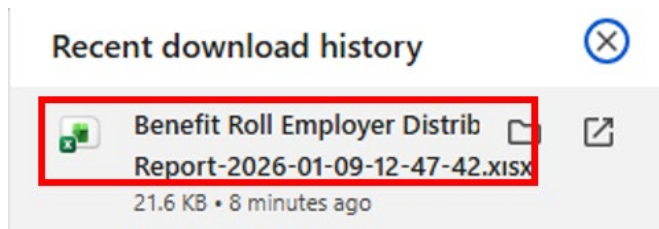
Step 4 Is HTML the format you wanted?

**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](http://www.calpers.ca.gov) at [www.calpers.ca.gov](http://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 Employer Reports (Cognos) 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](mailto:EmployerTechnicalSupport@calpers.ca.gov).
- For health reports, email [hamd\\_data\\_services@calpers.ca.gov](mailto:hamd_data_services@calpers.ca.gov).