myCalPERS System Access Administration

Student Guide

June 21, 2025

CalPERS

Introduction

This guide will assist system access administrators (SAA) with managing agency myCalPERS contacts, myCalPERS system access, and agency contact information.

To conduct business using myCalPERS, your organization must designate at least one SAA to manage system access for your agency. We recommend that you have at least two SAAs. If an SAA is unavailable (e.g., left your agency, on vacation, etc.), call CalPERS at **888 CalPERS** (or **888**-225-7377) for assistance.

What's New

- Scenario 6: Add or Remove Contacts From Health Email Notification List is new functionality to allow multiple contacts to receive the notification email at the end of the day after your employees submit an online health transaction or supporting document.
- Scenario 10: Unlock System Access has been readded to show how to unlock a contact.

Disclaimer

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

System Access

If you are unable to process these scenarios, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

Prior to taking a myCalPERS training, new users should review the Introduction to myCalPERS for Business Partners (PDF) student guide.

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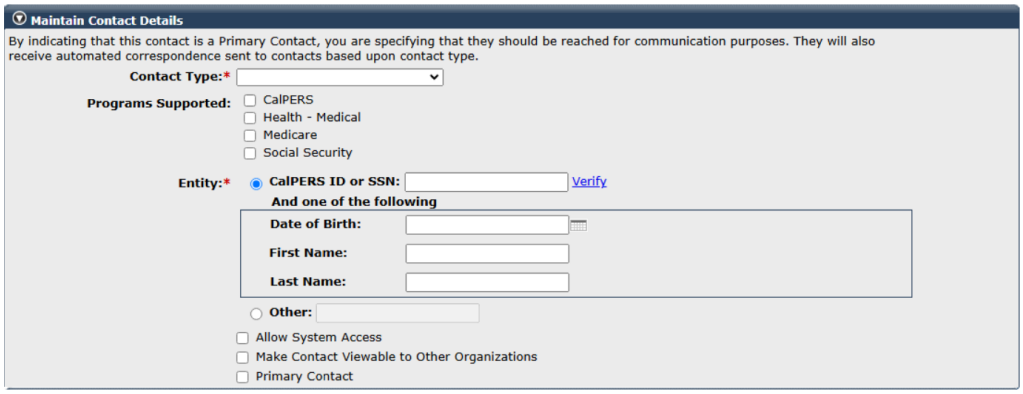
Terms and Definitions

Before you add a contact, review the following terms that will be used throughout this guide.

Contacts

The **Profile** global navigation tab will navigate to the Business Partner Summary page. A contact is someone at your agency who CalPERS can contact on a specific program topic. A contact may or may not have myCalPERS access. If there are more than eight contacts, select the **View More Actions** link to display additional contacts and information.

Maintain Contact Details



From the Contacts section, select the **Add New** button to navigate to the Business Partner Contact page.

- **Contact Type**: This drop-down list displays the duties, position titles, and/or program areas relating to a contact. If a contact serves multiple functions, add them for each contact type. This *does not determine their myCalPERS access*. We may use the contact type to communicate with a specific area of your agency regarding CalPERS business.
- **Programs Supported**: These check boxes are used to identify the programs the contact supports*. Selecting these does not grant system access.*
- **Entity**: At least one radio button must be used. To grant system access to a contact, their CalPERS ID or Social Security Number must be provided, along with one of the following: date of birth, first name, or last name. If you select the **Other** radio button, you can enter just a name of a contact who will be listed without system access.

- **Allow System Access**: This check box is used if the contact needs myCalPERS access to conduct business for your agency and contact CalPERS regarding agency or member-specific information.
- **Make Contact Viewable to Other Organizations**: This check box is used if you allow a contact's name and phone number to be available to other agencies via the **Other Organizations** global navigation tab.
- **Primary Contact**: This check box designates a contact to receive direct communication from CalPERS related to their contact type. When a primary contact isn't designated, CalPERS will send the communication to the General primary contact. If there is no General primary contact designated, CalPERS will send the communication to the agency's address on file.
- We strongly recommend that a primary contact be selected for each contact type to ensure that communications are received in a timely manner. Only one person can be identified as the primary contact for each contact type.

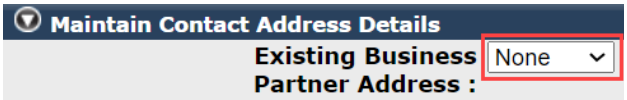
Maintain Preferred Communication Details

The Preferred Communication drop-down list displays two options for the contact:

- **Email:** Emailed notifications alert you to a new document in the myCalPERS. The document is not included in the email but can be accessed via the **Document History** left-side link under Common Tasks. Some documents may be mailed due to legal requirements, even if email is the preferred communication method.
- **Mail:** Mailed notifications will be sent via USPS to the address listed for the contact. A copy will also be saved in your agency's myCalPERS document history.

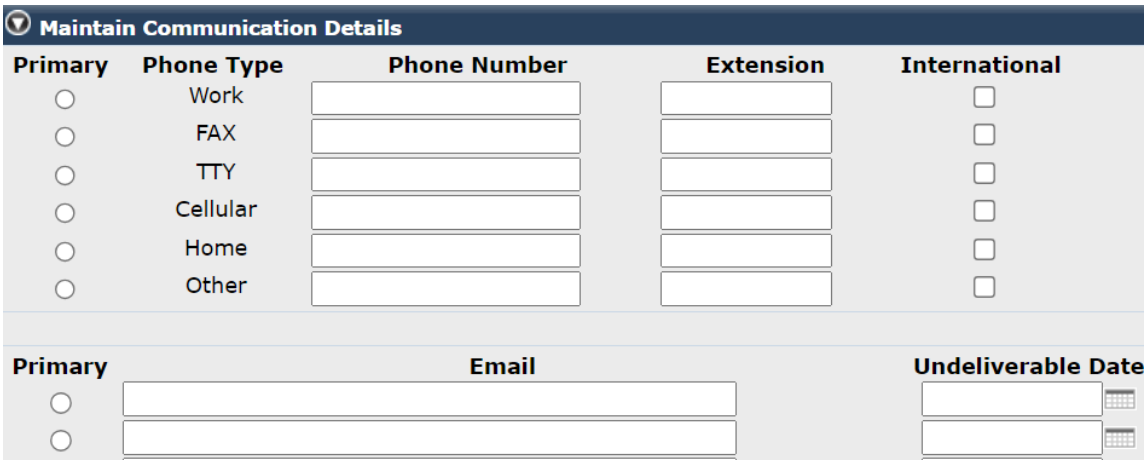
Note: Any agency contact with system access can review documents in your agency's myCalPERS document history, but only the relevant primary contact will be notified when a new document is available for review.

Maintain Contact Address Details



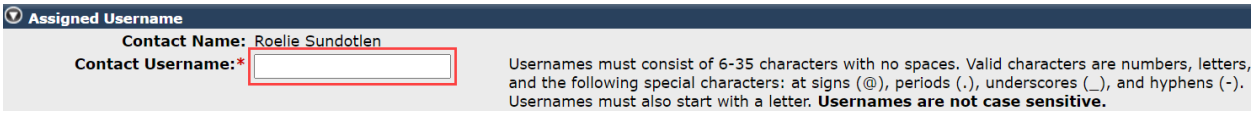
The Existing Business Partner Address drop-down list contains Physical and Mailing and will prepopulate the address based on your agency's addresses in myCalPERS.

Maintain Communication Details



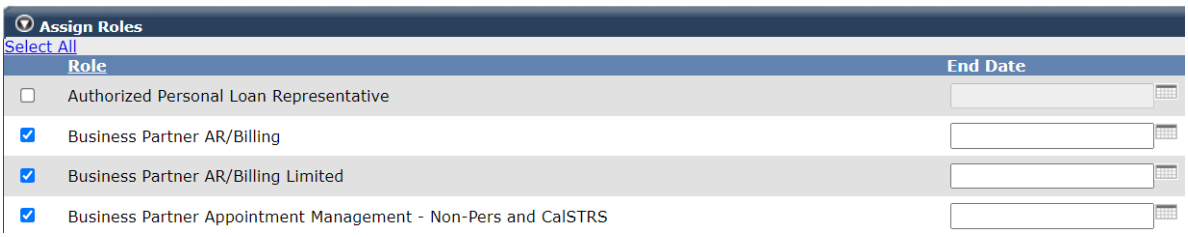
At least one primary phone number and email address for the contact are required.

Assigned Username



After saving the previous page, you navigate to the Access Details page to enter a username for the contact that fulfills the requirements and is not already used by another person.

Assign Roles



- **Role:** Access roles allow the contact to process transactions and run reports. Roles should be assigned based on the duties they will be performing for your agency. Only user roles specific to your agency's contracts are available. A complete list of roles can be found in the myCalPERS System Privileges for Business Partner Roles (PDF) supplemental guide.
- **End Date:** This optional field is to limit access to a role for a known length of time. If an end date is entered, the role will be granted until the end date. If the End Date field is left blank, the role is granted until an end date is entered, the user role is unchecked, or their account is deactivated or locked.

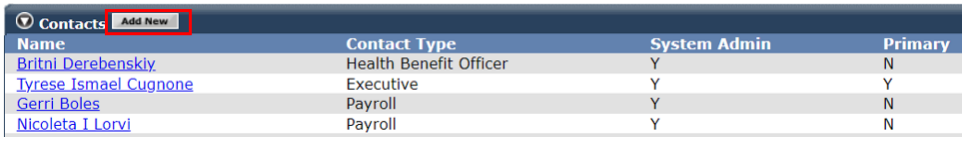
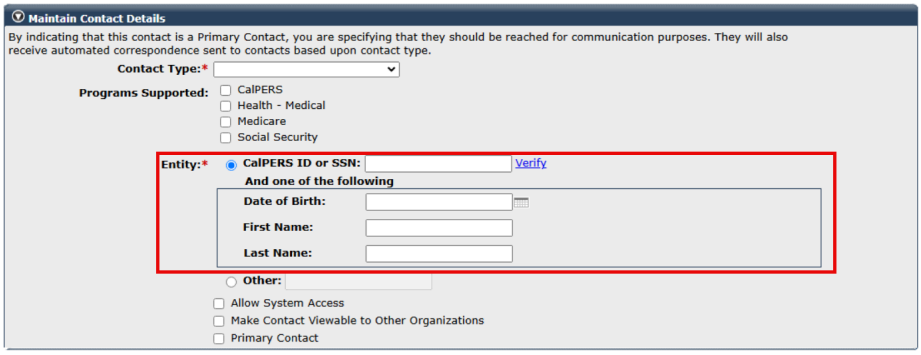
Unit 1: Add New Contacts

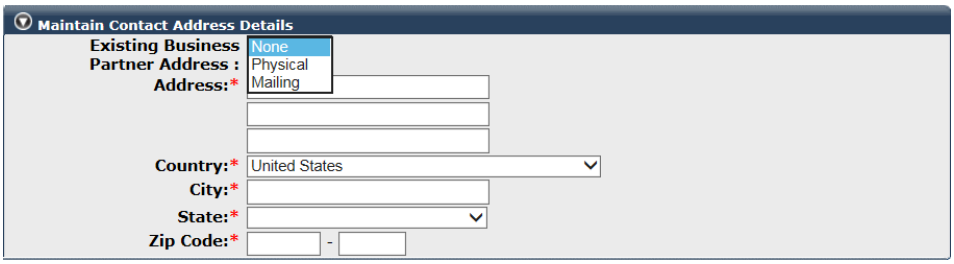
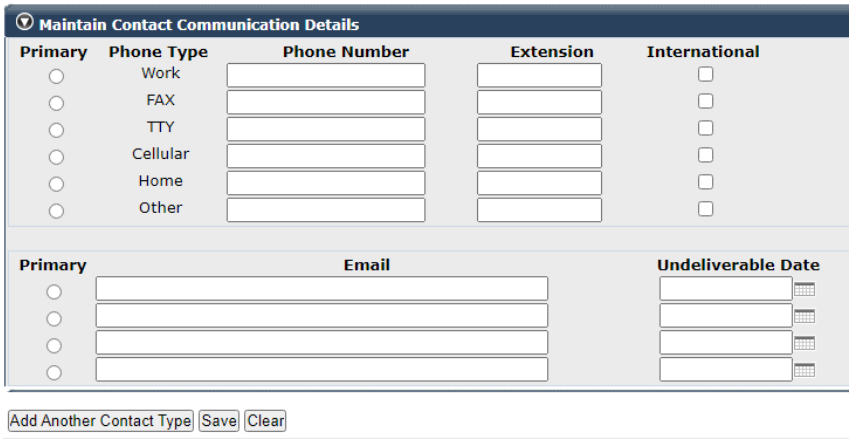
In this unit, you will learn how to add a contact with system access for your agency. A Social Security number or CalPERS ID along with either a date of birth, first name, or last name must be entered for all myCalPERS users.

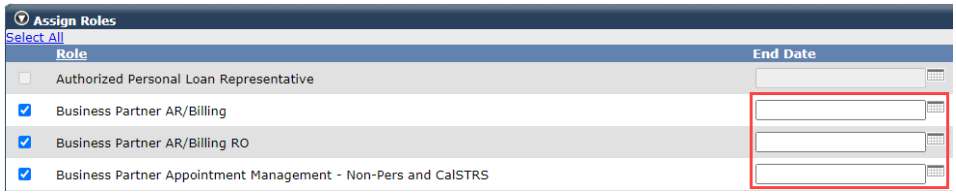
Security Agreement

Safeguard your agency's and employees' confidential data by creating a unique login for each employee needing myCalPERS access. It is a violation of the CalPERS Security Agreement to share login information between individuals. Review the CalPERS website's Conditions of Use and Privacy Policy for additional information.

Step Actions (26 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, select the **Add New** button. 
Step 3	In the Maintain Contact Details section, select from the Contact Type drop-down list.
Step 4	Select the Programs Supported check box(es).
Step 5	Enter the new contact's CalPERS ID or Social Security number along with either their Date of Birth, First Name, or Last Name. 
Step 6	Select the **Verify** link.

Step 7	Was the contact found in myCalPERS? **Yes**: Skip to step 10. **No**: Select the **Add Person** link.
Step 8	Complete the Person Details section.
Step 9	Select the **Save** button.
Step 10	Is the contact being granted system access? **Yes**: Select the Allow System Access check box. **No**: Continue to step 11.
Step 11	**Optional**: Sect the Make Contact Viewable to Other Organizations check box.
Step 12	If applicable, select the Primary Contact check box.
Step 13	In the Maintain Preferred Communication Details section, select the Preferred Communication method from the drop-down list.
Step 14	In the Maintain Contact Address Details section, select from the Existing Business Partner Address drop-down list. The None option requires you to enter the address which must be manually maintained to ensure CalPERS communications are received timely when the preferred method of communication is mail. 
Step 15	Enter the contact's phone number(s) and email address(es).
Step 16	Select the **Primary** radio button for one phone number and email address. 

Step 17	Does this person need to be added as another contact type? **Yes:** Select the **Add Another Contact Type** button and select a contact type. **No:** Continue to step 18.
Step 18	Select the **Save** button.
Step 19	Did you check the **Allow System Access** check box in step 10? **Yes**: Continue to step 20. **No**: **You've completed this scenario.**
Step 20	In the Assigned Username section, enter a username for this contact.
Step 21	In the Assign Roles section, select the check box(es) for the roles that apply to the contact. Refer to the myCalPERS System Privileges for Business Partner Roles (PDF) guide on what each role allows a contact to review and/or process.
Step 22	Are any of the selected user roles temporary and need an end date? **Yes**: Continue to step 23. **No**: Skip to step 24.
Step 23	Complete the End Date field(s). 
Step 24	Select the **Save** button.
Step 25	Provide the username and temporary password to the contact.
Step 26	Select the **Continue** button. **You have completed this scenario.**

Unit 2: Maintain Existing Contacts

In this unit, you will learn how to maintain your contacts to ensure the accuracy and security of information delivered to and from CalPERS. When your agency contacts are kept up to date, it prevents unauthorized access to agency and employee information in myCalPERS and ensures your agency is receiving proper communication from CalPERS.

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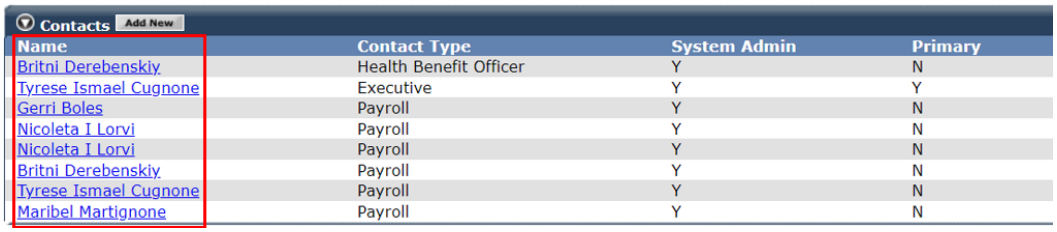
Scenario 1: Grant System Access

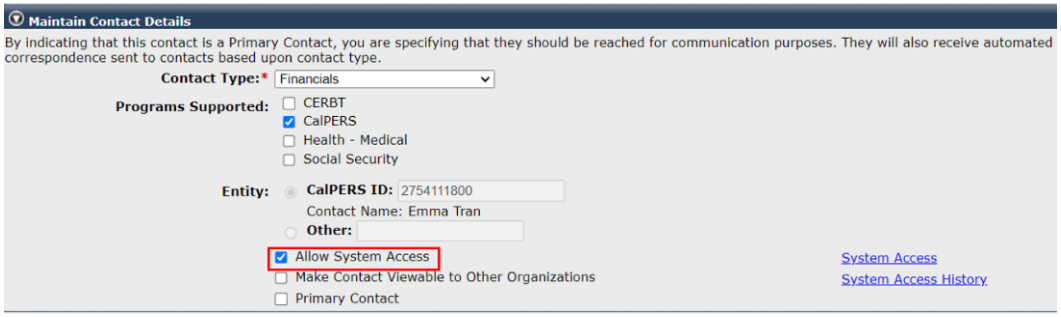
You will grant system access to an existing contact.

Step Actions (11 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Continue to step 3. **No**: Select the **View More Actions** link.
Step 3	In the Contacts section, select the **contact name** link.

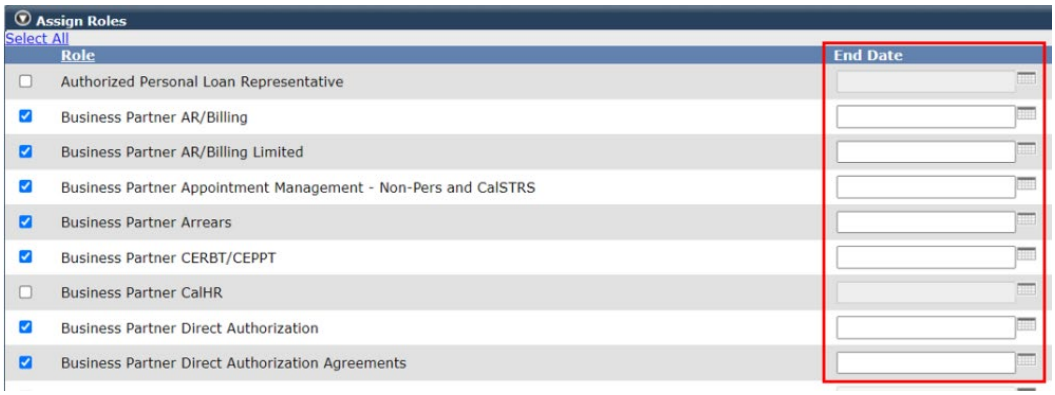


Step 4	In the Maintain Contact Details section, select the Allow System Access check box.



Step 5	In the Maintain Contact Details section, select the **System Access** link.
Step 6	In the Assigned Username section, enter a username for this contact.

Step 7	In the Assign Roles section, select the appropriate check box(es) to assign access roles to the contact. Refer to the myCalPERS System Privileges for Business Partner Roles (PDF) on what each role allows a contact to review and/or process.

Step 8	Do any of the selected user roles need to have an assigned end date? **Yes**: Complete the End Date field(s).  **No**: Continue to step 9.
Step 9	Select the **Save** button.
Step 10	Provide the username and temporary password to the contact.
Step 11	Select the **Continue** button. **You have completed this scenario.**

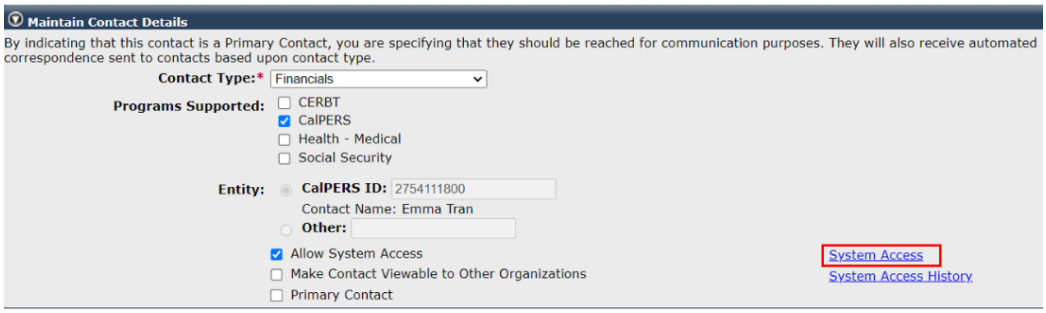
Scenario 2: Update System Access

A contact has a change in duties and needs additional myCalPERS access. You will update their system access.

System Logic

If the contact is logged in at the time their system access is updated, they will need to log out and log in again to use the additional access.

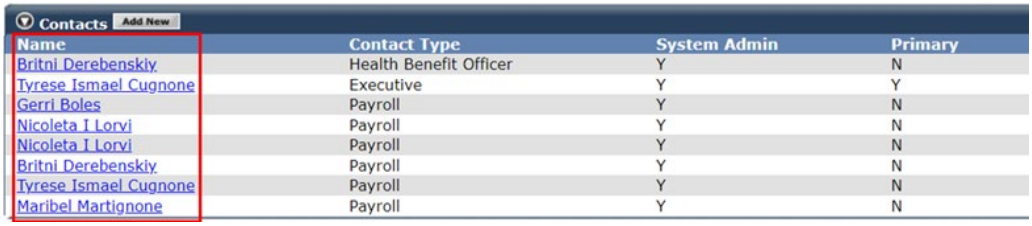
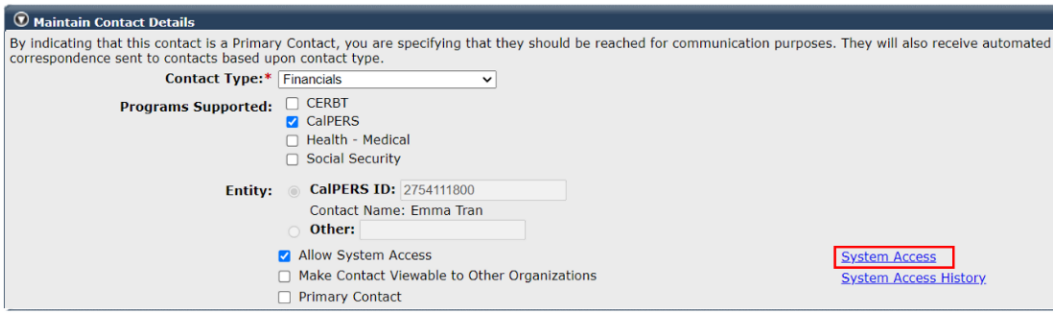
Step Actions (7 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Continue to step 3. **No**: Select the **View More Actions** link.
Step 3	Select the **contact name** link.
Step 4	In the Maintain Contact Details section, select the **System Access** link. 
Step 5	In the Assign Roles section, select and/or deselect the appropriate check box(es).
Step 6	Do the user role(s) need to have end date(s) updated? **Yes**: Complete the End Date field(s). **No**: Continue to step 7.
Step 7	Select the **Save** button. **You have completed this scenario.**

Scenario 3: Add an Additional System Access Administrator

You will designate an additional SAA for your agency.

Step Actions (7 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Continue to step 3. **No**: Select the **View More Actions** link.
Step 3	Select the **contact name** link. 
Step 4	In the Maintain Contact Details section, select the **System Access** link. 
Step 5	In the Assign Roles section, select the System Access Administrator check box.
Step 6	Is the SAA user role temporary and needs an end date? **Yes**: Complete the End Date field. **No**: Continue to step 7.
Step 7	Select the **Save** button. **You have completed this scenario.**

Scenario 4: Designate a New Primary Contact

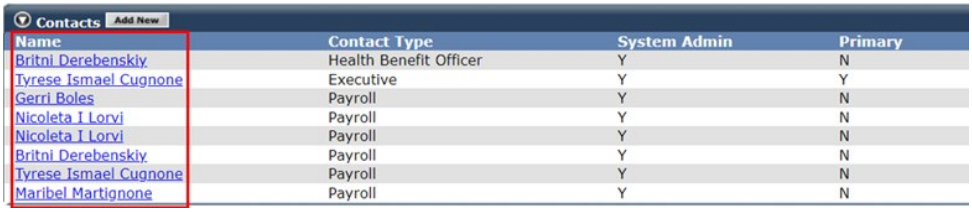
A primary contact has left your agency. You will designate an existing contact as the new primary contact.

System Logic

- Only one contact can be assigned as the primary contact for each contact type.
- Each contact type in use should have a primary contact designated.
- Once a new primary contact is designated, the system will remove the primary contact status from the previous primary contact.
- Primary contacts are not required to have system access. If they do not have system access, their preferred communication should be *mail* (refer to scenario 7).

Step Actions (5 step)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Continue to step 3. **No**: Select the **View More Actions** link.
Step 3	Select the **contact name** link.



Step 4	In the Maintain Contact Details section, select the Primary Contact check box.

Step 5	Select the **Save** button. **You have completed this scenario.**

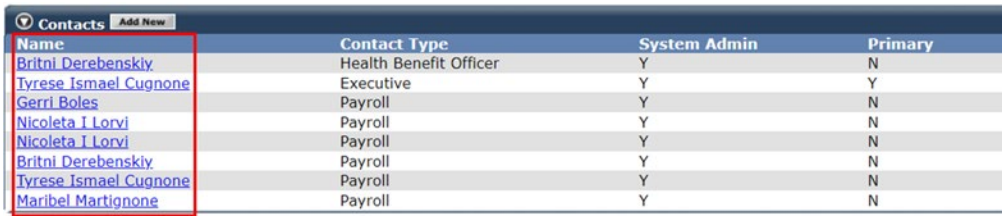
Scenario 5: Update Contact Type

Due to a change in duties, you will update the contact type of an existing contact.

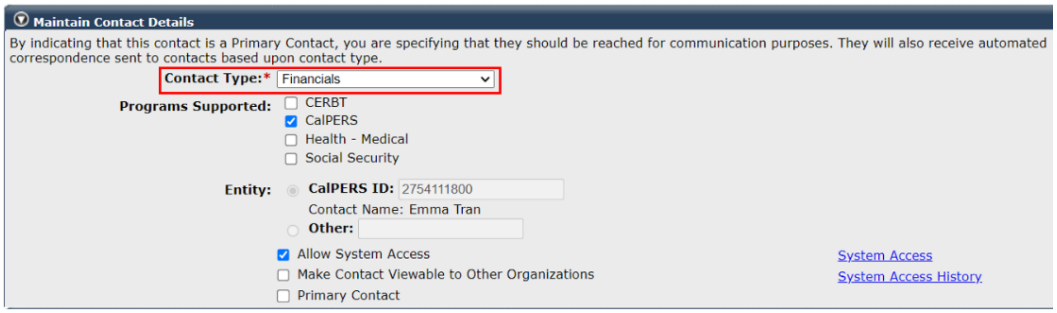
The contact type *does not determine myCalPERS access*. It helps CalPERS to know who to contact at your agency regarding CalPERS business.

Step Actions (5 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Continue to step 3. **No**: Select the **View More Actions** link.
Step 3	Select the **contact name** link.



Step 4	In the Maintain Contact Details section, select from the Contact Type drop-down list.



Step 5	Select the **Save** button. **You have completed this scenario.**

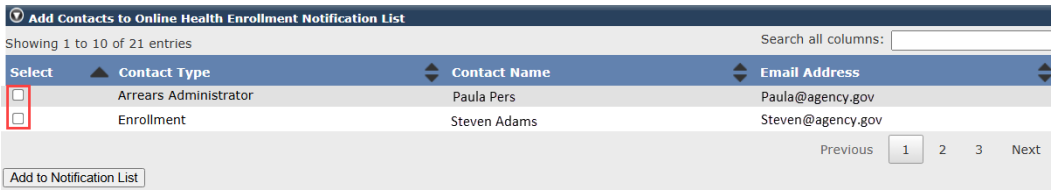
Scenario 6: Add or Remove Contacts From Health Email Notification List

When employees submit a health transaction or document in myCalPERS, by default, only the primary health benefits officer receives an email notification at the end of the day. You will create a list of contacts who will also receive the email notification.

System Logic

- This takes effect the same day if the contact is added to the list before 5:00 PM.
- 20 is the maximum number of contacts on the list.
- Even if a contact's access is deactivated, they will remain on the list until you remove them.
- If CalPERS deletes a contact, they will be removed from the list.

Step Actions (8 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	Select the **Health Email Notification** left-side link.
Step 3	**Optional**: At top, filter the Add Contacts to Online Health Enrollment Notification List section by a contact name or contact type, then select the **Display** button.
Step 4	Do you want to add or remove a contact from the Online Health Enrollment Notification List? • Add a contact to the notification list: Continue to step 5. • Remove a contact from the notification list: Skip to step 7.
Step 5	Within the Add Contacts to Online Health Enrollment Notification List section, select the check box(es) for the contact(s). 
Step 6	Select the **Add to Notification List** button.
Step 7	Toward the bottom, within the Maintain Notification List for Online Health Enrollment section, select the check box(es) for the contact(s).
Step 8	Select the **Save** button at bottom left. This does not remove them as a myCalPERS contact. **You have completed this scenario.**

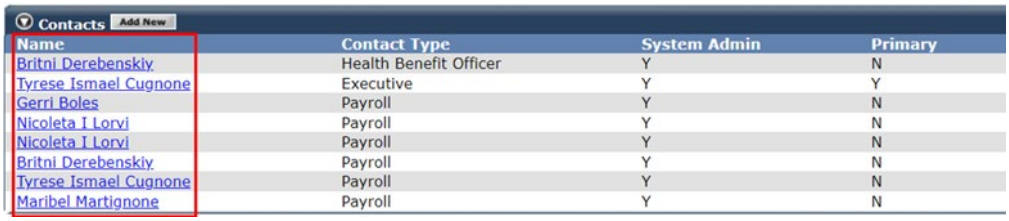
Scenario 7: Update Preferred Communication Method

You will update the method that CalPERS communicates with a contact.

System Logic

The preferred method of communication is used when CalPERS sends notifications to primary contacts for your agency. Review the Terms and Definitions section at the beginning of this student guide for additional information.

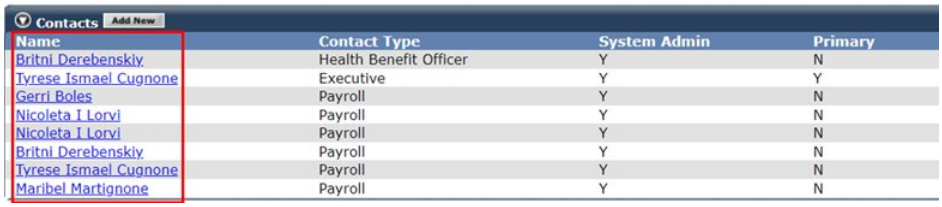
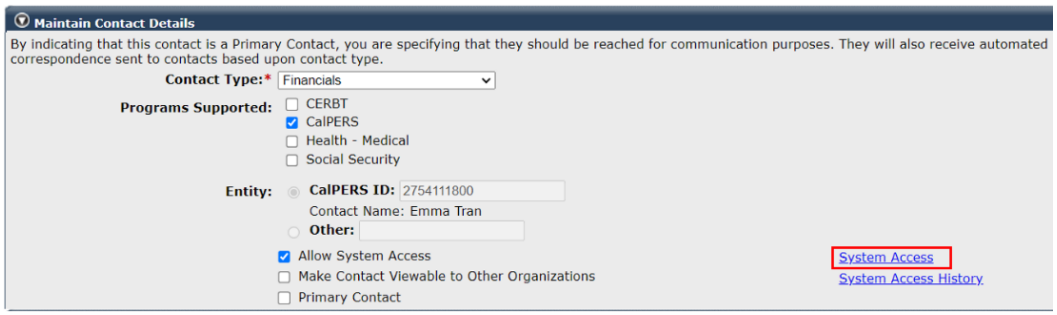
Step Actions (5 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Continue to step 3. **No**: Select the **View More Actions** link.
Step 3	Select the **contact name** link. 
Step 4	In the Maintain Preferred Communication Details section, select from the Preferred Communication drop-down list.
Step 5	Select the **Save** button. **You have completed this scenario.**

Scenario 8: Reset Password

A contact has forgotten their password. You will reset their password.

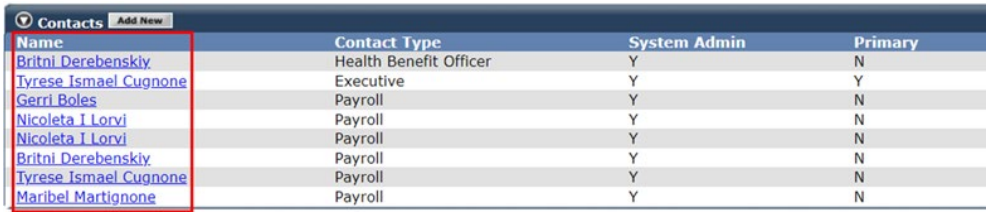
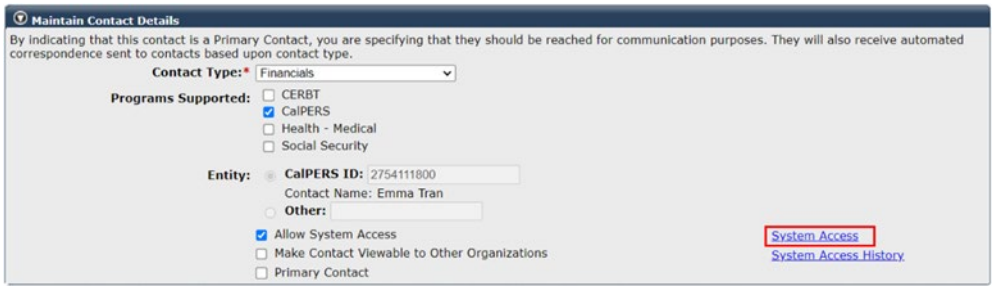
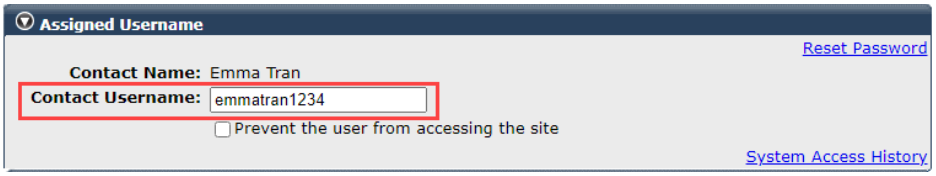
Step Actions (7 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Continue to step 3. **No**: Select the **View More Actions** link.
Step 3	Select the **contact name** link. 
Step 4	In the Maintain Contact Details section, select the **System Access** link. 
Step 5	In the Assigned Username section, select the **Reset Password** link.
Step 6	Provide the contact with their temporary password.
Step 7	Select the **Continue** button. **You have completed this scenario.**

Scenario 9: Update Username

A contact recently changed their name. Per their request, you will update their username.

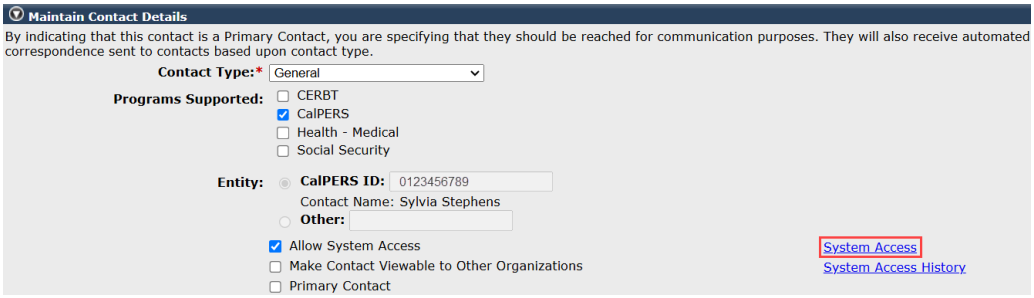
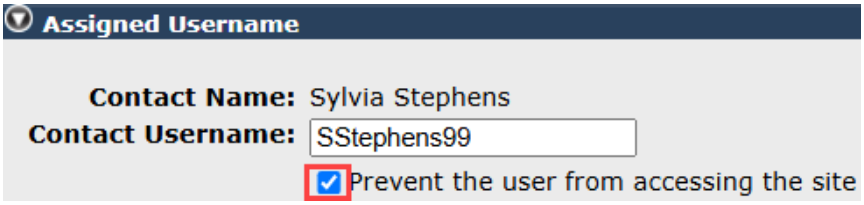
Step Actions (6 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Continue to step 3. **No**: Select the **View More Actions** link.
Step 3	Select the **contact name** link. 
Step 4	In the Maintain Contact Details section, select the **System Access** link. 
Step 5	In the Assigned Username section, update the Contact Username field. 
Step 6	Select the **Save** button. **You have completed this scenario.**

Scenario 10: Unlock System Access

You will unlock a contact's account which may have been locked due to six consecutive, unsuccessful password attempts. Once unlocked, their system access roles will be the same as before the account was locked.

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	Within the Contacts section, is the contact listed? **Yes**: Skip to step 4. **No**: Continue to step 3.
Step 3	Select the **View More Actions** link.
Step 4	Select the **contact name** link.
Step 5	Within the Maintain Contact Details section, select the **System Access** link. 
Step 6	Within the Assigned Username section, deselect the *Prevent the user from accessing the site* check box. 
Step 7	Select the **Save** button.
Step 8	Select the **Save** button. **You have completed this scenario.**

Scenario 11: Deactivate Contact

Contacts must be deactivated once they leave your agency or when they should no longer be a contact. They will no longer have access to myCalPERS or be able to contact CalPERS for member and employer-specific information.

System Logic

- If the contact is listed as multiple contact types, deactivate all of them.
- Before deactivating a primary contact, designate a new primary contact (scenario 3).
- If the current date is used as the deactivation date, the contact's access will deactivate at midnight. If a future date is used, their access will deactivate at midnight on that date.
- If they never should have been added as a contact, call CalPERS to *delete* the contact.

Automatic Deactivation

- Contacts will be deactivated via a batch process upon permanent separation or a state agency transfer on either the effective date of the appointment change or the date the change was entered, whichever is later. Always verify the contact has been deactivated.
- Once a contact has been automatically deactivated, access will not reactivate upon retroactive changes to appointment status. If appointment changes are completed prior to the effective date of the automatic deactivation, access will not be deactivated.
- Contacts without a CalPERS retirement appointment (health-only STRS and nonPERS, non-contributory appointments, and third-party contacts) must be deactivated manually.

Step Actions (5 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Continue to step 3. **No**: Select the **View More Actions** link.
Step 3	In the Contacts section, select the **contact name** link.
Step 4	In the Maintain Contact Details section, complete the Deactivation Date field(s).
Step 5	Select the **Save Deactivation** button. **You have completed this scenario.**

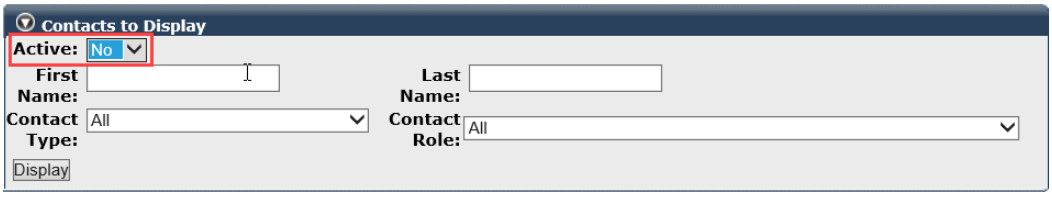
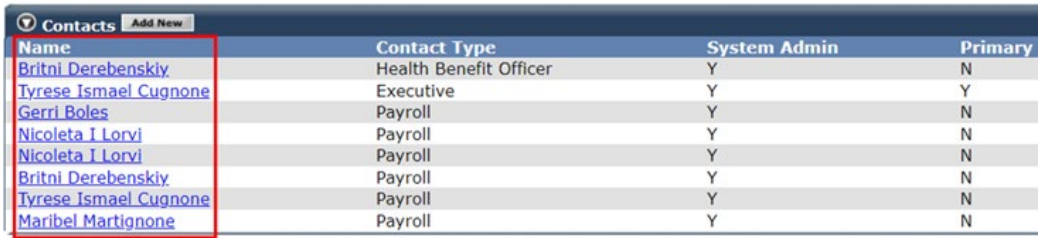
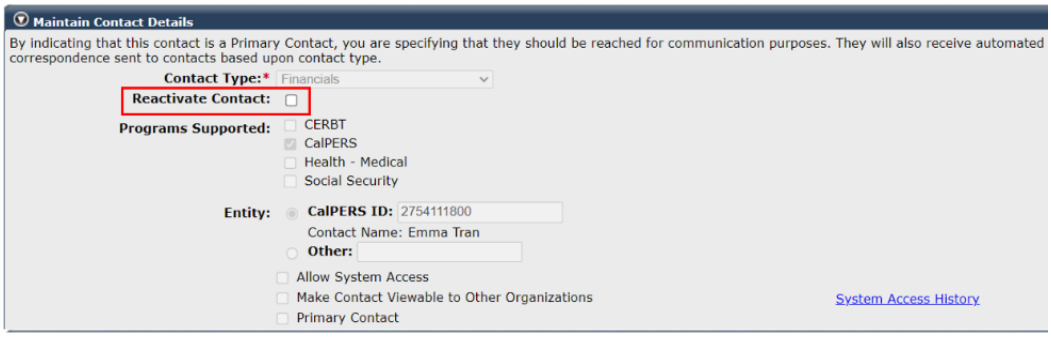
Scenario 12: Reactivate Contact

A contact returned from a leave of absence. You will reactivate the contact.

System Logic

If system access is granted upon reactivation, the same user roles and username will be assigned to the contact.

Step Actions (7 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, select the **View More Actions** link.
Step 3	In the Contacts to Display section, select No from the Active drop-down list. 
Step 4	Select the **Display** button.
Step 5	In the Contacts section, select the **contact name** link. 
Step 6	Select the Reactivate Contact check box. 
Step 7	Select the **Save** button. **You have completed this scenario.**

Scenario 13: Review System Access History

You will review a contact's system access and assigned role history.

The System Access History section displays who and when created, deactivated, and reactivated the contact's system access.

The Assigned Role History section displays the history of the contact's user roles.

Step Actions (5 steps)

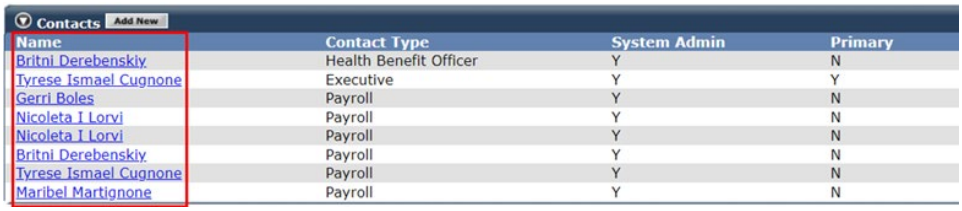
Step 1 Select the **Profile** global navigation tab.

Step 2 Within the Contacts section, is the contact listed?

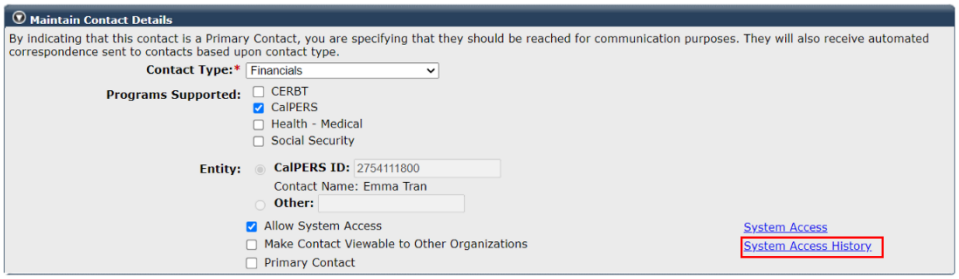
Yes: Continue to step 3.

No: Select the **View More Actions** link.

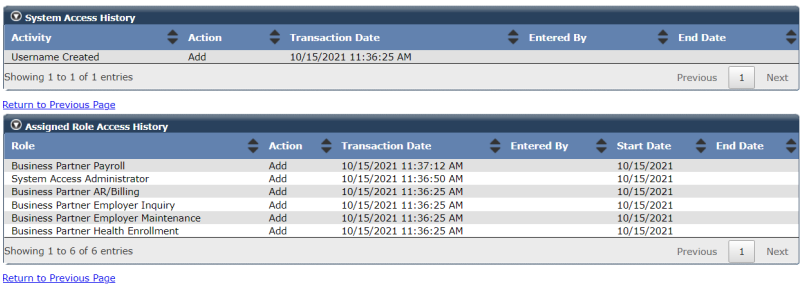
Step 3 Select the **contact name** link.



Step 4 In the Maintain Contact Details section, select the **System Access History** link.



Step 5 Review the System Access History and Assigned Role Access History sections.



You have completed this scenario.

Unit 3: Maintain Agency Information

In this unit, you will update your agency's contact information in myCalPERS so your agency will continue to receive communications from CalPERS. It’s your responsibility to keep your agency’s address(es), contact number(s), and email address(es) current.

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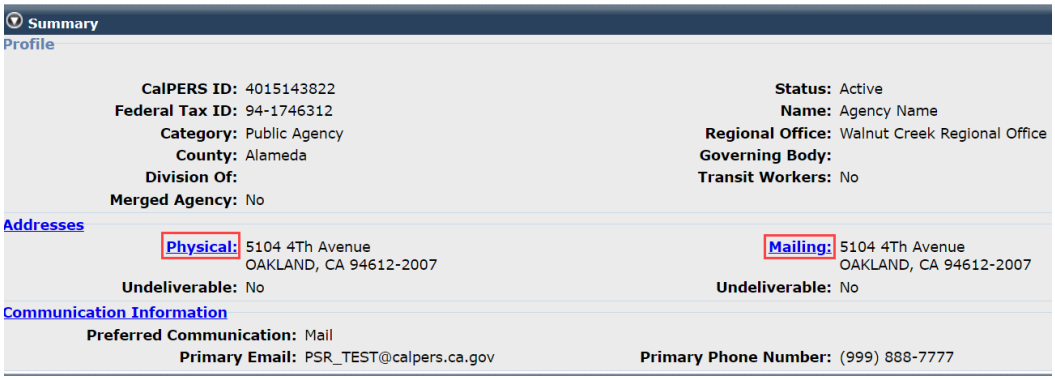
Scenario 1: Update Agency Address

Your agency has moved. You will update the address in myCalPERS.

Step Actions (7 steps)

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Summary section, select either the **Physical** or **Mailing** link. 
Step 3	Within the Maintain Address Details section, update the address. The county will update after you save.
Step 4	Select the **Save** button.
Step 5	Is the U.S. Postal Service Match correct? **Yes**: Continue to step 6. **No**: Select the **Entered Address** radio button.
Step 6	Select the **Confirm** button.
Step 7	Select the **Save** button. **You have completed this scenario.**

Scenario 2: Update Agency Phone Number and Email Address

You will update the primary phone number and email address that displays on your agency's profile page in myCalPERS.

Step Actions (5 steps)

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

Step 2 In the Summary section, select the **Communication Information** link.

Step 3 In the Maintain Preferred Communication Details and Maintain Communication Details sections, update your agency's communication information.

Step 4 Ensure the **Primary** radio buttons are selected for the main phone number and email address for your agency.

Step 5 Select the **Save** button.

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 > Employer Education > (Under Resources on right side) myCalPERS Student Guides & Resources
- System Access Administrators
  Pathway: CalPERS website > Employers > System Access Administrators
- myCalPERS System Privileges for Business Partner Roles (PDF)
  Pathway: CalPERS website > Employers > System Access Administrators > (Under Resources on right side) myCalPERS System Privileges for Business Partner Roles (PDF)
- myCalPERS Employer Reports (Cognos) Catalog
  Pathway: CalPERS website > Employers > Employer Reports (Cognos) Catalog
  – Business Partner myCalPERS User Access Report
- Self-Paced Online Classes (Log in to myCalPERS, select the **Education** global navigation tab)
  – Add & Maintain Business Partner Contacts
  – Change Username, Unlock Account & Reset Password
  – Maintain Your Agency's Address & Communication Information

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.