myCalPERS System Privileges for Business Partner Roles

Supplemental Guide

October 31, 2025

CalPERS

System Privileges for Business Partner Roles

Introduction

This document provides System Access Administrators (SAA) a list of privileges for each user role. Based on your organizational needs, security, and confidentiality practices, each user should only be assigned the roles necessary to perform the functions of their position. Not all user roles are applicable to all business partners.

Contents

General

Business Partner Employer Inquiry

Assigned to all contacts under a public agency, school, state, or service provider

- Review business partner contact list, document history, business partner relationships, and other organization contact information
- Review and submit inquiries
- Access the Education global navigation tab
- Upload files

Business Partner Employer Maintenance

- Order publications and submit inquiries
- Maintain agency address(es), business partner relationship(s), and add organizations
- Review document history, cost share details, rate summary, division, agency mergers, agreements, Supplemental Income Plan (SIP), other organization contact information, cases, statutory event information, member rate summary, retirement program history, and file upload history
- Review and maintain contacts and business partner relationships
- Review and submit inquiries and maintain employer supporting documentation
- Access the Education global navigation tab
- Upload files

Business Partner Limited

- Review home and agency profile pages

Contracts & Agreements

Business Partner Direct Authorization Agreements

For agencies with Direct Authorization (DA) agreements

- Review business partner contact list, document history, business partner relationships, and other organization contact information
- Establish and review direct authorization agreements
- Access the Education global navigation tab
- Upload files
- See also: Business Partner Direct Authorization

Business Partner Health Contracts

For agencies with a PERS and/or non-PERS health contract

- Review health contract details: Medical group summary and history, optional provisions like vesting, subscriber list, employer contribution, contract history, and contract notes
- Review business partner contact list, document history, business partner relationships, other organization, contact information, and mergers and reorganizations
- Access the Education global navigation tab
- Upload files and submit documentation
- Request and review Other Post-Employment Benefits (OPEB) census data (must also have the Business Partner AR/Billing role)

Business Partner Retirement Contracts

For agencies with a CalPERS retirement contract

- Review business partner contact list, document history, business partner relationships, and other organization contact information, contract history, rate summary, benefit levels and provisions, employee and employer rates (current and historical), merger history, contract exclusions, census data, participant summary via the person information search, file upload history, and reorganizations
- Submit and review valuation report requests and inquiries
- Review and maintain retirement contract, system transfer out, amendments, cost share, finalize contract, terminate contract, resolutions, written labor agreements, reclassification provisions, school districts (dissolve or add new), Employer Paid Member Contributions (EPMC), and 2-years additional service credit (Golden Handshake)
- Initiate and maintain retirement contract, Social Security 218 agreement, appointments, direct authorization agreements, and reciprocal agreements
- Review and maintain position titles and collective bargaining units (CBU)
- Request, review, and maintain GASB 68 census data (must also have the Business Partner Retirement GASB Contact role)
- Access the Education global navigation tab
- Upload files and submit documentation

Business Partner Social Security

For agencies with a Social Security 218 agreement

- Review business partner summary, contracts and agreements, Social Security Administration (SSA) invoices, and receivables
- Review and maintain SSA 218 agreement
- Submit and review SSA 218 Annual Information Requests (AIR)
- Access the Education global navigation tab
- Review and upload documents

Business Partner Supplemental Income Plan

For agencies with a CalPERS SIP-457 agreement

- Review and maintain participant summary via the person information search
- Review, initiate, and maintain Supplemental Income Plan (SIP) agreements and enrollment information
- Access the Education global navigation tab
- Upload files

Financials/Payments

Business Partner AR/Billing

- Review business partner contact list, document history, business partner relationships, other organization contact information, receivables, invoices, billing and payment summary, arrears invoices, fees, and payment history
- Process, review, and cancel payments
- Establish, maintain, and review banking accounts
- Review and maintain appointment and payroll information within the Receivables page
- Review and maintain out-of-class appointments, documents, and penalties
- Request and review Other Post-Employment Benefits (OPEB) census data (must also have the Business Partner Health Contracts role)
- Access the Education global navigation tab
- Upload files

Business Partner AR/Billing Limited

- Review business partner contact list, document history, business partner relationships, other organization contact information, receivables, invoices, billing and payment summary, payments, arrears invoices, fees, and payment history
- Process, review, and cancel payments
- Review and maintain appointment and payroll information within the Billing and Payments page
- Review and maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

Business Partner CERBT/CEPPT

For agencies participating in the California Employers’ Retiree Benefit Trust (CERBT) and California Employers’ Pension Prefunding Trust (CEPPT) Funds

- Review CERBT and CEPPT agreement details
- Review payment, transaction, and disbursement details and history
- Upload files

Business Partner Direct Authorization

For agencies with Direct Authorization (DA) agreements

- Review direct authorization agreements and hold harmless agreements
- Review direct authorization deductions and errors
- Review document history, other organization contact information, cases, file upload history, receivables, invoices, payments, and payment history
- Review and maintain agency address(es), contacts, agency contracts and business partner relationships
- Review and submit inquiries
- Access the Education global navigation tab
- Upload files

Business Partner PA Billing

- Review business partner contact list, document history, business partner relationships, other organization contact information, receivables, invoices, billing and payment summary, and monthly billing roster
- Review appointment and payroll information within the Billing and Payments page
- Access the Education global navigation tab
- Upload files

GASB Contact

- Review business partner contact list, document history, business partner relationships, other organization contact information
- Review and maintain appointment and payroll information within the Retirement Appointment Reconciliation page
- Request, review, and maintain GASB 68 census data (must also have the Business Partner Retirement Contracts role)
- Access the Education global navigation tab
- Upload files

Health Enrollment

For agencies with PERS and/or non-PERS health contracts

Business Partner Appointment Management – Non-PERS and CalSTRS

For agencies with a non-PERS health contract

- Review participant summary via the person information search
- Review, maintain, and initiate appointments
- Access the Education global navigation tab
- Upload files

Business Partner Health Enrollment

- Review participant summary via the person information search
- Review business partner contact list, document history, business partner relationships, and other organization contact information
- Enroll, maintain, and review health enrollments
- Review, confirm, and reject health transaction verifications submitted online by members
- Complete Dependent Eligibility Verification (DEV) – *for state agencies only*
- Access the Education global navigation tab
- Upload files

Business Partner Health Enrollment Read Only

- Review participant summary and health enrollment details via the person information search
- Review business partner contact list, document history, business partner relationships, and other organization contact information
- Access the Education global navigation tab
- Upload files

Payroll

For agencies with a CalPERS retirement contract

Business Partner Payroll

- Review business partner contact list, document history, business partner relationships, other organization contact information, retirement contract information, rate summary, amendments and resolutions, written labor agreements, exclusions, cost share details, rate summary, member and employer rates, benefit provisions, retirement program history, arrears invoice details, rate plan receivable details, fee details, billing and payment summary, and invoice history pages
- Review participant summary via the person information search
- Review and process earned period and adjustment payroll reports
- Review participant posted and unposted payroll and contributory appointment history via the View Service History and View Transaction History links
- Review and maintain payroll schedules
- Reverse and modify posted payroll records via the Maintain Record Details page
- Maintain unposted payroll within the Retirement Appointment Reconciliation, Payroll Schedules, and Receivables pages
- Review and maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

Business Partner Payroll Limited

- Review business partner contact list, document history, business partner relationships, and other organization contact information
- Review participant summary via the person information search
- Review participant posted payroll via the View Service History and View Transaction History links
- Review payroll schedules
- Maintain unposted payroll within the Retirement Appointment Reconciliation, Payroll Schedules, and Receivables pages
- Review and maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

Business Partner SCP Certification

- Review business partner contact list, document history, business partner relationships, and other organization contact information
- Review participant summary via the person information search, employee rate summary, service credit purchase list, cost share details, employment certification requests, service credit purchase determination information, reciprocal eligibility determination information, contribution adjustment cost information, and member election details
- Review and maintain appointments
- Initiate and maintain service period records and special compensation details
- Access the Education global navigation tab
- Upload files and submit documentation

Retirement Enrollment

For agencies with a CalPERS retirement contract

Business Partner Arrears

To access the following pages the user must also have one of the following roles: Business Partner Payroll, Business Partner Payroll Limited, Business Partner Retirement Enrollment, and/or Business Partner Retirement Enrollment Limited.

- Submit service credit purchase requests, including appointment and payroll information
- Submit employment certifications and CalPERS Review Reports to request a membership review

Business Partner Retirement Enrollment

- Review and maintain participant summary via the person information search
- Review business partner contact list, document history, business partner relationships, other organization contact information, retirement contract, contributory appointment history, employee rate summary, cost share, member and employer rates, and findings
- Review, maintain, and add appointments and positions
- Maintain participant contact and demographic information
- Review and maintain appointment and payroll information within the Retirement Appointment Reconciliation page
- Review and maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

Business Partner Retirement Enrollment Limited

- Review participant summary via the person information search
- Review business partner contact list, document history, business partner relationships, other organization contact information
- Review appointment details
- Confirm unposted payroll within the Retirement Appointment Reconciliation page
- Review and maintain out-of-class appointments, documents, and penalties
- Access the Education global navigation tab
- Upload files

System Access Administration

System Access Administrator

- Review and maintain agency address(es), contact list, system access, business partner relationship(s), out-of-class appointments, documents, and penalties
- Review document history, other organization contact information, contact system access history
- Reset user passwords
- Access the Education global navigation tab
- Upload files

Other

Authorized Personal Loan Representative

- Review and maintain business partner address(es), contact list, and business partner relationships
- Review agreements, and loan eligibility
- Access the Education global navigation tab
- Upload files

Business Partner IME/JA

For Independent Medical Examiners (IME) and Job Assessors (JA)

- Review and maintain IME fees, administrative hearing fees, cancellation fees, JA summary and fee schedules
- Submit documentation
- Review documents and other organization contact information
- Review file upload history
- Review and maintain business partner summary, participant address, and communication details

---

Business Partner Reciprocal

For reciprocal retirement systems

- Review and maintain business partner summary, contact information, and business partner relationships
- Review reciprocal agreement, participant appointment and service credit information, service verification requests, and document history
- Submit reciprocal employment information and Inter-System Membership Advice (ISMA) forms
- Access the Education global navigation tab
- Upload files

Carrier

Assigned to all health carrier contacts

- Review carrier address(es), health plan list, document history, participant summary and health enrollment information, and other organization contact information
- Review and maintain business partner relationship(s), agency contacts, other organizations, health carrier ZIP code information, and health reconciliation
- Review current and former plans, restrictions, rates, service area, and contact information

---

Business Partner CalHR

For the California Department of Human Resources

- Review business partner summery, contact information, and business partner relationships
- Access the Education global navigation tab
- Upload files