myCalPERS State-Active Health Premium Reconciliation

Student Guide

June 21, 2025

Introduction

This student guide will assist central-state agencies with reconciling health premiums.

Role & Responsibility

You should regularly research active employee health premium discrepancies between CalPERS and the State Controller's Office (SCO). It is your responsibility to monitor and maintain premium payments for your employees. CalPERS provided Circular Letter 600-025-24 that informed state agencies of two health reports that assist in reconciling employee health premiums. The SCO also provided SCO Payroll Letter 18-017 (PDF) with instructions on how to process missing or incorrect health deductions.

Importance of Reconciling

- Employees are more satisfied when health deductions are current rather than having retroactive deductions, especially when they haven't used services.
- Reconciliation is easier when it's done within shorter timeframes.
- Timely payment of premiums ensures your employees and dependents can use services.
- It mitigates risk of potential over or under payment by the state for health premiums due.

Best Practices

- Review transactions and premium deductions for transactions completed after payroll cutoff and confirm correct deductions are applied. Below is a list of some, but not all, examples of transactions you should monitor to ensure premiums are collected timely:
  - New health enrollment, add dependent, delete dependent, and plan changes
  - Rescission
  - Dependent eligibility verification
  - Late parent-child relationship recertification
  - Permanent separation
- Confirm a transferred employee's health premiums are associated with your agency and not with their former agency.
- Verify the following employees' health benefits will be on direct pay or cancelled:
  - Employee on an unpaid leave
  - Employee who is permanently separating
- Submit one of these payroll adjustment notices to the SCO promptly:
  - Standard Form 674 A/R – Payroll Adjustment Notice Accounts Receivable when health premium deductions haven't been processed by the SCO
  - Standard Form 674 – Payroll Adjustment Notice when a refund is due to the employee because of the difference in premiums and no A/R reversal is needed

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 and take a health Business Rules class. Business rules summarize the laws defined by the California Public Employees' Retirement Law (PERL).

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Unit 1: Run Reports

To help you properly maintain health enrollments and health premium payments, two health reports are recommended.

- The *State Active Health Enrollment and SCO Health Deduction Discrepancy Report* identifies discrepancies between SCO and myCalPERS data.
- The *Employer Health Event Transaction Report* displays transactions that have been updated in myCalPERS. You can be proactive in tracking transactions that were updated after payroll cutoff, so you can anticipate the premiums that will be outstanding.

Refer to the myCalPERS Employer Reports (Cognos) Catalog for a list of employer reports and myCalPERS Employer Reports (Cognos) (PDF) student guide for detailed Cognos functionality.

In this unit, you will use Cognos in myCalPERS to run both reports in the Excel Data format.

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Scenario 1: State Active Health Enrollment and SCO Health Deduction Discrepancy Report

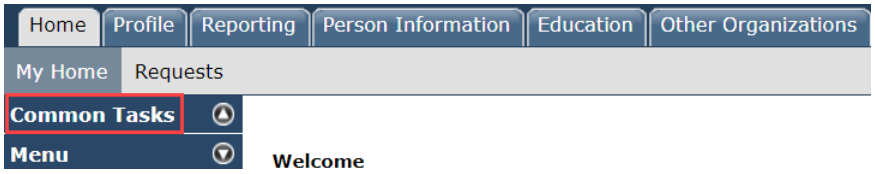
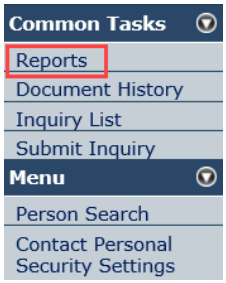
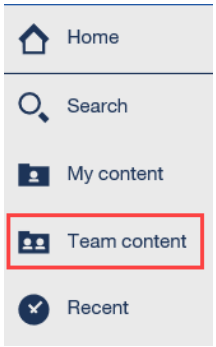
You will run the *State Active Health Enrollment and SCO Health Deduction Discrepancy Report* to identify premium discrepancies (unpaid, underpaid, and overpaid) for your current and former employees. Included in the report are plan codes, party rates and premium amounts according to CalPERS and SCO records.

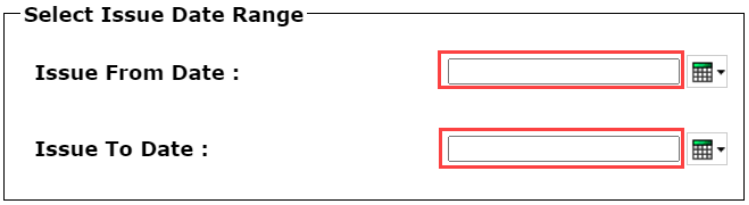
After all past discrepancies have been resolved, continue to run the report at regular intervals as some newly updated health transactions may be retroactive.

System Logic

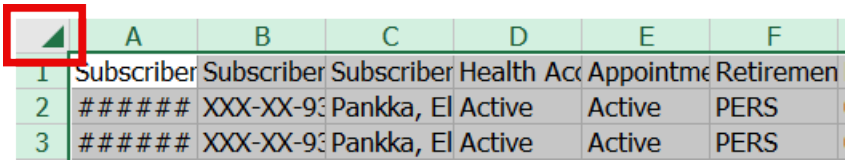
Using multiple coverage months for the criteria adds extra time to generate the report.

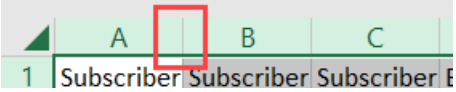
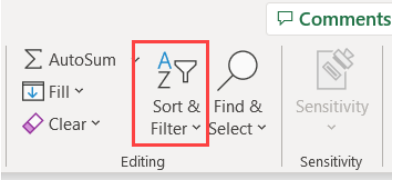
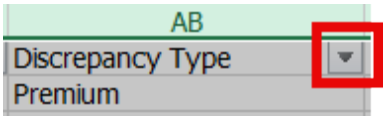
Step Actions (27 Steps)

Step 1	From the homepage, select the Common Tasks folder at the upper-left side. 
Step 2	Select the **Reports** left-side link. 
Step 3	From the left-side navigation menu, select the Team content folder. 
Step 4	From the Team content folder, select the PSR_REPORTS_ENV98 folder.
Step 5	From the reports list, locate (don't select) the *State Active Health Enrollment and SCO Health Deduction Discrepancy Report*.

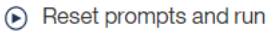
Step 6	Select the More icon to the right of the report name.
Step 7	Select the Run as menu.
Step 8	Select the **Excel Data** radio button.
Step 9	Select the **Run** button at the bottom-right side.
Step 10	It's recommended to leave the **Coverage Period Range** radio button selected and use the coverage period range for a three-month span or less. However, you can select the **Issue Date Range** radio button if you prefer. **Note**: You have the option to select the **Show All Premiums** radio button to generate the list of your entire agency's active employee health enrollment roster and associated SCO payroll deductions.
Step 11	Did you select the **Issue Date Range** radio button? **Yes:** Select the **Reprompt** button. **No:** Skip to step 13.
Step 12	Complete the Issue Date Range fields. 
Step 13	Complete the Coverage Period Date Range fields.
Step 14	Select the **Finish** button at the bottom-left side.
Step 15	Do you want to filter the spreadsheet? **Yes:** Continue to step 16. **No: You have completed this scenario.**

Filter the Report

Step 16	Select the cell at the top-left corner to highlight the entire spreadsheet. 

Step 17	To widen all cells, double-click on the line between any two columns. 
Step 18	From the ribbon, select the Sort & Filter icon. 
Step 19	Select the Filter option.
Step 20	Select the drop-down arrow for the column you want to filter. 
Step 21	Deselect the Select All check box, and then select the check box(es) for the specific criteria you want to display.
Step 22	Select the **OK** button.
Step 23	Do you want to rerun the report with a different date range? **Yes:** Minimize or close the Excel spreadsheet, and then continue to step 24. **No: You have completed the scenario.**

Rerun the Report

Step 24	Select the Run as menu at the top-left side of the page.
Step 25	Select Reset prompts and run option from the list. 
Step 26	Enter the report criteria.
Step 27	Select the **Finish** button at the bottom-left side. **You have completed this scenario.**

Scenario 2: Employer Health Event Transaction Report

You will run the *Employer Health Event Transaction Report* to review transactions that are updated for your employees. It's recommended to run this report monthly. When the month is complete, you can run the report to capture and verify all transactions that occurred in a desired timeframe. If an enrollment is processed after payroll cutoff, confirm the information in the report and proactively establish an accounts receivable (AR) to collect the premium that will not automatically be processed due to timing.

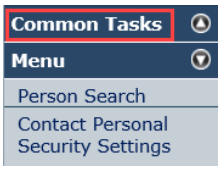
Best Practices

- To be proactive, instead of waiting months to reconcile, populate the Event Create Date Range criteria with the date of payroll cutoff to the end of month.
- If retrieving next month's data, wait to run this report until after the first business day of the current month (26-year-old deletion batch runs the first business day). For example, it's January and you want to review transactions that are effective February 1. If January 1 is a Monday holiday, run the report on Wednesday, January 3rd.

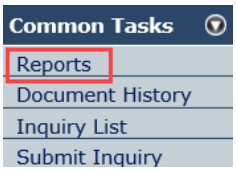
Step Actions (26 Steps)

Run Report

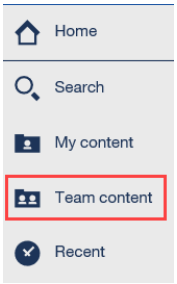
Step 1 From the homepage, select the Common Tasks folder at the upper-left side.

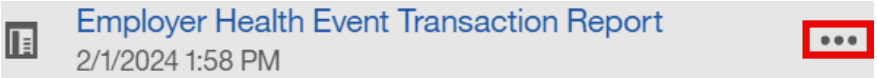
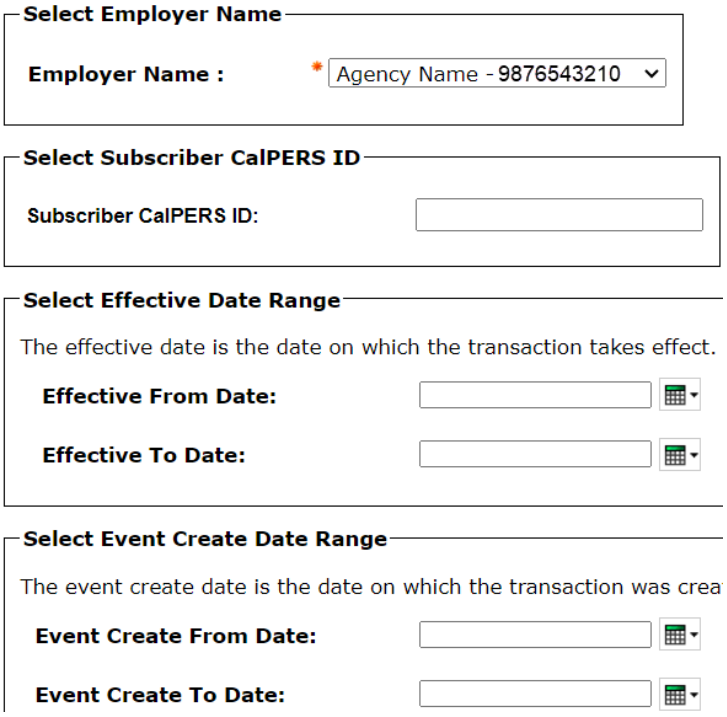


Step 2 Select the **Reports** left-side link.

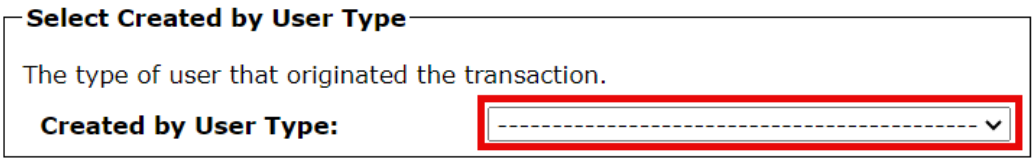


Step 3 From the left-side navigation menu, select the Team content folder.



Step 4	Select the PSR_REPORTS_ENV98 folder.
Step 5	From the reports list, locate (don't select) the *Employer Health Event Transaction Report*.
Step 6	Select the More icon to the right of the report name. 
Step 7	Select the Run as menu.
Step 8	Select the **Excel Data** radio button.
Step 9	Select the **Run** button at the bottom-right side.
Step 10	Use the employer name and one other criterion to retrieve relevant data.  • **Employer Name:** You may choose a different department from the drop-down list if your agency processes health benefits for other departments. • **Subscriber CalPERS ID:** Enter an employee's CalPERS ID (not SSN) if you are searching for discrepancies for a single subscriber. • **Effective From/To Date:** Populate the dates of when transactions became effective, e.g., 6/1/24 for the from and to dates for June. • **Event Create From/To Date:** Populate the dates of when transactions updated to myCalPERS. It's recommended to use the from date with the payroll cutoff date and to date with the last day of the month.

Step 11 To filter the report by who/what updated the transaction, select from the Created by User Type drop-down list.



Created by User Type: Choose who/what updated the transactions:

- **External Business Partner**: Employer (Employer processed the enrollment or confirmed an employee-submitted myCalPERS transaction)
- **External Participant**: Employee or retiree
- **Internal User**: CalPERS team member
- **Service**: Automatically updated by the system, e.g., 26-year-old delete – Batch, Continued Elig: Retirement – Batch, etc.
- **Blank**: No user (transaction was due to a data fix)

Step 12 Select the **Finish** button at the bottom-left side.

Step 13 Select the file to open it.

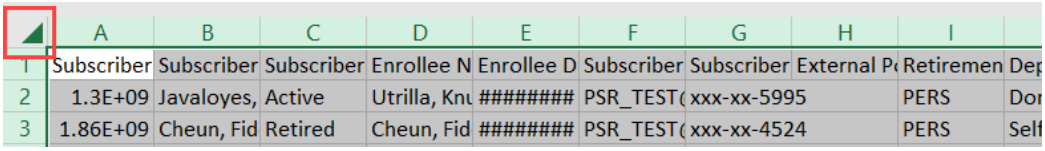
Step 14 Do you want to filter the spreadsheet?

Yes: Continue to step 15.

No: You have completed this scenario.

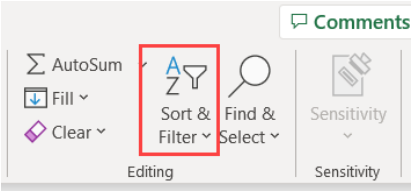
Filter the Report

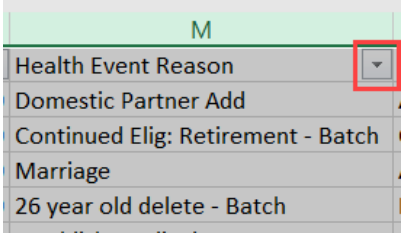
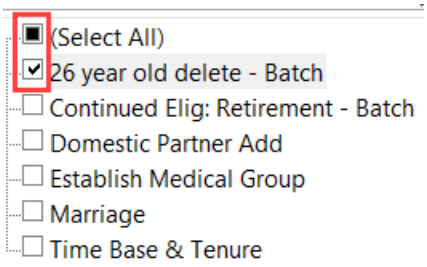
Step 15 Select the cell at the upper-left corner to highlight the entire spreadsheet.



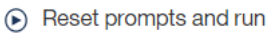
Step 16 To widen all cells, double-click on the line between any two columns.

Step 17 From the ribbon, select the Sort & Filter icon.



Step 18	Select the Filter option.
Step 19	Select the drop-down arrow for the column you want to filter. 
Step 20	Deselect the Select All check box, and then select the check box(es) for the specific transactions you want displayed. 
Step 21	Select the **OK** button.
Step 22	Do you want to rerun the report with a different date range? **Yes:** Minimize or close the Excel spreadsheet, and then continue to step 23. **No: You have completed the scenario.**

Rerun the Report

Step 23	Select the Run as menu at the top-left side of the page.
Step 24	Select Reset prompts and run option. 
Step 25	Enter the report criteria.
Step 26	Select the **Finish** button at the bottom-left side. **You have completed this scenario.**

Unit 2: Review Reports

To help you understand the reports, this unit defines each column within them.

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Scenario 1: State Active Health Enrollment and SCO Health Deduction Discrepancy Report

Review the *State Active Health Enrollment and SCO Health Deduction Discrepancy Report* to identify your active employees who are enrolled in health benefits and have premium discrepancies, so you can take action to rectify the unpaid, underpaid, or overpaid premiums.

Column Definitions

The first seven columns provide employee information that is in myCalPERS.

Subscriber CalPERS ID	Subscriber SSN (last 4)	Subscriber Name	Health Account Status	Appointment Status	Retirement System	Medical Group
0123456789	XXX-XX-4321	Faughn, Limam	Active	Perm Sep	PERS	R08-Rnk&File/Firefighters
1234567890	XXX-XX-4228	Lindman, Luminita I	Active	Active	PERS	R01-Rnk&File/Admin, Finan&Staf
1234567890	XXX-XX-4228	Lindman, Luminita I	Active	Active	PERS	R01-Rnk&File/Admin, Finan&Staf
1234567890	XXX-XX-4228	Lindman, Luminita I	Active	Active	PERS	R01-Rnk&File/Admin, Finan&Staf

Below is a description of each column:

- **Subscriber CalPERS ID:** Employee's 10-digit unique ID number
- **Subscriber SSN (last 4):** Last four-digits of their Social Security number
- **Subscriber Name:** Last name, first name, and middle initial as in myCalPERS
- **Health Account Status:** Active for active employment. If the subscriber health account status is cancelled or retired and there is an SCO deduction received for this subscriber from the selected agency, the report will populate a discrepancy line item.
- **Appointment Status:** Current employment status (Active, On Leave, or Permanent Separation)
- **Retirement System:** PERS (California Public Employees' Retirement System), STRS (California State Teachers' Retirement System), JRS (Judges' Retirement System), JRS II, LRS (Legislators' Retirement System), Affordable Care Act/None, or Other
- **Medical Group:** Collective bargaining unit

The next seven columns provide employee health benefits information that is in myCalPERS.

Health Enrollment Effective Date	Coverage Period Start Date	Coverage Period End Date	Base Plan Name	Base Plan Code	Party Type	Premium Amount
07/01/2023	01/01/2024	01/31/2024	PERS Gold California	437	Self/B and 2+/B	2,234.21
01/01/2021	11/01/2023	11/30/2023	PERS Gold California	437	Self/B	766.11
01/01/2021	12/01/2023	12/31/2023	PERS Gold California	437	Self/B	766.11
01/01/2021	01/01/2024	01/31/2024	PERS Gold California	437	Self/B	859.31

Below is a description of each column:

- **Health Enrollment Effective Date:** Effective date of their health enrollment
- **Coverage Period Start Date:** Based on the criteria you chose for the report, the first of the month with a premium discrepancy issue
- **Coverage Period End Date:** Based on the criteria you chose for the report, the end of the last month with a premium discrepancy issue
- **Base Plan Name:** Name of their health plan
- **Base Plan Code:** Three-digit plan code of their health plan
- **Party Type:** Self only, self plus one dependent, or family (self plus two or more dependents) and coverage type (B = Basic coverage/non-Medicare)
- **Premium Amount:** Total premium (sum of the employer and employee share) that should be paid

The next seven columns provide agency, issue dates, coverage period, and health plan information from the SCO.

SCO Employer	SCO - Agency Code	SCO - Issue Dates	SCO - Deduction Code	SCO - Coverage Period Start Date	SCO - Coverage Period End Date	SCO - Plan Name
	542		MED			
	541	11/01/2023	MED	11/01/2023	11/30/2023	PERS Gold California
	541	12/01/2023	MED	12/01/2023	12/31/2023	PERS Gold California
	541	01/01/2024	MED	01/01/2024	01/31/2024	PERS Gold California

Below is a description of each column:

- **SCO Employer:** Employer that paid the premium based on SCO record
- **SCO Agency Code:** Agency code of the associated agency attached to the health enrollment
- **SCO-Issue Dates:** Issue date(s) of the health deduction transaction(s). For a subscriber with multiple issue dates, multiple dates will be displayed.
- **SCO Deduction Code:** Type of deduction (MED = Medical)
- **SCO-Coverage Period Start Date:** Start date of the subscriber's health coverage period
- **SCO-Coverage Period End Date:** End date of the subscriber's health coverage period
- **SCO-Plan Name:** Name of their health plan shown on the SCO deduction file

The last seven columns provide employee health premium information from the SCO, the difference of what should be paid/credited, and the type of discrepancy.

SCO - Base Plan Code	SCO - Party Type	SCO - Employer Share	SCO - Employee Share	SCO - Total Premium	CalPERS and SCO Premium Difference	Discrepancy Type
		0.00	0.00	0.00	2,234.21	Premium
437	Self/B and 2+/B	1,784.00	207.89	1,991.89	(1,225.78)	Party Type,Premium
437	Self/B and 2+/B	1,784.00	207.89	1,991.89	(1,225.78)	Party Type,Premium
437	Self/B and 2+/B	2,101.00	133.21	2,234.21	(1,374.90)	Party Type,Premium

Below is a description of each column:

- **SCO-Base Plan Code:** Base plan code of the health plan
- **SCO-Party Type:** Type of coverage (B = Basic coverage/non-Medicare, M = Medicare); Self only, plus one dependent, or family (two or more dependents)
- **SCO-Employer Share:** Employer's share of the premium
- **SCO-Employee Share:** Employee's share of the premium
- **SCO-Total Premium:** Total premium for health coverage (sum of the employer and employee share)

  Note: If no premiums are reflected in this column, then CalPERS hasn't received the Premium Collected Report from SCO yet. Change your date criteria to a prior month or wait to rerun the report if using the same dates.
- **CalPERS and SCO Premium Difference:** Difference between the premium and what SCO paid. Amounts in parenthesis are credits.
- **Discrepancy Type:** Health account status, base plan code, party rate, and/or premium amount data differs from myCalPERS and SCO and would display as:
  - Enrollment
  - Plan Code
  - Party Type
  - Premium

You have completed this scenario.

Scenario 2: Employer Health Event Transaction Report

Review the *Employer Health Event Transaction Report* for myCalPERS transactions that were processed for your entire agency or for an individual subscriber.

Column Definitions

The first five columns provide employee demographics and status.

Subscriber CalPERS ID	Subscriber Name	Subscriber Status	Enrollee Name	Enrollee Date of Birth
0123456789	Palva, Cern	Active	Palva, Cern,	04/04/1967
0123456789	Palva, Cern	Active	Palva, Paula,	03/03/1968
1234567890	Lange, Leo	Active	Lange, Leo,	07/07/1986
1234567890	Lange, Leo	Active	Lange, Leo,	07/07/1986

Below is a description of each column:

- **Subscriber CalPERS ID:** Employee's 10-digit unique ID number
- **Subscriber Name:** Last name, first name, and middle initial as in myCalPERS
- **Subscriber Status:** Active for active employment and Retired for your retirees
- **Enrollee Name:** Subscriber or dependent names
- **Enrollee Date of Birth:** Employee or retiree birth date

The next five columns provide employee email, SSN, position number, retirement system and dependent type.

Subscriber Email	Subscriber SSN	External Position Number	Retirement System	Dependent Type
cpalva@agency.ca.gov	xxx-xx-2199	065	PERS	Self
cpalva@agency.ca.gov	xxx-xx-2199	065	PERS	Spouse
	xxx-xx-9117	312	PERS	Self
	xxx-xx-9117	312	PERS	Self

Below is a description of each column:

- **Subscriber Email:** Subscriber email in myCalPERS
- **Subscriber SSN:** Last four-digits of subscriber Social Security number
- **External Position Number:** 4th, 5th, and 6th digits of a subscriber's 13-digit external position number that are for the unit within the division
- **Retirement System:** PERS (California Public Employees' Retirement System), STRS (California State Teachers' Retirement System), JRS (Judges' Retirement System), etc.
- **Dependent Type:** Relationship to the subscriber (Self, Spouse, Child, Domestic Partner, etc.)

The next five columns provide employee medical group and health transaction information.

Medical Group	Effective Date	Health Event Reason	Health Event Type	Event Create Date
R08-Rnk&File/Firefighters	05/01/2024	Recalculation Event - Batch	Update Enrollment	02/28/2024
R08-Rnk&File/Firefighters	05/01/2024	Verification of Dependent	Verify Dependent	02/28/2024
R08-Rnk&File/Firefighters	03/01/2024	Establish Medical Group	Update Enrollment	02/27/2024
R08-Rnk&File/Firefighters	03/01/2024	Time Base & Tenure	New Enrollment	02/27/2024

Below is a description of each column:

- **Medical Group:** State employee's bargaining unit
- **Effective Date:** Date transaction is effective
- **Health Event Reason:** Reason for the transaction
- **Health Event Type:** High-level health event category for the health event reason
- **Event Create Date:** Date the transaction was processed or updated to myCalPERS

The next five columns provide the user type, transaction status, plan name/code, and ZIP code.

Created by User	Event Status	Plan Name	Plan Code	Health Eligibility Zip Code
Service	Confirmed	Kaiser Permanente California	056	95747
External Business Partner	Confirmed			95747
External Business Partner	Confirmed			90623
External Business Partner	Confirmed	Anthem Blue Cross Select HMO California	181	90623

Below is a description of each column:

- **Created by User:** Who/what updated the transaction
  - External Business Partner (Employer processed or confirmed an employee-submitted transaction)
  - External Participant (Employee submitted the transaction online that automatically updated)
  - Internal User (CalPERS employee processed)
  - Service (Automatically batch processed)
  - Blank (No user, transaction was due to a data fix)
- **Event Status:** Status of the transaction (Confirmed, Rescinded, Reapplied, or Pending Analyst Review)
- **Plan Name:** Health plan in which the subscriber is enrolled
- **Plan Code:** Three-digit number that represents the subscriber's health plan
- **Health Eligibility Zip Code:** Residential or work ZIP code used for health eligibility

The last six columns provide the county, party rate, and premium information.

Participant County	Health Benefit Type	Party Rate	Employee Premium Share	Employer Premium Share	Total Premium
Placer	Medical		2,506.79	0.00	2,506.79
Placer					
Orange					
Orange	Medical	Self/B	925.57	0.00	925.57

Below is a description of each column:

- **Participant County:** Subscriber's residential or mailing address county
- **Heath Benefit Type:** Medical
- **Party Rate:** Self = One party, Self and 1 = Two party, or Self and 2+ = Three party (two or more dependents) and their coverage type (B = Basic, M = Medicare)
- **Employee Premium Share:** Employee's share of their premium
- **Employer Premium Share:** State's contribution toward the health premium
- **Total Premium:** Employee share plus the state contribution equals the total premium

You have completed this scenario.

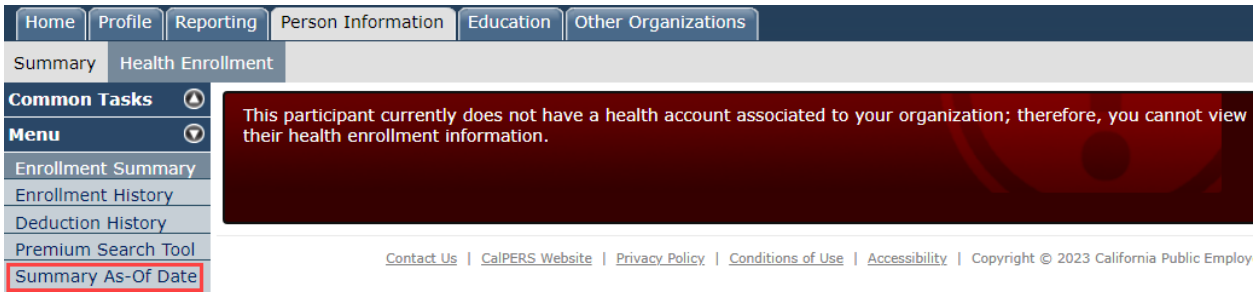
Unit 3: Verify Data

Use myCalPERS to verify the data on the *State Active Health Enrollment and SCO Health Deduction Discrepancy Report*. For each employee with a premium discrepancy, review their health enrollment summary, transaction history, and deductions.

For those on a leave of absence or permanently separated, confirm the appointment event dates are correct.

System Logic for the Person Search Tool

- You may access health details only for those who work(ed) for your agency.
- myCalPERS automatically displays information as of the current date. A warning message displays when you're accessing a future new health enrollment or a retroactive cancelled enrollee. To review their Health Enrollment Summary page, use the **Summary As-Of Date** left-side link, and then enter a date of when they had/will have health benefits with your agency.



- In most cases, a permanent separation will cancel health benefits; however, verify the cancellation of a separated employee to ensure the premiums cease.
- To clear the previous subscriber's health benefits information, select the myCalPERS logo at the upper-left side.

Contents

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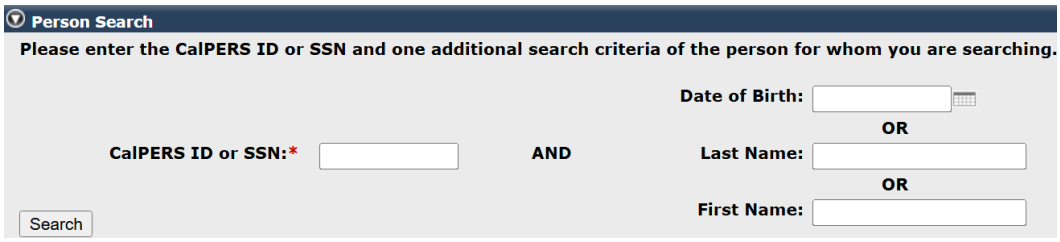
Scenario 1: Enrollment Summary

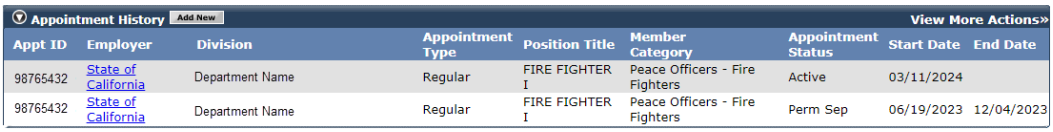
You will review subscriber health enrollment information which includes current and formerly covered dependents, health plan, total premium, and future health events.

Step Actions (13 Steps)

Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Enter the employee's CalPERS ID or SSN and populate one field on the right.

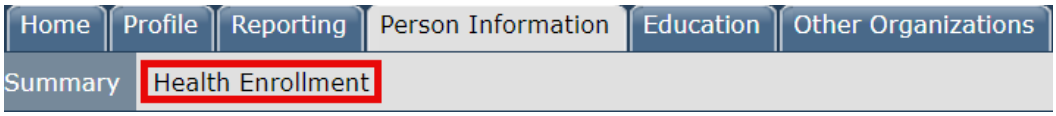


Step 3	Select the **Search** button at the bottom-left side.
Step 4	At the bottom of the page, review their appointment status.

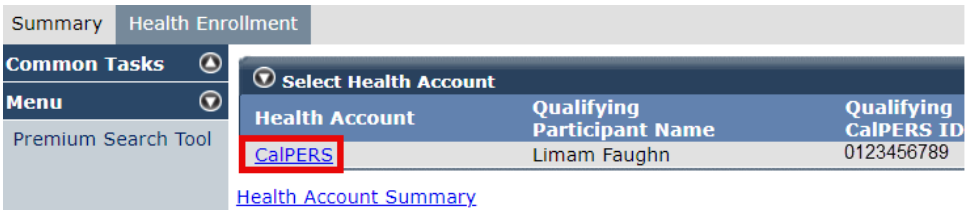


Appt ID	Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
98765432	State of California	Department Name	Regular	FIRE FIGHTER I	Peace Officers - Fire Fighters	Active	03/11/2024	
98765432	State of California	Department Name	Regular	FIRE FIGHTER I	Peace Officers - Fire Fighters	Perm Sep	06/19/2023	12/04/2023

Step 5	Select the **Health Enrollment** local navigation link.



Step 6	Under the Health Account column, select the first link (CalPERS, CalPERS Employment, or CalPERS Retiree).



Step 7	Did "This Participant currently does not have a health account associated to your organization; therefore, you cannot view their health enrollment information." display? **Yes:** Select the **Enrollment History** link and review the enrollment history. **No:** Skip to step 10.

Step 8 From the Health Enrollment History section, under the Status column, select a **Confirmed** link that is *not* for the Cancel Coverage transaction.

Health Enrollment History

Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status	Appointment ID	Create Date	Change Date
02/01/2024	Cancel Coverage	Perm Sep: Batch Cancel	Limam Faughn	Medical	Confirmed	93528486	11/28/2023 08:19:56 PM	11/28/2023 08:19:56 PM
07/01/2023	New Enrollment	Time Base & Tenure	Georgeta Victoria Levlin	Medical	Confirmed	93528486	07/03/2023 03:55:59 PM	07/03/2023 03:55:59 PM
07/01/2023	New Enrollment	Time Base & Tenure	Khadeaja Ninke McCarthy	Medical	Confirmed	93528486	07/03/2023 03:55:59 PM	07/03/2023 03:55:59 PM
07/01/2023	New Enrollment	Time Base & Tenure	Limam Faughn	Medical	Confirmed	93528486	07/03/2023 03:55:58 PM	07/03/2023 03:55:58 PM

Step 9 From the Transaction Details section, select the **View Heath Enrollment Summary** link.

Transaction Details

Subscriber Name: Limam Faughn
Subscriber CalPERS ID: 0123456789
Subscriber Date of Birth: 11/11/1961
Subscriber Coverage Type: Basic
Health Event Type: New Enrollment
Health Event Reason: 100 - Time Base & Tenure
Health Benefit Type: Medical
Health Plan Name: PERS Gold California (4373)
Party Type: Self/B and 2+/B
Effective Date: 07/01/2023
Event Date: 06/19/2023
Received Date: 06/19/2023
Status: Confirmed
Appointment ID: 93528486

Created Date: 07/03/2023 03:55:59 PM
Change Date: 07/03/2023 03:55:59 PM
Created by User: Employer
Updated by User: Employer
Reason for Rescission:
Additional Information:
Financial Impacts Suspended: No

Dependent List

Dependent Name	Dependent CalPERS ID	Dependent Date of Birth	Dependent Coverage Type
Georgeta Victoria Levlin	1234567890	10/02/2005	Basic

View Health Enrollment Summary

Step 10 Review the Health Enrollment Information section.

Step 11 Review the Covered Persons Summary section for a list of covered (Basic under the Medical column) and former (No under the Medical column) dependents.

Covered Persons Summary

Below are your covered persons for health.
Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical
Limam Faughn	11/11/1961	Self	NA	Basic
Khadeaja McCarthy	03/06/1961	Spouse	No	Basic
Georgeta Levin	10/02/2005	Parent-Child	Yes	Basic
Liber Liinamo	12/13/1984	Natural Born Child	No	No

Note: Each name is a link to their Covered Persons Health Information page.

Step 12 If there is a **View More Actions** link in the Covered Persons Summery section, you can select it to display the full list of dependents.

Covered Persons Summary View More Actions

Below are your covered persons for health.
Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision

Step 13 Review the Health Plan Summary section.

Health Plan Summary

Below is your plan and premium information.

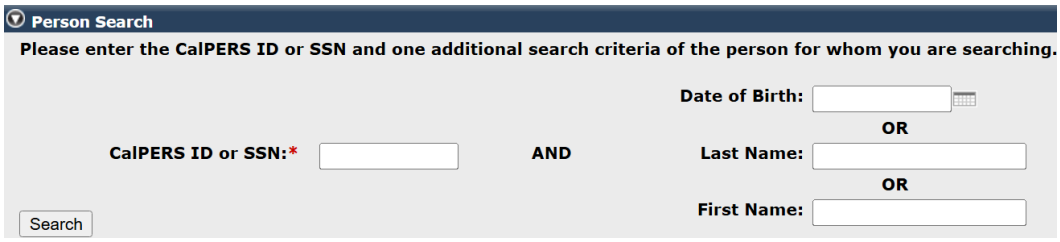
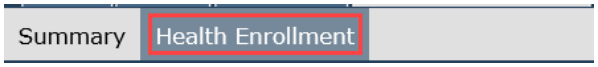
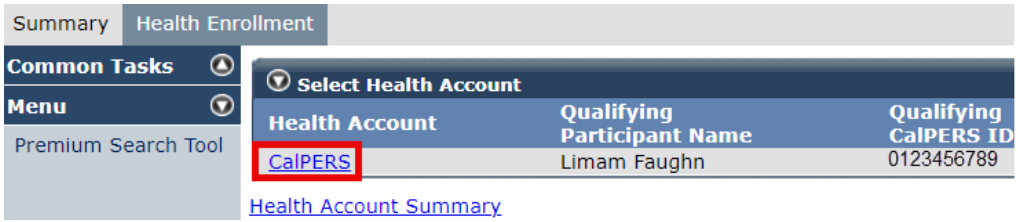
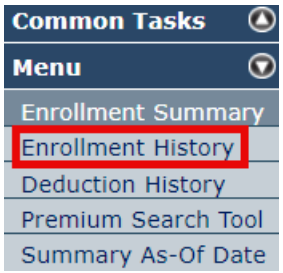
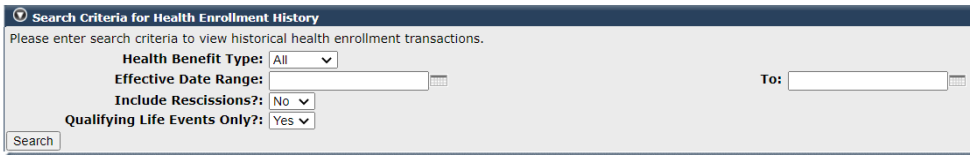
Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	PERS Gold California (4373)	Self/B and 2+/B	07/01/2023	$1,991.89

You have completed this scenario.

Scenario 2: Enrollment History

You will review all health enrollment transactions and rescissions in chronological order. Access transaction details such as effective dates, health event types, and future enrollment changes.

Step Actions (12 Steps)

Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Enter the employee's CalPERS ID or SSN and populate one field on the right. 
Step 3	Select the **Search** button.
Step 4	Select the **Health Enrollment** local navigation link. 
Step 5	Under the Health Account column, select the first link (CalPERS, CalPERS Employment, or CalPERS Retiree). 
Step 6	Select the **Enrollment History** link under the Menu left-side navigation. 
Step 7	Do you want to filter your search to review specific transactions like a rescission? **Yes:** Use the Search Criteria for Health Enrollment History section.  **No:** Skip to step 9.
Step 8	Select the **Search** button.

Step 9 From the Health Enrollment History section, under the Status column, select a **Confirmed** link for the transaction below the Cancel Coverage transaction.

Health Enrollment History

Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status	Appointment ID	Create Date	Change Date
02/01/2024	Cancel Coverage	Perm Sep: Batch Cancel	Limam Faughn	Medical	Confirmed	93528486	11/28/2023 08:19:56 PM	11/28/2023 08:19:56 PM
07/01/2023	New Enrollment	Time Base & Tenure	Georgeta Victoria Levlin	Medical	Confirmed	93528486	07/03/2023 03:55:59 PM	07/03/2023 03:55:59 PM
07/01/2023	New Enrollment	Time Base & Tenure	Khadeaja Ninke McCarthy	Medical	Confirmed	93528486	07/03/2023 03:55:59 PM	07/03/2023 03:55:59 PM
07/01/2023	New Enrollment	Time Base & Tenure	Limam Faughn	Medical	Confirmed	93528486	07/03/2023 03:55:58 PM	07/03/2023 03:55:58 PM

Note: Rescissions only display if you selected Yes in the Include Rescissions? drop-down field on step 7.

Step 10 Review the transaction details (dates used to enter the transaction, created date, if your agency or CalPERS processed, and possible notes on rescissions).

Step 11 Select the **View Health Enrollment Summary** link for the health enrollment summary as of the effective date of the transaction.

Transaction Details

Subscriber Name: Limam Faughn
Subscriber CalPERS ID: 0123456789
Subscriber Date of Birth: 11/11/1961
Subscriber Coverage Type: Basic
Health Event Type: New Enrollment
Health Event Reason: 100 - Time Base & Tenure
Health Benefit Type: Medical
Health Plan Name: PERS Gold California (4373)
Party Type: Self/B and 2+/B
Effective Date: 07/01/2023
Event Date: 06/19/2023
Received Date: 06/19/2023
Status: Confirmed
Appointment ID: 93528486

Created Date: 07/03/2023 03:55:58 PM
Change Date: 07/03/2023 03:55:58 PM
Created by User: Employer
Updated by User: Employer
Reason for Rescission:
Additional Information:
Financial Impacts Suspended: No

Dependent List

Dependent Name	Dependent CalPERS ID	Dependent Date of Birth	Dependent Coverage Type
Khadeaja Ninke McCarthy	1234567890	03/06/1961	Basic
Georgeta Victoria Levlin	2345678901	10/02/2005	Basic

View Health Enrollment Summary

Step 12 Review the health information based on the effective date of the transaction.

Health Enrollment Information

Your health enrollment is based on the following information:

Health Enrollment Summary As Of: 07/01/2023

Health Eligibility Information

Maintain Health Enrollment

Appointment ID: 93528486
Employer CalPERS ID: 9876543210
Employer: State of California
Division CalPERS ID: 8765432109
Division: Department Name
Agency Type: State of California
Qualifying CalPERS ID: 0123456789

Medical Group: R08-Rnk&File/Firefighters
Permanent Separation Date:
Retirement Date:
Health Benefit Appointment Same As Health Eligibility: Yes

Enrollment Information

Affiliated Retirement System: PERS
Financially Responsible CalPERS ID: 0123456789
Payroll Office Code: 0
Affiliated Association:
Health Account Status: Active Employment

Health Eligibility Zip Code: 94509
Zip Code Override Indicator: No
Override Zip Code Type:
Region: RG1
County: Contra Costa

Covered Persons Summary

Below are your covered persons for health.
Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
Limam Faughn	11/11/1961	Self	NA	Basic	No	No
Khadeaja McCarthy	03/06/1961	Spouse	No	Basic	No	No
Georgeta Levlin	10/02/2005	Parent-Child	No	Basic	No	No

Health Plan Summary

Below is your plan and premium information.

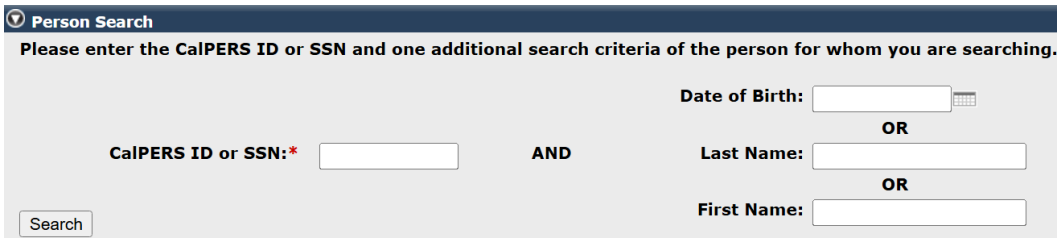
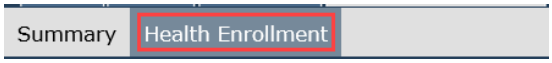
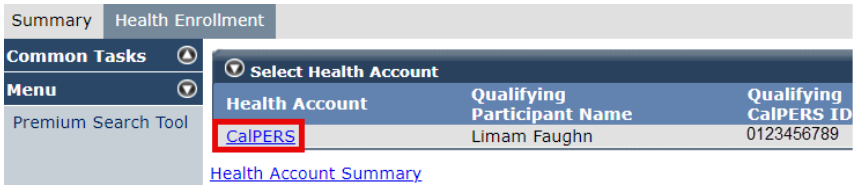
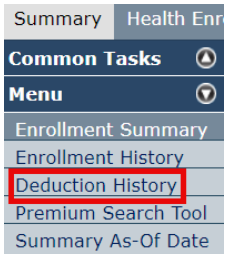
Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	PERS Gold California (4373)	Self/B and 2+/B	07/01/2023	$1,991.89

You have completed this scenario.

Scenario 3: Deduction History

You will review an employee's (or former employee) history of premium payments and credits. This includes the coverage month, plan name, party type, and participant/employer share.

Step Actions (9 Steps)

Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Enter the employee's CalPERS ID or SSN and populate one field on the right. 
Step 3	Select the **Search** button at the bottom-left side.
Step 4	Select the **Health Enrollment** local navigation link. 
Step 5	Under the Health Account column, select the first link (CalPERS, CalPERS Employment, or CalPERS Retiree). 
Step 6	Select the **Deduction History** link under the Menu left-side navigation. 
Step 7	From the Deduction Source drop-down list, select SCO for central-state deductions.
Step 8	Select the **Search** button to display the deduction history.

Step 9 Review the Deduction History section to verify the premiums paid for the coverage months. Ensure the plan, plan code, and party type are correct.

If a coverage month is not displayed, then SCO has not paid premiums for that month.

Deduction History

Coverage Month	Status	Employer CalPERS ID	Plan Name	Party Type	Plan Code	Participant Share	Employer Share
December 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	$1,991.89	$0.00
November 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	$1,991.89	$0.00
October 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	$1,991.89	$0.00
September 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	$1,991.89	$0.00
August 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	$1,991.89	$0.00
July 2023	Employment	8765432109	PERS Gold California	Self/B and 2+/B	4373	$1,991.89	$0.00

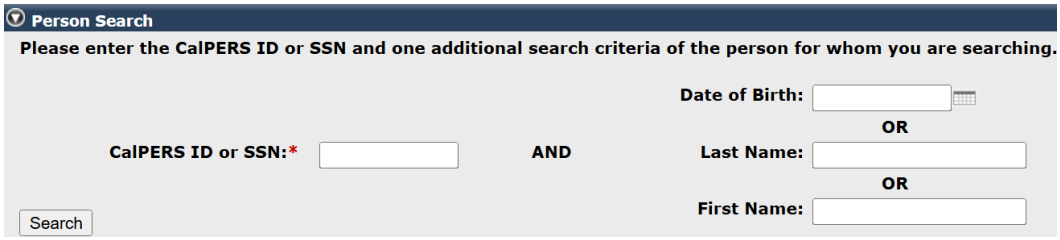
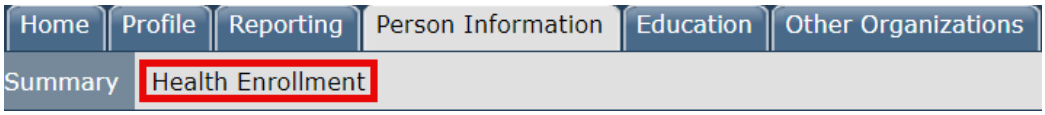
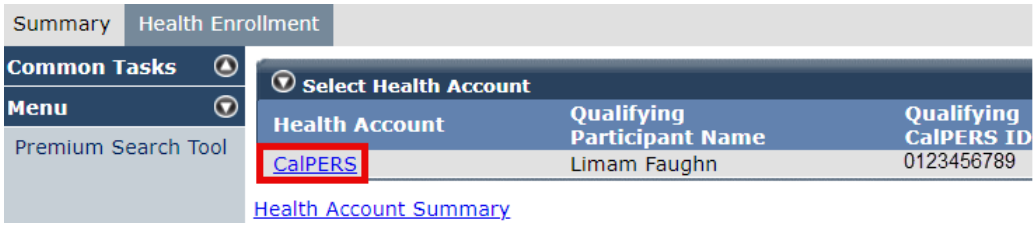
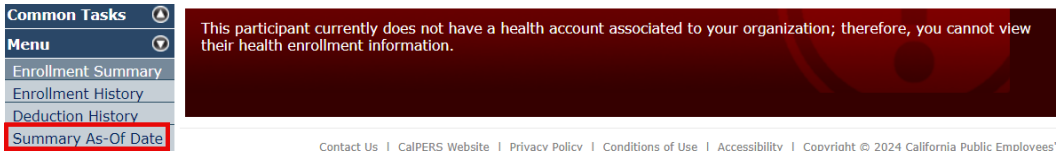
Note: Employees with a consolidated benefits (CoBen) allowance have their full premium displayed under the Participant Share column.

You have completed this scenario.

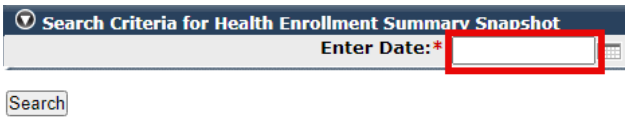
Scenario 4: Summary As-Of Date

You will verify health enrollment details on a former employee's health summary page. The former employee's health benefits were retroactively cancelled.

Step Actions (9 Steps)

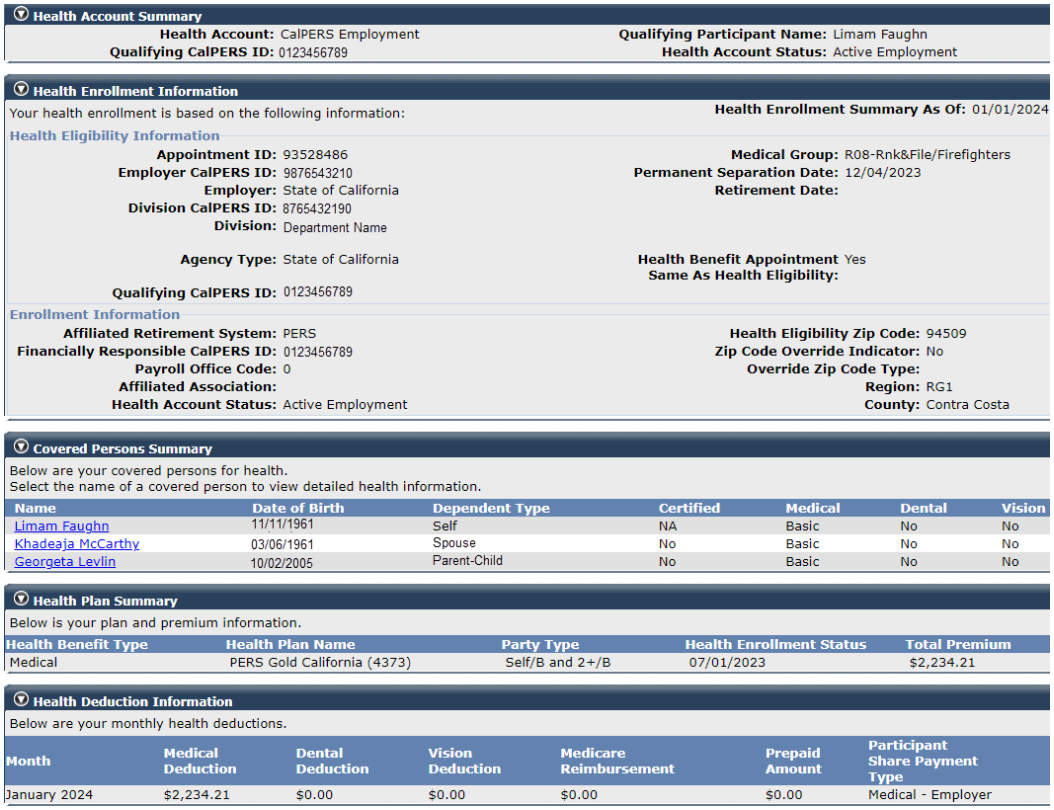
Step 1	From the homepage, select the **Person Information** global navigation tab.
Step 2	Enter the employee's CalPERS ID or SSN and populate one field on the right. 
Step 3	Select the **Search** button.
Step 4	Select the **Health Enrollment** local navigation link. 
Step 5	Under the Health Account column, select the first link (CalPERS, CalPERS Employment, or CalPERS Retiree). 
Step 6	Select the **Summary As-Of Date** link under the left-side Menu folder. This employee's health benefits have been canceled, so their Enrollment Summary page did not automatically display. 

Step 7 Enter a date when the enrollee had health coverage with your agency or the date for which you want to review the status (the health plan, covered dependents, etc. as of the entered date).



Step 8 Select the **Search** button.

Step 9 Review the enrollment summary information based on the as-of date entered. Refer to scenario 1 for details.



Health Account Summary

Health Account: CalPERS Employment
Qualifying CalPERS ID: 0123456789
Qualifying Participant Name: Limam Faughn
Health Account Status: Active Employment

Health Enrollment Information

Your health enrollment is based on the following information:
Health Enrollment Summary As Of: 01/01/2024

Health Eligibility Information

Appointment ID: 93528486
Employer CalPERS ID: 9876543210
Employer: State of California
Division CalPERS ID: 8765432190
Division: Department Name
Agency Type: State of California
Qualifying CalPERS ID: 0123456789
Medical Group: R08-Rnk&File/Firefighters
Permanent Separation Date: 12/04/2023
Retirement Date:
Health Benefit Appointment Same As Health Eligibility: Yes

Enrollment Information

Affiliated Retirement System: PERS
Financially Responsible CalPERS ID: 0123456789
Payroll Office Code: 0
Affiliated Association:
Health Account Status: Active Employment
Health Eligibility Zip Code: 94509
Zip Code Override Indicator: No
Override Zip Code Type:
Region: RG1
County: Contra Costa

Covered Persons Summary

Below are your covered persons for health.
Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
Limam Faughn	11/11/1961	Self	NA	Basic	No	No
Khadeaja McCarthy	03/06/1961	Spouse	No	Basic	No	No
Georgeta Levlin	10/02/2005	Parent-Child	No	Basic	No	No

Health Plan Summary

Below is your plan and premium information.

Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	PERS Gold California (4373)	Self/B and 2+/B	07/01/2023	$2,234.21

Health Deduction Information

Below are your monthly health deductions.

Month	Medical Deduction	Dental Deduction	Vision Deduction	Medicare Reimbursement	Prepaid Amount	Participant Share Payment Type
January 2024	$2,234.21	$0.00	$0.00	$0.00	$0.00	Medical - Employer

You have completed this scenario.

Unit 4: Proceed to Corrective Steps

State Controller's Office (SCO)

If myCalPERS has accurate information and the correct premium needs to be collected:

- Follow the instructions on the SCO Payroll Letter #18-017- Form STD. 674 A/R Processing For Missing Health Deductions (PDF). This provides information on how to complete the STD. 674 A/R to set up an accounts receivable (AR).
- Refer to the Payroll Procedures Manual Section H Deductions (PDF), Section H 722: Retroactivity on information with this process.
- Submit an STD. 674 A/R or STD. 674 (if necessary) via ConnectHR for the associated pay periods through the ConnectHR dropdown: Benefits – STD. 674 A/R Benefits Accounts Receivable.

For additional guidance, contact the SCO's Statewide Customer Contact Center at 916-372-7200 and follow the prompts. Leave a detailed voicemail if prompted.

CalPERS

If myCalPERS has incorrect information, contact CalPERS to:

- Update the employee's health information.
- Rescind a mandatory transaction or a transaction with a past effective date.
- Associate your agency to your employee's health benefits. If an employee transferred from another state agency, their health may be attached to their former agency.

For additional guidance, contact the CalPERS Employer Contact Center at **888 CalPERS** (or **888**-225-7377), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

CalPERS Resources

Obtain more information by visiting the CalPERS website at www.calpers.ca.gov.

- Business Rules & myCalPERS Classes
  Pathway: CalPERS website > Employers > Employer Education > Business Rules & myCalPERS Classes
- myCalPERS Student Guides & Resources
  Pathway: CalPERS website > Employers > Employer Education > (On the right side under Resources) myCalPERS Student Guides & Resources
- Policies & Procedures
  Pathway: CalPERS website > Employers > Policies & Procedures
- State Health Benefits Guide (PDF)
  Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Health Benefits Guide (PDF)
- Health Program Guide (HBD-120) (PDF) (Member publication)
  Pathway: CalPERS website > In the search box at top right, enter HBD-120 > CalPERS Health Program Guide
- System Enhancements
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Enhancements
- Circular Letters
  Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- Public Employees' Retirement Law (PERL)
  Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)
- myCalPERS Employer Reports (Cognos) Catalog
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog
  - Run these from the **Reports** left-side link under the Common Tasks folder:
    - CalPERS Health Subscriber Out of Service Population – Employer
    - Chancellor's Office Parent – Child Recertification Report CSU Campuses
    - Dental Retirees OE Report – CalHR
    - Dental Retirees OE Report – CSU
    - Dependent Enrollment Report
    - Employer Health Enrollee Report – Ext
    - Employer Health Event Notification Report
    - Employer Health Event Transaction Report (**Note:** The 26-year-old deletion batch runs the first business day of the month.)

    - Health Plan Statement Employer Report
    - Health ZIP Code Yes-No Report – State/CSU
    - Parent-Child Relationship Dependent with Expiring Certification Report
    - State Active Health Enrollment and SCO Health Deduction Discrepancy Report
  - Run these reports from myCalPERS pages (not the **Reports** left-side link):
    - Dependent Verification End Date Employer Report
    - Dependent Verification Health Event Employer Report
    - Dependent Verification with Past Due or No End Dates Active Health Report

- Self-Paced Online Classes (log in to myCalPERS, select the **Education** global navigation tab)
  – Business Rules
    - Health Plan Options
    - Health Benefits Officer Roles & Responsibilities
    - Health Eligibility Requirements
    - Health Enrollment
  – myCalPERS
    - New Enrollment
    - Change Plan
    - Cancellation
    - Rescission
    - Add a Dependent
    - Delete Dependent
    - COBRA Enrollment for Deleted Dependents
    - COBRA Enrollment for Employees
    - Set Up Direct Pay
    - Reconcile State-Active Premiums (central-state agencies)

SCO and CalHR Resources

SCO

- SCO Payroll Letter #18-017- Form STD. 674 A/R Processing For Missing Health Deductions (PDF)
- Payroll Procedures Manual Section H Deductions (PDF): H 722
- ConnectHR CS Directory Documents and Processing Needs (PDF)

CalHR

- Benefits Administration Manual - CalHR
  - BAM – Consolidated Benefits (CoBen)
  - BAM – Deduction Codes

Note: The Deduction Codes and Consolidated Benefits (CoBen) pages may require a password. If you don't have the password, please contact your supervisor.

CalPERS and SCO Contacts

CalPERS

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

Contact 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

Send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation folder, then select the **Submit Inquiry** link to submit a question or request.

State Controller's Office

Phone

Contact the SCO's Statewide Customer Contact Center at 916-372-7200 and follow the prompts. Leave a detailed voicemail if prompted.