

myCalPERS System Access Administration

Student Guide

December 19, 2025



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

- CalPERS enhanced security through Multi-Factor Authentication (MFA) is being implemented as of 11/17/25. This impacts adding new users with system access, granting system access and resetting passwords.
- Unit 2, 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.

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.

Contents

Terms and Definitions	3
Unit 1: Add New Contacts	6
Unit 2: Maintain Existing Contacts	10
Unit 3: Maintain Agency Information	27
CalPERS Resources	30
CalPERS Contacts	31

Terms and Definitions

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

Contacts

▼ Contacts Add New		View More Actions»		
Name	Contact Type	System Admin	Primary	Phone Number
Britni Derebenskiy	Health Benefit Officer	Y	Y	(916) 888-7777
Tyrese Ismael Cugnone	Financials	Y	Y	(916) 888-7777
Tyrese Ismael Cugnone	Executive	Y	Y	(916) 888-7777
Maribel Martignone	Payroll	Y	N	(916) 888-7777

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

▼ Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: *

Programs Supported:

- ☐ CalPERS
- ☐ Health - Medical
- ☐ Medicare
- ☐ Social Security

Entity: *

☒ CalPERS ID or SSN: [Verify](#)

And one of the following

Date of Birth:

First Name:

Last Name:

☐ Other:

☐ Allow System Access

☐ Make Contact Viewable to Other Organizations

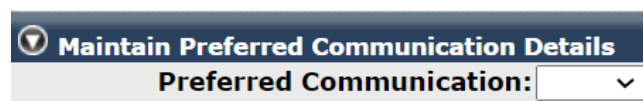
☐ Primary Contact

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 full Social Security Number must be provided, along with one of the following: date of birth, first name, or last name. To add a contact without system access, select the **Other** radio button and provide their name.

- **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

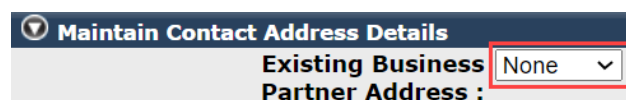


The Preferred Communication drop-down list displays two options for the contact:

- **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

Maintain Communication Details				
Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Work	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

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

Assigned Username

Assigned Username	
Contact Name: Roelie Sundotlen Contact Username:* <input type="text"/>	Usernames must consist of 6-35 characters with no spaces. Valid characters are numbers, letters, and the following special characters: at signs (@), periods (.), underscores (_), and hyphens (-). Usernames must also start with a letter. Usernames are not case sensitive.

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

Assign Roles	
Role	End Date
<input type="checkbox"/> Authorized Personal Loan Representative	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner AR/Billing	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner AR/Billing Limited	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	<input type="text"/>

- 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.

Note: Third-party contacts who perform services on behalf of your agency should not be added as a new contact. For more information on establishing a Business Partner Relationship, please refer to the [myCalPERS Business Partner Relationships \(PDF\)](#) Student Guide.

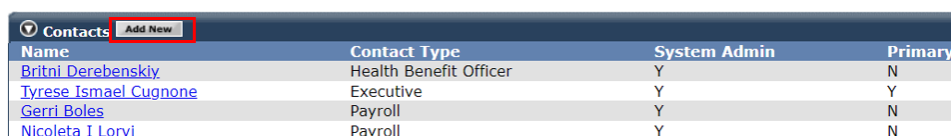
Security Agreement

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 (31 steps)

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

Step 2 In the Contacts section, select the **Add New** button.

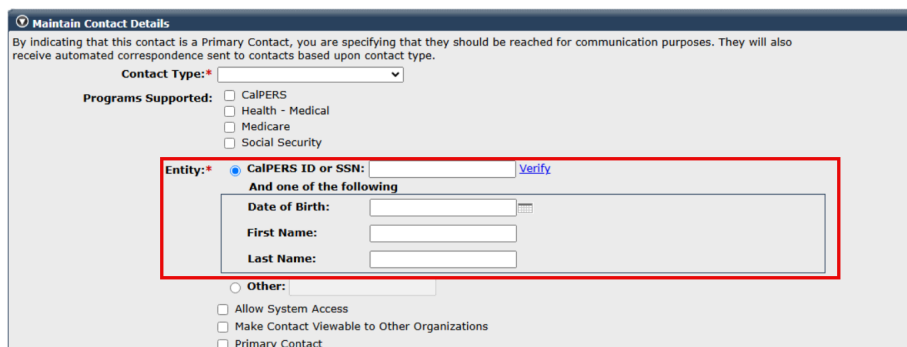


▼ Contacts Add New			
Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N

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.



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: *

Programs Supported:

- ☐ CalPERS
- ☐ Health - Medical
- ☐ Medicare
- ☐ Social Security

Entity: *

☒ CalPERS ID or SSN: [Verify](#)

And one of the following

Date of Birth:

First Name:

Last Name:

☐ Other:

☐ Allow System Access

☐ Make Contact Viewable to Other Organizations

☐ Primary Contact

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:** Select 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.

Maintain Contact Address Details

Existing Business Partner Address : **None**
Physical
Mailing

Address:*

Country: United States

City:*

State:*

Zip Code:*

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.

Maintain Contact Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Work			<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Home			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		
<input type="radio"/>		

Add Another Contact Type Save Clear

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.

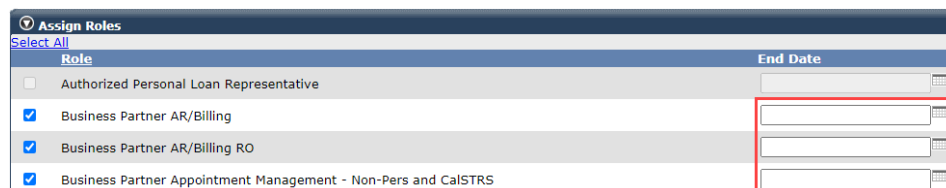
Step 21 In the Assign Roles section, select the check box(es) for the roles that apply to the contact. Refer to the [myCalPERS System Privileges for Business Partner Roles \(PDF\)](#) guide on what each role allows a contact to review and/or process.

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).



The screenshot shows a web interface titled "Assign Roles" with a "Select All" link. Below is a table with two columns: "Role" and "End Date".

Role	End Date
<input type="checkbox"/> Authorized Personal Loan Representative	
<input checked="" type="checkbox"/> Business Partner AR/Billing	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner AR/Billing RO	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	<input type="text"/>

The "End Date" column for the three selected roles is highlighted with a red rectangle.

Step 24 Select the **Save** button.

Step 25 Does the email address or mobile phone number displayed need to be updated?

Yes: Continue to step 26.

No: Skip to step 29.

Step 26 Select the **Update Email or Phone** link.

Step 27 Update the email address and/or mobile phone number.

Password Recovery Options

Recovery options give your users a way to access their account. We can send them an email or text message, if they forget their password. Their email address and mobile phone number will be used for CalPERS purposes and are protected by our [Privacy Policy](#).

Email Address:*
stevens@agency.gov Work email is preferred.

Mobile Phone:
(555) 555-5555 We can't send a temporary passcode to international phone numbers.

Note: Changes only update password recovery options and will not update communication details.

Save and Continue Clear

Step 28 Select the **Save and Continue** button.

Step 29 Choose a delivery method to send a set password link directly to the user.

Set Password

Username: stevens1977

Delivery Method: *

☐ Text Message - (555) 555-5555 (SMS)

☐ Email - stevens@agency.gov

Submit Cancel [Update Email or Phone](#)

Step 30 Select the **Submit** button. A Create Password link has been sent to the user.

Create Password link has been sent to (XXX) XXX-5555.

Step 31 Select the **Save** 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.

Contents

Scenario 1: Grant System Access	11
Scenario 2: Update System Access	14
Scenario 3: Add an Additional System Access Administrator.....	15
Scenario 4: Designate a New Primary Contact	16
Scenario 5: Update Contact Type	17
Scenario 6: Add or Remove Contacts From Health Email Notification List	18
Scenario 7: Update Preferred Communication Method.....	19
Scenario 8: Reset Password	20
Scenario 9: Update Username	22
Scenario 10: Unlock System Access	23
Scenario 11: Deactivate Contact.....	24
Scenario 12: Reactivate Contact	25
Scenario 13: Review System Access History	26

Scenario 1: Grant System Access

You will grant system access to an existing contact.

Step Actions (16 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.

▼ Contacts Add New			
Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta J Lorvi	Payroll	Y	N
Nicoleta J Lorvi	Payroll	Y	N
Britni Derebenskiy	Payroll	Y	N
Tyrese Ismael Cugnone	Payroll	Y	N
Maribel Martignone	Payroll	Y	N

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

▼ Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type*: General

Programs Supported:

- ☐ Social Security
- ☐ Health - Medical
- ☒ CalPERS
- ☐ CERBT

Entity:

☒ CalPERS ID: 3738249770

Contact Name: Sylvia Stephens

☐ Other:

☒ Allow System Access

☐ Make Contact Viewable to Other Organizations

☐ Primary Contact

[System Access](#)

[System Access History](#)

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.

▼ Assigned Username

[Reset Password](#)

Contact Name: Sylvia Stephens

Contact Username: sylvia.stephens73

☐ Prevent the user from accessing the site

Assigned Roles Last Updated On: 10/01/2025

Created By: B. env89

Created On: 10/01/2025

Updated By: B. env89

[System Access History](#)

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).

Role	End Date
<input type="checkbox"/> Authorized Personal Loan Representative	
<input checked="" type="checkbox"/> Business Partner AR/Billing	
<input checked="" type="checkbox"/> Business Partner AR/Billing Limited	
<input checked="" type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	
<input checked="" type="checkbox"/> Business Partner Arrears	
<input checked="" type="checkbox"/> Business Partner CERBT/CEPPT	
<input type="checkbox"/> Business Partner CalHR	
<input checked="" type="checkbox"/> Business Partner Direct Authorization	
<input checked="" type="checkbox"/> Business Partner Direct Authorization Agreements	

No: Continue to step 9.

Step 9 Select the **Save** button.

Step 10 Does the email address or mobile phone number displayed need to be updated?

Yes: Continue to step 11.

No: Skip to step 14.

Step 11 Select the **Update Email or Phone** link.

Step 12 Update the email address and/or mobile phone number.

Password Recovery Options

Recovery options give your users a way to access their account. We can send them an email or text message, if they forget their password. Their email address and mobile phone number will be used for CalPERS purposes and are protected by our [Privacy Policy](#).

Email Address:*
stevens@agency.gov Work email is preferred.

Mobile Phone:
(555) 555-5555 We can't send a temporary passcode to international phone numbers.

Note: Changes only update password recovery options and will not update communication details.

Step 13 Select the **Save and Continue** button.

Step 14 Choose a delivery method to send a set password link directly to the user.



The screenshot shows a web form titled "Set Password". At the top, it displays "Username: stevens1977". Below this, there is a section labeled "Delivery Method: *" which is highlighted with a red rectangle. This section contains two radio button options: "Text Message - (555) 555-5555 (SMS)" and "Email - stevens@agency.gov". At the bottom of the form, there are three buttons: "Submit", "Cancel", and a blue link "Update Email or Phone".

Step 15 Select the **Submit** button. A Create Password link has been sent to the user.

Create Password link has been sent to (XXX) XXX-5555.

Step 16 Select the **Save** 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.

Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: * Financials

Programs Supported:

- ☐ CERBT
- ☒ CalPERS
- ☐ Health - Medical
- ☐ Social Security

Entity:

- ☒ **CalPERS ID:** 2754111800
- ☐ **Contact Name:** Emma Tran
- ☐ **Other:**

☒ Allow System Access

☐ Make Contact Viewable to Other Organizations

☐ Primary Contact

[System Access](#)

[System Access History](#)

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)

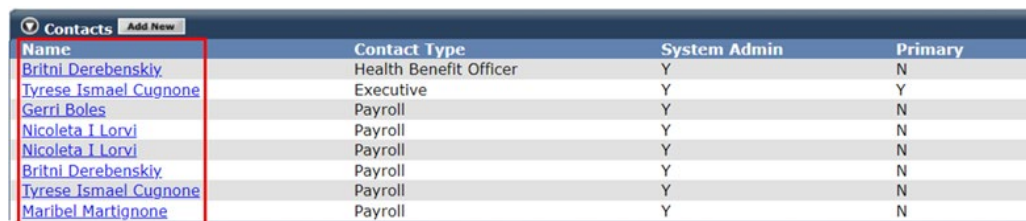
Step 1 Select the **Profile** global navigation tab.

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.



Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Britni Derebenskiy	Payroll	Y	N
Tyrese Ismael Cugnone	Payroll	Y	N
Maribel Martignone	Payroll	Y	N

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



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type:

Programs Supported:

- ☐ CERBT
- ☒ CalPERS
- ☐ Health - Medical
- ☐ Social Security

Entity: ☒ CalPERS ID:

Contact Name:

☐ Other:

☒ Allow System Access

☐ Make Contact Viewable to Other Organizations

☐ Primary Contact

[System Access](#)

[System Access History](#)

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 steps)

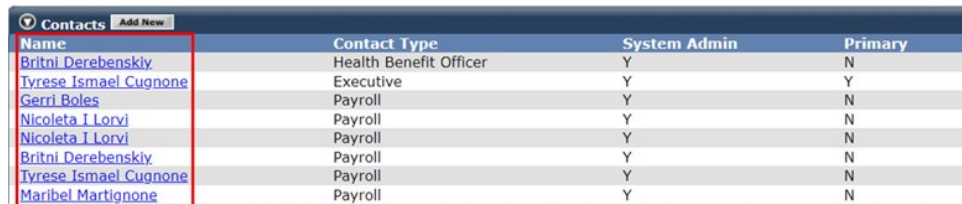
Step 1 Select the **Profile** global navigation tab.

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

Yes: Continue to step 3.

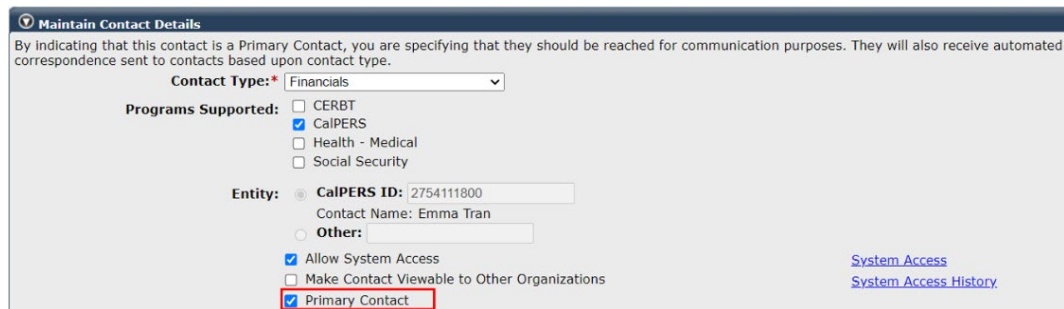
No: Select the **View More Actions** link.

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



Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Britni Derebenskiy	Payroll	Y	N
Tyrese Ismael Cugnone	Payroll	Y	N
Maribel Martignone	Payroll	Y	N

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



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type:

Programs Supported:

- ☐ CERBT
- ☒ CalPERS
- ☐ Health - Medical
- ☐ Social Security

Entity:

☒ CalPERS ID:

☐ Contact Name:

☐ Other:

☒ Allow System Access

☐ Make Contact Viewable to Other Organizations

☒ Primary Contact

[System Access](#)

[System Access History](#)

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)

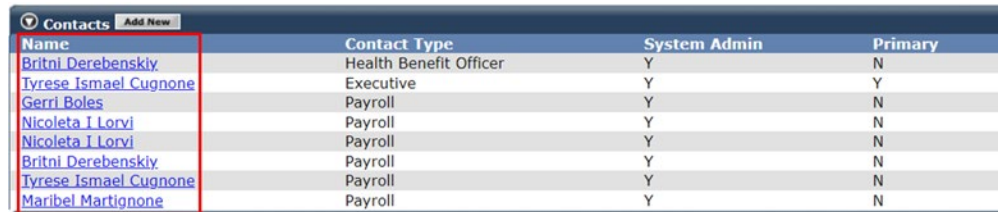
Step 1 Select the **Profile** global navigation tab.

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

Yes: Continue to step 3.

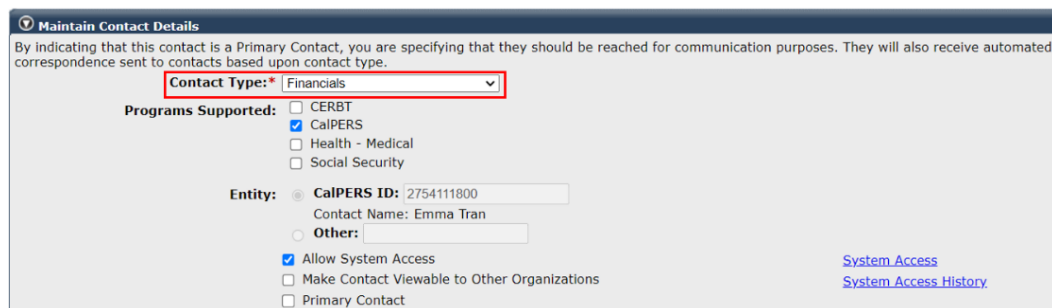
No: Select the **View More Actions** link.

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



Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta I Lorvi	Payroll	Y	N
Nicoleta I Lorvi	Payroll	Y	N
Britni Derebenskiy	Payroll	Y	N
Tyrese Ismael Cugnone	Payroll	Y	N
Maribel Martignone	Payroll	Y	N

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



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: * Financials

Programs Supported:

- ☐ CERBT
- ☒ CalPERS
- ☐ Health - Medical
- ☐ Social Security

Entity:

☒ **CalPERS ID:** 2754111800
Contact Name: Emma Tran

☐ **Other:**

☒ Allow System Access

☐ Make Contact Viewable to Other Organizations

☐ Primary Contact

[System Access](#)

[System Access History](#)

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.
- The maximum number of contacts on the list is 20.
- 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 the top, filter 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).

Select	Contact Type	Contact Name	Email Address
<input checked="" type="checkbox"/>	Arrears Administrator	Paula Pers	Paula@agency.gov
<input checked="" type="checkbox"/>	Enrollment	Steven Adams	Steven@agency.gov

Add to Notification List

Step 6 Select the **Add to Notification List** button, and then skip to step 8.

Step 7 Toward the bottom, within the Maintain Notification List for Online Health Enrollment section, select the check box(es) for the contact(s).

Remove from Notification	Contact Type	Contact Name	Email Address
<input checked="" type="checkbox"/>	Arrears Administrator	Kitty Kooper	Kitty@agency.gov
<input checked="" type="checkbox"/>	Enrollment	Annie Adams	Annie@agency.gov

Save Cancel

Step 8 Select the **Save** button at bottom left. **Note:** Removing a person from the notification list 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)

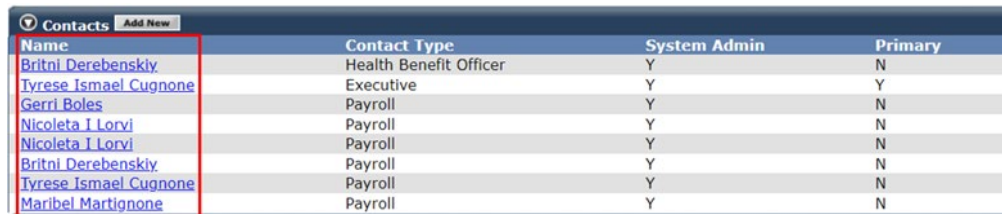
Step 1 Select the **Profile** global navigation tab.

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.



Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta I Lorvi	Payroll	Y	N
Nicoleta I Lorvi	Payroll	Y	N
Britni Derebenskiy	Payroll	Y	N
Tyrese Ismael Cugnone	Payroll	Y	N
Maribel Martignone	Payroll	Y	N

Step 4 In the Maintain Preferred Communication Details section, select from the Preferred Communication drop-down list.



Maintain Preferred Commu	Details
Preferred Communication:	<div>Mail</div> <div>Email</div>

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 (12 steps)


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

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

Yes: Continue to step 3.

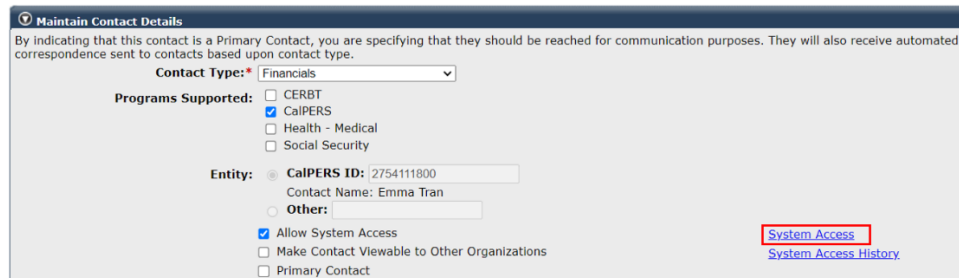
No: Select the **View More Actions** link.

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



Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta I Lorvi	Payroll	Y	N
Nicoleta I Lorvi	Payroll	Y	N
Britni Derebenskiy	Payroll	Y	N
Tyrese Ismael Cugnone	Payroll	Y	N
Maribel Martignone	Payroll	Y	N

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



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: Financials

Programs Supported:

- ☐ CERBT
- ☒ CalPERS
- ☐ Health - Medical
- ☐ Social Security

Entity:

- ☒ CalPERS ID: 2754111800
- ☐ Other: Contact Name: Emma Tran

☒ Allow System Access

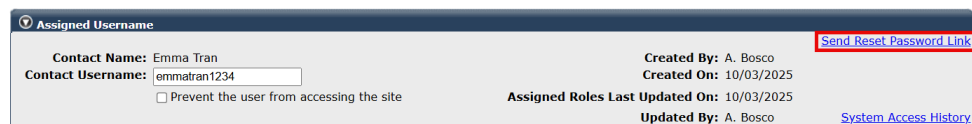
☐ Make Contact Viewable to Other Organizations

☐ Primary Contact

[System Access](#)

[System Access History](#)

Step 5 In the Assigned Username section, select the **Send Reset Password Link**.



Assigned Username

Contact Name: Emma Tran

Contact Username: emmatran1234

☐ Prevent the user from accessing the site

Created By: A. Bosco

Created On: 10/03/2025

Assigned Roles Last Updated On: 10/03/2025

Updated By: A. Bosco

[Send Reset Password Link](#)

[System Access History](#)

Step 6 Does the email address or mobile phone number displayed need to be updated?

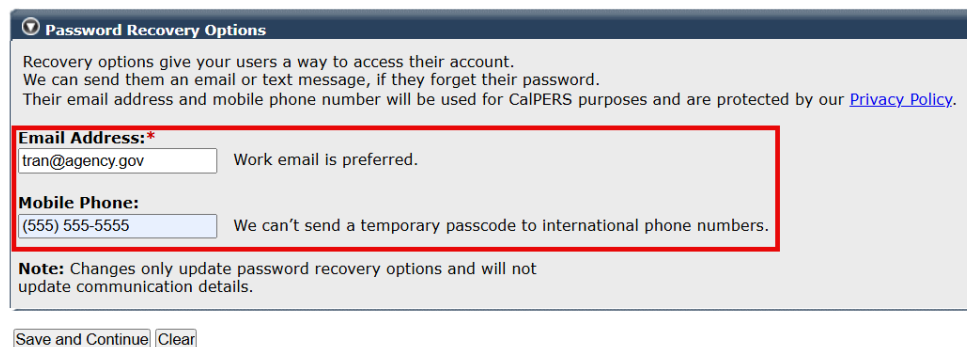
Yes: Continue to step 7.

No: Skip to step 10.

Note: The email address displayed is used for Multi-Factor Authentication (MFA) as the login recovery email. Proceed to Step 7 to update the MFA email address. This email may differ from the one listed in the Maintain Communication Details section on the previous page.

Step 7 Select the **Update Email or Phone** link.

Step 8 Update the email address and/or mobile phone number.



The screenshot shows the 'Password Recovery Options' form. It has a title bar with a dropdown arrow and the text 'Password Recovery Options'. Below the title bar, there is a paragraph: 'Recovery options give your users a way to access their account. We can send them an email or text message, if they forget their password. Their email address and mobile phone number will be used for CalPERS purposes and are protected by our [Privacy Policy](#).' Below this paragraph, there are two input fields. The first is labeled 'Email Address: *' and contains the text 'tran@agency.gov'. To its right, it says 'Work email is preferred.' The second is labeled 'Mobile Phone: *' and contains the text '(555) 555-5555'. To its right, it says 'We can't send a temporary passcode to international phone numbers.' Below these fields, there is a 'Note: Changes only update password recovery options and will not update communication details.' At the bottom, there are two buttons: 'Save and Continue' and 'Clear'.

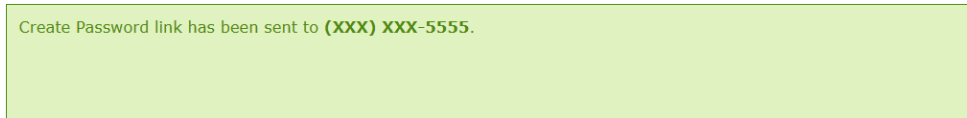
Step 9 Select the **Save and Continue** button

Step 10 Choose a delivery method to send a set password link directly to the user.



The screenshot shows the 'Reset Password' form. It has a title bar with a dropdown arrow and the text 'Reset Password'. Below the title bar, it says 'Username: emmatran1234'. Below this, there is a section labeled 'Delivery Method: *' with two radio buttons. The first is 'Text Message - (555) 555-5555 (SMS)' and the second is 'Email - tran@agency.gov'. Below these radio buttons, there are three buttons: 'Submit', 'Cancel', and 'Update Email or Phone'.

Step 11 Select the **Submit** button. A Reset Password link has been sent to the user.



The screenshot shows a green box with the text: 'Create Password link has been sent to (XXX) XXX-5555.'

Step 12 Select the **Save** 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)

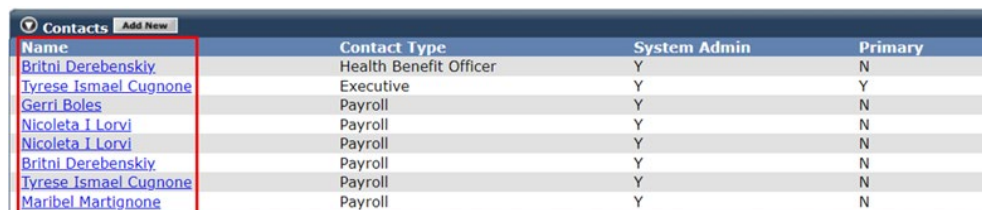
Step 1 Select the **Profile** global navigation tab.

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

Yes: Continue to step 3.

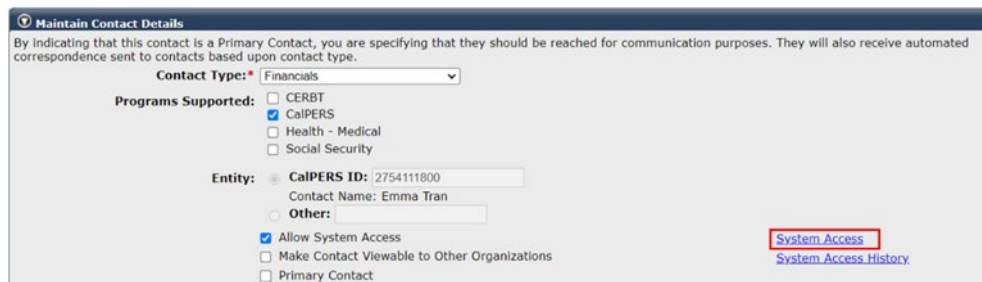
No: Select the **View More Actions** link.

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



Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Britni Derebenskiy	Payroll	Y	N
Tyrese Ismael Cugnone	Payroll	Y	N
Maribel Martignone	Payroll	Y	N

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



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type:

Programs Supported:

- ☐ CERBT
- ☒ CalPERS
- ☐ Health - Medical
- ☐ Social Security

Entity:

- ☒ CalPERS ID:
- ☐ Contact Name:
- ☐ Other:

☒ Allow System Access

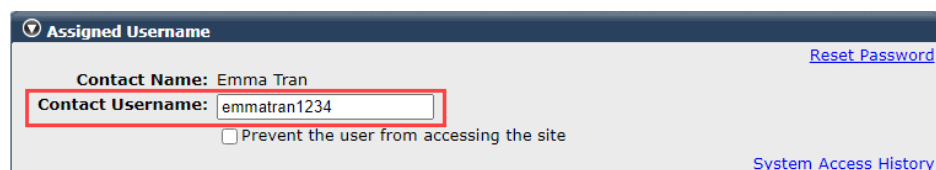
☐ Make Contact Viewable to Other Organizations

☐ Primary Contact

[System Access](#)

[System Access History](#)

Step 5 In the Assigned Username section, update the Contact Username field.



Assigned Username

[Reset Password](#)

Contact Name:

Contact Username:

☐ Prevent the user from accessing the site

[System Access History](#)

Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 10: Unlock or Lock System Access

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

Step Actions (8 steps)

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

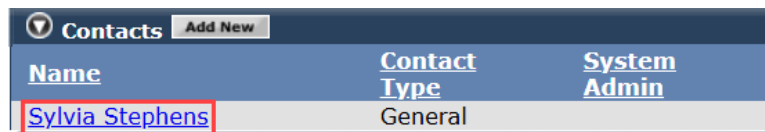
Step 2 Within the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

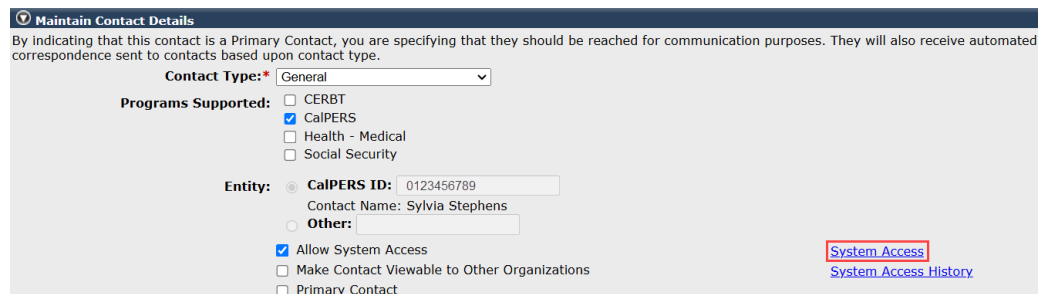
Step 3 Select the **View More Actions** link.

Step 4 Select the **contact name** link.



▼ Contacts Add New		
Name	Contact Type	System Admin
Sylvia Stephens	General	

Step 5 Within the Maintain Contact Details section, select the **System Access** link.



▼ Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type: * General

Programs Supported:

- ☐ CERBT
- ☒ CalPERS
- ☐ Health - Medical
- ☐ Social Security

Entity:

- ☒ CalPERS ID: 0123456789
- ☐ Other:

Contact Name: Sylvia Stephens

☒ Allow System Access

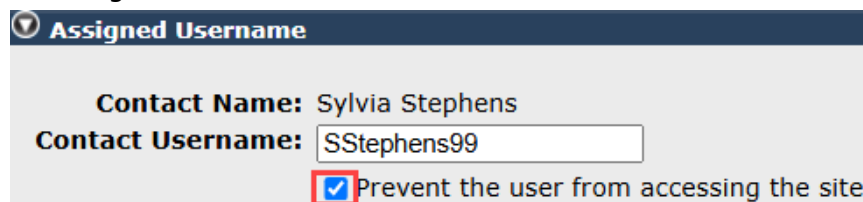
☐ Make Contact Viewable to Other Organizations

☐ Primary Contact

[System Access](#)

[System Access History](#)

Step 6 Within the Assigned Username section, deselect the *Prevent the user from accessing the site* check box or select the check box to lock.



▼ Assigned Username

Contact Name: Sylvia Stephens

Contact Username: SStephens99

☒ Prevent the user from accessing the site

Step 7 Select the **Save** button.

Step 8 Select the **Save** button.

You have completed this scenario.

Scenario 11: Deactivate Contact

You have a contact who is going on leave of absence. 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 listed has 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 non-PERS, 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.

Contacts		Add New		View More Actions»	
Name	Contact Type	System Admin	Primary	Phone Number	
Britni Derebensky	Health Benefit Officer	Y	N	(916) 888-7777	
Britni Derebensky	Financials	Y	N	(916) 795-3000	

Step 4 In the Maintain Contact Details section, complete the Deactivation Date field(s).

Maintain Contact Type							
Contact Type	Address Type	Address	Primary Phone	Phone Type	Primary Email	System Admin	Deactivation Date
Health Benefit Officer	Mailing Address	69 Weald Way, Oakland, CA 94617	9168887777	Work	PSR_TEST@calpers.ca.gov	Y	
Financials	Mailing Address	5104 4Th Avenue, 1219 DUNCAN BAY CITY TX.77414, OAKLAND, CA 94612 2007	9167953000	Work	britni@agency.gov	Y	

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

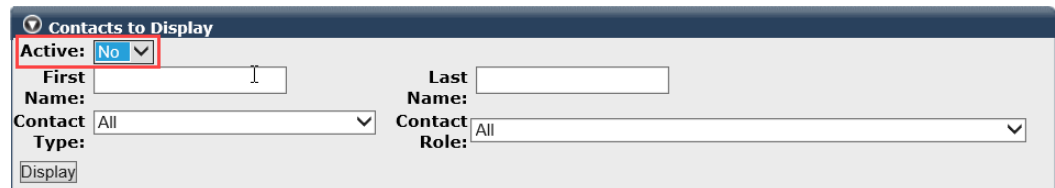
If system access is granted upon reactivation, the same user roles and username will be assigned to the contact.

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.



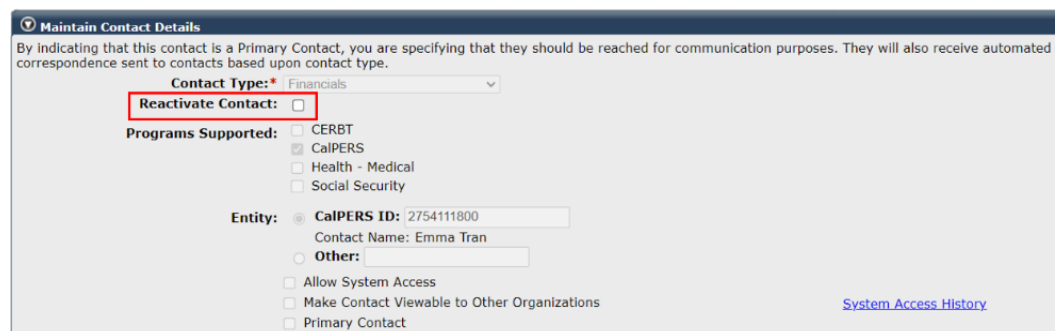
Step 4 Select the **Display** button.

Step 5 In the Contacts section, select the **contact name** link.



Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Britni Derebenskiy	Payroll	Y	N
Tyrese Ismael Cugnone	Payroll	Y	N
Maribel Martignone	Payroll	Y	N

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 created, deactivated, and reactivated the contact's system access and when the action was performed.

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

Step Actions (5 steps)

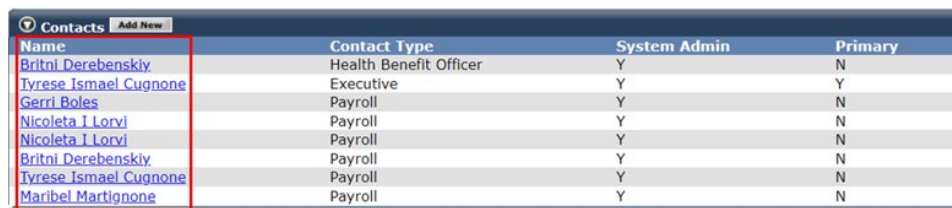
Step 1 Select the **Profile** global navigation tab.

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.



Name	Contact Type	System Admin	Primary
Britni Derebenskiy	Health Benefit Officer	Y	N
Tyrese Ismael Cugnone	Executive	Y	Y
Gerri Boles	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Nicoleta I Loryi	Payroll	Y	N
Britni Derebenskiy	Payroll	Y	N
Tyrese Ismael Cugnone	Payroll	Y	N
Maribel Martignone	Payroll	Y	N

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



Maintain Contact Details

By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication purposes. They will also receive automated correspondence sent to contacts based upon contact type.

Contact Type:

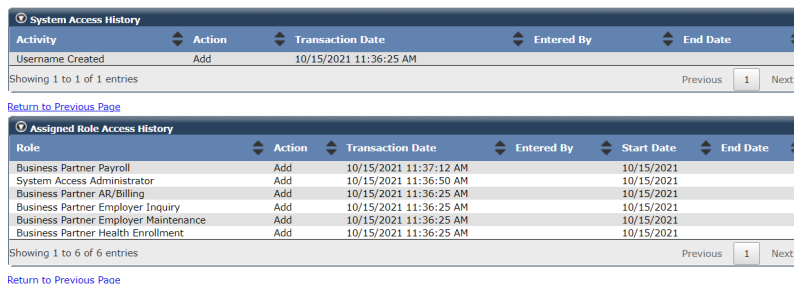
Programs Supported: ☐ CERBT ☒ CalPERS ☐ Health - Medical ☐ Social Security

Entity: ☒ CalPERS ID: 2754111800 ☐ Other:

☒ Allow System Access ☐ Make Contact Viewable to Other Organizations ☐ Primary Contact

[System Access](#) [System Access History](#)

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



System Access History

Activity	Action	Transaction Date	Entered By	End Date
Username Created	Add	10/15/2021 11:36:25 AM		

Showing 1 to 1 of 1 entries Previous 1 Next

[Return to Previous Page](#)

Assigned Role Access History

Role	Action	Transaction Date	Entered By	Start Date	End Date
Business Partner Payroll	Add	10/15/2021 11:37:12 AM		10/15/2021	
System Access Administrator	Add	10/15/2021 11:36:50 AM		10/15/2021	
Business Partner AR/Billing	Add	10/15/2021 11:36:25 AM		10/15/2021	
Business Partner Employer Inquiry	Add	10/15/2021 11:36:25 AM		10/15/2021	
Business Partner Employer Maintenance	Add	10/15/2021 11:36:25 AM		10/15/2021	
Business Partner Health Enrollment	Add	10/15/2021 11:36:25 AM		10/15/2021	

Showing 1 to 6 of 6 entries Previous 1 Next

[Return to Previous Page](#)

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.

Contents

Scenario 1: Update Agency Address	28
Scenario 2: Update Agency Phone Number and Email Address.....	29

Scenario 1: Update Agency Address

Your agency has changed their mailing address. 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.

Summary
Profile

CalPERS ID: 4015143822
Federal Tax ID: 94-1746312
Category: Public Agency
County: Alameda
Division Of:
Merged Agency: No

Status: Active
Name: Agency Name
Regional Office: Walnut Creek Regional Office
Governing Body:
Transit Workers: No

Addresses

Physical: 5104 4Th Avenue
OAKLAND, CA 94612-2007

Mailing: 5104 4Th Avenue
OAKLAND, CA 94612-2007

Undeliverable: No

Communication Information

Preferred Communication: Mail
Primary Email: PSR_TEST@calpers.ca.gov
Primary Phone Number: (999) 888-7777

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.

The screenshot shows the 'Summary' section of the myCalPERS interface. It includes a 'Profile' section with fields for CalPERS ID, Federal Tax ID, Category, County, Division Of, and Merged Agency. To the right, it shows Status (Active), Name (Agency Name), Regional Office (Walnut Creek Regional Office), Governing Body, and Transit Workers (No). Below this is an 'Addresses' section with Physical and Mailing addresses, and Undeliverable status. At the bottom is a 'Communication Information' section with Preferred Communication (Mail), Primary Email (PSR_TEST@calpers.ca.gov), and Primary Phone Number ((916) 888-7777).

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

The screenshot shows the 'Maintain Communication Details' form. It has a table with columns: Primary, Phone Type, Phone Number, Extension, and International. The 'Primary' column has radio buttons. The 'Phone Type' column has options: Work, FAX, TTY, Cellular, and Other. The 'Phone Number' column has input fields. The 'Extension' column has input fields. The 'International' column has checkboxes. Below the table, there is a 'Primary' section with a radio button and an 'Email' section with an input field. At the bottom, there are 'Save' and 'Clear' buttons.

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](http://www.calpers.ca.gov) 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.