

# Introduction to myCalPERS for Business Partners

Student Guide

**December 19, 2025**



# Introduction

myCalPERS is an online system business partners use to access information, process transactions, and generate reports. This guide contains information to help new business partner contacts get started with myCalPERS.

## Disclaimer

- Business partner and participant information has been masked in this procedure guide.
- We strive to provide accurate information within this guide; however, the Public Employees' Retirement Law is the authoritative source for CalPERS policies.

## What's New

- Multi-Factor Authentication steps have been added and updated in Unit 1.

## Contents

Unit 1: Log In and Reset Password.....	3
Unit 2: myCalPERS Navigation .....	13
Unit 3: myCalPERS & Windows Tips.....	23
Unit 4: Employer Classes.....	24
Unit 5: Submit Inquiry & Inquiry List .....	35
Unit 6: Resources .....	37
CalPERS Contacts .....	42

## Unit 1: Log In and Reset Password

To begin using myCalPERS, your agency's System Access Administrator (SAA) will need to add you as a contact. Contact CalPERS to set up your agency's access if you work for a new contracting agency.

### System Logic

- Changes to password recovery options will not update communication details.
- Best practice is to use an individual work email address for security settings.

### Security Agreement

Safeguard your agency and employee confidential data by not revealing your username or password to anyone. CalPERS will never ask for your password. It is a violation of the CalPERS Security Agreement to share log-in information. Review CalPERS website's [Conditions of Use](#) and [Privacy Policy](#) for additional information.

### Locked Account

Your account will lock after six unsuccessful password attempts. Use one of the following options to unlock your account:

- Use the **Forgot your Password?** link in myCalPERS (scenario 2)
- Contact your agency's System Access Administrator (SAA)
- Call CalPERS at **888 CalPERS** (or **888-225-7377**)

### Contents

Scenario 1: Log In .....	4
Scenario 2: Reset Your Password.....	8
Scenario 3: Change Your Password, Email, or Phone Number .....	10

## Scenario 1: Log In

New myCalPERS contacts start with step 1. Existing users skip to step 11.

### System Logic

The log in link expires after 30 days.

### Step Actions (20 steps)

Are you a new contact for your agency?

Step 1      **Yes:** Continue to step 2

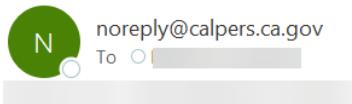
**No:** Skip to step 11

---

### Create Your Password

Step 2      Retrieve the **Business Partner Account Password** email.

Business Partner Account Password



Dear M [redacted],

To set your password visit: <https://env95-ext.mycalpers.calpers.ca.gov/setupPassword>.

Don't reply to this message. For further assistance, contact us at **888 CalPERS** (or **888-225-7377**).

Thank you,  
CalPERS

---

Step 3      Click the **Setup Password** link in the message to create a password.

---

Step 4      Enter your email and username.

### Set Your Password

Complete the following fields so we can confirm your identity. The information you enter must match our records exactly.

**Email** (required)

**Username** (required)

**Continue**

---

Step 5      Select the **Continue** button.

Step 6 Enter the six-digit code in the Code field.

## Enter Your Code

We've sent a six-digit code to [j\\*\\*\\*\\*\\*@calpers.ca.gov](mailto:j*****@calpers.ca.gov) The code expires in 10 minutes.

**Code** (required)

**Continue**

[Send a New Code](#)

---

Step 7 Select the **Continue** button.

Step 8 Create your password.

Your new password must have:

- 8 characters minimum
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- no spaces

**Password** (required)

[Show Password](#)

**Continue**

---

Step 9 Select the **Continue** button.

Step 10 Click Return to Log in, then skip to step 13.

## Password Updated

✓ You've successfully updated your password

[Return to Log in](#)

## Log In

Step 11 Go to the CalPERS website at [www.calpers.ca.gov](http://www.calpers.ca.gov).

Step 12 Select the **Log in to myCalPERS** button.



Step 13 Enter your username and password.

A screenshot of the myCalPERS login page. It features a 'myCalPERS' logo and fields for 'Username (required)' and 'Password (required)'. There is a 'Show Password' link and a 'Log In' button. Below the login form are links for 'Forgot your username?' and 'Forgot your password?'. To the right, a sidebar titled 'Register for an Account' provides information for members and employers, and contains a 'Member Registration' button.

Step 14 Select the **Continue** button.

Step 15 Retrieve your six-digit code, and enter it in the Code field

### Enter Your Code

We've sent a six-digit code to [e\\*\\*\\*\\*\\*@calpers.ca.gov](mailto:e*****@calpers.ca.gov) The code expires in 10 minutes. Check your spam folder if you don't see the email.

Code (required)

[Continue](#) [Send a New Code](#) [Cancel](#)

If you need assistance, contact us at **888 CalPERS** (or 888-225-7377).

Step 16 Select the **Continue** button.

Step 17 Read the security agreement.

Step 18 If you agree with this statement, select the **I Accept** button at the bottom left.

Step 19 Read the Conditions of Use for Business Partners (Employers) section.

Step 20      Do you agree to the Conditions of Use for Business Partners (Employers)?

**Yes:** Select the **Accept** button

**No:** Select the **Decline** button

**Note:** You cannot continue if you select Decline.

 **Conditions of Use for Business Partners (Employers)**

To help you submit and maintain accurate information, as well as ensure compliance, CalPERS provides Retirement Business Rules, Health Business Rules, and myCalPERS system training. For more information, select the Education tab within myCalPERS or visit the Education Center on the CalPERS website.

By accessing this application, you acknowledge that training is available to you. In addition, all information accessible to you will be used only to assist you in conducting official business with CalPERS.

**You have completed this scenario.**

---

## Scenario 2: Reset Your Password

### Step Actions (11 steps)

Step 1 Go to the CalPERS website at [www.calpers.ca.gov](http://www.calpers.ca.gov).

---

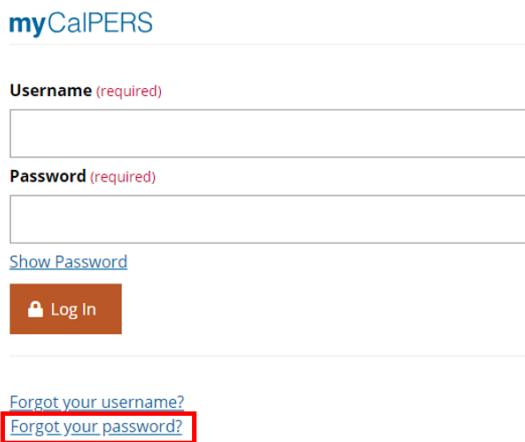
Step 2 Select the **Log in to myCalPERS** button.



The screenshot shows the CalPERS website homepage. At the top right, there is a red rectangular box highlighting the 'Log in to myCalPERS' button. Above the button, there are links for 'Contact' and 'About'. Below the button, there is a search bar with the placeholder 'Search' and a magnifying glass icon.

Step 3 At the Log In page, select the **Forgot your password?** link.

---



The screenshot shows the 'myCalPERS' Log In page. It features fields for 'Username' and 'Password', a 'Show Password' link, and a 'Log In' button. Below the form, there are links for 'Forgot your username?' and 'Forgot your password?'. The 'Forgot your password?' link is highlighted with a red box.

Step 4 Enter your email and username.

### Reset Your Password

Complete the following fields so we can confirm your identity. The information you enter must match our records exactly.

Email (required)

Username (required)

**Continue**

---

Step 5 Select the **Continue** button.

---

Step 6 Select a verification method.

## Choose a Verification Method

For security purposes, we require this step to log in to your account. If the contact information listed is incorrect, please contact us at **888 CalPERS** (or **888-225-7377**).

How should we verify you? (required)

- Call (XXX) XXX-7777
- Text (XXX) XXX-7777
- Email j\*\*\*\*\*@calpers.ca.gov

**Continue**

---

Step 7 Select the **Continue** button.

Step 8 After you receive your six-digit code, enter it in the Code field.

## Enter Your Code

We've sent a six-digit code to **j\*\*\*\*\*@calpers.ca.gov** The code expires in 10 minutes.

Code (required)

**Continue**

[Send a New Code](#)

---

Step 9 Select the **Continue** button.

## Create Your New Password

Step 10 Enter a new password.

## Create Your New Password

Your new password must have:

- 8 characters minimum
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- no spaces

Password (required)

[Show Password](#)

**Continue**

---

Step 11 Select the **Continue** button.

**You have completed this scenario.**

## Scenario 3: Change Your Password, Email, or Phone Number

### Step Actions (15 steps)

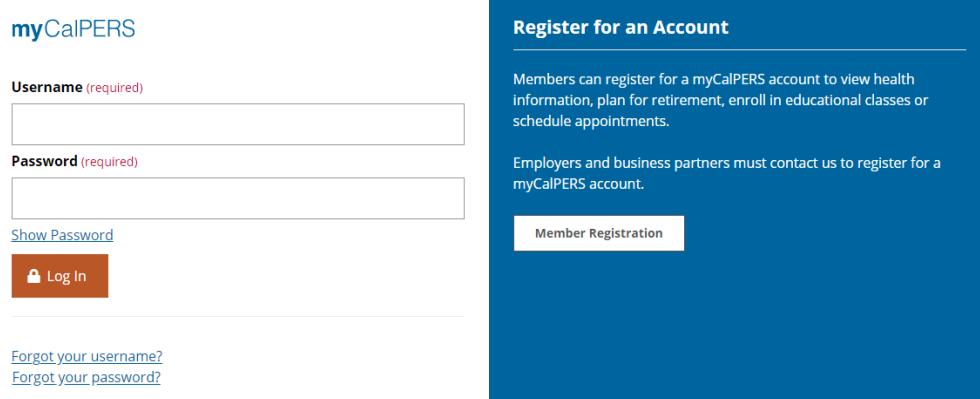
Step 1 Go to the CalPERS website at [www.calpers.ca.gov](http://www.calpers.ca.gov).

---

Step 2 Select the **Log in to myCalPERS** button.



Step 3 Enter your username and password.

A screenshot of the 'myCalPERS' login page. It features a 'Register for an Account' section on the right with instructions for members and employers. The main area contains fields for 'Username' and 'Password', a 'Show Password' link, and a 'Log In' button. Below the login form are links for 'Forgot your username?' and 'Forgot your password?'. The 'Log In' button is highlighted with a red box.

Step 4 Select the **Log In** button.

---

Step 5 Do you agree to the Conditions of Use for Business Partners (Employers)?

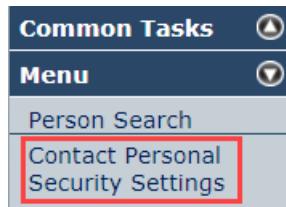
**Yes:** Select the **Accept** button

**No:** Select the **Decline** button

**Note:** You cannot continue if you select Decline.

---

Step 6 On the left-side navigation, select **Contact Personal Security Settings**.



Step 7	What would you like to update?  <b>Password:</b> Continue to step 8  <b>Email or Phone Number:</b> Skip to step 12  <b>Note:</b> Updating this email or phone will not impact your contact communication details. Best practice is to use an individual work email address for security settings.
--------	---

---

#### Password

Step 8	Within the Username and Password section, select the <b>Edit password</b> link.
Step 9	Enter a new password.

## Create Your New Password

Your new password must have:

- 8 characters minimum
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- no spaces

**Password** (required)

 Enter the required field: Password

[Show Password](#)

**Continue**

**Cancel**

---

Step 10	Select the <b>Continue</b> button.
---------	------------------------------------

---

Step 11	Did you need to make additional updates?
---------	--

**Yes:** Return to step 7

**No: You have completed this scenario**

---

#### Email or Phone Number

---

Step 12	Within the Password Recovery Options section, select the <b>Edit password recovery options</b> link.
---------	--

Step 13      Update your email address and/or phone number

**>Password Recovery Options**

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

**Email Address:**

**Mobile Phone:**  
 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 14      Select the **Save and Continue** button.

---

Step 15      Did you need to make additional updates?

**Yes:** Return to step 7

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

---

## Unit 2: myCalPERS Navigation

myCalPERS has global navigation tabs, local navigation links, and left-side navigation links to access information, process transactions, and run reports. Your system access determines what information you can access and which transactions you can process in myCalPERS. This unit has descriptions of commonly used tools.

### Contents

myCalPERS Homepage .....	14
Global Navigation Tabs .....	15
Local Navigation Links .....	16
Left-Side Navigation Links .....	18

## myCalPERS Homepage

Below shows the myCalPERS homepage followed by descriptions of the main features.

- **Maintain Health Enrollment Requests** section displays if there is a new employee-submitted health transaction or document to review. For more information, refer to the [myCalPERS Health Transaction Verification student guide \(PDF\)](#).
- **My Messages** provides CalPERS issues, events, and updates such as upcoming training classes in your area, new student guides, new services, billing cutoff dates, etc.
- **My Cases or View More Actions>>** allows you to open and review the progress and status of your contract(s) with CalPERS.
- **Health Plan Search by ZIP Code** tool can be used to find CalPERS health plans in an area.

Skip to: Content | Footer | Welcome CalPERS | Help | Contact Us | Log out **March 11, 2022**

**myCalPERS**

Home | Profile | Reporting | Person Information | Education | Other Organizations

My Home | Requests

Common Tasks |                                                                 <img alt="Feedback icon" data-bbox="200 4205 215 421

## Global Navigation Tabs

The global navigation tabs are the primary ways to navigate in myCalPERS.



### Home

- Refresh the system and return to the homepage.
- Clear a previous employee/retiree query before another person search.

### Profile

- Access your agency's address and communication information, contacts, business partner relationships, and contracts/agreements.
- Clear a previous employee, member, or retiree query before another person search.

### Reporting

- Process retirement and health enrollments, employment certifications, and payroll.
- Access billing and payments.
- Request a new payroll schedule or extension.
- Report out-of-class appointments.
- Reconcile retirement appointments with unposted payroll.

### Person Information

Query employee and retiree retirement and health information.

- Check membership status of a new employee.
- Verify or update an employee's demographics and addresses.
- Access a retiree's retirement date.
- Review member contributions and service credit totals for your CalPERS-covered employees.
- Access a subscriber's health benefit information.
- Review appointment history or add a new appointment for an employee who previously worked with your agency. You may also review or add/correct appointment events, e.g., add/end a leave of absence, permanently separate, change a member category, etc.

### Education

Register for employer instructor-led or self-paced online classes. Edit or cancel an enrollment. Review your training history.

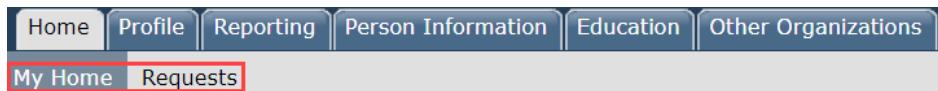
### Other Organizations

Access other CalPERS employer contact information (e.g., names, emails, and phone numbers).

## Local Navigation Links

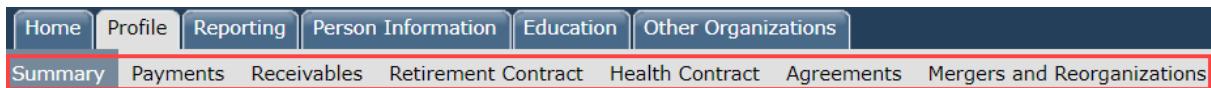
The local navigation links are right below the global navigation tabs and change depending on which global tab is selected. If your agency contracts for both retirement and health benefits, the following links in myCalPERS will display.

### Home Global Navigation Tab, Local Navigation Links



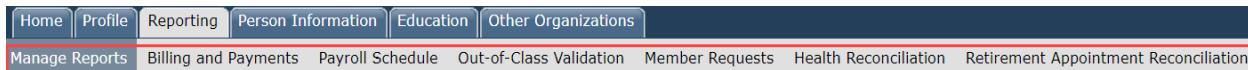
- **My Home:** My Messages, My Cases, and Health Plan Search by ZIP Code sections and CalPERS News.
- **Requests:** Order up to three publications with a maximum of 150 copies for each at no cost.

### Profile Global Navigation Tab Local Navigation Links



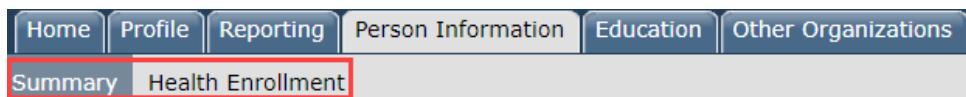
- **Summary:** Access your agency's main address(es) and phone numbers, contacts, business partner relationships, and contracts/agreements. System access administrators can make updates to this page such as adding and maintaining contacts.  
*State agencies:* Select a program link within the Statutory Plan section to review the retirement program event summary, base benefits, special provisions, and member rate summaries.
- **Payments:** Check the status of payments (e.g., Pending, Posted, Canceled, In Process, etc.). You may also generate an Employer Payment Report.
- **Receivables:** Access open and closed receivables, due dates and amounts, receivable balance, and receivable description. You may also generate an Employer Receivable report.
- **Retirement Contract:** Public agencies and schools can access, add, or modify a resolution, submit a valuation request, or request an amendment to your agency's CalPERS contract.  
*State agencies:* Refer to the first bullet for retirement contract information.
- **Health Contract:** Access your agency's health contract(s) and effective dates.
- **Agreements:** Review your agency's list of agreements with CalPERS.
- **Mergers and Reorganizations:** Access pending and completed agency mergers and school district reorganizations. You may also initiate and add new merger requests.

## Reporting Global Navigation Tab, Local Navigation Links



- **Manage Reports:** Upload files, manually process retirement and health enrollments, copy forward a posted payroll report, or maintain health enrollment requests that were submitted by active employees online. File upload reporters who submit service period payroll details for the service credit purchase requests can access a list of their reports and report status. They can also correct errors.
- **Billing and Payments:** Access year-to-date billing and payments, receivable history, and health billing roster.
- **Payroll Schedule:** Add a new schedule or request an extension or exemption. You may also reconcile employees with unposted payroll by earned period.
- **Out-of-Class Validation:** Create, add, or search Out-of-Class records within a report or upload a CSV file. You may select a record to review, update, or delete from the report.
- **Member Requests:** Update the status of an employment certification request, access historical certification information, provide employment certification for a period of service that is not listed, or add a new employment service period.
- **Health Reconciliation:** Health carriers remit enrollment discrepancy reports to CalPERS.
- **Retirement Appointment Reconciliation:** Review and reconcile employees with unposted payroll, confirm earned periods that should not have payroll, and update appointments.

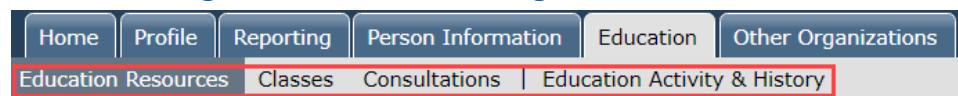
## Person Information Global Navigation Tab, Local Navigation Links



Displays after you retrieve your employee's or retiree's profile page.

- **Summary:** View profile, communication, pre-retirement benefit information, and access appointment details.
- **Health Enrollment:** Access health account summary.

## Education Global Navigation Tab, Local Navigation Links



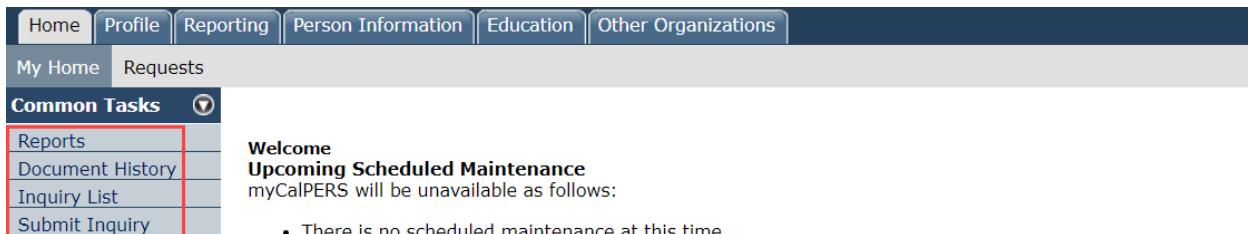
- **Education Resources:** Enroll in a class, request an Educational Forum consultation, review education training activity and history, and access resources.
- **Classes:** Review instructor-led class dates and enroll. You may also start online classes.
- **Consultations:** Request a one-on-one consultation with an employer educator.
- **Education Activity & History:** Access your upcoming, past, enrolled, and canceled classes and consultations. You may reschedule and cancel classes.

## Left-Side Navigation Links

The left-side navigation links change depending on which global navigation tab or local navigation link is selected. If your agency contracts for both retirement and health benefits, the following links are available in myCalPERS.

### Common Tasks Folder

The Common Tasks folder is available via the **Home**, **Profile**, **Reporting**, or **Education** global navigation tabs. Select Common Tasks to access these static links:



Common Tasks

Reports  
Document History  
Inquiry List  
Submit Inquiry

Welcome  
Upcoming Scheduled Maintenance  
myCalPERS will be unavailable as follows:

- There is no scheduled maintenance at this time.

- **Reports:** Run reports that query data from myCalPERS via the Cognos application.
- **Document History:** Access documents that you sent or received from CalPERS.
- **Inquiry List:** Review inquiry and response history.
- **Submit Inquiry:** Submit a question/information to CalPERS securely (refer to unit 5).

### Home Global Navigation Tab, Left-Side Navigation Links

From the **Home** tab, **My Home** and **Requests** local links, these Menu left-side links display:

- Select **My Home** local navigation link to display its left-side navigation menu links:



Common Tasks

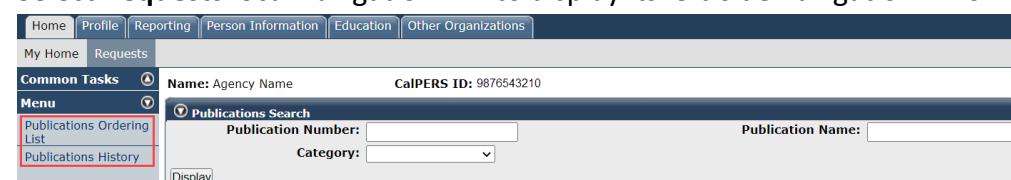
Menu

Person Search  
Contact Personal Security Settings

My Cases

- **Person Search:** Query employee/retiree information.
- **Contact Personal Security Settings:** Change your password, challenge questions, security image and message, phone number, and/or email address.

- Select **Requests** local navigation link to display its left-side navigation links:



Common Tasks

Menu

Publications Ordering List  
Publications History

Publications Search

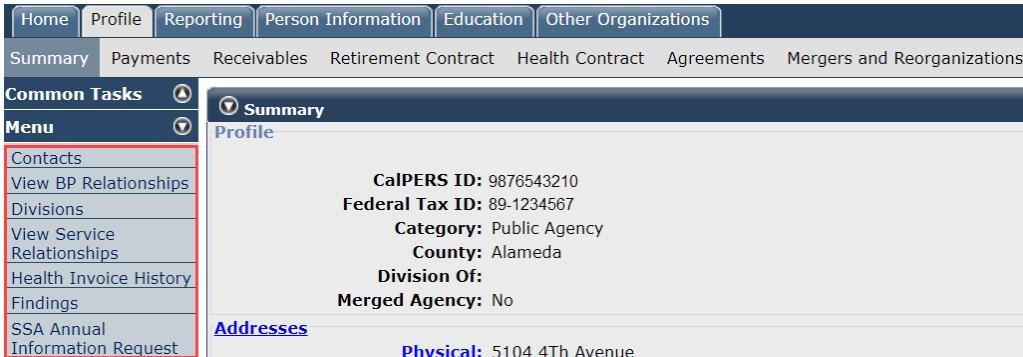
Publication Number:   
Category:   
Publication Name:

- **Publications Ordering List:** Order up to three publications with a maximum of 150 copies for each at no cost.
- **Publications History:** Review your publication order history.

## Profile Global Navigation Tab, Left-Side Navigation Links

From the **Profile** tab, **Summary**, **Payments**, **Receivables**, **Retirement Contract**, **Health Contract**, **Agreements**, **Mergers and Reorganizations** local links, these Menu left-side links display:

- Select **Summary** local navigation link to display its left-side navigation links:

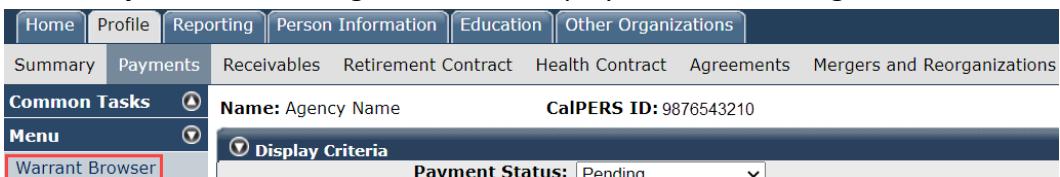


CalPERS ID: 9876543210  
Federal Tax ID: 89-1234567  
Category: Public Agency  
County: Alameda  
Division Of:  
Merged Agency: No

Physical: 5104 4Th Avenue

- **Contacts:** Review current and former myCalPERS contacts for your agency.
- **View BP Relationships:** Review business partner relationships that your agency established with a third party to do business on your agency's behalf.
- **Divisions:** Access a list of agencies under the umbrella of your agency, e.g., a school district is a division of a county office of education.
- **View Service Relationships:** Review a list of agencies for which your agency provides service.
- **Health Invoice History:** Access a list of your health receivables.
- **Findings:** Review the CalPERS auditor's compliance review findings for your agency.
- **SSA Annual Information Request:** Review a list of the responses to the Annual Information Request (AIR) questionnaire.

- Select **Payments** local navigation link to display its left-side navigation link:



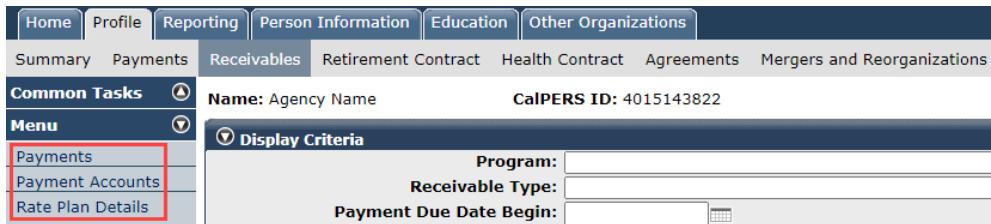
Name: Agency Name      CalPERS ID: 9876543210

Display Criteria

Payment Status: Pending

- **Warrant Browser:** Search for a payment sent to your agency from CalPERS such as Advanced Disability Pension Payments (ADPP) reimbursements.

- Select **Receivables** local navigation link to access its left-side navigation links:



The screenshot shows the 'Receivables' page. At the top, there is a global navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this is a local navigation bar with tabs: Summary, Payments, Receivables, Retirement Contract, Health Contract, Agreements, and Mergers and Reorganizations. The 'Receivables' tab is selected. On the left, a 'Common Tasks' menu is open, showing 'Payments', 'Payment Accounts', and 'Rate Plan Details' under the 'Menu' section, with a red box highlighting these three items. The main content area displays 'Name: Agency Name' and 'CALPERS ID: 4015143822'. Below this is a 'Display Criteria' section with fields for 'Program:', 'Receivable Type:', and 'Payment Due Date Begin:'.

- **Payments:** Check the status of payments (e.g., pending, posted, Canceled etc.).
- **Payment Accounts:** Add or delete bank accounts used for EFT payments.
- **Rate Plan Details:** Review your year-to-date PERS contributions.
- Select **Retirement Contract** local navigation link to access its left-side navigation links.

*State agencies:* Select the **Profile** global navigation tab, **Summary** local navigation link for retirement contract information (review page 13).



The screenshot shows the 'Retirement Contract' page. At the top, there is a global navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this is a local navigation bar with tabs: Summary, Payments, Receivables, Retirement Contract, Health Contract, Agreements, and Mergers and Reorganizations. The 'Retirement Contract' tab is selected. On the left, a 'Common Tasks' menu is open, showing 'View Benefits', 'Maintain Positions', 'View Merger History', 'View Special Provisions', 'Maintain CBU', and 'GASB Information', with a red box highlighting these six items. The main content area displays 'Contract Number: 30366', 'Contract Effective Date: 09/01/1970', and 'Contract Status: Active'. Below this is a 'Contract Event Summary' table with columns: Contract Event, Status, Member Category, Submission Date, Effective Date, Requested By, and Amendment Status. One row is shown: 'Amendment' with 'Approved' status, 'Safety - Police Miscellaneous' category, '09/22/2016' submission date, '12/31/2016' effective date, 'Completed' requested by, and 'Completed' amendment status.

- **View Benefits:** Review benefit levels and provisions.
- **Maintain Positions:** Add or update codes and names for positions. Each agency determines the codes and position names.
- **View Merger History:** Review business partner merger history and dates.
- **View Special Provisions:** Access summarized information for special provisions.
- **Maintain CBU:** Review a list of collective bargaining units (CBUs) or add a new CBU.
- **GASB Information:** Public agency employers can request, pay for, and download their Governmental Accounting Standards Board (GASB) 68 accounting valuation reports. Agents with multiple-employer plans will also be able to obtain their census data.
- Select **Health Contract** local navigation link to access its left-side navigation links:



The screenshot shows the 'Health Contract' page. At the top, there is a global navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below this is a local navigation bar with tabs: Summary, Payments, Receivables, Retirement Contract, Health Contract, Agreements, and Mergers and Reorganizations. The 'Health Contract' tab is selected. On the left, a 'Common Tasks' menu is open, showing 'OPEB Data Extract', with a red box highlighting this item. The main content area displays 'Select Health Contract' and 'Health Contract' sections, with links to 'PEMHCA CalPERS Health Contract' and 'PEMHCA Non-CalPERS Health Contract'.

- **OPEB Data Extract:** Request and access Other Post-Employment Benefits (OPEB) health census data. Review information on active and retired employees covered and those eligible but not enrolled in a health plan by your agency. This information may be used to support an agency's requirements to report OPEB liability under Governmental Accounting Standards Board (GASB) Statement No. 75 for financial reporting.

- Select a **Health Contract name** link, then access its left-side navigation links:

The screenshot shows the 'Health Contract Information' page. The left sidebar has a red box around the 'Common Tasks' menu, which includes 'Group Summary', 'Contribution Preview', 'Subscriber List', 'Contract History', and 'OPEB Data Extract'. The main content area shows 'Contract Number: 33932' and 'Contract Category: FEMHCA CalPERS Health Contract'. Below that is a 'Contract Summary' section with 'Contract State: Amended', 'Submission Date: 09/25/2019', 'Contract Status: Active', and 'Effective Date: 01/01/2020'. At the bottom is a 'Maintain Contract' section.

- **Group Summary:** Review medical groups for your agency.
- **Contribution Preview:** Review your agency's contribution toward enrollees' health premiums and vesting information.
- **Subscriber List:** Access your agency's health enrollees and number of covered persons.
- **Contract History:** Check your agency's health contract's type and status.

## Reporting Global Navigation Tab, Left-Side Navigation Links

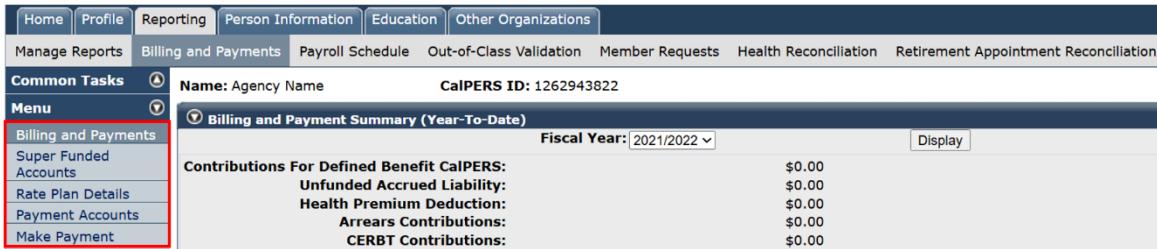
From the **Reporting** tab, **Manage Reports**, **Billing and Payments**, **Payroll Schedule**, **Out-of-Class Validation**, **Member Requests**, **Health Reconciliation**, **Retirement Appointment Reconciliation** local links, these Menu left-side links display:

- Select **Manage Reports** local navigation link to display its left-side navigation links. The following descriptions are the main left-side links used by employers:

The screenshot shows the 'Manage Reports' page. The left sidebar has a red box around the 'Common Tasks' menu, which includes 'Organization Search', 'Adjustment Reports', 'Search Payroll Records by Participant', 'Maintain Payroll Records', 'Preprocessing Area', 'File Upload History', 'Furlough Reduction', 'Retirement Contract Summary', 'Maintain DA Deductions', 'Current DA Errors', 'Unresolved Historical DA Errors', 'Maintain Employer Supporting Documents', and 'File Upload History'. The main content area shows a 'Create or Edit Report' section and a 'Work On Existing Payroll Reports' table.

- **Adjustment Reports:** Create a payroll adjustment report to adjust posted payroll records.
- **Search Payroll Records by Participant:** Search for posted or unposted payroll records for a specific employee for your agency.
- **Maintain Payroll Records:** Reverse and/or modify posted payroll records.
- **Preprocessing Area:** Review XML reports for retirement or health files that passed level 1 validation but may have data errors that need to be corrected. Files will remain in a pending status until cleared from the preprocessing area.
- **File Upload History:** Check if the uploaded file was accepted or rejected.

- Select **Billing and Payments** local link to display its left-side navigation links:



The screenshot shows the 'Billing and Payments' page. The left-side navigation menu is highlighted with a red box and includes 'Billing and Payments', 'Super Funded Accounts', 'Rate Plan Details', 'Payment Accounts', and 'Make Payment'. The main content area displays a 'Billing and Payment Summary (Year-To-Date)' table with the following data:

	Fiscal Year: 2021/2022	Display
Contributions For Defined Benefit CalPERS:	\$0.00	
Unfunded Accrued Liability:	\$0.00	
Health Premium Deduction:	\$0.00	
Arrears Contributions:	\$0.00	
CERBT Contributions:	\$0.00	

- **Billing and Payments:** Access a summary of your financials at the current time. Review contributions reported and paid for each rate plan, arrears, CERBT, and supplemental income plan, billing for health premium deductions, fees, and amount owed to CalPERS.
- **Super Funded Accounts:** Review the details of your super funded rate plans.
- **Rate Plan Details:** Review year-to-date contributions by rate plan.
- **Payment Accounts:** Add, modify, or delete bank accounts for online payments.
- **Make Payment:** Make an online payment to one or more receivables.

- Select **Payroll Schedule** local navigation link to display its left-side navigation link:



The screenshot shows the 'Payroll Schedule' page. The left-side navigation menu is highlighted with a red box and includes 'Fees List'. The main content area displays a 'Payroll Schedule Options' section.

- **Fees List:** Review your agency's assessed and waived fees.
- Select **Out-of-Class Validation** local navigation link to display its left-side navigation links:



The screenshot shows the 'Out-of-Class Validation' page. The left-side navigation menu is highlighted with a red box and includes 'Preprocessing Area' and 'File Upload History'. The main content area displays a 'Out-of-Class Validation' section with the message: 'Select a Fiscal Year and click the Display button to view a previous Out-of-Class report.'

- **Preprocessing Area:** Access XML reports for retirement or health files that may have errors that need to be corrected. Records will remain in a pending status until cleared from the preprocessing area.
- **File Upload History:** Check if an uploaded file was accepted or rejected.

## Person Information Global Navigation Tab

From the **Person Information** tab, search for your employee or retiree. From the **Summary** and **Health Enrollment** local links, several Menu left-side links display.

Refer to the [myCalPERS student guides](#) for retirement, health, and payroll left-side link information for your employees and retirees.

**Note:** No left-side links display until you access an employee's or retiree's profile page.

## Unit 3: myCalPERS & Windows Tips

### Zoom

- Press and hold the **Ctrl** key to scroll up and down with your mouse wheel.
- Press and hold the **Ctrl** key and use the + or – key.

### Open Multiple Tabs to Multi-Task

- On any tab or link, press your mouse wheel or right click and select **Open in new tab** (or Open link in new tab) to open item in a new tab.

### Open Multiple Windows to Multi-Task

- Right click on any tab or link, then select **Open in new window** (or Open link in new window).
- Use the **Windows** key (between **Ctrl** & **Alt** keys) and select the **left** or **right** arrow keys to evenly split the multiple windows.
- Select the top of the window and drag it to the side of the screen. Let go when window shaded area is in the desired position. Repeat to split the remaining windows.

### Keyboard Shortcuts

- Press the **Tab** key to move to the next field on the page, press **Shift+Tab** to go back.
- Enter dates and phone numbers without / - or ( ).
- Press the **Enter** key to select the button if the cursor is on a button (button is highlighted).
- Press the **spacebar** to select the radio button if the cursor is on a radio button.
- Enter the first letter or number to populate that item from a drop-down list, e.g., “f” for female, “h” for hourly, etc.

### Refresh myCalPERS

- Select the **myCalPERS** logo or **Home** global navigation tab to refresh the page if you receive an error page or if the global tabs aren't displayed.

### Clear a Previous Person Search

- Select the **myCalPERS** logo or **Home** or **Profile** global navigation tabs.
- Select the **Person Search** left-side link if you're on the employee's Profile page.

### Return to Previous Page

- Avoid using the browser **back** arrow or **Backspace** key. If there are no return links, use the navigation tabs or links to return to the previous page.

## Unit 4: Employer Classes

Our instructor-led and self-paced classes support you in all your CalPERS business.

### **Instructor-Led Classes**

Our [Business Rules & myCalPERS classes](#) will help you understand the importance of your business-related reporting responsibilities, how to use myCalPERS, and how to avoid late fees and administrative costs. Attend an in-person class for a hands-on learning experience where you can complete transactions in a training environment or attend a virtual class and walk through the scenarios in our student guides with an instructor.

#### **Business Rules Classes**

Gain a better understanding of the laws and rules associated with your agency's retirement and/or health contract. Our classes are employer-specific and customized to your employer type: school, public agency, or state.

#### **myCalPERS Classes**

After attending a Business Rules class, attend myCalPERS classes to learn how to navigate and process transactions in myCalPERS.

#### **Self-Paced Online Classes**

You may elect to take our online classes available 24 hours a day. We offer classes to help you understand retirement and health business rules, navigate myCalPERS, and perform transactions.

### **Contents**

Scenario 1: Register for an Employer Class .....	25
Scenario 2: Modify Enrollment .....	27
Scenario 3: Review Education Activity & History.....	29
Scenario 4: Print Class Completion Certificate .....	30
Scenario 5: Enroll a Division Employee in a Class .....	31
Scenario 6: Register Employees for a Member Education Class .....	33

## Scenario 1: Register for an Employer Class

### System logic

- For virtual classes, select Sacramento as your regional office.
- After registering for a class, you will receive an email confirmation.
- If the class is full, you can select the **Add to Wait List** button. You will receive an email if a seat becomes available.
- To request free training at your agency, email the [employer educators](mailto:employer_educators@calpers.ca.gov) at [calpers\\_employer\\_communications@calpers.ca.gov](mailto:calpers_employer_communications@calpers.ca.gov).

### Step Actions (15 steps)

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



Step 2 Select the **Classes** local link or the **Enroll in a Class** hyperlink on the dashboard.

Step 3 Which type of class do you want to enroll?

**Instructor-led (in-person or virtual):** Skip to step 7

**Online:** Continue to step 4

Step 4 Select the **Online** tab.

Sign up for an instructor-led class that's offered virtually or in person at a location near you. Or, take an online class at your own pace.

View your [Education Activity & History](#) to see classes you've enrolled in or completed.



Step 5 Select the **Start** button next to the class you want to take.

Class	Duration	Action
CalPERS 101: More Than Just a Retirement System	1 Hour	<input type="button" value="Continue"/>
CalPERS Membership Qualifications for California State Universities	1 Hour	<input type="button" value="Start"/>
CalPERS Membership Qualifications for Public Agencies	1 Hour	<input type="button" value="Start"/>

Step 6 Select the name of the class topic and the online class will launch.

**You have completed enrolling in an online class.**

Step 7 Ensure that the Instructor-Led Tab is selected, then Select the **View Class Dates** button for the class you wish to enroll.

Class ▾	Action
Business Rules for Public Agency Employers	<a href="#">View Class Dates</a>
Business Rules: Health for Public Agency and School Employers	<a href="#">View Class Dates</a>
myCalPERS Employer Reports (Cognos)	<a href="#">View Class Dates</a>

Step 8 You may use the Regional Office and Delivery Method drop-down lists to narrow your search.

Step 9 Select the **Enroll** or **Add to Wait List** button next to the class date and location.

Date & Time ▾	Location ▾	Action
05/10/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	<a href="#">Add to Wait List</a> 0 on wait list
05/17/2023 8:30 AM - 11:00 AM	CalPERS Orange Regional Office 500 N State College Blvd., Suite 750 Orange, CA 92868 Room: Suite 750 <a href="#">Get Directions ↗</a>	<a href="#">Enroll</a> 10 seats left
06/14/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	<a href="#">Enroll</a> 16 seats left

Step 10 On the Enroll in Class page, verify and update contact information (select the **Needs Special Assistance** check box if necessary).  
Note: Visual or auditory aid requires four weeks' notice.

Step 11 Do you want to enroll other students?

**Yes:** Continue to step 12

**No:** Skip to step 15

Step 12 Select the **Add Students** button at the bottom.

Students

[Add Students](#)

[Enroll](#) [Back](#) [Cancel](#)

Step 13 Update the Add Student page (select **Needs Special Assistance** check box if necessary).

Step 14 Select the **Save & Finish** button.

Step 15 Select the **Enroll** button at the bottom of the screen.

**You have completed this scenario.**

## Scenario 2: Modify Enrollment

### Step Actions (11 steps)

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



Step 2 Select the **Education Activity & History** local navigation link.

Step 3 What would you like to do?

**Reschedule:** Continue to step 4

**Edit Enrollment:** Skip to step 7

**Cancel Enrollment:** Skip to step 10

Step 4 Select the **Reschedule** link.

Date & Time	Class	Location	Status	Action
04/12/2023 8:30 AM - 11:00 AM	<a href="#">myCalPERS Payroll Reporting</a>	Virtual Class (Sacramento RO)  When it's time, join the class here:  <a href="#">Join Class</a> Meeting ID: 894 3333 7805 Password: 667415	Enrolled	<a href="#">Reschedule</a> <a href="#">Edit Enrollment</a> <a href="#">Cancel Enrollment</a>

Step 5 Adjust the Regional Office and Delivery Method if necessary.

Step 6 Select the **Enroll** or **Add to Wait List** button next to the class date and location.

Date & Time	Location	Action
05/10/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	<a href="#">Add to Wait List</a> 0 on wait list
05/17/2023 8:30 AM - 11:00 AM	CalPERS Orange Regional Office 500 N State College Blvd., Suite 750 Orange, CA 92868 Room: Suite 750 <a href="#">Get Directions</a>	<a href="#">Enroll</a> 10 seats left
06/14/2023 8:30 AM - 11:00 AM	Virtual Class (Sacramento RO)	<a href="#">Enroll</a> 16 seats left

**You have completed this scenario.**

Step 7 Select the **Edit Enrollment** link.

Date & Time ▾	Class ▾	Location ▾	Status ▾	Action
04/12/2023 8:30 AM - 11:00 AM	<a href="#">myCalPERS Payroll Reporting</a>	Virtual Class (Sacramento RO)  When it's time, join the class here:  <a href="#">Join Class ↗</a> Meeting ID: 894 3333 7805 Password: 667415	Enrolled	<a href="#">Reschedule</a> <a href="#">Edit Enrollment</a> <span style="border: 2px solid red; padding: 2px;">Edit Enrollment</span> <a href="#">Cancel Enrollment</a>

---

Step 8 Modify your enrollment information.

---

Step 9 Select the **Save Change** button.

**You have completed this scenario.**

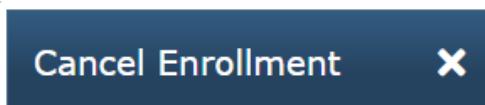
---

Step 10 Select the **Cancel Enrollment** link.

Date & Time ▾	Class ▾	Location ▾	Status ▾	Action
04/12/2023 8:30 AM - 11:00 AM	<a href="#">myCalPERS Payroll Reporting</a>	Virtual Class (Sacramento RO)  When it's time, join the class here:  <a href="#">Join Class ↗</a> Meeting ID: 894 3333 7805 Password: 667415	Enrolled	<a href="#">Reschedule</a> <a href="#">Edit Enrollment</a> <span style="border: 2px solid red; padding: 2px;">Edit Enrollment</span> <a href="#">Cancel Enrollment</a> <span style="border: 2px solid red; padding: 2px;">Cancel Enrollment</span>

---

Step 11 Select the **Yes** button to confirm your enrollment cancellation.



Are you sure you want to cancel this enrollment?

Yes No

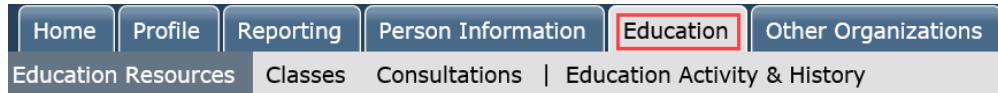
**You have completed this scenario.**

---

## Scenario 3: Review Education Activity & History

### Step Actions (4 steps)

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



Step 2 Select the **Education Activity & History** local navigation link.

Step 3 Select either the **Instructor-Led Classes**, **Online Classes**, or **Consultations** tab.

<a href="#">Instructor-Led Classes</a> <a href="#">Online Classes</a> <a href="#">Consultations</a>				
Your Enrollments   <a href="#">Employer Enrollments</a>				
Date & Time	Class	Location	Status	Action
06/14/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO)	Cancelled	
04/12/2023 8:30 AM - 11:00 AM	<a href="#">myCalPERS Payroll Reporting</a>	Virtual Class (Sacramento RO)  When it's time, join the class here:  <a href="#">Join Class</a> Meeting ID: 894 3333 7805 Password: 667415	Enrolled	<a href="#">Reschedule</a> <a href="#">Edit Enrollment</a> <a href="#">Cancel Enrollment</a>

Step 4 Review your activity.

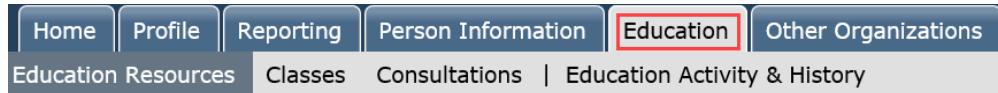
<a href="#">Instructor-Led Classes</a> <a href="#">Online Classes</a> <a href="#">Consultations</a>				
Your Enrollments   <a href="#">Employer Enrollments</a>				
Date & Time	Class	Location	Status	Action
06/14/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO)	Canceled	
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO)  When it's time, join the class here:  <a href="#">Join Class</a> Meeting ID: 894 3333 7805 Password: 667415	Attended	

You have completed this scenario.

## Scenario 4: Print Class Completion Certificate

### Step Actions (4 steps)

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

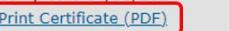


Step 2 Select the **Education Activity & History** local navigation link.

Step 3 Select either the **Instructor-Led Classes** or **Online Classes** tab.

Your Enrollments   <a href="#">Employer Enrollments</a>				
Date & Time ▾	Class ▾	Location ▾	Status ▾	Action
06/14/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO)	Canceled	
04/12/2023 8:30 AM - 11:00 AM	myCalPERS Payroll Reporting	Virtual Class (Sacramento RO)  When it's time, join the class here:  <a href="#">Join Class</a>  Meeting ID: 894 3333 7805 Password: 667415	Attended	

Step 4 Select the **Print Certificate (PDF)** link.

Your Enrollments   <a href="#">Employer Enrollments</a>		
Class ▾	Duration ▾	Status ▾
<a href="#">Business Rules: Health Benefits</a> ; <a href="#">Health Benefits: Health Eligibility Requirements</a>	1 Hour	Completed 04/05/2024 <a href="#">print Certificate (PDF)</a> 
<a href="#">myCalPERS Retirement Enrollment: Add Appointment Events</a>	30 Minutes	Completed 04/05/2024 <a href="#">print Certificate (PDF)</a>
Showing records 1 - 2		

You have completed this scenario.

## Scenario 5: Enroll a Division Employee in a Class

You work for a County Office of Education (COE), and you need to enroll a division (school district) employee in a class. A county office typically holds the CalPERS contract, and the school districts are called divisions under the county.

Refer to the [myCalPERS System Access Administrator \(PDF\)](#) student guide for more information regarding adding and maintaining contacts, granting contacts system access and user roles, and enrolling employees in classes.

**Pathway:** CalPERS website > Employers > I Want To...: Access myCalPERS Student Guides

### System Logic

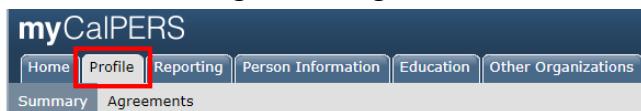
- You must be a System Access Administrator with the Business Partner Employer Maintenance access role. If you do not have the role, assign it to yourself, log out, then log in to myCalPERS for the change in role to take effect.
- You only need to add yourself as a contact for a division once (steps 1-7). Complete steps 8-9 for any future class enrollments of that division's employees.

### Step Actions (11 steps)

#### Add Yourself as a Contact at the Division

Step 1 Log in to myCalPERS with your COE credentials.

Step 2 Select the **Profile** global navigation tab.



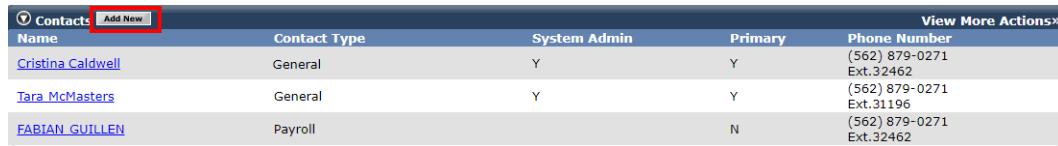
Step 3 Select the **Divisions** left-side link.



Step 4 Select the name link for the division from which you will enroll students.

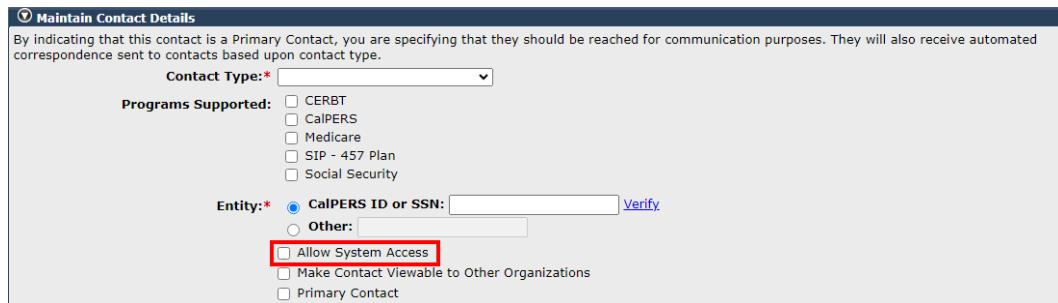
Divisions		Add New	Employer: Trinity County Schools				CalPERS ID: 1002021340
							Search: <input type="text"/>
Name		CalPERS ID	Category	Type	Address		
<a href="#">Coffee Elementary School District</a>		6533811674	School	School District	P.O. BOX 3674 TEMPLE HILLS CA 90212		
<a href="#">Lewis Joint Unified School District</a>		7603634956	School	School District	546 S. 4TH ST COVINA CA 90401		

Step 5 Within the division's Contacts section, select the **Add New** button.



Name	Contact Type	System Admin	Primary	Phone Number
<a href="#">Cristina Caldwell</a>	General	Y	Y	(562) 879-0271 Ext.32462
<a href="#">Tara McMasters</a>	General	Y	Y	(562) 879-0271 Ext.31196
<a href="#">FABIAN GUILLEN</a>	Payroll		N	(562) 879-0271 Ext.32462

Step 6 Complete the Maintain Contact Details and remaining sections to add yourself as a contact at the division.



**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  
 Medicare  
 SIP - 457 Plan  
 Social Security

Entity: \*  CalPERS ID or SSN:  Verify  
 Other:

Allow System Access  
 Make Contact Viewable to Other Organizations  
 Primary Contact

**Note:**

- Ensure you select the Allow System Access check box.
- You must have a different username for each division at which you make yourself a contact. Your password can be the same.
- You do not need to assign any additional access roles for yourself at the division level.
- You may need to select the **System Access** link after adding yourself as a contact and uncheck the Prevent the user from accessing the site check box.

Step 7 Select the **Save** button at the bottom.

Step 8 Select the **Log Out** link at the top right of the page to log out under your agency.

### Enroll a Division Employee in a Class

Step 9 Log in to myCalPERS with the username you created for the division.

Step 10 Select the **Education** global navigation tab to search for the class and enroll the division employee(s).



Step 11 Do you want to enroll a different division's employee in a class?

**Yes:** Return to step 1 to add yourself as a contact for the other division, then enroll that division's employee in a class.

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

## Scenario 6: Register Employees for a Member Education Class

To request an instructor-led [member education class](#) for your employees, call our CalPERS contact center at **888 CalPERS** (or **888-225-7377**). A CalPERS Regional Office team member will contact you to arrange your agency's virtual or in-person member class.

**Scenario:** Your agency is hosting a Planning Your Retirement class for your employees. You will register your employees who want to attend.

### System logic

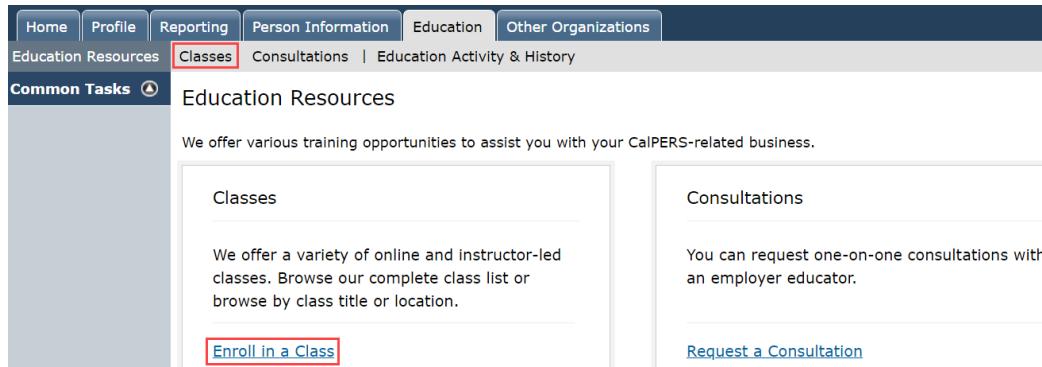
- The *Needs Special Assistance* check box should be selected for anyone who needs visual or auditory aid (requires four weeks' notice).
- After registering your employees for a class, those registered will receive an email confirmation with the training details, e.g., date, time, location, Zoom link, etc.

### Step Actions

Step 1 From the homepage, select the **Education** global navigation tab.



Step 2 Select the **Classes** local navigation link or the [Enroll in a Class](#) hyperlink on the dashboard.



Step 3 Select the **View Class Dates** button for the class you wish to register employees.

Class	Action
Planning Your Retirement - For members within 10 years of retirement (Sponsored by Agency Name)	<a href="#">View Class Dates</a>

Step 4 Select the **Enroll** button next to the class date and location.

Date & Time	Location	Action
10/30/2024 1:30 PM - 4:00 PM	Agency Name 1234 Agency Street San Jose, CA 95110 Room: 1st Floor- Training Rooms (combined) <a href="#">Get Directions</a>	<a href="#">Enroll</a> 118 seats left

Step 5 Are you attending this class?

**Yes:** Leave the *Attending the class* check box selected.

**No:** Deselect the *Attending the class* check box.

---

Step 6 Select the **Add Students** button near the bottom left.

Students

**Add Students**

[Enroll](#)

[Back](#)

[Cancel](#)

---

Step 7 Enter the employee's name and email address.

Step 8 If the employee has an appointment with your agency, their name will be displayed for you to select.

---

Step 9 Select the **Save & Add Another** button to register another employee or the **Save & Finish** button.

**Save & Finish**

**Save & Add Another**

[Cancel](#)

---

Step 10 Repeat steps 8 and 9 until you are done registering all employees.

Step 11 Select the **Enroll** button at the bottom left.

Your Information

Attending the class

Name

Tina Test

Email \*

tina.test@agency.gov

Phone Type \*

Work

Phone Number \*

916-795-3000

Extension

**Needs Special Assistance**

Students

[Add Students](#)

[Enroll](#)

[Back](#)

[Cancel](#)

---

**You have completed this scenario.**

## Unit 5: Submit Inquiry & Inquiry List

### Submit Inquiry

This feature allows you to send a question or information online to CalPERS in a secured environment. When submitting an inquiry, follow the guidelines below.

- For privacy and security, do not include any Social Security numbers or HIPAA information.
- If you need to reference an individual employee, be sure to include their full name, date of birth, and CalPERS ID.
- If you are requesting demographic changes, include which type of documented proof you have, e.g., driver license, birth certificate, Social Security card, etc.

### Step Actions (5 steps)

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



---

Step 2 Select the **Submit Inquiry** link from the left-side navigation menu.

---

Step 3 Complete the Contact Information section.

---

Step 4 Enter your question or information in the Inquiry field.

---

Step 5 Select the **Submit** button.

---

**You have completed this scenario.**

---

## Inquiry List

Within five business days, you will receive an email that indicates a response to your inquiry is available. The Inquiry List displays all inquiries submitted by your agency's contacts. Your list of inquiries and responses are retained for future reference.

### Step Actions (4 steps)

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

Step 2 Select the **Inquiry List** link from the left-side navigation menu.



Step 3 Select the **Inquiry ID** number for your inquiry. You may sort by column headers to find submitted inquiries.

Inquiries						
Inquiry ID	Date Received	Category	Program	Status	Contacted About	
0004269723	04/10/2014	Health Enrollment	Health - Medical	Closed	City Name	

Step 4 Within the Response section, review the response from a CalPERS team member.

The image shows two sections. The top section is titled 'Inquiry' and contains the text 'Category: Health Enrollment' and 'Inquiry: Sample Inquiry Text'. The bottom section is titled 'Response' and contains the text 'Response: Sample Response Text' (which is highlighted with a red box).

**You have completed this scenario.**

## Unit 6: Resources

### Contents

myCalPERS Student Guides & Resources.....	38
Retirement Reference & Health Benefits Guides .....	38
Forms & Publications .....	38
Email Subscriptions & Circular Letters.....	39
myCalPERS Technical Requirements.....	40

## myCalPERS Student Guides & Resources

The [myCalPERS Student Guides & Resources](#) page contains resources to will help you navigate and process transactions through myCalPERS. The student guides will assist you with system functionality related to job functions and correspond with the myCalPERS employer training classes. Check back often for the most updated versions.

**Pathway:** CalPERS website > Employers > Employer Education > (On the right side under Resources) myCalPERS Student Guides & Resources

## Retirement Reference & Health Benefits Guides

The [Reference & Health Guides](#) will help you understand the retirement and health rules, policies, laws, requirements, deadlines, etc. All contacts who process enrollments or convey retirement and/or health benefits information to employees should reference these resources.

**Pathway:** CalPERS website > Employers > Policies & Procedures > Reference & Health Guides

## Forms & Publications

The [Forms & Publications](#) page allows you to browse, download, or print any form, publication, and other documents you may need.

**Pathway:** CalPERS website > Employers > Forms & Publications

### Forms & Publications

Browse, download, or print any form, publication, or other documents you may need. Forms are subject to our [Privacy Notice](#).

To order a publication:

- Members: [contact us](#) by phone.
- Employers: log in to [myCalPERS](#) and select Requests to access the Publication Ordering List.

#### Filter Documents

[Clear All](#)

**Document Year**

**Active Members**

All Active Members Documents (241)  
 Beneficiaries (6)  
 Community Property (4)  
 Deferred Compensation (1)  
 Health Benefits (134)  
 Judges' Retirement Systems (12)  
 Refunds & Reciprocity (10)  
 Retirement Benefits (71)  
 Service Credit (13)  
 Trusts & Power of Attorney (3)

Show  entries

Search:

Title
<a href="#">2023 Anthem Blue Cross Del Norte County (EPO) Evidence of Coverage (PDF)</a>
<a href="#">2023 Anthem Blue Cross Del Norte County EPO Summary of Benefits and Coverage (PDF)</a>
<a href="#">2023 Anthem Blue Cross Medicare Preferred Evidence of Coverage (PDF)</a>
<a href="#">2023 Anthem Blue Cross Medicare Preferred Summary of Benefits and Coverage (PDF)</a>
<a href="#">2023 Anthem Blue Cross Select Basic (HMO) Evidence of Coverage (PDF)</a>
<a href="#">2023 Anthem Blue Cross Select Basic (HMO) Summary of Benefits and Coverage (PDF)</a>
<a href="#">2023 Anthem Blue Cross Traditional Basic (HMO) Evidence of Coverage (PDF)</a>
<a href="#">2023 Anthem Blue Cross Traditional Basic (HMO) Summary of Benefits and Coverage (PDF)</a>
<a href="#">2023 Anthem Medicare Preferred Medicare Part D Prescription Drug Plan Evidence of Coverage (PDF)</a>
<a href="#">2023 Blue Shield of California: Access + HMO Evidence of Coverage and Disclosure Form (PDF)</a>
<a href="#">2023 Blue Shield of California: Access+ EPO Evidence of Coverage and Disclosure Form (PDF)</a>
<a href="#">2023 Blue Shield of California: Blue Shield Medicare PPO Evidence of Coverage and Disclosure Form (PDF)</a>

## Email Subscriptions & Circular Letters

### Email Subscriptions

**Pathway:** CalPERS website > Email subscriptions

Subscribe to receive the latest information about board meetings, legislative news, CalPERS Long-Term Care program, CalPERS news, employer bulletins, member education bulletins, Circular Letters, and State Social Security Administrator program newsletters.

Visit the Email Subscriptions page to subscribe.

**Subscribe to our newsletters and alerts**

To get started, enter your email address below and select **Subscribe**. You'll choose or change your subscriptions on the next page.

Email Address

**Subscribe**

### Circular Letters

**Pathway:** CalPERS website > Employers > Policies & Procedures > Circular Letters

Circular Letters notify employers of changes in laws, procedures, Employer News, health billing cutoff dates, etc. To subscribe, see the Email Subscriptions information in the previous section.

Browse or search Circular Letters from 1996 to the present.

### **Circular Letters**

Browse or search Circular Letters from 1996 to present. You can also subscribe to [Employer Bulletins](#) to receive email notifications when new Circular Letters are posted.

Show  entries

Search

Letter No.	Subject	Audience	Date
200-008-25	Governmental Accounting Standards Board (GASB) Statement 68 Cost-Sharing Reports for Measurement Date June 30, 2024	• Public Agency Employers	1/31/2025
200-007-25	Governmental Accounting Standards Board (GASB) Statement 68 Cost-Sharing Reports for Measurement Date June 30, 2024	• State Colleges and Universities • County Superintendent of Schools • Individual School Districts	1/31/2025
200-006-25	Governmental Accounting Standards Board (GASB) Statement 68 Agent Reports Availability Form	• Public Agency Employers	1/31/2025
200-009-25	Governmental Accounting Standards Board (GASB) Statement 75 Report Availability for Public Agencies and Schools	• Public Agency Employers • School Employers	1/24/2025
600-005-25	2025 Health Billing Cutoff Dates and Payment Information <a href="#">View Attachment:</a> • <a href="#">2025 Health Billing Cutoff Dates, Contracting School Districts and Public Agencies (PDF)</a>	• All Health Benefits Officers • All Assistant Health Benefits Officers • All Health Enrollment and Health PA Billing Contacts for Contracting School Districts and Public Agencies	1/7/2025
200-003-25	Pay Rate Reporting for Classified School Members	• All CalPERS Employers	1/6/2025
200-001-25	2025 Compensation Limits for Classic and PEPRA Members	• All CalPERS Employers	1/2/2025
200-035-24	Post-Retirement Employment of CalPERS Retired Annuitants – Extra Help	• All School Employers	12/18/2024

## **myCalPERS Technical Requirements**

From this page, the following five business partner page links are displayed.

### [myCalPERS Employer Reports \(Cognos\) Catalog Page](#)

**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

- myCalPERS Employer Reports (Cognos) student guide
- List of employer reports and descriptions
- Type of reports (Benefits, Contributions, Enrollments, Financials, Health, Retirement Enrollment, Retirement Contracts, System Access Administration)
- User role needed to run each report

### [Special Compensation Reportability Table Page](#)

**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > Special Compensation Reportability Table

This includes a table of reportability details for each member category within the identified special compensation category and type.

### [System Access Administrator page](#)

**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators

- myCalPERS System Access Administration student guide
- myCalPERS System Privileges for Business Partner Roles supplemental guide
- New Contact Checklist, User Access Role Change and Exit Checklist

### [System Enhancements Page](#)

**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > System Enhancements

Access this link for myCalPERS system enhancements implemented to improve functionalities and efficiencies when conducting business with CalPERS.

## Technical Resources Page

**Pathway:** CalPERS website > Employers > myCalPERS Technical Requirements > Technical Resources

You may also log in to a [file readiness test environment](#) on this page. Transactions processed in this environment will not update your agency's actual myCalPERS data.

- **Employers:**
  - Information for file uploading transactions in myCalPERS
  - Reporting Out-of-Class Hours Worked section (Data element definitions, sample CSV file, student guide, frequently asked questions, and Circular Letter)
- **Direct Authorization Vendors:** Information for organizations authorized to receive monthly deductions from a retirement warrant to pay a sponsored company
- **Making Payments:** Electronic Funds Transfer (EFT) and the CalPERS ACH ID number

## CalPERS Contacts

### Email

- To contact the [employer educators](#) for training questions and requests, email [calpers\\_employer\\_communications@calpers.ca.gov](mailto: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](mailto:ert@calpers.ca.gov).
- To contact [CalPERS Membership Unit](#) for questions regarding membership eligibility and/or enrolling an employee, email [membership\\_reporting@calpers.ca.gov](mailto:membership_reporting@calpers.ca.gov).
- To contact the [Audit Compliance and Resolution Unit](#) for questions regarding Publicly Available Pay Schedules, reportable payrates and special compensation, labor policies or agreements, Out-of-Class reporting, and compensation reportability related to settlement agreements, email [mou\\_review@calpers.ca.gov](mailto:mou_review@calpers.ca.gov).
- To contact the [Cashiers Unit](#) for questions about your agency's online payments, email [fcsd\\_cashiers@calpers.ca.gov](mailto:fcsd_cashiers@calpers.ca.gov).
- To contact the [myCalPERS System Support](#) team for questions regarding the Retirement Appointment Reconciliation tool, email [EmployerTechnicalSupport@calpers.ca.gov](mailto:EmployerTechnicalSupport@calpers.ca.gov).
- To order large quantities of [health publications](#), email [ossd\\_public\\_agency\\_requests\\_publication\\_fulfillment@calpers.ca.gov](mailto:ossd_public_agency_requests_publication_fulfillment@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. Save time by having your employer myCalPERS account open before calling in.

- 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. Review unit 5 for full instructions.