

myCalPERS Business Partner Relationships

Student Guide

March 6, 2021



Business Partner Relationships

This guide will assist your agency with the process of establishing, modifying, and ending business partner relationships.

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

System Access

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

Contents

Introduction to Business Partner Relationships.....	2
Scenario 1: Establish a Business Partner Relationship	3
Scenario 2: Modify a Business Partner Relationship	6
Scenario 3: End Date a Business Partner Relationship	7
CalPERS Resources.....	8
CalPERS Contacts	9

Introduction to Business Partner Relationships

Overview

A business partner relationship is an agreement between two agencies or between an agency and a company authorizing services to be performed on your agency's behalf. When a business partner relationship is established, the agency or company acting on behalf of your agency, can perform services such as submitting payroll, processing retirement and health enrollments, or handling payments.

Services Provided

Business partner relationships can be established for the following services for each CalPERS contract or agreement type (Retirement, Health, and Supplemental Income Plan-457) your agency has:

- Enrollment
- Billing
- Payroll

Notifications

CalPERS will send a letter to your agency and the agency you have a business partner relationship with when the business partner relationship:

- Has been approved by CalPERS
- Has been rejected by CalPERS
- If the begin or end dates have been modified by your agency
- Has ended

Scenario 1: Establish a Business Partner Relationship

Scenario

You will establish a Business Partner Relationship within myCalPERS.

System Logic

- If you add the business partner to myCalPERS, advise them to call the CalPERS contact center to establish this agency access.
- The Relationship Start Date can be back dated up to 60 days.
- Your agency can establish multiple relationships for the same services.
- A letter will be sent to your agency and the agency you have a business partner relationship with once CalPERS approves the business partner relationship request.

Step Actions

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

Step 2 Select the **View BP Relationships** left-side navigation link.

Step 3 Within the Business Relationships section, select the **Add New** button.

Step 4 Within the Maintain Business Relationship Details section, select the **Select** link.

Maintain Business Relationship Details

Business Partner Name: * [Select](#)

Address: _____

Contact Name: * _____ Phone Number: * _____

Programs Supported

California Public Employees' Retirement System PEMHCA CalPERS Health Contract

PEMHCA Non-CalPERS Health Contract

* I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.

Step 5 Within the Organization Search section, enter the business partner name, Federal Tax ID, or CalPERS ID.

Organization Search

Name: _____ Federal Tax ID: _____ CalPERS ID: _____ [Person Search](#)

Search Clear Advanced Options

Step 6 Select the **Search** button.

Step 7 Is the business partner displayed in the Search Results section?

Yes: Skip to step 15

No: Continue to step 8

Step 8 Within the Search Results section, select the **Add New** button.



Step 9 Complete the Organization Details section.

A screenshot of the 'Organization Details' form. It contains the following fields: 'Business Partner Category:' with a dropdown menu showing 'Service Provider'; 'Business Partner Type:' with a dropdown menu; 'Business Partner Name:' with a text input field; and 'Federal Tax ID:' with a text input field.

Step 10 Complete the Address & Communication Details section.

Step 11 Complete the General Contact Information section.

Step 12 Select the **Submit** button.

Step 13 Verify the U.S. Postal Service Matches is correct.

Step 14 Select the **Confirm** button.

Step 15 Select the **Submit** button.

Step 16 Within the Search Results section, select the radio button for the appropriate business partner.

Step 17 Select the **Select** button.

Step 18 Within the Maintain Business Relationship Details section, enter the **Contact Name** and **Phone Number** for the business partner listed above. This information is needed in the event CalPERS needs to contact the agency for additional information to process the request.

A screenshot of the 'Maintain Business Relationship Details' form. It shows the following information: 'Business Partner Name:* Company Payroll Services, PO Box 123, Address: Sacramento, CA 95616'. Below this are two input fields: 'Contact Name:*' and 'Phone Number:*', both highlighted with red boxes. Under 'Programs Supported', there are two checkboxes: 'California Public Employees' Retirement System -30366' and 'PEMHCA CalPERS Health Contract -33932'. At the bottom, there is a checkbox and a text line: '* I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.'

Step 19 Within the Programs Supported area, select the contract(s) or agreements your agency holds with CalPERS for which the business partner will provide services.

Maintain Business Relationship Details

Business Partner Name:* Company Payroll Services [Select](#) **CalPERS ID:** 0123456789

Address: PO Box 123
Sacramento, CA 95818

Contact Name:* Arthur Reed **Phone Number:*** 916-795-3000

Programs Supported

California Public Employees' Retirement System -30366 PEMHCA CalPERS Health Contract -33932

PEMHCA Non-CalPERS Health Contract -34432

* I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.

Step 20 Under each contract select the check box for the service the business partner will provide.

Maintain Business Relationship Details

Business Partner Name:* Company Payroll Services [Select](#) **CalPERS ID:** 0123456789

Address: PO Box 123
Sacramento, CA 95818

Contact Name:* Arthur Reed **Phone Number:*** 916-795-3000

Programs Supported

California Public Employees' Retirement System -30366 PEMHCA CalPERS Health Contract -33932

PEMHCA Non-CalPERS Health Contract -34432

California Public Employees' Retirement System - 30366

Enrollment Services

Billing Services

Payroll Services

PEMHCA CalPERS Health Contract - 33932

Enrollment Services

Billing Services

Payroll Services

PEMHCA Non-CalPERS Health Contract - 34432

Enrollment Services

Billing Services

Payroll Services

* I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.

Step 21 For each service enter a **Relationship Start Date**.

Maintain Business Relationship Details

Business Partner Name:* Company Payroll Services [Select](#) **CalPERS ID:** 0123456789

Address: PO Box 123
Sacramento, CA 95818

Contact Name:* Arthur Reed **Phone Number:*** 916-795-3000

Programs Supported

California Public Employees' Retirement System -30366 PEMHCA CalPERS Health Contract -33932

PEMHCA Non-CalPERS Health Contract -34432

California Public Employees' Retirement System - 30366

Enrollment Services

Billing Services

Payroll Services

Relationship Start Date:* 03/01/2021 **Relationship End Date:**

* I certify to the best of my knowledge, the above named business partner may conduct the myCalPERS services selected on our behalf.

Step 22 If applicable, enter a **Relationship End Date** for each service.

Step 23 Select the certification checkbox at the bottom.

Step 24 Select the **Establish Relationship** button.

You have completed this scenario.

Scenario 2: Modify a Business Partner Relationship

Scenario

You will modify a business partner relationship in myCalPERS.

System Logic

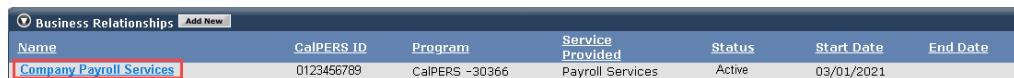
- End dates can only be entered or updated by the CalPERS contracting agency.
- End dates may only be for current date or futured dates. If the current date is used as the end date, allow 24 hours for the system to terminate the relationship.
- CalPERS will send a notification to both agencies advising the business partner relationship has ended.

Step Actions

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

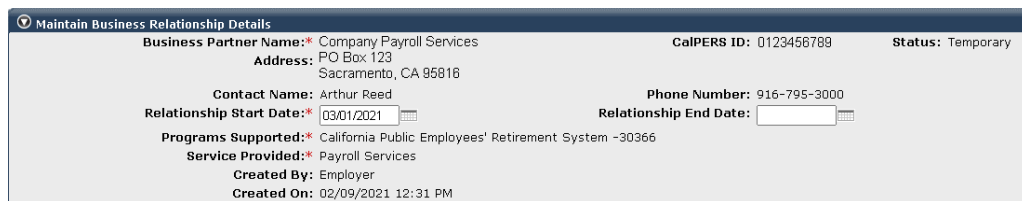
Step 2 Select the **View BP Relationships** left-side navigation link.

Step 3 Within the Business Relationships section, select the name of the Business Partner Relationship associated with the service you want to terminate.



Name	CalPERS ID	Program	Service Provided	Status	Start Date	End Date
Company Payroll Services	0123456789	CalPERS -30366	Payroll Services	Active	03/01/2021	

Step 4 Within the Maintain Business Relationship Details section, modify the relationship as necessary.



Business Partner Name: *	Company Payroll Services	CalPERS ID:	0123456789	Status:	Temporary
Address:	PO Box 123 Sacramento, CA 95816				
Contact Name:	Arthur Reed	Phone Number:	916-795-3000		
Relationship Start Date: *	03/01/2021	Relationship End Date:			
Programs Supported: *	California Public Employees' Retirement System -30366				
Service Provided: *	Payroll Services				
Created By:	Employer				
Created On:	02/09/2021 12:31 PM				

Step 5 Select the **Save** button.

You have completed this scenario.

Scenario 3: End Date a Business Partner Relationship

Scenario

You will end date a business partner relationship in myCalPERS.

System Logic

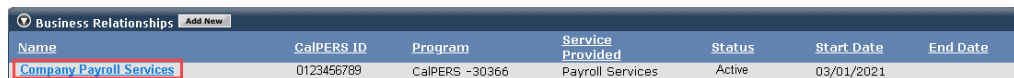
- End dates can only be entered or updated by the CalPERS contracting agency.
- End dates may only be for current date or futured dates. If the current date is used as the end date, allow 24 hours for the system to terminate the relationship.
- CalPERS will send a notification to both agencies advising the business partner relationship has ended.

Step Actions

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

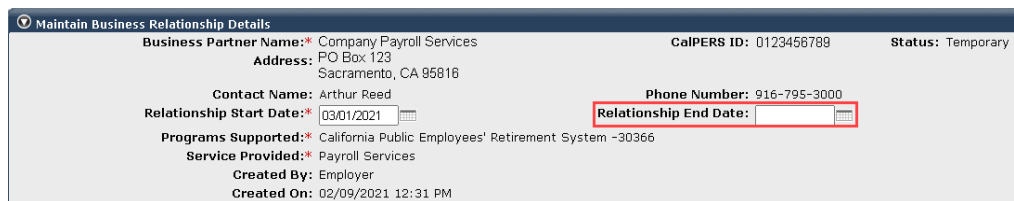
Step 2 Select the **View BP Relationships** left-side navigation link.

Step 3 Within the Business Relationships section, select the name of the Business Partner Relationship associated with the service you want to terminate.



Name	CalPERS ID	Program	Service Provided	Status	Start Date	End Date
Company Payroll Services	0123456789	CalPERS -30366	Payroll Services	Active	03/01/2021	

Step 4 Within the Maintain Business Relationship Details section, enter the Relationship End Date.



Maintain Business Relationship Details

Business Partner Name: * Company Payroll Services CalPERS ID: 0123456789 Status: Temporary
Address: PO Box 123
Sacramento, CA 95818

Contact Name: Arthur Reed Phone Number: 916-795-3000

Relationship Start Date: * 03/01/2021 Relationship End Date: *

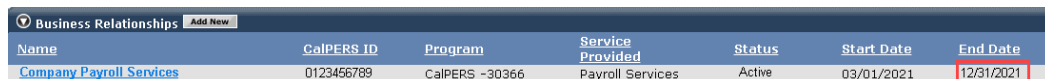
Programs Supported: * California Public Employees' Retirement System -30366

Service Provided: * Payroll Services

Created By: Employer

Created On: 02/09/2021 12:31 PM

Step 5 Select the **Save** button.



Name	CalPERS ID	Program	Service Provided	Status	Start Date	End Date
Company Payroll Services	0123456789	CalPERS -30366	Payroll Services	Active	03/01/2021	12/31/2021

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 > Employers > I Want To...: Find myCalPERS Student Guides
- [Employer Education Schedule \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To... : Find myCalPERS Student Guides > Employer Education Schedule
- [Online Classes for Employers \(PDF\)](#)
Pathway: CalPERS website > Employers > I Want To... : Find myCalPERS Student Guides > Online Classes for Employers

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.