myCalPERS System Access Administration

Student Guide

March 5, 2022

CalPERS

System Access Administration

This guide will assist system access administrators with their responsibility of managing their agency's contacts, myCalPERS system access, and agency contact information.

Business with CalPERS

To conduct business using myCalPERS, your organization must designate at least one system access administrator (SAA) to manage system access for your agency. If the SAA is unavailable (e.g., left your agency, on vacation, etc.), call CalPERS at **888 CalPERS** (or **888**-225-7377) for assistance.

Disclaimer

As a security safeguard, business partner and participant information has been masked 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.

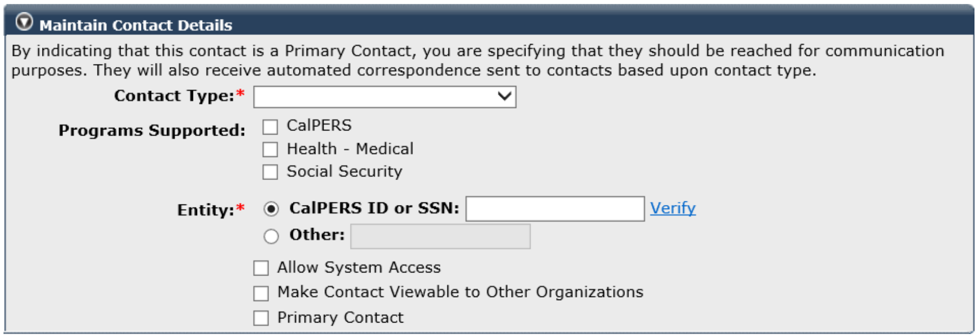
Training Opportunities

Prior to taking a myCalPERS training, new users should review the Introduction to myCalPERS for Business Partners (PDF) student guide.

Contents

Terms and Definitions

The terms and definitions outlined in this section are used within this guide. Review each term along with the definition to properly add contacts in myCalPERS.



Contact Type

This identifies the duties, position titles, and/or program areas relating to a contact. Each contact is identified by one contact type. If a contact serves multiple functions, add the contact multiple times for each contact type. This does not determine the access the contact has within myCalPERS. We may use the contact type to connect with a specific area of your agency regarding CalPERS business.

Primary Contact

This person is designated to receive direct communication (e.g., letters, invoices, system message notifications, etc.) from CalPERS related to their assigned contact type. When a primary contact isn't designated, CalPERS will send the communication to the General primary contact. If a General primary contact isn't designated, CalPERS will send the communication to the agency's address on file.

It is recommended that a primary contact be selected for each contact type applicable to the agency to ensure that communications are received in a timely manner. Only one person can be identified as the primary contact for each contact type.

Make Contact Viewable to Other Organizations

This feature allows you to share your agency's contact's name and phone number with other agencies via the **Other Organizations** global navigation tab.

Allow System Access

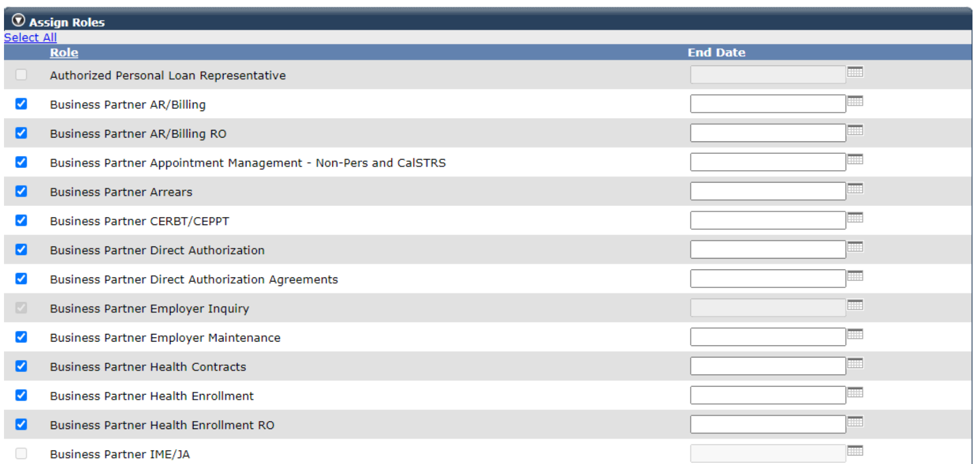
A contact may be granted system access allowing them to log in to myCalPERS to conduct business for your agency. They may contact CalPERS regarding agency or member-specific information.

Roles

The access to information and ability to process transactions is based on the user roles assigned to the contact. Roles should be assigned based on the duties the contact will be performing for your agency. All agency contacts with myCalPERS system access are automatically assigned the Business Partner Employer Inquiry role. Only user roles specific to your agency's contracts are available for selection.

A complete list of roles can be found in the [myCalPERS System Privileges for Business Partner Roles (PDF)] supplemental guide on the CalPERS website.

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators > Assign System Access and System Role Privileges: myCalPERS System Privileges for Business Partner Roles (PDF)



End Dates

The optional End Date field allows you to grant a user a role for a known length of time. If an end date is entered for a user role, the role will be granted immediately and will continue until the specified end date. If the End Date field is left blank, the user will continue to have access under the user role until an end date is entered, the user role is unchecked, or their account is deactivated or locked.

Preferred Communication

The primary contact will receive notifications from CalPERS based upon the preferred communication method selected in myCalPERS:

- **Email:** Notification will be sent advising the contact that there is a document to view in myCalPERS. The document can be located by logging in to myCalPERS and selecting Document History on the left-side navigation under Common Tasks.
- **Mail:** Notification 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.

Unit 1: Add New Contacts

A contact is someone who represents your agency and has been added to your agency's Contacts list in myCalPERS.

Contents

Scenario 1: Add a Contact with System Access

A person with system access is listed in myCalPERS as a contact, has access to myCalPERS to process transactions and run reports, may be an assigned primary contact, and can contact CalPERS to request member or agency-specific information.

Scenario

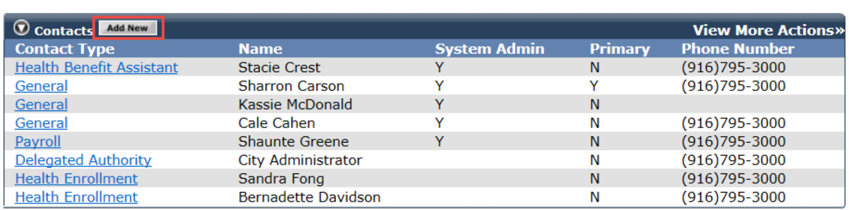
You have a new team member who needs to access myCalPERS for their job duties. You will add them as a contact with system access.

System Logic

- For a contact to have system access, their Social Security number or CalPERS ID must be entered.
- For mailing addresses:
  - – Select from the Existing Business Partner Address drop-down list.
  - – Select Mailing or Physical to ensure the contact's address is updated if your agency's address is updated.
  - – If an address is manually entered, this information must be maintained to ensure the contact will receive CalPERS communication timely when the preferred method of communication is mail.
- Contacts should never share their username or password. CalPERS will never ask for their password.

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, select the **Add New** button.



Contact Type	Name	System Admin	Primary	Phone Number
Health Benefit Assistant	Stacie Crest	Y	N	(916)795-3000
General	Sharron Carson	Y	Y	(916)795-3000
General	Kassie McDonald	Y	N	
General	Cale Cahen	Y	N	(916)795-3000
Payroll	Shaunte Greene	Y	N	(916)795-3000
Delegated Authority	City Administrator		N	(916)795-3000
Health Enrollment	Sandra Fong		N	(916)795-3000
Health Enrollment	Bernadette Davidson		N	(916)795-3000

Step 3	In the Maintain Contact Details section, select a **Contact Type** link.
Step 4	Select the **Programs Supported** check box(es).
Step 5	Enter the new contact's CalPERS ID or Social Security number.

Step 6 Select the **Verify** link. Was the contact found in myCalPERS?

Yes: Skip to step 10.

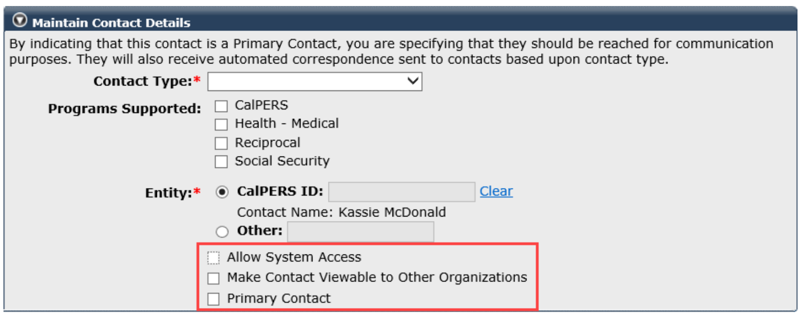
No: Continue to step 7.

Step 7 Select the **Add Person** link.

Step 8 Complete the Person Details section.

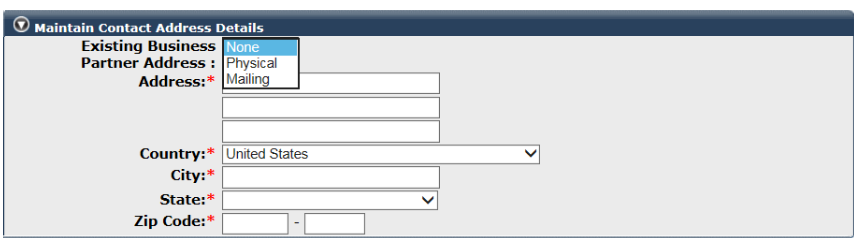
Step 9 Select the **Save** button.

Step 10 If applicable, select the **Allow System Access**, **Make Contact Viewable to Other Organizations**, and/or **Primary Contact** check box(es).



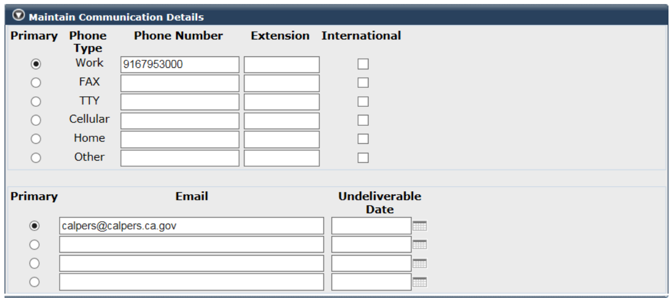
Step 11 In the Maintain Preferred Communication Details section, select the **Preferred Communication** method from the drop-down list.

Step 12 In the Maintain Contact Address Details section, select from the **Existing Business Partner Address** drop-down list.



Step 13 Enter the contact's phone number(s) and email address(es).

Step 14 Select the **Primary** radio button for one phone number and email address.



Step 15 Select the **Save** button.

Step 16 In the Assigned Username section, enter a username for this contact.

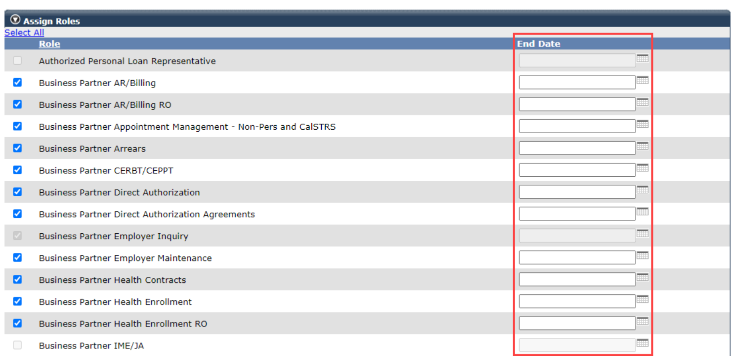
Step 17 In the Assign Roles section, select the check box(es) for the roles that apply to the contact.

Step 18 Do the selected user roles need to have an assigned end date?

Yes: Continue to step 19.

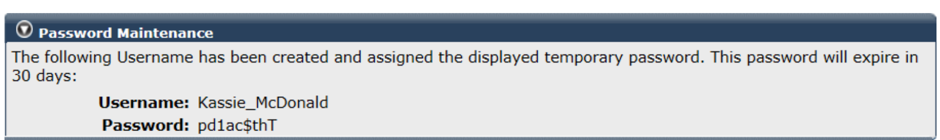
No: Skip to step 20.

Step 19 Populate the necessary End Date field(s).



Step 20 Select the **Save** button.

Step 21 Provide the username and temporary password to the contact.



Step 22 Select the **Continue** button.

You have completed this scenario.

Scenario 2: Add a Contact Without System Access

A person can be listed as a myCalPERS contact without system access. They will not have access to myCalPERS to process transactions and run reports, cannot be an assign primary contact, and can only contact CalPERS to request general information.

Scenario

You have a new team member who needs to be a contact in myCalPERS for their job duties. You will add them as a contact without system access.

System Logic

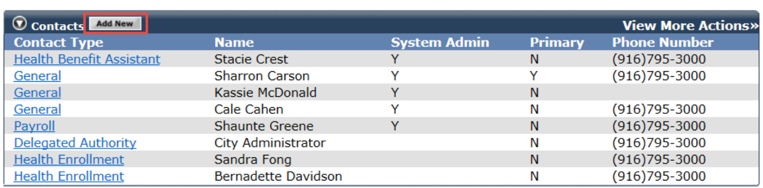
- A contact without system access can be added with or without a Social Security number or CalPERS ID.
- For mailing addresses:

  – Select from the Existing Business Partner Address drop-down list.
  – Select Mailing or Physical to ensure the contact's address is updated if your agency's address is updated.
  – If an address is manually entered, it is important that this information be maintained to ensure the contact will receive CalPERS communication timely when the preferred communication is mail.

Step Actions

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

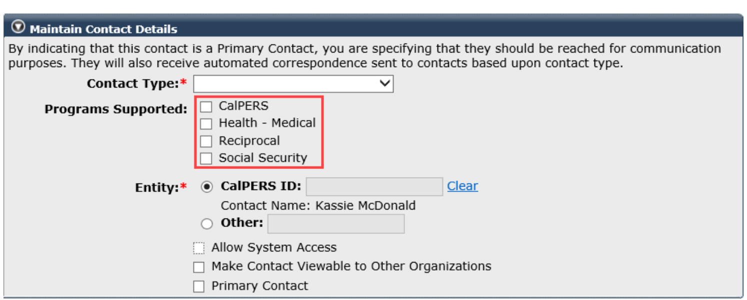
Step 2 In the Contacts section, select the **Add New** button.


Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Health Benefit Assistant	Stacie Crest	Y	N	(916)795-3000
General	Sharron Carson	Y	Y	(916)795-3000
General	Kassie McDonald	Y	N	
General	Cale Cahen	Y	N	(916)795-3000
Payroll	Shaunte Greene	Y	N	(916)795-3000
Delegated Authority	City Administrator		N	(916)795-3000
Health Enrollment	Sandra Fong		N	(916)795-3000
Health Enrollment	Bernadette Davidson		N	(916)795-3000

Step 3 In the Maintain Contact Details section, select from the Contact Type field.

Step 4 Select the **Programs Supported** check box(es).



Step 5 Enter the new contact's CalPERS ID or Social Security number.

Step 6 Select the **Verify** link. Was the contact found in myCalPERS?

Yes: Skip to step 10.

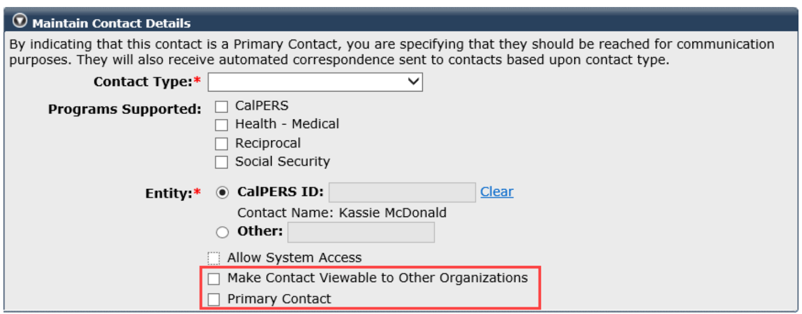
No: Continue to step 7.

Step 7 Select the **Add Person** link.

Step 8 Complete the Person Details section.

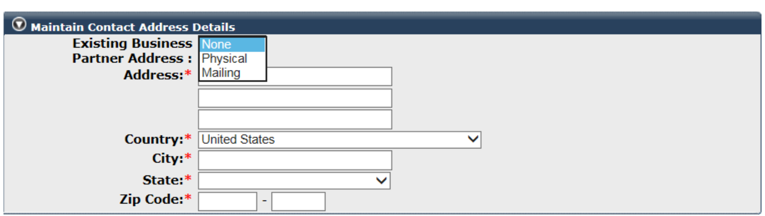
Step 9 Select the **Save** button.

Step 10 If applicable, select the **Make Contact Viewable to Other Organizations** and/or **Primary Contact** check box(es).



Step 11 In the Maintain Preferred Communication Details section, select the **Preferred Communication** method from the drop-down list.

Step 12 In the Maintain Contact Address Details section, select from the **Existing Business Partner Address** drop-down list.



Step 13 Enter the contact's phone number(s) and email address(es).

Step 14 Select the **Primary** radio button for one phone number and email address.

Step 15 Select the **Save** button.

You have completed this scenario.

Unit 2: Maintain Existing Contacts

It is important 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 assures your agency is receiving proper communication from CalPERS.

Contents

Scenario 1: Grant System Access

You will grant system access to an existing contact.

Step Actions

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

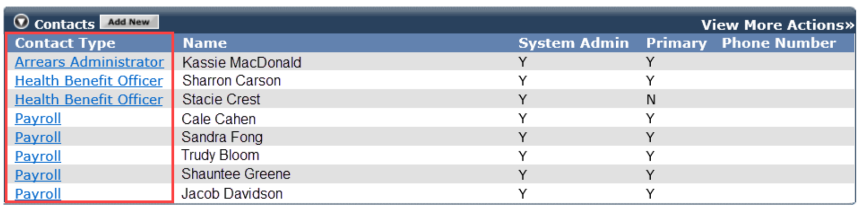
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

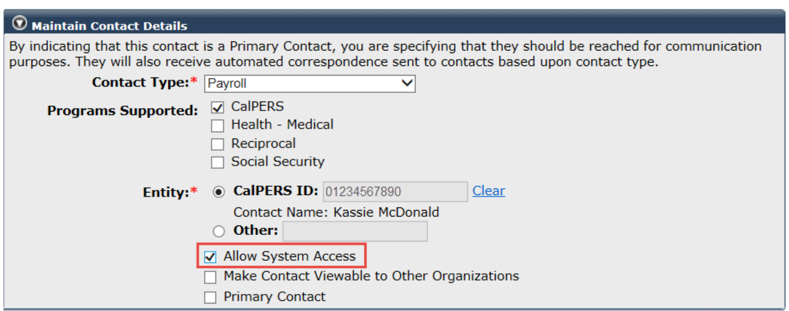
No: Continue to step 3.

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

Step 4 Select the **Contact Type** link of the contact.



Step 5 In the Maintain Contact Details section, select the **Allow System Access** check box.



Step 6 In the Maintain Contact Details section, select the **System Access** link.

Step 7 In the Assigned Username section, enter a username for this contact.

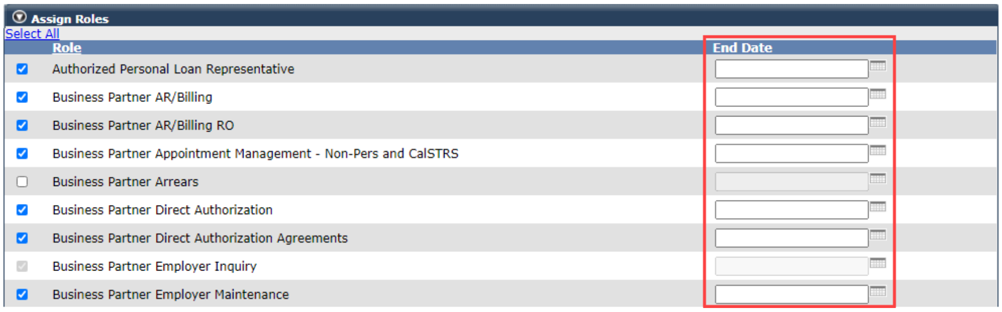
Step 8 In the Assign Roles section, select the appropriate check box(es) to assign access to the contact.

Step 9 Do the selected user roles need to have an assigned end date?

Yes: Continue to step 10.

No: Skip to step 11.

Step 10	Populate the necessary End Date fields.



Step 11	Select the **Save** button.
Step 12	Provide the username and temporary password to the contact.
Step 13	Select the **Continue** button. **You have completed this scenario.**

Scenario 2: Remove System Access

You have a contact who no longer needs to access myCalPERS but needs to remain an active contact. You will remove their system access.

System Logic

- The contact will remain an active contact under your agency.
- They'll continue to receive communications related to their contact type if they are a primary contact. Ensure their preferred communication is set to *mail* (see unit 2, scenario 7).
- If the contact's account needs to be deactivated, see unit 2, scenario 11.

Step Actions

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

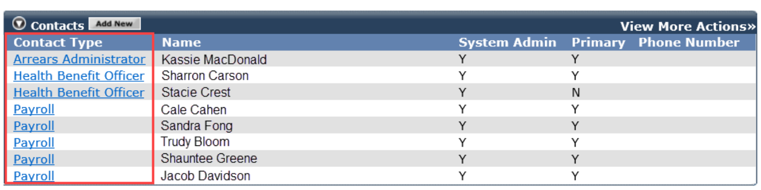
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

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

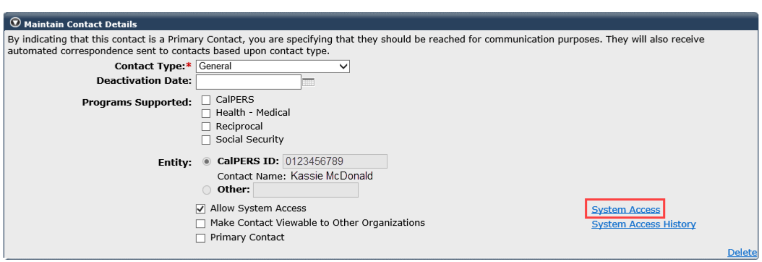
Step 4 Select the **Contact Type** link of the contact.



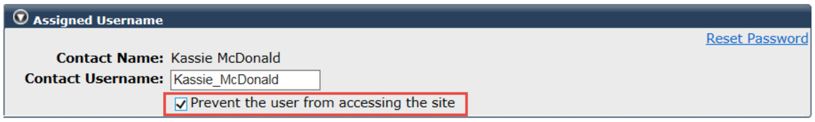
Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

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



Step 6	In the Assigned Username section, select the **Prevent the user from accessing the site** check box.
Step 7	Select the **Save** button.
Step 8	Scroll to the bottom of the page and select the **Save** button again. **You have completed this scenario.**



Scenario 3: Update System Access

A contact has a change in duties and needs additional myCalPERS access. You will update their system access.

Step Actions

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

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

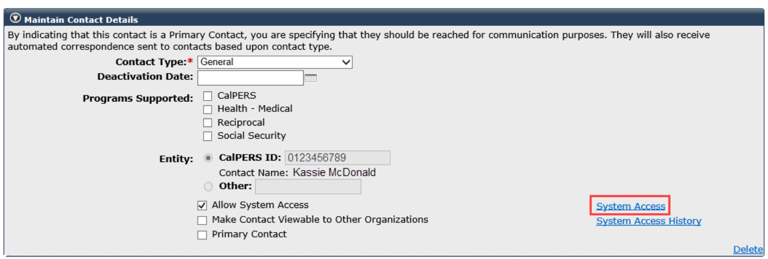
Yes: Skip to step 4.

No: Continue to step 3.

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

Step 4 Select the **Contact Type** link of the contact.

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



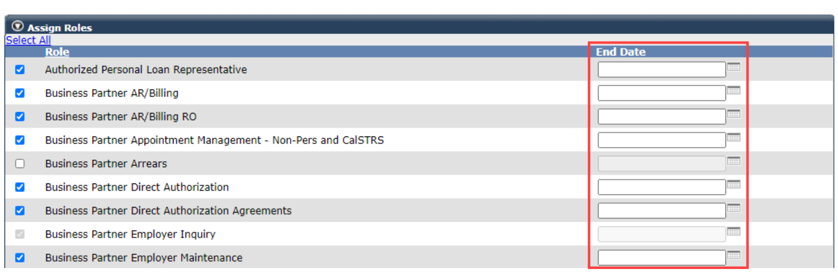
Step 6 In the Assign Roles section, select and/or deselect the appropriate check box(es).

Step 7 Do the user role(s) need to have end date(s) updated?

Yes: Continue to step 8.

No: Skip to step 9.

Step 8 Populate the necessary End Date field(s).



Step 9 Select the **Save** button.

Step 10 Scroll to the bottom of the page and select the **Save** button again.

You have completed this scenario.

Scenario 4: Add Additional System Access Administrator

Your agency only has one SAA. You will designate an additional SAA for your agency.

Step Actions

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

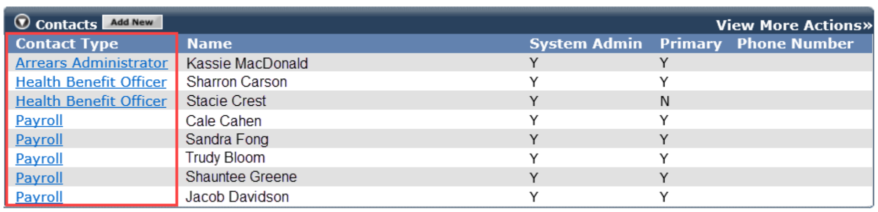
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

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

Step 4 Select the **Contact Type** link of the contact.



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

Step 6 In the Assign Roles section, select the **System Access Administrator** check box.

Step 7 Does the SAA user role need an end date?

Yes: Continue to step 8.

No: Skip to step 9.

Step 8 Populate the End Date field.

Step 9 Select the **Save** button.

Step 10 Scroll to the bottom of the page and select the **Save** button again.

You have completed this scenario.

Scenario 5: Designate a New Primary Contact

A primary contact has left your agency and you have selected a replacement. 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* (see unit 2, scenario 7).

Step Actions

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

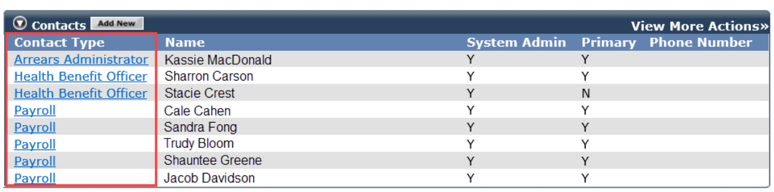
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

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

Step 4 Select the **Contact Type** link of the contact.



Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 In the Maintain Contact Details section, check the **Primary Contact** check box.

Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 6: Update Contact Type

Due to a change in duties, you will update the contact type of an existing contact.

Step Actions

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

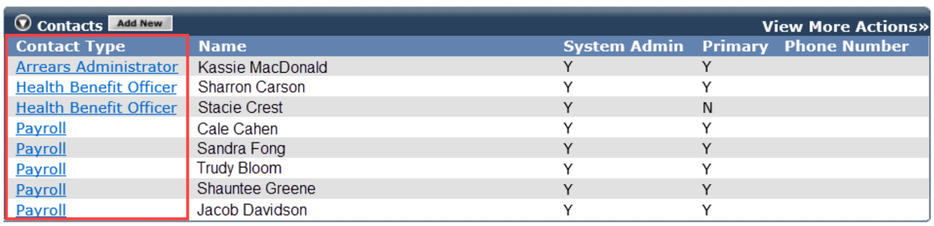
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

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

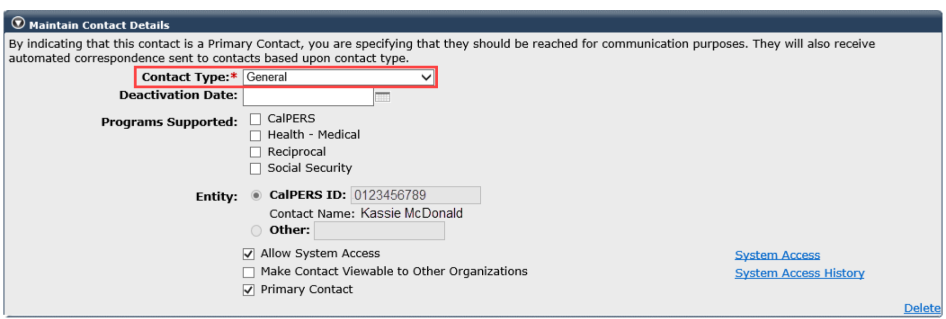
Step 4 Select the **Contact Type** link of the contact.



Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 In the Maintain Contact Details section, select from the **Contact Type** drop-down list.



Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 7: Update Preferred Communication Method

You will update the method that CalPERS communicates with the contact.

System Logic

The selected preferred method of communication is used when CalPERS sends notifications, letters, and other communications to primary contacts for your agency. See the Terms & Definitions section at the beginning of this student guide.

Step Actions

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

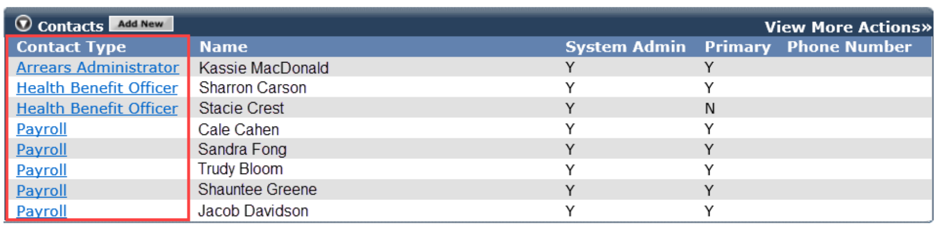
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

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

Step 4 Select the **Contact Type** link of the contact.



Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 In the Maintain Preferred Communication Details section, select from the **Preferred Communication** drop-down list.

Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 8: Unlock System Access

A contact's account may be locked:

- Due to five consecutive, unsuccessful password attempts. See unit 2, scenario 9 to reset their password after their account has been unlocked.
- If the contact incorrectly answers their challenge questions when attempting to reset their password.
- If the SAA locked their system access.

Scenario

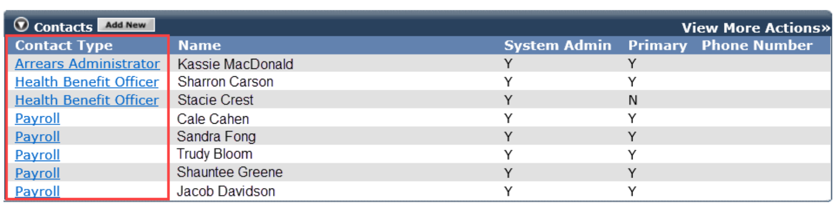
You will unlock a contact's system access that was locked.

System Logic

- Once unlocked, system access will be the same as it was prior to their account being locked.
- You may also need to reset the contact's password (see unit 2 scenario 9).

Step Actions

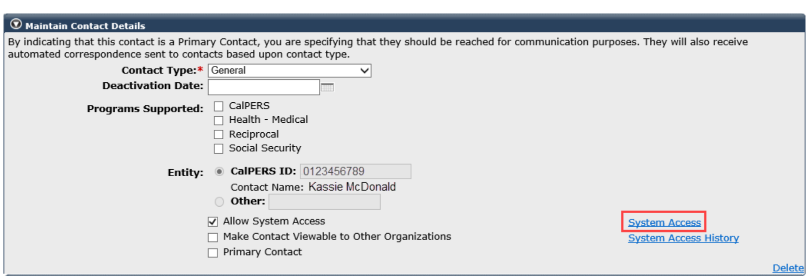
Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Skip to step 4. **No**: Continue to step 3.
Step 3	Select the **View More Actions** link.
Step 4	Select the **Contact Type** link of the contact.

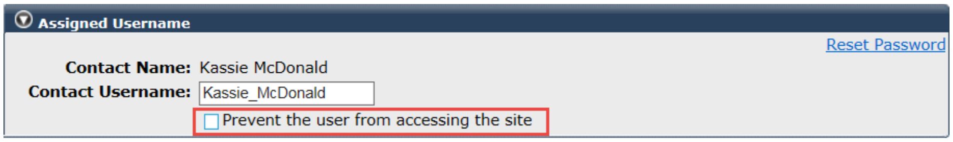


Contacts Add New — View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

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



Step 6	In the Assigned Username section, you will deselect the **Prevent the user from accessing the site** check box. 
Step 7	Select the **Save** button.
Step 8	Scroll to the bottom of the page and select the **Save** button again. **You have completed this scenario.**

Scenario 9: Reset Password

A contact has forgotten their password. You will reset their password.

System Logic

Passwords expire every 90 calendar days.

Step Actions

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

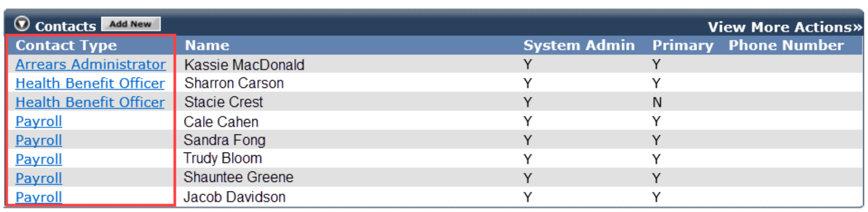
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

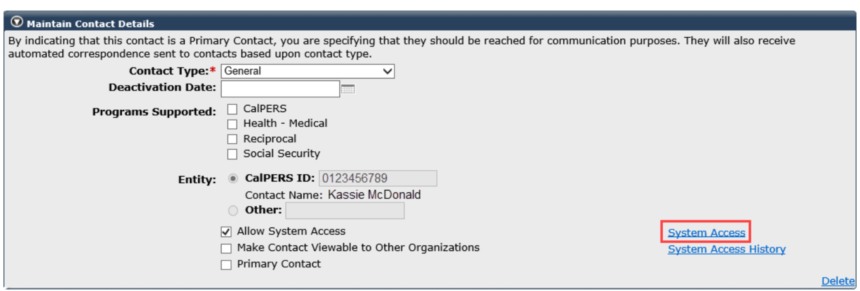
No: Continue to step 3.

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

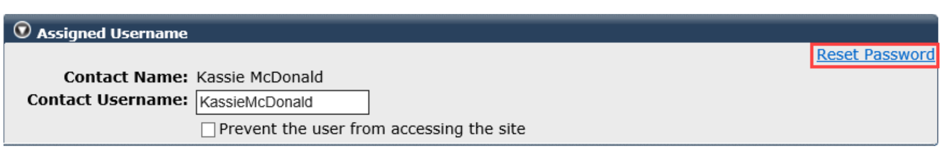
Step 4 Select the **Contact Type** link of the contact.



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



Step 6 In the Assigned Username section, select the **Reset Password** link.



Step 7 Provide the contact with their temporary password.

Step 8 Select the **Continue** button.

You have completed this scenario.

Scenario 10: Update Username

A contact recently changed their name. Per their request, you will update their username.

Step Actions

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

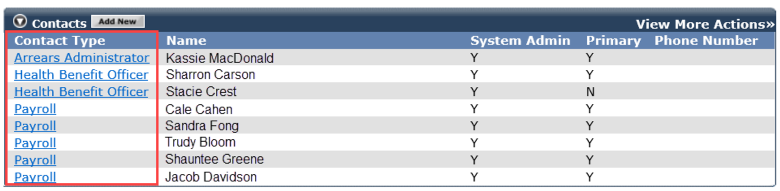
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

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

Step 4 Select the **Contact Type** link of the contact.



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

Step 6 In the Assigned username section, enter a new username in the Contact Username field.

Step 7 Select the **Save** button.

Step 8 Scroll to the bottom of the page and select the **Save** button again.

You have completed this scenario.

Scenario 11: Deactivate Contact

You must deactivate contacts once they leave your agency, go on a leave of absence, or when they should no longer be a contact for your agency. By deactivating a contact, they will no longer have access to myCalPERS or be able to contact CalPERS for member and employer-specific information.

Scenario

One of your agency contacts has permanently separated. You will deactivate their account.

System Logic

- If the contact is listed under multiple contact types, you must deactivate them under all contact types.
- If the contact is a primary contact, you should designate a new primary contact (see unit 2, scenario 5).
- 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 on the date entered.

Automatic Deactivation

Contacts will be deactivated via a batch process upon permanent separation, retirement, or agency transfer (state agencies only). Deactivation will become effective on either the effective date of the change in appointment or the date the change was entered, whichever is later.

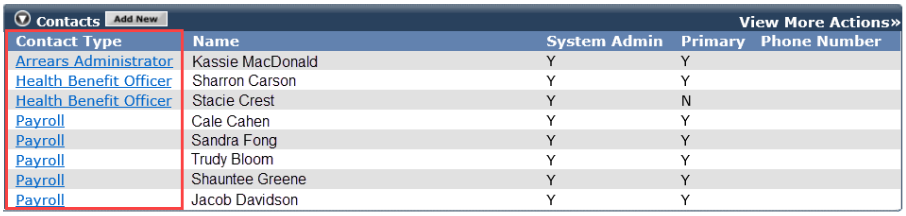
If there is a change to the appointment after the batch process and the effective date has passed, the system will not reactivate the contact. If the change is completed prior to the effective date, the system will not deactivate the contact.

Contacts who do not have a retirement appointment under your agency must be deactivated manually. This includes health-only appointments, non-contributory appointments, and third-party contacts.

Step Actions

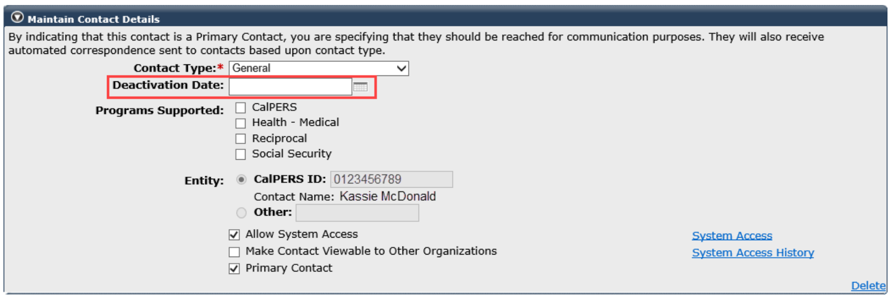
Step 1	Select the **Profile** global navigation tab.
Step 2	In the Contacts section, is the contact listed? **Yes**: Skip to step 4. **No**: Continue to step 3.
Step 3	Select the **View More Actions** link.

Step 4 Select the **Contact Type** link of the contact.


Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 In the Maintain Contact Details section, complete the Deactivation Date field.



Step 6 Select the **Save** button.

You have completed this scenario.

Scenario 12: Reactivate Contact

You have a contact returning from a leave of absence. You will reactivate the contact.

System Logic

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

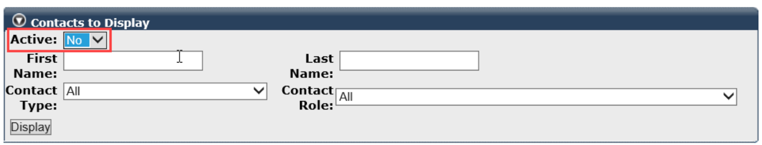
1. Review and update user roles
2. Reset the contact's password (see unit 2, scenario 13)
3. Provide the contact with their username and temporary password

Step Actions

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

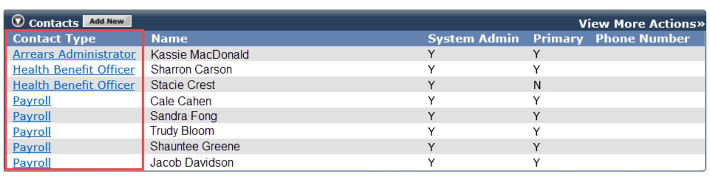
Step 2 In the Contacts section, select the **View More Actions** link.

Step 3 In the Contacts to Display section, select **No** from the Active drop-down list.

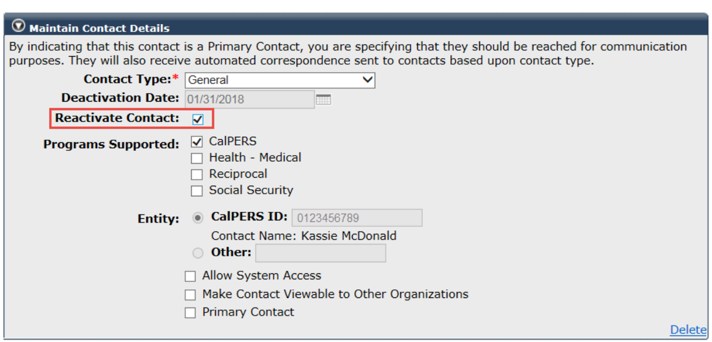


Step 4 Select the **Display** button.

Step 5 In the Contacts section, select the **Contact Type** link for the contact.



Step 6 Select the **Reactivate Contact** check box.



Step 7 Does the contact need system access?

Yes: Continue to step 8.

No: Skip to step 18.

Step 8 Select the **Allow System Access** check box.

Step 9 Select the **System Access** link.

Step 10 Did the contact have system access prior to being deactivated?

Yes: Skip to step 12.

No: Continue to step 11.

Step 11 In the Assigned Username section, enter a username for this contact.

Step 12 In the Assign Roles section, review the assigned roles.

Step 13 Does the contact need their access updated?

Yes: Continue to step 14.

No: Skip to step 18.

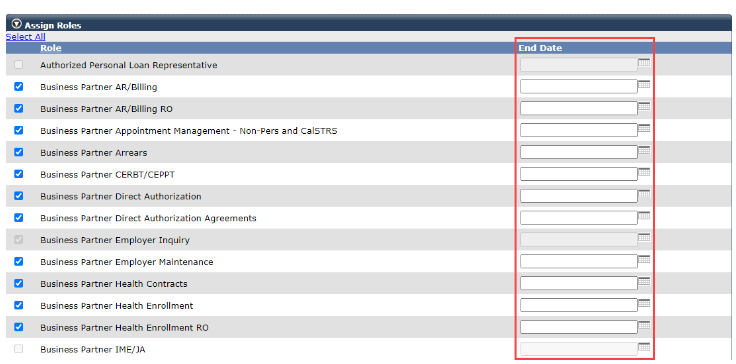
Step 14 In the Assign Roles section, select and/or deselect the appropriate check box(es).

Step 15 Do the user roles need to have an end date updated?

Yes: Continue to step 16.

No: Skip to step 17.

Step 16 Update the End Date field(s).



Step 17	Select the **Save** button.
Step 18	In the Maintain Contact Details section, update the appropriate check box(es).
Step 19	Select the **Save** button.
Step 20	Do you need to reset the contact's password? **Yes**: See unit 2, scenario 9. **No**: **You have completed this scenario.**

Scenario 13: Delete Contact

You mistakenly added a contact to myCalPERS. You will delete the contact.

System Logic

- Delete only when a contact was added in error. Deactivation should be used when a contact leaves your agency or goes on a leave of absence (see unit 2, scenario 11).
- Once a contact's account is deleted, all history of their access is removed from myCalPERS.

Step Actions

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

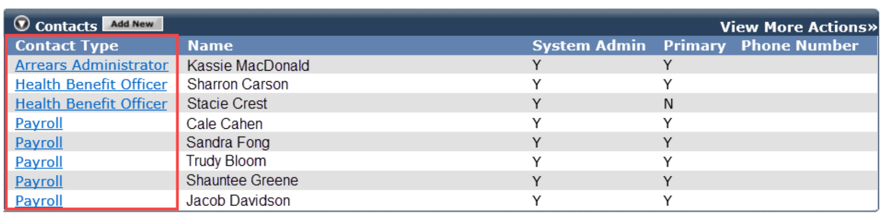
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

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

Step 4 Select the **Contact Type** link of the contact.



Contacts Add New View More Actions»

Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharron Carson	Y	Y	
Health Benefit Officer	Stacie Crest	Y	N	
Payroll	Cale Cahen	Y	Y	
Payroll	Sandra Fong	Y	Y	
Payroll	Trudy Bloom	Y	Y	
Payroll	Shauntee Greene	Y	Y	
Payroll	Jacob Davidson	Y	Y	

Step 5 In the Maintain Contact Details section, select the **Delete** link.

Step 6 In the Confirm Deletion dialogue box, select the **OK** button.

You have completed this scenario.

Scenario 14: Review System Access History

The System Access History section displays the history of the contact's system access, including creation, deactivation, and reactivation. The Assigned Role History section displays the history of the contact's user roles.

Scenario

You want to review a contact's system access and assigned role history.

Step Actions

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

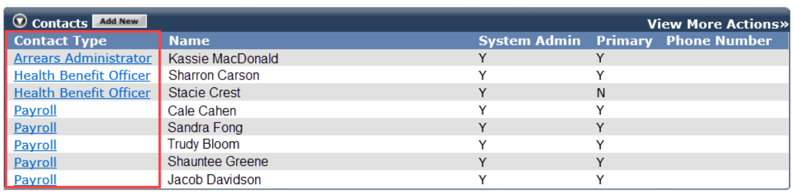
Step 2 Within the Contacts section, is the contact listed?

Yes: Skip to step 4.

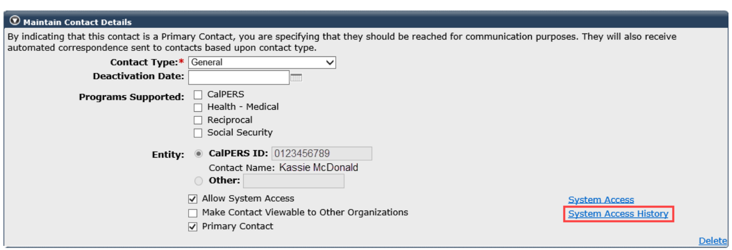
No: Continue to step 3

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

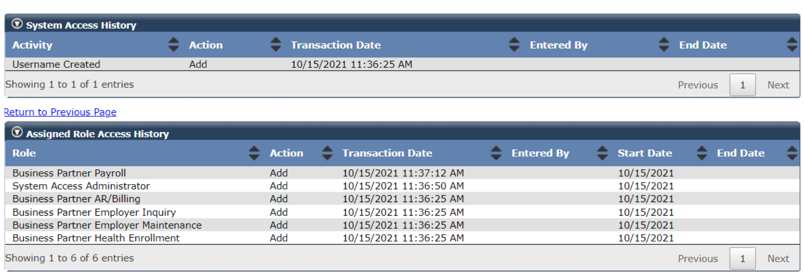
Step 4 Select the **Contact Type** link of the contact.



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



Step 6 Review the System Access History and Assigned Role Access History sections.



You have completed this scenario.

Unit 3: Maintain Agency Information

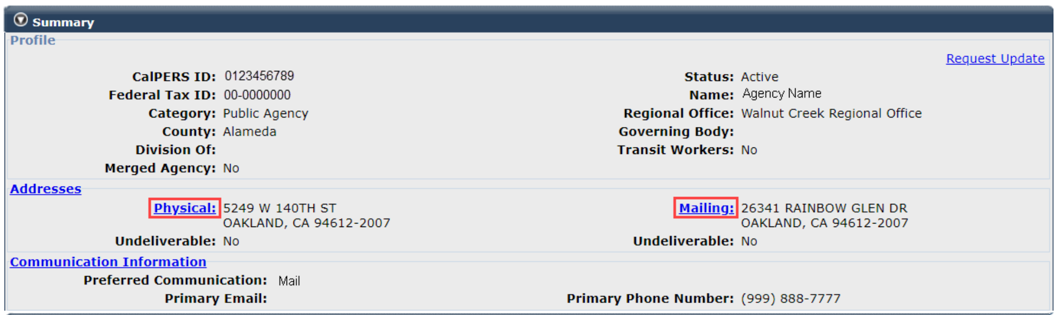
To receive proper communication from CalPERS, ensure your agency's contact information in myCalPERS is kept current. This includes agency address(es), contact number(s), and email address(es).

Contents

Scenario 1: Update Agency Address

Your agency has moved. You will update the address in myCalPERS.

Step Actions

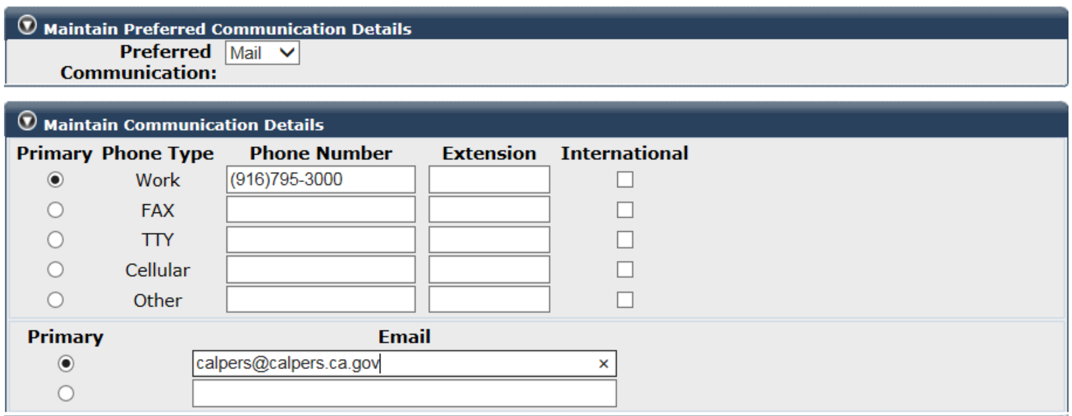
Step 1	Select the **Profile** global navigation tab.
Step 2	In the Summary section, select either the **Physical** or **Mailing** link. 
Step 3	Update or correct the information contained in the Maintain Address Details section.
Step 4	Select the **Save** button.
Step 5	Is the U.S. Postal Service Matches address correct? **Yes**: Skip to step 7. **No**: Continue to step 6.
Step 6	Select the **Entered Address** radio button.
Step 7	Select the **Confirm** button.
Step 8	Is the U.S. Postal Service Matches address correct? **Yes**: Select the **Confirm** button and skip to step 9. **No**: Return to step 6.
Step 9	Select the **Save** button. **You have completed this scenario.**

Scenario 2: Update Agency Phone Number and Email Address

You want to update the primary phone number and email address that displays on your agency's profile page in myCalPERS.

Step Actions

Step 1	Select the **Profile** global navigation tab.
Step 2	In the Summary section, select the **Communication Information** link.
Step 3	In the Maintain Preferred Communication Details and Maintain Communication Details sections, update your agency's communication information.



Step 4	Select the **Primary** radio button for one phone number and email address.
Step 5	Select the **Save** button. **You have completed this scenario.**

CalPERS Resources

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

- myCalPERS Student Guides & Resources
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides
- Employer Education Schedule (PDF)
  Pathway: CalPERS website > Employers > I Want To… : Access myCalPERS Student Guides > Employer Education Schedule (PDF)
- Online Classes for Employers (PDF)
  Pathway: CalPERS website > Employers > I Want To… : Access myCalPERS Student Guides > Online Classes for Employers (PDF)
- System Access Administrators
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators
- myCalPERS System Privileges for Business Partner Roles (PDF)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators > Assign System Access and System Role Privileges: myCalPERS System Privileges for Business Partner Roles (PDF)
- myCalPERS Employer Reports (Cognos) Catalog
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > Employer Reports (Cognos) Catalog
  – Business Partner myCalPERS User Access Report

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.