

myCalPERS System Access Administration

Student Guide

March 5, 2022



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.

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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.

Maintain Contact Details

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

Contact Type: *

Programs Supported:

- CalPERS
- Health - Medical
- Social Security

Entity: *

- CalPERS ID or SSN:** [Verify](#)
- Other:**

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

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

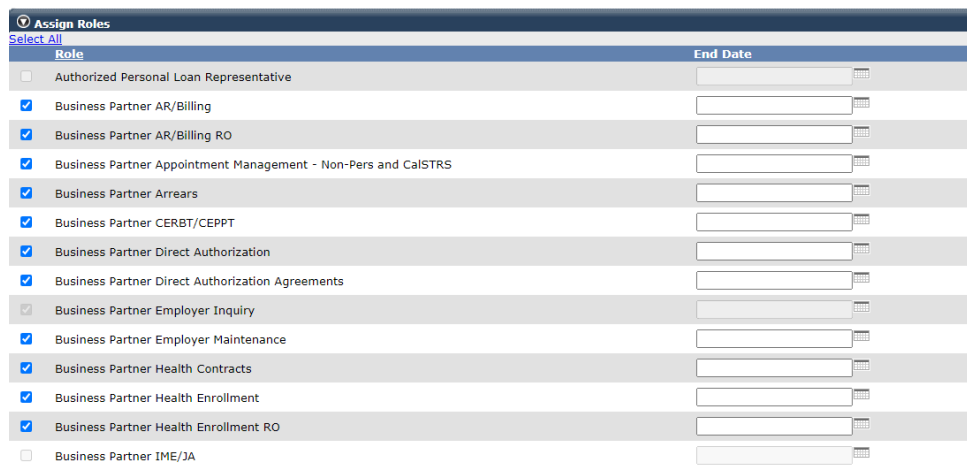
A contact may be granted system access allowing them to log in to myCalPERS to conduct business for your agency. They may contact CalPERS regarding agency or member-specific information.

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)



Role	End Date
<input type="checkbox"/> Authorized Personal Loan Representative	
<input checked="" type="checkbox"/> Business Partner AR/Billing	
<input checked="" type="checkbox"/> Business Partner AR/Billing RO	
<input checked="" type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	
<input checked="" type="checkbox"/> Business Partner Arrears	
<input checked="" type="checkbox"/> Business Partner CERBT/CEPPT	
<input checked="" type="checkbox"/> Business Partner Direct Authorization	
<input checked="" type="checkbox"/> Business Partner Direct Authorization Agreements	
<input checked="" type="checkbox"/> Business Partner Employer Inquiry	
<input checked="" type="checkbox"/> Business Partner Employer Maintenance	
<input checked="" type="checkbox"/> Business Partner Health Contracts	
<input checked="" type="checkbox"/> Business Partner Health Enrollment	
<input checked="" type="checkbox"/> Business Partner Health Enrollment RO	
<input type="checkbox"/> Business Partner IME/JA	

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.

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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.

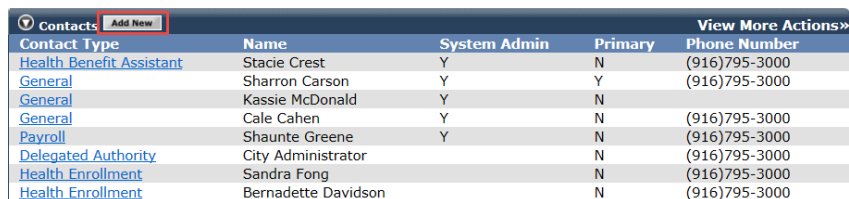
System Logic

- 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).

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

Contact Type: *

Programs Supported: CalPERS
 Health - Medical
 Reciprocal
 Social Security

Entity: * CalPERS ID: [Clear](#)
Contact Name: Kassie McDonald
 Other:

Allow System Access
 Make Contact Viewable to Other Organizations
 Primary Contact

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.

Maintain Contact Address Details

Existing Business Partner Address: None
Physical
Mailing

Address: *

Country: * United States

City: *

State: *

Zip Code: * -

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.

Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Work	9167953000		<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Home			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	calpers@calpers.ca.gov	
<input type="radio"/>		
<input type="radio"/>		

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).

Role	End Date
<input type="checkbox"/> Authorized Personal Loan Representative	
<input checked="" type="checkbox"/> Business Partner AR/Billing	
<input checked="" type="checkbox"/> Business Partner AR/Billing RO	
<input checked="" type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	
<input checked="" type="checkbox"/> Business Partner Arrears	
<input checked="" type="checkbox"/> Business Partner CERBT/CEPPT	
<input checked="" type="checkbox"/> Business Partner Direct Authorization	
<input checked="" type="checkbox"/> Business Partner Direct Authorization Agreements	
<input type="checkbox"/> Business Partner Employer Inquiry	
<input checked="" type="checkbox"/> Business Partner Employer Maintenance	
<input checked="" type="checkbox"/> Business Partner Health Contracts	
<input checked="" type="checkbox"/> Business Partner Health Enrollment	
<input checked="" type="checkbox"/> Business Partner Health Enrollment RO	
<input type="checkbox"/> Business Partner IME/JA	

Step 20 Select the **Save** button.

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

Password Maintenance

The following Username has been created and assigned the displayed temporary password. This password will expire in 30 days:

Username: Kassie_McDonald
Password: pd1ac\$thT

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.

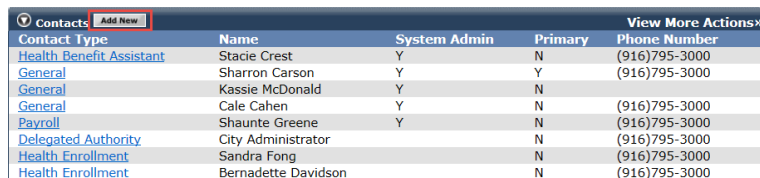
System Logic

- 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.

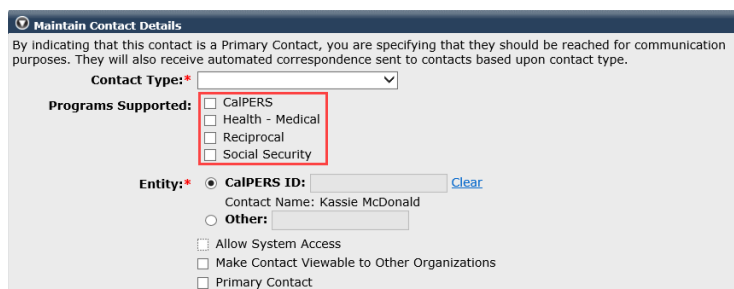
Step 2 In the Contacts section, select the **Add New** button.



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).



Maintain Contact Details

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

Contact Type:*

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity:*

CalPERS ID: [Clear](#)

Other:

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

- 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).

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

Contact Type:*

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity:*

- CalPERS ID: [Clear](#)
- Other:

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

- 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.

Maintain Contact Address Details

Existing Business Partner Address:

Address:*

Country:*

City:*

State:*

Zip Code:*

- 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.

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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.

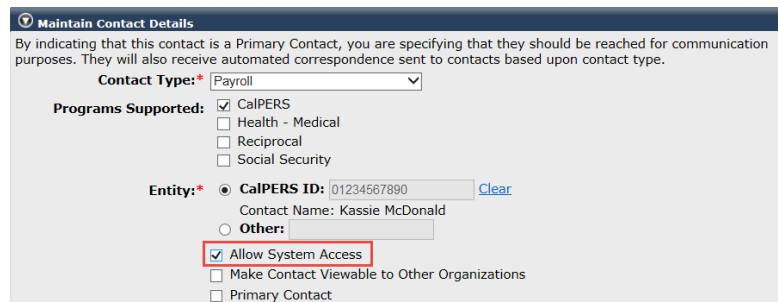
Step 3 Select the **View More Actions** link.

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



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 **Allow System Access** check box.



Maintain Contact Details

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

Contact Type: * Payroll

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity: *

- CalPERS ID:** 01234567890 [Clear](#)
- Contact Name: Kassie McDonald
- Other:**

Allow System Access

- Make Contact Viewable to Other Organizations
- Primary Contact

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.

The screenshot shows a web interface titled "Assign Roles" with a "Select All" link. Below is a table with two columns: "Role" and "End Date". The "Role" column contains a list of roles with checkboxes. The "End Date" column contains empty text input fields. A red rectangular box highlights the "End Date" column.

Role	End Date
<input checked="" type="checkbox"/> Authorized Personal Loan Representative	
<input checked="" type="checkbox"/> Business Partner AR/Billing	
<input checked="" type="checkbox"/> Business Partner AR/Billing RO	
<input checked="" type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	
<input type="checkbox"/> Business Partner Arrears	
<input checked="" type="checkbox"/> Business Partner Direct Authorization	
<input checked="" type="checkbox"/> Business Partner Direct Authorization Agreements	
<input type="checkbox"/> Business Partner Employer Inquiry	
<input checked="" type="checkbox"/> Business Partner Employer Maintenance	

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.

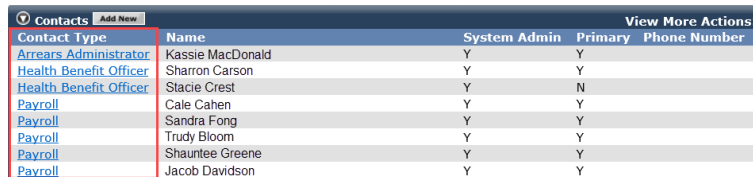
Step 2 In the Contacts section, is the contact listed?

Yes: Skip to step 4.

No: Continue to step 3.

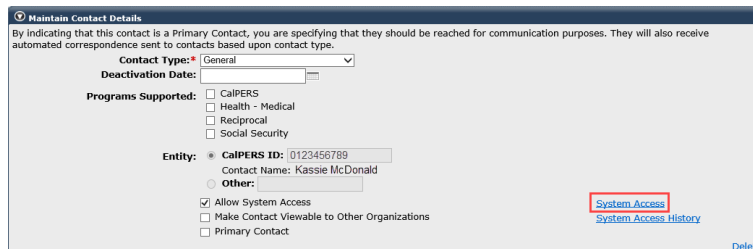
Step 3 Select the **View More Actions** link.

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



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.



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:

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity:

- CalPERS ID:
- Contact Name:
- Other:

Allow System Access

Make Contact Viewable to Other Organizations

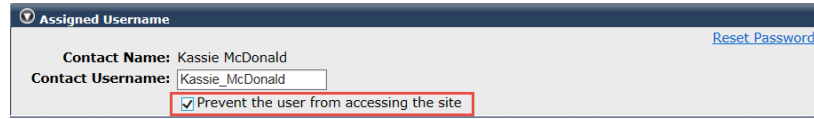
Primary Contact

[System Access](#)

[System Access History](#)

[Delete](#)

Step 6 In the Assigned Username section, select the **Prevent the user from accessing the site** check box.



The screenshot shows a form titled "Assigned Username". It contains the following fields and options:

- Contact Name:** Kassie McDonald
- Contact Username:** Kassie_McDonald
- [Reset Password](#)
- Prevent the user from accessing the site

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?

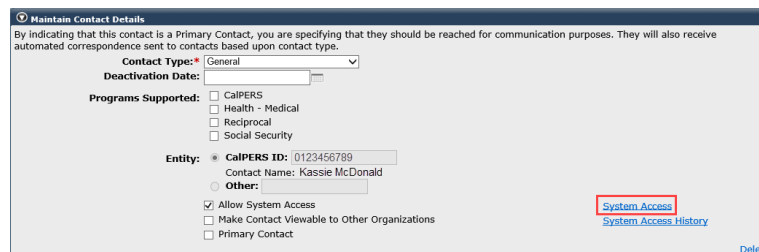
Yes: Skip to step 4.

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.



The screenshot shows the 'Maintain Contact Details' form. At the top, there is a note: '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.' Below this, there are fields for 'Contact Type' (set to 'General'), 'Deactivation Date', and 'Programs Supported' (with checkboxes for CalPERS, Health - Medical, Reciprocal, and Social Security). The 'Entity' section has 'CalPERS ID' (0123456789) selected, with 'Contact Name' (Kassie McDonald) and 'Other' options. At the bottom, there are checkboxes for 'Allow System Access' (checked), 'Make Contact Viewable to Other Organizations', and 'Primary Contact'. On the right side, there are two links: 'System Access' (highlighted with a red box) and 'System Access History'. A 'Delete' link is at the bottom right.

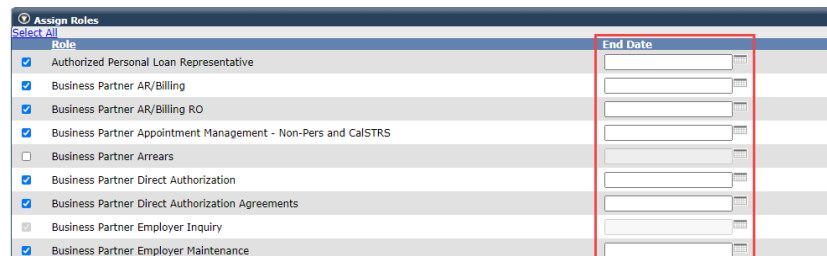
Step 6 In the Assign Roles section, select and/or deselect the appropriate check box(es).

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).



The screenshot shows the 'Assign Roles' form. It has a table with columns for 'Role' and 'End Date'. The 'End Date' column is highlighted with a red box. The roles listed are: Authorized Personal Loan Representative, Business Partner AR/Billing, Business Partner AR/Billing RO, Business Partner Appointment Management - Non-Pers and CalSTRS, Business Partner Arrears, Business Partner Direct Authorization, Business Partner Direct Authorization Agreements, Business Partner Employer Inquiry, and Business Partner Employer Maintenance. The first four roles have their 'End Date' fields populated with dates.

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.

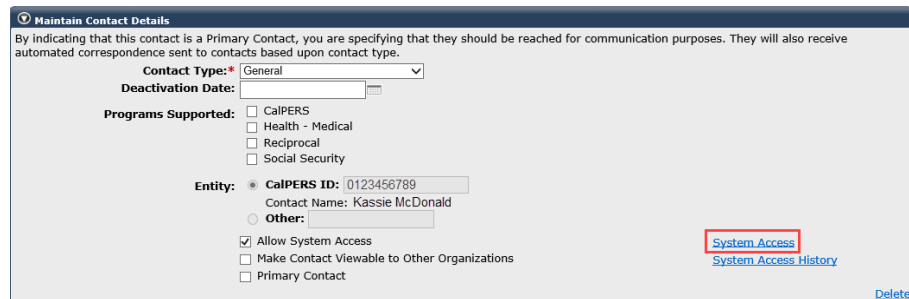
Step 3 Select the **View More Actions** link.

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



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.



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:

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity: CalPERS ID: 0123456789
 Other:

Contact Name: Kassie McDonald

Allow System Access
 Make Contact Viewable to Other Organizations
 Primary Contact

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

[Delete](#)

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.

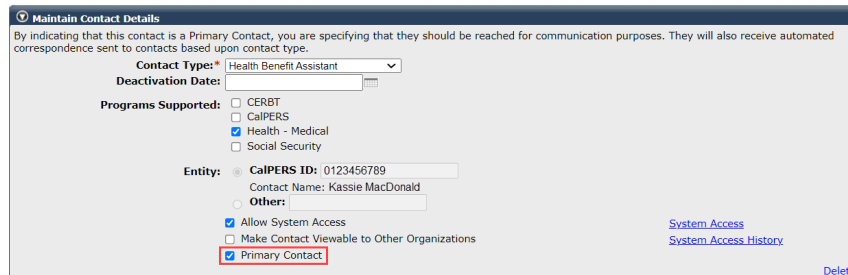
Step 3 Select the **View More Actions** link.

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.



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: Health Benefit Assistant

Deactivation Date:

Programs Supported:

- CERBT
- CalPERS
- Health - Medical
- Social Security

Entity:

- CalPERS ID: 0123456789
- Other:

Contact Name: Kassie MacDonald

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[System Access History](#)

[Delete](#)

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.

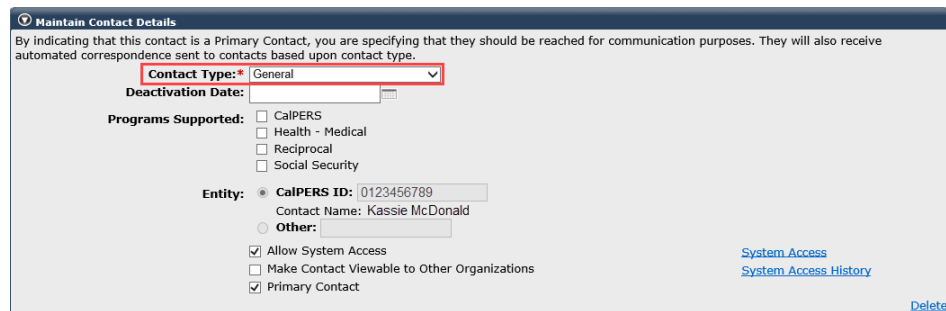
Step 3 Select the **View More Actions** link.

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



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.



Maintain Contact Details

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

Contact Type: * General

Deactivation Date: []

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity:

- CalPERS ID: 0123456789
Contact Name: Kassie MacDonald
- Other: []

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[System Access History](#)

[Delete](#)

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	Sharon 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.



Maintain Preferred Communication Details
Preferred Communication: Mail
Email

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.

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.

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:

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity:

- CalPERS ID:
- Other:

Allow System Access

Make Contact Viewable to Other Organizations

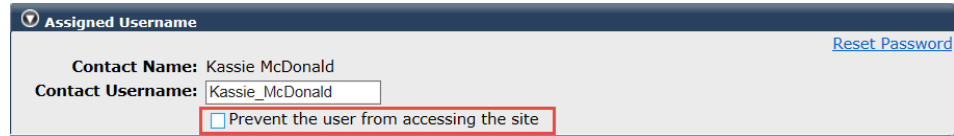
Primary Contact

[System Access](#)

[System Access History](#)

[Delete](#)

Step 6 In the Assigned Username section, you will deselect the **Prevent the user from accessing the site** check box.



Assigned Username [Reset Password](#)

Contact Name: Kassie McDonald

Contact Username:

Prevent the user from accessing the site

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.



Contact Type	Name	System Admin	Primary	Phone Number
Arrears Administrator	Kassie MacDonald	Y	Y	
Health Benefit Officer	Sharon 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.



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:*

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity: CalPERS ID:
 Other:

Allow System Access
 Make Contact Viewable to Other Organizations
 Primary Contact

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

[Delete](#)

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



Assigned Username

Contact Name: Kassie McDonald

Contact Username:

Prevent the user from accessing the site

[Reset Password](#)

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.



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.



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:

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity:

- CalPERS ID:
- Contact Name:
- Other:

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[System Access History](#)

[Delete](#)

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



Assigned Username

[Reset Password](#)

Contact Name:

Contact Username:

Prevent the user from accessing the site

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.

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.

Maintain Contact Details

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

Contact Type: * General

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity:

- CalPERS ID:** 0123456789
- Other:**

Contact Name: Kassie McDonald

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations [System Access History](#)

Primary Contact [Delete](#)

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:

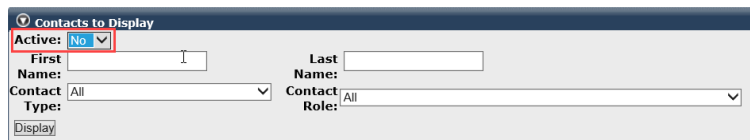
1. Review and update user roles
2. Reset the contact's password (see unit 2, scenario 13)
3. Provide the contact with their username and temporary password

Step Actions

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

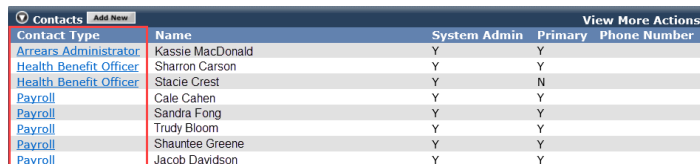
Step 2 In the Contacts section, select the **View More Actions** link.

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



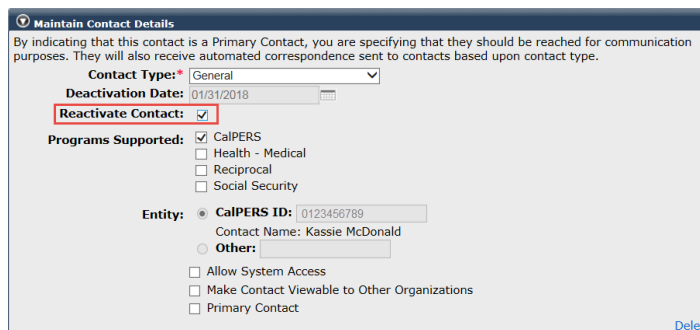
Step 4 Select the **Display** button.

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



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 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.



The screenshot shows a form titled "Assigned Username". It includes a "Contact Name" field with the value "Kassie McDonald" and a "Reset Password" link. Below it is a "Contact Username" field with an empty text input box. At the bottom, there is a checkbox labeled "Prevent the user from accessing the site".

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.

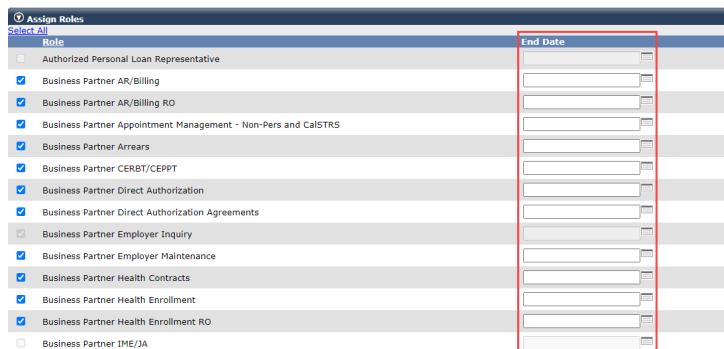
Step 14 In the Assign Roles section, select and/or deselect the appropriate check box(es).

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).



The screenshot shows a table titled "Assign Roles" with columns for "Role" and "End Date". The "End Date" column is highlighted with a red box. The table lists various roles with checkboxes in the "Role" column and date pickers in the "End Date" column.

Role	End Date
<input type="checkbox"/> Authorized Personal Loan Representative	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner AR/Billing	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner AR/Billing RO	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Appointment Management - Non-Pers and CalSTRS	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Arrears	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner CERBT/CEPPT	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Direct Authorization	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Direct Authorization Agreements	<input type="text"/>
<input type="checkbox"/> Business Partner Employer Inquiry	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Employer Maintenance	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Health Contracts	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Health Enrollment	<input type="text"/>
<input checked="" type="checkbox"/> Business Partner Health Enrollment RO	<input type="text"/>
<input type="checkbox"/> Business Partner IME/JA	<input type="text"/>

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.

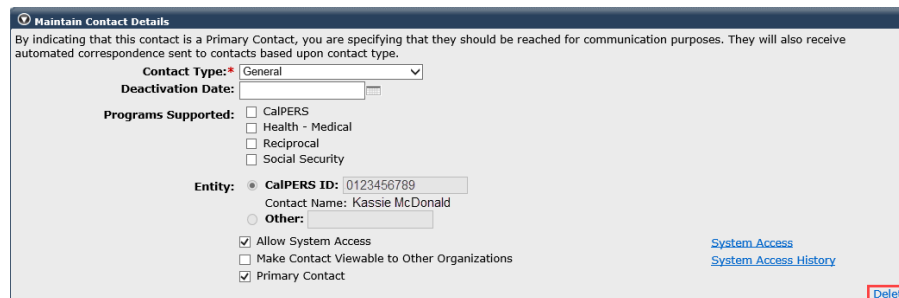
Step 3 Select the **View More Actions** link.

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



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.



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:

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity:

- CalPERS ID:
- Other:

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations [System Access History](#)

Primary Contact

[Delete](#)

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.

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 History** link.

Maintain Contact Details

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

Contact Type:

Deactivation Date:

Programs Supported:

- CalPERS
- Health - Medical
- Reciprocal
- Social Security

Entity: CalPERS ID: 0123456789

Contact Name: Kassie McDonald

Other:

Allow System Access

Make Contact Viewable to Other Organizations

Primary Contact

[System Access](#)

[System Access History](#)

[Delete](#)

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

System Access History

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

Showing 1 to 1 of 1 entries Previous 1 Next

[Return to Previous Page](#)

Assigned Role Access History

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

Showing 1 to 6 of 6 entries Previous 1 Next

[Return to Previous Page](#)

You have completed this scenario.

Unit 3: Maintain Agency Information

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.....	32
Scenario 2: Update Agency Phone Number and Email Address	33

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.

The screenshot shows the 'Summary' page for an agency profile. The page is divided into several sections: Profile, Addresses, and Communication Information. The Profile section includes fields for CalPERS ID, Federal Tax ID, Category, County, Division Of, Merged Agency, Status, Name, Regional Office, Governing Body, and Transit Workers. The Addresses section shows two address types: Physical and Mailing, both with the same address: 5249 W 140TH ST, OAKLAND, CA 94612-2007. The Communication Information section shows Preferred Communication (Mail) and Primary Email. A 'Request Update' link is visible in the top right corner.

Section	Field	Value
Profile	CalPERS ID:	0123456789
	Federal Tax ID:	00-0000000
	Category:	Public Agency
	County:	Alameda
	Division Of:	
	Merged Agency:	No
	Status:	Active
	Name:	Agency Name
	Regional Office:	Walnut Creek Regional Office
	Governing Body:	
Transit Workers:	No	
Addresses	Physical:	5249 W 140TH ST OAKLAND, CA 94612-2007
	Mailing:	26341 RAINBOW GLEN DR OAKLAND, CA 94612-2007
	Undeliverable:	No
	Undeliverable:	No
Communication Information	Preferred Communication:	Mail
	Primary Email:	
	Primary Phone Number:	(999) 888-7777

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.

The screenshot shows two sections of a web form. The top section is titled "Maintain Preferred Communication Details" and contains a "Preferred Communication:" label with a dropdown menu set to "Mail". The bottom section is titled "Maintain Communication Details" and contains a table with columns for "Primary", "Phone Type", "Phone Number", "Extension", and "International". The "Work" phone type is selected with a radio button, and its phone number is "(916)795-3000". Below the table, there is a "Primary" section with a radio button selected and an "Email" field containing "calpers@calpers.ca.gov".

Primary	Phone Type	Phone Number	Extension	International
<input checked="" type="radio"/>	Work	(916)795-3000		<input type="checkbox"/>
<input type="radio"/>	FAX			<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary **Email** calpers@calpers.ca.gov x

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