myCalPERS Health Transaction Verification

Student Guide

December 2, 2023

CalPERS

Introduction

This guide will assist you with confirming or rejecting health benefit enrollments and changes submitted by your employees in myCalPERS. You must also review and confirm any required supporting documents, e.g., marriage or birth certificates, Social Security cards, etc. in myCalPERS. Your employees' uploaded documents are saved in myCalPERS.

If your employees need information on signing up for a myCalPERS account and submitting a health enrollment or change request, refer them to the [Online Health Enrollment for Active Members](#) webpage.

Health Enrollment Requests to Enroll, Make Changes, and Cancel

Employees of **public agencies**, **schools**, and **state agencies** (excluding California State Universities) can submit the following health requests in myCalPERS:

- New enrollment
- Changes: Add or delete dependent, change health plan, or recertify parent-child relationship
- Cancel coverage
- Open Enrollment: New enrollment, add or delete dependent, change health plan, or cancel

Disclaimer

Business partner and participant information has been masked in this procedure guide.

System Access

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

Training Opportunities

Prior to taking a myCalPERS training, new users should review the [Introduction to myCalPERS for Business Partners (PDF)](#) student guide and take a health Business Rules class. Business rules summarizes the laws defined by the California Public Employees' Retirement Law (PERL).

Contents

Unit 1: Add a Non-PERS or CalSTRS Appointment

For public agencies, schools, and non-central state agencies, you will learn how to add a new appointment for a non-PERS or California State Teachers' Retirement System (CalSTRS) employee. Your employee must have an active appointment with your agency in myCalPERS before they can create a member account and submit an online health enrollment request.

Scenario: Add an Appointment for an Active Non-PERS or CalSTRS Employee

You will add your non-PERS or CalSTRS employee's demographics and appointment information in myCalPERS.

- CalPERS members: If your employee is a CalPERS member without an appointment, refer to the myCalPERS Retirement Enrollment (PDF) student guide.
- Non-PERS or CalSTRS members: You must add their appointment with your agency in myCalPERS. *If the system does not allow you to add an appointment, contact CalPERS.*
- System Access Roles
- To add a non-PERS or CalSTRS appointment for an employee with a previous appointment with your agency in myCalPERS, you must have the *Business Partner Appointment Management-Non-Pers and CalSTRS* access role.
- To add a non-PERS or CalSTRS appointment for an employee with *no previous appointment with your agency* in myCalPERS, you must have the *Business Partner Retirement Enrollment* role and your agency must have a CalPERS retirement contract.
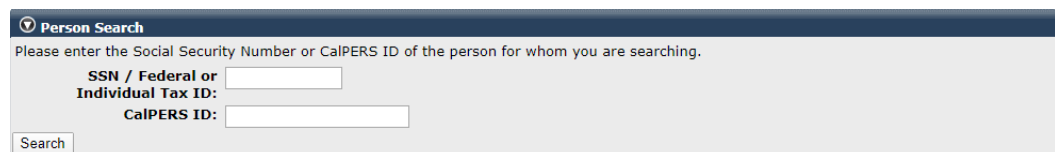
Step Actions

Check If Your Employee Has a Prior Appointment With Your Agency in myCalPERS

Step 1	Select the **Person Information** global navigation tab.
Step 2	Enter either the SSN, Federal or Individual Tax ID, or CalPERS ID.

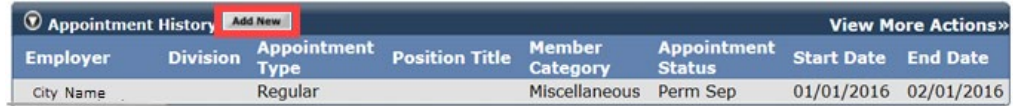| Step 3	Select the **Search** button.
Step 4	If they:
	• **Have a prior appointment with your agency:** Continue to step 5.
	• **Do not have a prior appointment with your agency:** Skip to step 7.

Add New Appointment for a *Returning Non-PERS or CalSTRS Employee* With a Prior Appointment With Your Agency in myCalPERS

Step 5	In the Appointment History section, select the **Add New** button.

Step 6	Skip to step 20.

Add New Appointment for a Non-PERS or CalSTRS Employee Without a Prior Appointment With Your Agency in myCalPERS

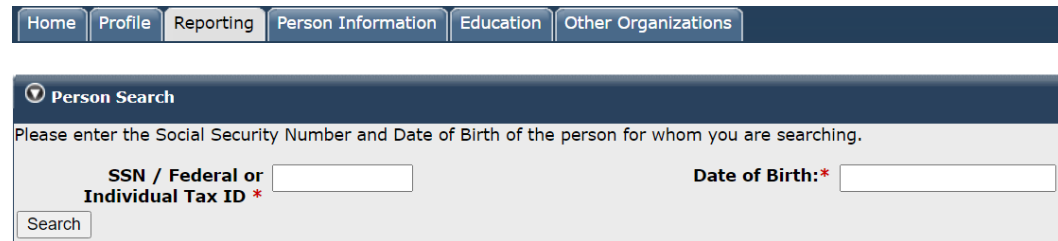|	
Step 7	Select the **Reporting** global navigation tab.
Step 8	In the Create or Edit Report section, select *Add Retirement Enrollment* from the Method drop-down list.

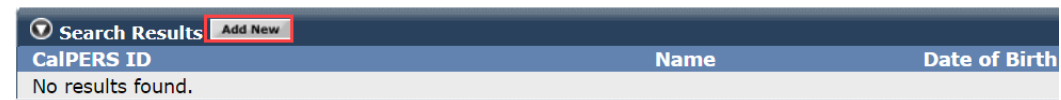|	
Step 9	Select the **Continue** button.
Step 10	Complete the Person Search section.

Step 11	Select the **Search** button.
Step 12	What displays in the Search Results section? **No results found**: Continue to step 13. **Appointment Details page**: Skip to step 20.
Step 13	In the Search Results section, select the **Add New** button.

Step 14	Complete the Person, Address, and Communication Details sections.

Person Details
Prefix:
First Name:*
Suffix:
Date of Birth:*
SSN:*
Middle Name:
Gender:*
Confirm SSN:*
Last Name:*

Address Details
Address Type:*
Address:*
Country: United States
City:*
State:* California
Zip Code:*

Communication Details

Primary	Phone Type	Phone Number	Extension	International
○	Work			☐
○	Fax			☐
○	TTY			☐
○	Cellular			☐
○	Home			☐
○	Other			☐

Primary	Email
○	
○	

Step 15	Select the **Primary** radio button for a phone number and an email address.
Step 16	Select the **Save & Continue** button.
Step 17	Select the radio button for the address that best matches what was provided by your employee.
Step 18	Select the **Confirm** button.
Step 19	Select the **Save & Continue** button.
Step 20	Complete the Appointment Details section with this information: • **Program:** Health (Ensure this field does **not** display **CalPERS**) • **Enrollment Eligibility Date:** When appointment qualified for health benefits • **Retirement System:** CalSTRS or Other (non-PERS) • **Division:** Only complete if your employee works for an agency under a parent agency, e.g., a school district under a county office of education • **Original Hire Date:** When the employee was originally hired by your agency

Appointment Details
Program
Program: Health   Enrollment Eligibility Date: *
Retirement System:
Position Information
Employer: City Name   CalPERS ID (Employer): 9876543210
Division: CalPERS ID (Division): 0
Original Hire Date:*

Save   Clear

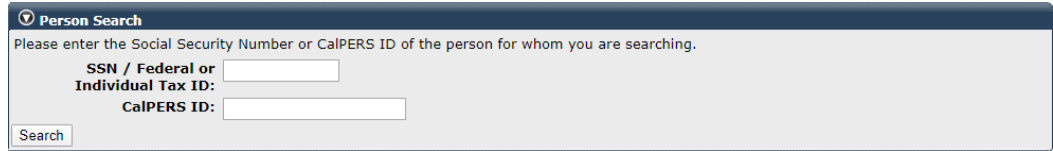| Step 21	Select the employee's medical group from the CBU drop-down list. **Note:** CBU (Collective Bargaining Unit) list has the medical groups of a public agency or school's health contract. CBU: *
Step 22	Select the **Save** button.

Step 23	Do you need to update the employee's demographics or communication information (phone number, email address, or address)?
	Yes: Select the **Person Information** global navigation tab.
	No: **You have completed this scenario.**

Step 24	Enter either the SSN, Federal or Individual Tax ID, or CalPERS ID.

Step 25	Select the **Search** button.

Step 26	Select the **Update Personal Information** or **Update** link(s) in the Summary section to correct the employee's profile or communication information.

Note: If you do not have the **Update Personal Information** link, you do not have the required access (*Business Partner Retirement Enrollment* or *Business Partner Supplemental Income Plan* access role) to update your employee's name, SSN, or date of birth.

You have completed this scenario.

Unit 2: Confirm or Reject Health Enrollment or Change Requests

You will learn how to confirm an employee's request to enroll in health benefits, add a dependent, and recertify a dependent in a parent-child relationship.

An employee may submit a new health enrollment or change request in myCalPERS. In the table below, these transactions require you to confirm or reject. For a reason not listed, the employee will need to submit an HBD form to you for processing.

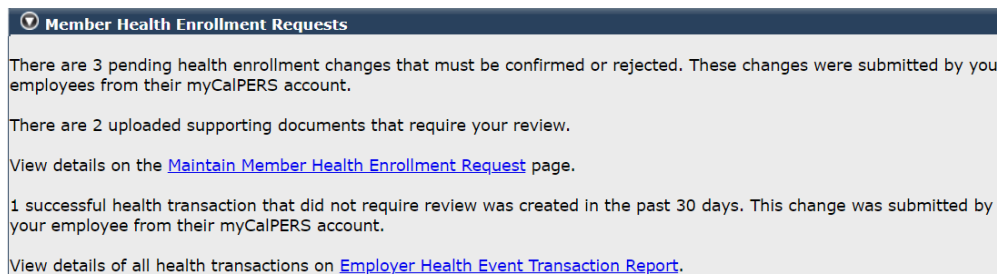| Health Event Types And Health Event Reasons	State Transactions That Require Employer Review	State Transactions That Automatically Update	Public Agency & School Transactions That Require Employer Review	Public Agency & School Transactions That Automatically Update
New Enrollment | Time Base & Tenure, Loss of Coverage, New Contracting Employee	X		X	
Add Dependent | Birth/Placement, Marriage, Parent-Child Relationship, Court Order, Domestic Partner Add, Court Order, Domestic Partner Child Add, Loss of Coverage	X		X	
Add Dependent | Return from Military Leave		X		X
Delete Dependent | Death, Divorce, Legal Separation, Domestic Partner Term	X		X	
Delete Dependent | Enroll Own Right Dependent, Gains Other Coverage, Military-Del Dependent, Loss Parent-Child Relationship		X		X
Change Health Plan* | Move, Association Membership, Out of Association Plan *State: For those with a CoBen allowance, a change health plan outside of Open Enrollment will need employer review.		X	X	
Cancel Coverage* | Subscriber Request *State: For those with a CoBen allowance, a cancel coverage outside of Open Enrollment will need employer review.		X	X	
Open Enrollment | OE Employees New Enrollment, OE Add Dep	X		X	
Open Enrollment | OE Delete Dependent, OE Change Health Plan, OE Cancel Coverage		X		X

Notifications

Emails

At the end of each day, your agency's designated *primary* health benefits officer in myCalPERS will receive an email notification after an employee submits a health transaction request (either automatically updated or one that requires your review) or uploads a new document in myCalPERS. Only one notification is sent per day, even if there were multiple submissions.

To review all your new active and retiree transactions, refer to unit 4.

Member Health Enrollment Requests

This section displays on the myCalPERS homepage if there is a new transaction, or you have at least one transaction or document that has a Submitted or In Review status. It also states the number of transactions that automatically updated and has a link to run a report to review all new transactions.

Supporting Documents

Uploaded documents, e.g., marriage or birth certificates, divorce decrees, Social Security cards, etc. are saved in myCalPERS (refer to unit 3).

Transaction Statuses

All employee-submitted transactions remain listed permanently. You can't modify transactions with confirmed or rejected statuses, but you can access the details and supporting documents.

- **Submitted**: The employee submitted a health transaction request, and it is pending.
- **In Review**: A myCalPERS user with your agency selected the **Document Review in Progress** radio button after reviewing the request.
- **Complete**: A myCalPERS user with your agency confirmed the transaction, and it is updated to myCalPERS.
- **Rejected**: A myCalPERS user with your agency denied the transaction.

Contents

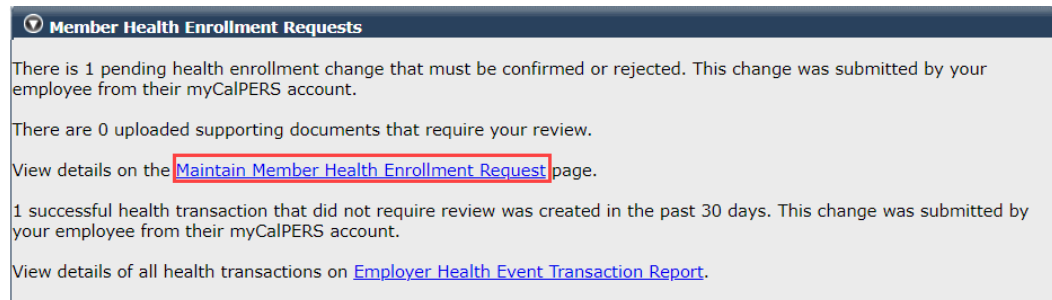## Scenario 1: Confirm or Reject a Request for a New Health Enrollment

Your employee submitted a health enrollment request with supporting documents in myCalPERS. You will review their enrollment and documents, and then confirm or reject the enrollment.

System Logic

On the homepage, the **Member Health Enrollment Requests** section will display (step 1) if there is a new transaction and/or pending health enrollment requests or documents that require your verification.
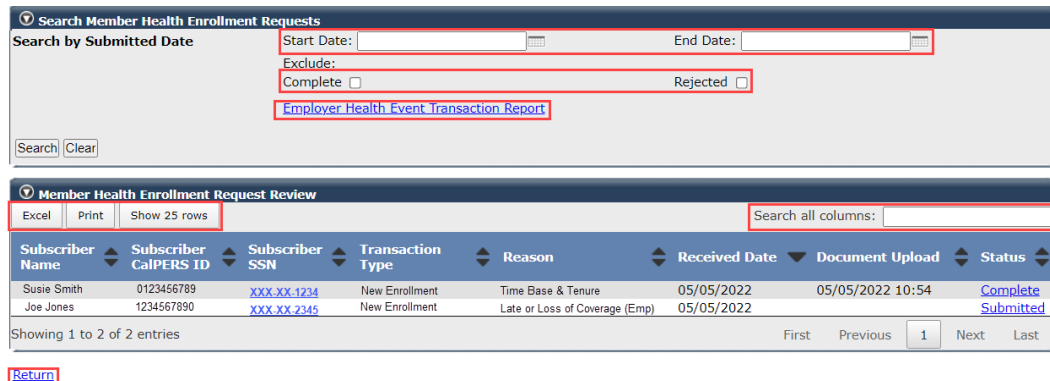
Step Actions

Step 1   From the homepage, select the **Maintain Member Health Enrollment Request** link.

Step 2   Optional filters, buttons, and links:

- Use the date filters at the top to search for a request.
- Select the check box(es) to hide complete and/or rejected transactions.
- Select the **Employer Health Event Transaction Report** link to run the report.
- Select the **Excel, Print,** or **Show 25 rows** button to display list in other ways.
- Enter an employee's CalPERS ID, name, or the last four digits of their SSN in the **Search all columns** field to locate their transaction.
- Select the **Return** link at the bottom right to go back to the previous page.

Step 3   Select the link on the far right under the Status column.

Step 4   For public agencies and schools, select the employee's medical group from the Medical Group drop-down list.

⊙ Health Enrollment Information	
Health Eligibility Information	
Appointment ID: 93076305	**Medical Group:** [⌄]

Step 5   In the Supporting Documentation section, select the **document** link to review.

⊙ Supporting Documentation			
Uploaded Documents			
As the custodian of record for your employees, please save these supporting documents in your employees' personnel records. The supporting documents will not be available to you once you confirm the enrollment request.			
Document Type	**Dependent Name**	**Document**	**Date Uploaded**
Marriage Certificate	Wendy Webber	myCalPERS 2867	06/15/2021 18:11

Note: Documents will be saved in myCalPERS for you to access (refer to unit 3).

Step 6   If necessary, in the Supporting Documentation Review sub-section, select from the document status drop-down list.

Supporting Documentation Review						
First Name	**Last Name**	**CalPERS ID**	**Date of Birth**	**Dependent Type**	**Required Documents**	
Joe	Jones	0123456789	05/05/1968	Self		
Wendy	Webber	1234567890	03/03/1968	Spouse	Marriage Certificate	Needs Review ⌄

The document status drop-down list contains the following:

- **Needs Review**: Document needs verifying
- **Complete**: Document fulfills the requirement, and no other action is needed
- **Missing**: Required document was omitted
- **Insufficient**: Document does not fulfill the requirement
- **Not Required**: Document was not needed

Step 7   If you agree to the Status of Enrollment Request section, select the check box.

☐ I hereby certify under penalty of perjury that I am the duly appointed Health Benefits Officer (HBO) of the above-named agency, and the agency's payment required by Government Code Sections 22870-22905, as applicable, is hereby approved. I acknowledge that the final eligibility determination for the enrollment action will be made by the CalPERS Board of Administration in accordance with the Public Employees' Medical and Hospital Care Act and implementing regulations. Employer in its sole discretion approves this election or change. If Employer has a Cafeteria Plan, as defined by and subject to Internal Revenue Code (IRC) Section 125, Employer acknowledges it is solely responsible for ensuring that this election or change complies and conforms with its Cafeteria Plan. Employer further acknowledges that CalPERS has no duty to determine and makes no warranty or representation of any kind, expressed or implied, whether this election or change complies with or conforms to Employer's IRC Section 125 Cafeteria Plan. CalPERS shall not be liable for any tax consequences or for any loss or damage of whatever nature in connection with Employer's approval of any election or change.

Step 8   Select a radio button for the status of the request.

○ Document Review in Progress
○ Confirm
○ Reject

- **Document Review in Progress**: Request is pending because the required document(s) was not marked as Complete or Not Required. If you set the document status to Missing or Insufficient, the next day, the employee will receive an email instructing them to log in to their myCalPERS account. In myCalPERS, the information on which documents are missing or insufficient displays, and they can upload the required document(s).
- **Confirm**: Request is approved.
- **Reject**: Request is denied. Requests should not be rejected due to missing or insufficient documents.
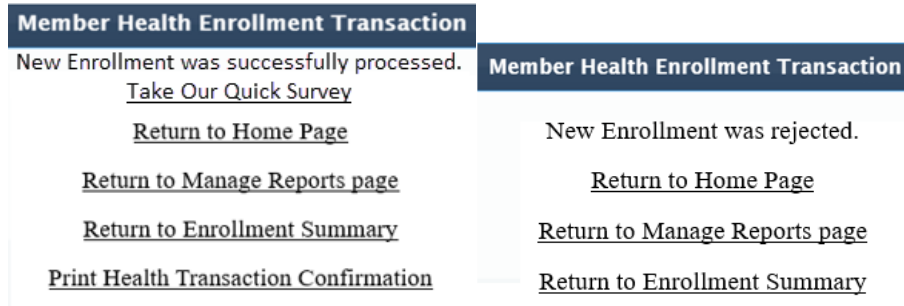
Step 9   Select the **Save** button.

Note: If you selected the **Document Review in Progress** radio button on step 8, then you will return to step 6 where the transaction will have an In Review status. Review documents and repeat steps 6-9 to confirm the transaction.

If you complete the transaction, it updates immediately. You may review the health details in myCalPERS via the employee's profile (refer to unit 1 in the [myCalPERS Health Enrollment (PDF)](#) student guide).

Step 10   Select one of the links (print and survey links display for a confirmed transaction) in the transaction confirmation:

- To provide feedback on the system, select **Take Our Quick Survey** (link is only for a confirmed transaction). After you take or decline the survey, the link will not display for 90 days.
- To go to the main myCalPERS page, select **Return to Home Page**.
- To submit new transactions, select **Return to Manage Reports page**.
- To review more requests, select **Return to Enrollment Summary**.
- To review transaction details in a PDF format, select **Print Health Transaction Confirmation** (link is only available for a confirmed transaction).

Member Health Enrollment Transaction

New Enrollment was successfully processed.
Take Our Quick Survey

Return to Home Page

Return to Manage Reports page

Return to Enrollment Summary

Print Health Transaction Confirmation

Member Health Enrollment Transaction

New Enrollment was rejected.

Return to Home Page

Return to Manage Reports page

Return to Enrollment Summary

Note: Your employee will receive an email regarding the confirmed or rejected transaction the next day.

You have completed this scenario.

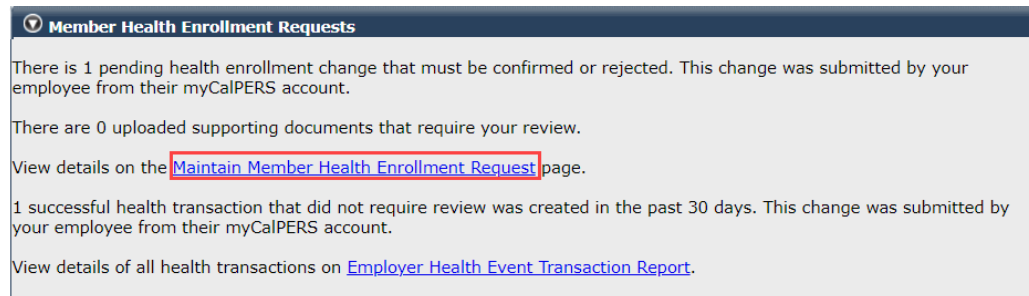## Scenario 2: Confirm or Reject a Request to Add a Dependent

Your employee submitted a request to add a dependent and included supporting documents in myCalPERS. You will review their enrollment and documents, and then confirm or reject the enrollment.

System Logic

On the homepage, the **Member Health Enrollment Requests** section will display (step 1) if there is a new transaction and/or pending health enrollment requests or documents that require your verification.
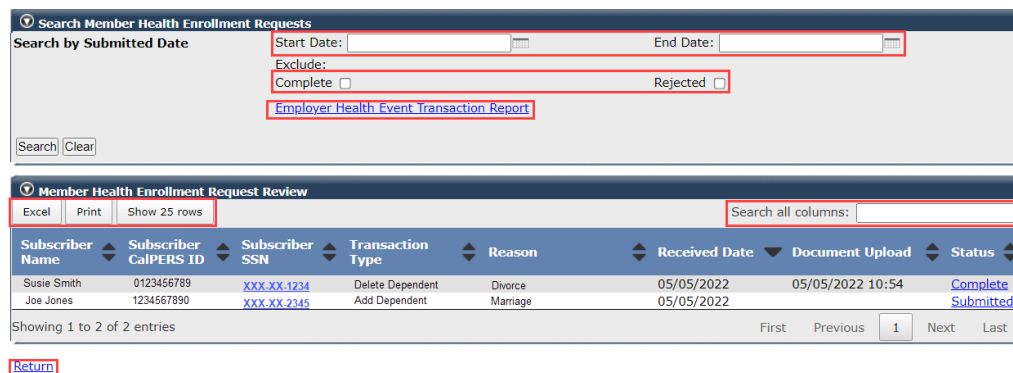
Step Actions

Step 1   From the homepage, select the **Maintain Member Health Enrollment Request** link.

Step 2   Optional filters, buttons, and links:

- Use the date filters at the top to search for a request.
- Select the check box(es) to hide complete and/or rejected transactions.
- Select the **Employer Health Event Transaction Report** link to run the report.
- Select the **Excel, Print,** or **Show 25 rows** button to display list in other ways.
- Enter an employee's CalPERS ID, name, or the last four digits of their SSN in the **Search all columns** field to locate their transaction.
- Select the **Return** link at bottom right to go back to the previous page.

Step 3   Select the **Submitted** link on the far right.

Step 4	In the Supporting Documentation section, select the **document** link if there are any to review.

Note: Documents will be saved in myCalPERS for you to access (refer to unit 3).

Step 5	If necessary, in the Supporting Documentation Review sub-section, select from the document status drop-down list.

The document status drop-down list contains the following:

- **Needs Review**: Document needs verifying
- **Complete**: Document fulfills the requirement, and no other action is needed
- **Missing**: Required document was omitted
- **Insufficient**: Document does not fulfill the requirement
- **Not Required**: Document was not needed

Step 6	If you agree to the Status of Enrollment Request section, select the check box.

Step 7	Select a radio button for the status of the request.

- **Document Review in Progress**: Request is pending because the required document was not marked as Complete or Not Required. If you set the document status to Missing or Insufficient, the next day, the employee will receive an email instructing them to log in to their myCalPERS account. In myCalPERS, the information on which documents are missing or insufficient displays, and they can upload the required document(s).
- **Confirm**: Request is approved.
- **Reject**: Request is denied. Requests should not be rejected due to missing or insufficient documents.
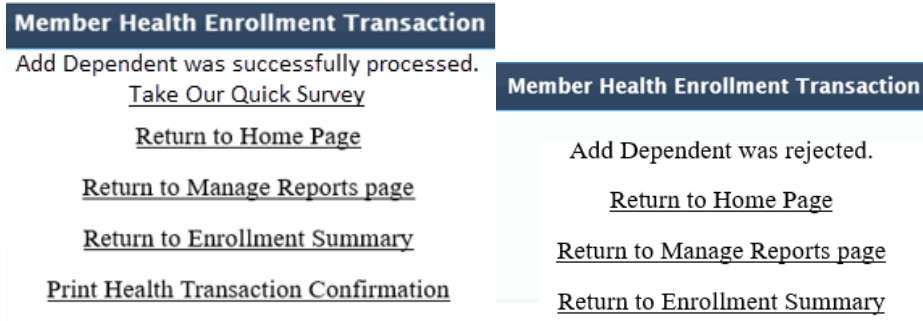
Step 8   Select the **Save** button.

Note: The transaction will update immediately. You may review the health details in myCalPERS via the employee's profile (refer to unit 1 in the myCalPERS Health Enrollment (PDF) student guide).

Step 9   Select one of the links (print and survey links display for a confirmed transaction) in the transaction confirmation:

- To provide feedback on the system, select **Take Our Quick Survey** (link is only for a confirmed transaction). After you take or decline the survey, the link will not display for 90 days.
- To go to the main myCalPERS page, select **Return to Home Page**.
- To submit new transactions, select **Return to Manage Reports page**.
- To review more requests, select **Return to Enrollment Summary**.
- To review transaction details in a PDF format, select **Print Health Transaction Confirmation**.

Member Health Enrollment Transaction

Add Dependent was successfully processed.
Take Our Quick Survey

Return to Home Page

Return to Manage Reports page

Return to Enrollment Summary

Print Health Transaction Confirmation

Member Health Enrollment Transaction

Add Dependent was rejected.

Return to Home Page

Return to Manage Reports page

Return to Enrollment Summary

Note: Your employee will receive an email regarding the confirmed or rejected transaction the next day.

You have completed this scenario.

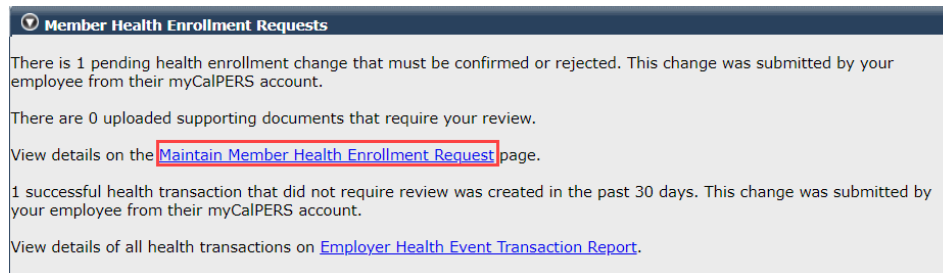## Scenario 3: Confirm a Request to Recertify a Parent-Child Relationship

Your employee submitted a request to recertify their dependent and included supporting documents in myCalPERS. You will review their request and documents, and then confirm the recertification.

System Logic

On the homepage, the **Member Health Enrollment Requests** section will display (step 1) if there is a new transaction and/or pending health enrollment requests or documents that require your verification.
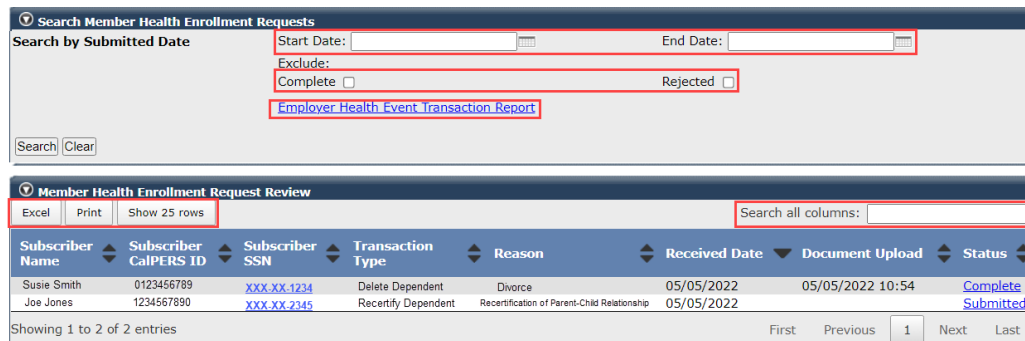
Step Actions

Step 1   From the homepage, select the **Maintain Member Health Enrollment Request** link.

Step 2   Optional filters, buttons, and links:

- Use the date filters at the top to search for a request.
- Select the check box(es) to hide complete and/or rejected transactions.
- Select the **Employer Health Event Transaction Report** link to run the report.
- Select the **Excel, Print,** or **Show 25 rows** button to display list in other ways.
- Enter an employee's CalPERS ID, name, or the last four digits of their SSN in the **Search all columns** field to locate their transaction.
- Select the **Return** link at bottom right to go back to the previous page.

Step 3   Select the **Submitted** link on the far right.

Step 4	In the Supporting Documentation section, select the **document** link if there are any to review.

Uploaded Documents Recertify Dependent			
Uploaded Documents			
Document Type	**Dependent Name**	**Document**	**Date Uploaded**
Affidavit of Parent-Child Relationship	KITTY KOOPER	myCalPERS 2915	10/26/2021 09:53

Note: Documents will be saved in myCalPERS for you to access (refer to unit 3).

Step 5	From the Supporting Documentation Review section, select an option from the drop-down list for each dependent in a parent-child relationship.

Supporting Documentation Review						
First Name	**Last Name**	**CalPERS ID**	**Date of Birth**	**Dependent Type**	**Required Documents**	**Do Not Recertify Dependent**
JOE	JONES	0123456789	10/06/1966	Self		
KITTY	KOOPER		07/05/2008	Parent-Child	Affidavit of Parent-Child Relationship HBD-40 [Needs Review ˅]	☐
					Dependent Eligibility Verification Checklist [Needs Review ˅]	
					Parent-Child Supporting Documentation [Needs Review ˅]	

The document status drop-down list contains the following:

- **Needs Review**: Document needs verifying
- **Complete**: Document fulfills the requirement, and no other action is needed
- **Missing**: Required document was omitted
- **Insufficient**: Document does not fulfill the requirement
- **Not Required**: Document was not needed

Note: Select the **Do Not Recertify Dependent** check box for each parent-child relationship dependent that is not being recertified at this time. By selecting this check box, it will not delete the dependent. You or the employee can still recertify the dependent during the recertification period.

Step 6	If you agree to the Status of Enrollment Request section, select the check box.

Health Enrollment Analyst Review
Status of the Enrollment Request
☐ I hereby certify under penalty of perjury that I am the duly appointed Health Benefits Officer (HBO) of the above-named agency, and the agency's payment required by Government Code Sections 22870-22905, as applicable, is hereby approved. I acknowledge that the final eligibility determination for the enrollment action will be made by the CalPERS Board of Administration in accordance with the Public Employees' Medical and Hospital Care Act and implementing regulations. Employer in its sole discretion approves this election or change. If Employer has a Cafeteria Plan, as defined by and subject to Internal Revenue Code (IRC) Section 125, Employer acknowledges it is solely responsible for ensuring that this election or change complies and conforms with its Cafeteria Plan. Employer further acknowledges that CalPERS has no duty to determine and makes no warranty or representation of any kind, expressed or implied, whether this election or change complies with or conforms to Employer's IRC Section 125 Cafeteria Plan. CalPERS shall not be liable for any tax consequences or for any loss or damage of whatever nature in connection with Employer's approval of any election or change.

Step 7	Select a radio button for the status of the request.

- **Document Review in Progress**: Request is pending because the required document was not marked as Complete or Not Required. If you set the document status to Missing or Insufficient, the next day, the employee will receive an email instructing them to log in to their myCalPERS account. In myCalPERS, the information on which documents are missing or insufficient displays, and they can upload the required document(s).
- **Confirm**: Request is approved.

Step 8   Select the **Save** button.

Note: The transaction will update immediately. You may review the health details in myCalPERS via the employee's profile (refer to unit 1 in the myCalPERS Health Enrollment (PDF) student guide).

Step 9   Select one of the links in the transaction confirmation:
                 • To provide feedback on the system, select the **Take Our Quick Survey** link. After you take or decline the survey, the link will not display for 90 days.
                 • To go to the main myCalPERS page, select **Return to Home Page**.
                 • To submit new transactions, select **Return to Manage Reports page**.
                 • To review more requests, select **Return to Enrollment Summary**.
                 • To review transaction details in a PDF format, select **Print Health Transaction Confirmation**.

Member Health Enrollment Transaction
Recertify Dependent was successfully processed.
Take Our Quick Survey

Return to Home Page

Return to Manage Reports page

Return to Enrollment Summary

Print Health Transaction Confirmation
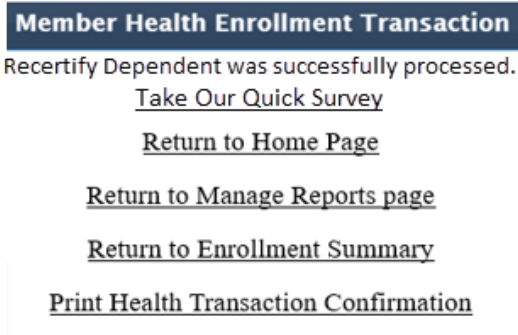
Note: Your employee will receive an email regarding the confirmed transaction the next day.

You have completed this scenario.

Unit 3: Review Completed/Rejected Transactions and Documents

You will learn how to review complete (confirmed) and rejected transactions and supporting documents your employees uploaded in myCalPERS.

Step Actions

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

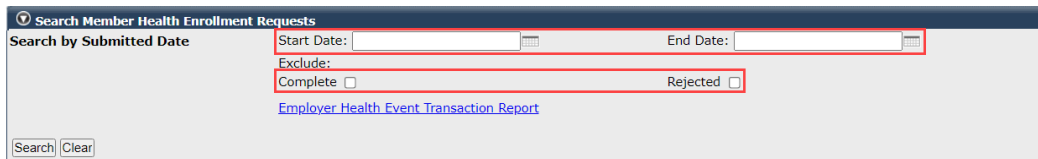| Step 2	In the Create or Edit Report section, select *Maintain Member Health Enrollment Request* from the Method drop-down list.

Step 3	Select the **Continue** button.

Step 4	You may narrow your search for transactions by:

- Using the date filters at the top to search for a request.
- Selecting the check box(es) to *hide* completed or rejected transactions.
- Entering an employee's CalPERS ID, name, or the last four digits of their SSN in the **Search all columns** field to locate their transaction.
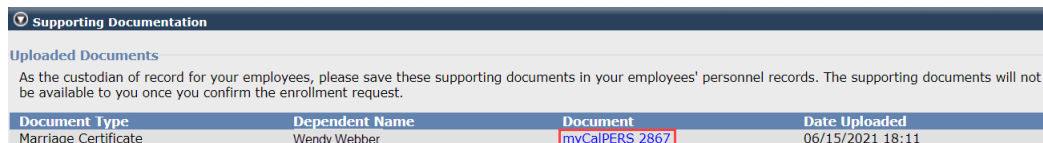
Step 5	Select the **Complete** or **Rejected** link if you want to review uploaded documents.

Step 6	In the Supporting Documentation section, if the employee provided supporting documents, select the **document** link.

You have completed this scenario.

Unit 4: Run a Health Report to Review New Transactions

You will learn how to run the Employer Health Event Transaction Report to review new transactions in myCalPERS. The report will display your agency's active and retired subscriber transactions based on criteria you enter. You have the option to run the report to display only transactions submitted by your employees and retirees.
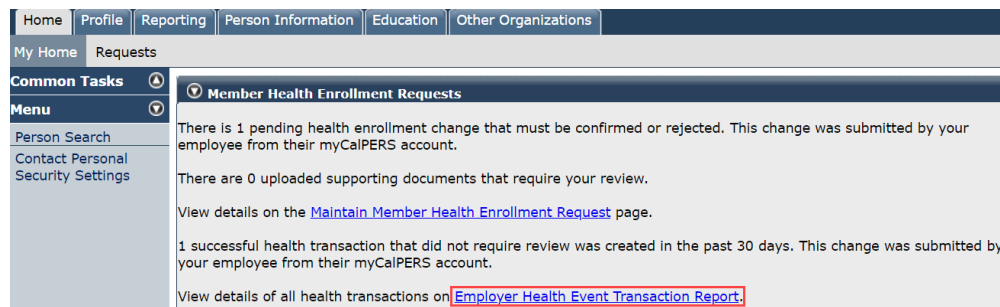
Refer to the myCalPERS Employer Reports (Cognos) Catalog on the CalPERS website for a list of employer reports and myCalPERS Employer Reports (Cognos) (PDF) student guide for detailed functionality.

System Logic

- The **Employer Health Event Transaction Report** link will display on the homepage if there is a transaction submitted by an employee in the last 30 days or if an uploaded transaction or document is waiting to be confirmed or rejected.
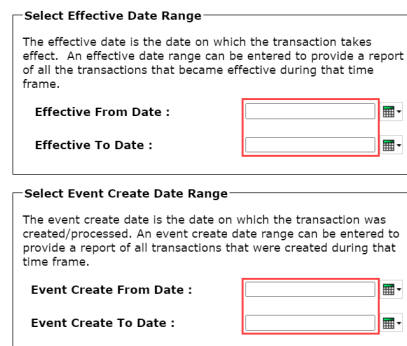- You may run or export a report in different formats, e.g., Excel or PDF.

Step Actions

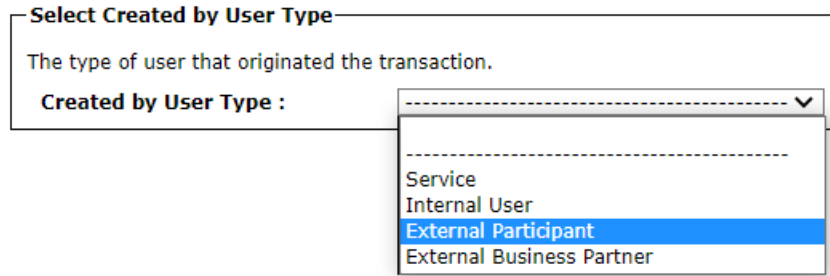Step 1   From the homepage, select the **Employer Health Event Transaction Report** link.

Note: If the report link isn't displayed, refer to the myCalPERS Employer Reports (Cognos) (PDF) student guide for steps on running a report.

Step 2   Complete the report criteria by entering dates in either the Effective Date Range (effective dates of the transactions) or Event Create Date Range (dates the transactions updated in myCalPERS) fields. Only use one date range at a time.

Step 3	If you only want to review transactions that were submitted by your employees and retirees, select External Participant from the Created by User Type drop-down list.

Select Created by User Type

The type of user that originated the transaction.

Created by User Type : --- ⌄

Service
Internal User
External Participant
External Business Partner

Who/what completed the transaction:

- **Service:** Automatically updated by the system, e.g., 26-year-old delete – Batch, Continued Elig: Retirement – Batch, etc.
- **Internal User:** CalPERS team member
- **External Participant:** Employee or retiree
- **External Business Partner:** Employer processed the enrollment or confirmed an employee-submitted myCalPERS transaction

Step 4	Select the **Finish** button.

Change Report Format

Step 5	Do you want this report in a different format?
	Yes: Select the **Run as** icon in the top left corner of the page.

No: Skip to step 9.

Step 6	Select a format. Run Excel data and Run CSV are recommended for filtering.

🌐 Run HTML

📄 Run PDF

📊 Run Excel

📊 Run Excel data

📋 Run CSV

Step 7	If you chose to export the report to Excel, select the document to open it.

📊 Employer Health E....csv   ⌃
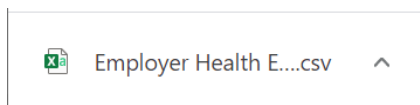
Step 8   If you didn't select a user type on step 3, you can filter the Excel spreadsheet Created by User column.

- **External Business Partner**: Employer (Employer processed the enrollment or confirmed an employee-submitted myCalPERS transaction)
- **External Participant**: Employee or retiree
- **Internal User**: CalPERS team member
- **Service**: Automatically updated by the system, e.g., 26-year-old delete – Batch, Continued Elig: Retirement – Batch, etc.
- **Blank**: No user (transaction was due to a data fix)

Change Report Criteria

Step 9   Do you want to re-run the report with different criteria?

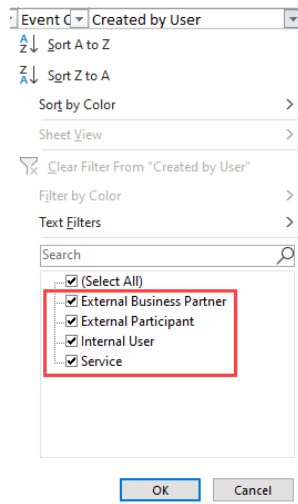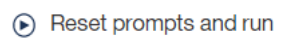**Yes:** Select the **Run as** icon in the top left corner of the page.

No: You have completed the scenario.

Step 10   Select **Reset prompts and run**.

 Reset prompts and run.

Step 11   Enter your report criteria.

Step 12   Select the **Finish** button.

You have completed the scenario.

CalPERS Resources

Obtain more information by visiting the [CalPERS website](#) at www.calpers.ca.gov.

- [Business Rules & myCalPERS Classes](#)
  Pathway: CalPERS website > Employers > I Want To…: Attend Training & Events > Business Rules & myCalPERS Classes
- [myCalPERS Student Guides & Resources](#)
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides
- [myCalPERS Health Billing Reconciliation (PDF)](#)
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides > Health > myCalPERS Health Billing Reconciliation (PDF)
- [myCalPERS Health Aid Health Event Types and Reasons for Employers (PDF)](#)
  Pathway: CalPERS website > Employers > I Want To…: Access myCalPERS Student Guides > Health > myCalPERS Health Aid: Health Event Types and Reasons for Employers (PDF)
- [Frequently Asked Questions (FAQ)](#)
  Pathway: CalPERS website > About > Resources: Questions, Comments, & Complaints > Frequently Asked Questions
- [Policies & Procedures](#)
  Pathway: CalPERS website > Employers > Policies & Procedures
- [myCalPERS Technical Requirements](#)
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- [Public Agency & Schools Health Benefits Guide (PDF)](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > Public Agency & Schools Health Benefits Guide (PDF)
- [State Health Benefits Guide (PDF)](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Reference & Health Guides > State Health Benefits Guide (PDF)
- [Health Program Guide (HBD-120) (PDF)](#)
  Pathway: CalPERS website > In the search box at top right, enter HBD-120 > CalPERS Health Program Guide
- [Circular Letters](#)
  Pathway: CalPERS website > Employers > Policies & Procedures > Circular Letters
- [Public Employees' Retirement Law (PERL)](#)
  Pathway: CalPERS website > About > Laws, Legislation & Regulations > Public Employees' Retirement Law (PERL)

- [myCalPERS Employer Reports (Cognos) Catalog](#)

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

  – CalPERS Health Subscriber Out of Service Population – Employer

  – Chancellor's Office Parent-Child Recertification Report CSU Campuses

  – Dental Retirees OE Report – CalHR

  – Dental Retirees OE Report – CSU

  – Dependent Enrollment Report

  – Employer Health Enrollee Report – Ext

  – Employer Health Event Notification Report

  – Employer Health Event Transaction Report

  Note: The 26-year-old deletion batch runs the first three business days of the month.

  – Health Plan Statement Employer Report

  – Health Subscriber PA Billing Report

  – Health ZIP Code Yes-No Report - HMO for Public Agency/School

  – Health ZIP Code Yes-No Report - PPO for Public Agency/School

  – Health ZIP Code Yes-No Report - State/CSU

  – Non-PERS Health Eligibility and Appointment Data Submission Report

  – Parent-Child Relationship Dependent with Expiring Certification Report

  – State Active Health Enrollment and SCO Health Deduction Discrepancy Report

  The following reports are run via the myCalPERS pages (not the **Reports** left-side link):

  For state agencies:

  – Dependent Verification End Date Employer Report

  – Dependent Verification Health Event Employer Report

  – Dependent Verification with Past Due or No End Dates Active Health Report

  For public agencies, schools, and non-central state agencies:

  – Monthly Employer Billing Roster 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**.
- To [order health publications](#), email **ossd_public_agency_requests_publication_fulfillment@calpers.ca.gov**.
- To [request a custom Cognos health report](#), email **hamd_data_services@calpers.ca.gov**. It can take 6-10 weeks to fulfill each request. Additional information and approval may be required.

Phone or Fax

Contact 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, then select the **Submit Inquiry** link to submit a question or request. Refer to the [Introduction to myCalPERS for Business Partners (PDF)](#) student guide for details.