

my|CalPERS Direct Authorization Vendor

User Guide

November 2011

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my|CalPERS Login, Demographics and Profile Maintenance for Direct Authorization Vendors

Part 1: my|CalPERS Login

Log in to my|CalPERS

Log in to my|CalPERS for the first time with a temporary password assigned by your organization's system access administrator

Your organization"s system access administrator will need to assign a username and system access roles before a system user can log in to my|CalPERS. my|CalPERS will generate a temporary password that will need to be documented and provided to the user by the system access administrator (this process is covered in the Establish a Business Partner Contact and the Assign and Modify Business Partner Contact Roles activities later in this user guide). Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The my|CalPERS *Business Partner Login* page displays.

myCalPERS	Help Contact Us CalPERS On-Line March 8, 2011
Business Partner Please log in with your Username and Password. Username: * filereporter Password: * Log In Ecrept Your Password?	* Required Fields Notice: Authorization to access this system is limited to users authorized by the California Public Employees' Retirement System, and may only be used in the proper conduct of official business. All other access is unauthorized and unlawful.
Please be sure to log out when you are done. For your security, we also recommended in the security of the sec	end that you close all of your browser windows after you log out.
Copyright © 2008 ∣ Privacy Policy	Conditions of Use Site Requirements

Enter your assigned username in the **Username** field and the temporary password provided by your organization"s system access administrator in the **Password** field and then select the **Log In** button.

myCalPERS	Help Contact Us CalPERS On-Line May 24, 2011
We construct the set of	New User? Registering is easy. Register Now Business Partner Login Required Please log in with your Username and Password. Old Password New Password Save Save
Copyright @ 2008 Privacy Policy Conditions of	r Uae (Site Réquirements

The my|CalPERS Business Partner Login page refreshes.

You will need to establish your new password. Enter the temporary password in the **Old Password** field and your new password in the **New Password** and **Confirm New Password** fields and then select the **Save** button.

The my|CalPERS Security Agreement page displays.



Read the security agreement and then select the **I Agree** button.

You will be prompted to set up responses to five security questions in case you forget your password. By providing the correct answers to the selected security questions, you will be able to reset your password in the future.

my CalPERS	Content Footer	Welcome Edward	Customize	Help Cont	act Us CalF	ERS On-Line	Log out	May 26, 2011
								*Required Fields
💿 Update Your Challenge Qu	estions							
Please modify your Challenge	questions and answ	ers below:						
Question 1:*				•				
Answer 1:*								
Question 2:*			-					
Answer 2:*								
Question 3:*			•					
Answer 3:*								
Question 4:*				1	•			
Answer 4:*								
Question 5:*		•						
Answer 5:*								
Save and Continue Clear								

Select a question from each dropdown and provide a response that you will recall at a future date. Select the **Save and Continue** button.

Here is an example of five selected challenge questions and answers:

Skip to:	Content Footer Welcome Edward Customize Help Contact Us CalPERS On-Line Log out May 26, 2011
my CalPERS	
	*Required Fields
😨 Update Your Challenge Q	uestions
Please modify your Challenge	questions and answers below:
Question 1:*	In what city did you meet your Spouse or Significant other?
Answer 1:*	New York
Question 2:*	In what city were you born?
Answer 2:*	Atlanta
Question 3:*	What was the first concert you attended?
Answer 3:*	The Beatles
Question 4:*	What was the name of your best man or maid of honor at your wedding?
Answer 4:*	George
Question 5:*	What is your favorite ice cream flavor?
Answer 5:*	Strawberry
·	
Save and Continue Clear	

The Conditions of Use for Business Partners (Employers) page displays.

my CalPER	Skip to: Content Footer Welcome city Customize Help Contact Us CalPERS On-Line Log out	March 08, 2011
• Conditions of U	se for Business Partners (Employers)	
By accessing this a with CalPERS.	pplication you acknowledge that all information accessible to you will be used only to assist you in conducting	official business
Accept Decline		
	Copyright Conditions of Use Sile Requirements Build) 110305_210553_v1_Int.5030 Baseline: 110305_210533_v1_Int.5000 Creator: Build & Deploy Team	

Read the my|CalPERS conditions of use and then select the **Accept** button to acknowledge the condition that the user is accessing the system for official business. Please note that the data within my|CalPERS is confidential and should be treated accordingly.

The my|CalPERS *Home* page displays.

s my∣CalPERS	kip to: Conten	t Footer W	Velcome Walter Customize	Help Contact Us	CalPERS On-Lir	e Log out	May 25, 20	11
Home Profile Repo	rting Person	Information 0	ther Organizations					
Common Tasks 🛛 🔕	💿 My Cases	i		View	More Actions»			
Menu 🕥	Case ID	Case Title	Case Type	Program	Status			
Person Search	731239		Initiate DA Agreement		Closed			- 12
Change Password	731151		Initiate DA Agreement		Closed			
Change Challenge								
Questions								

Log in to my|CalPERS after initial log in

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

	Skip to: Conten	t Footer 🕐	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Line	e Log out	May 26, 2011
my CalPERS							
Ing Car LNO	,						
Home Profile Repo	orting Person	Information	Other Organizations				
My Home							
Comment Table							
	💿 My Cases			View	More Actions»		
Menu 👽	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge							
Questions							

This scenario illustrates the error message displayed if an incorrect username and/or password are entered:

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner	New User? Registering is easy. Register Now Business Partner Login
This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	Please log in with your Username and Password. * Username: sample-user * Password: Log In Forgot Your Password? Disease be supply to be an uturbus your as does. For your password?
	Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log In button.

my|CalPERS Direct Authorization Vendor User Guide

nyCaIPERS	Help Contact Us CalPERS On-Line May 26, 2
You have entered an incorrect Username and Password combination. Please try again.	
Weiczewiczewiczewiczewiczewiczewiczewicze	Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. Username: Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

If you enter an incorrect username and/or password, the error message "You have entered an incorrect Username and Password combination. Please try again" will display on the my|CalPERS *Business Partner Login* page.

Part 2: Update Business Partner Demographics

Business Partner Demographics

Update a business partner's address and communication information

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

my CalPERS	kip to: Conten	t Footer '	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Lir	ne Log out	May 26, 2011
Home Profile Repor	ting Person I	Information	Other Organizations				
Common Tacks							
	💿 My Cases			View	More Actions»		
Menu 🖸	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

S	kip to: Content Footer	Welcome Bobbi	e Customize	Help Cont	tact Us CalPE	RS On-Line	Log out May 26, 2011
my CalPERS							
Home Profile Repo	rting Person Information	Other Organizat	tions				
Summary Agreements	3						
Common Tasks 🛛 🔕							
Menu 📀	Profile						
Summary							Request Update
Contacts	CalPERS ID:	3897160905			Statu	s: Active	
	Federal Tax ID:	1234567-89			Name	e: Direct Auth Organizatio	orization
	Category:	Direct Authorizat	ion Organizati	on			
	Addresses	49 Mailing Street.	Sacramento, C	Δ		49 Mailing	Street, Sacramento, CA
	Physical:	84567			Mailin	84567	
	Communication Inform	ation					
	Preferred Communica	tion: Email		Dulus and			
	Prindry E	man. Topertedat	Jeu.org	Prindry i	Phone Numbe	. 910-789-11	
	Contacts Add New						View More Actions»
	Contact Type C	ontact Type Det	ail	Program	Name		Phone Number
	<u>General</u> M	ain		CalPERS	Robert Dillman		
	Business Relationship	c Add New					
	Namo	CalDE	DE TO	Drogra		Service	Statuc
	Name	CalPE	.K3 10	Progra		Provided	Status
	NO results found.						
	O Contracts/Agreement	s					
	Contract/Agreement 1	ype Status	Date Status Changed	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agre	ement Active	04/01/1978	04/01/1978			

Select the **Physical** link in the Addresses area within the Summary section.

The current physical address ("49 Mailing Street, Sacramento, CA 84567" in this example) displays within the Maintain Address Details section.

Home Profile Por	acting Person Information Other Organizations	
House Prome Rep	ording Person minimation other organizations	
summary Agreemen	115	
Common Tasks	Name: Direct Authorization Calpers ID: 3897160905	R. S. S. A. F. M.
lenu 🖸	Organization	Required Field
Summary	Maintain Address Details	- A - B
Contacts	All address changes are effective immediately.	
letationships	Address Type: Physical Address Start Date: 05/25/2011	
adings.	Address:* 49 Mailing St	
in stanger		
	Country: 1 United States	
	City: Corramonto	
	State: Caldonia	
	Zie Code: L DATES	
ny CalPER	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us Co	alPERS On-Line Log out May 26, 201
ny CalPERS	Skip to: Content Footer Welcome Bobbie Customize Help Contact Us Ca Sorting Person Information Other Organizations hts	alPERS On-Line Log out May 26, 201
ny CalPERS	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us Ca Porting Person Information Other Organizations Its Name: Direct Authorization CalPERS ID: 3897160905 Organization	alPERS On-Line Log out May 26, 201 Required Field
ny CalPERS	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us Ca porting Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897160905 Organization @ Maintain Address Details	alPERS On-Line Log out May 26, 201 Required Field
ny CalPERS	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us Content Us Contact	alPERS On-Line Log out May 26, 201 Required Field
Home Profile Reg summary Agreemer ommon Tasks @ lenu @ sommary contacts. telabonships	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us Contact	alPERS On-Line Log out May 26, 201 Required Field
ny CalPERS Home Profile Rep ummary Agreemer ommon Tasks @ enu @ ummary ontacts elaborships ivelions	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us Contact	alPERS On-Line Log out May 26, 201 Required Field
ny CalPERS	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us Contact	alPERS On-Line Log out May 26, 201 Required Field
Home Profile Rep Ummury Agreemer Ommon Tasks O enu O Ummiary ontacts elaboriships ivisións ridings	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us Contact	alPERS On-Line Log out May 26, 201 Required Field
Home Profile Rep Ummury Agreemer Ommon Tasks O enu O Ummiary ontacts elaboratips ivesións ridings	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us C porting Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897160905 Organization O Maintain Address Details All address changes are effective immediately. Address Type: Physical Address Start Date: 05/25/2011 Address: "7691 Farwell St	alPERS On-Line Log out May 26, 201 Required Field
Home Profile Reg ummany Agreemer ommon Tasks @ enu @ ummkary ontacts elaboratips invisions indings	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us C Country Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897160905 Organization O Maintain Address Details All address changes are effective immediately. Address Type: Physical Address Start Date: 05/25/2011 Address: 7691 Farwell St Country: United States	alPERS On-Line Log out May 26, 201 Required Field
Home Profile Reg ummury Agreemer ommon Tasks @ enu @ ummiary ontacts elabonohips indings	Save Clear Skip to: Content Footer Welcome Bobbie Customize Help Contact Us C Sorting Person Information Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897160905 Organization O Maintain Address Details All address changes are effective immediately. Address: Topic = 05/25/2011 Address: 7691 Farwell St Country: United States City: Addison	alPERS On-Line Log out May 26, 201 Required Field
Home Profile Reg ummary Agreemer ommon Tasks @ enu @ ummiary contacts elaborships indings	Save Clear Skip to: Content Footer Welcome Bobble Customize Help Contact Us C Sorting Person Enformation Other Organizations Ints Name: Direct Authorization CalPERS ID: 3897160905 Organization Maintain Address Details All address changes are effective immediately. Address: Totale: 05/25/2011 Address: 7691 Farwell St Country: United States City: Addison State: Caldonna	alPERS On-Line Log out May 26, 201 Required Field

Enter the revised address information in the Maintain Address Details section. In this example, we entered "7691Farwell St, Addison, CA 92020-4567". Select the **Save** button.

The *Confirm Address* page displays. my|CalPERS searches for matching U.S. postal records. Select either the **Entered Address** or the **U.S. Postal Service Matches** radio button next to the correct physical mailing address and then select the **Confirm** button.

myCalPERS	Skip to: Content Footer	Help Contact Us CalPERS On-Line	March 15, 2011			
👁 Confirm Address						
We have validated your address against U.S. postal records and have provided an alternate choice according to these results. Please choose the address you wish to use or select the Cancel button to return to the address page to change your entry.						
Entered Address: 🔘 7691 Fa	rwell Street, Addison, CA 92020					
U.S. Postal Service Matches:	ARWELL STREET, ADDISON, CA 92020-45	67				

Confirm

The confirmed physical address displays in the Maintain Address Details section.

my CalPERS	Skip to: Content Footer Welcome Bobb rting Person Information Other Organiz;	oie Customize Help ations	Contact Us CalPERS Or	n-Line Log out May 26, 2011
Common Tasks 💿 Menu 💿	Name: Direct Authorization Ca Organization	IPERS ID: 3897160905	1	"Required Fields
Summary Contacts Relationships Divisions Findings	© Maintain Address Details All address changes are effective immedi Address Type: Start Date: Address:*	ately. Physical Address 05/25/2011 7691 Farwell St		
	Country:* City:* State:* Zip Code:*	United States Addison California 92020 - 4567	•	

If the revised physical address is displayed correctly, select the **Save** button.

The updated physical address is displayed in the Addresses area of the Summary section. Note that the process is the same for updating a mailing address.

S	kip to: Content Footer	Welcome Bobbi	e Customize	Help Cont	tact Us CalPE	RS On-Line	Log out May 26, 2011
my CalPERS							
Home Profile Repor	ting Person Information	Other Organiza	tions				
Summary Agreements	3						
Common Tasks 🛛 🔕	Summary						
Menu 💿	Profile						
Summary		22274 62225					<u>Request Update</u>
Contacts	CalPERS ID: Federal Tax ID:	1234567-89			Statu	 s: Active e: Direct Auth 	horization
						Organizati	ion
	Category:	Direct Authorizat	tion Organizatio	on			
	Addresses Physical:	7691 Farwell St	14567		Mailin	49 Mailing	Street, Sacramento, CA
	Communication Inform	addison, CA 92020	J-4307			- 84307	
	Preferred Communica	ation: Email					
	Primary E	mail: robert@da	ocu.org	Primary I	Phone Numbe	r: 916-789-1	111
	Contacts Add New						View More Actions»
	Contact Type C	ontact Type De	tail	Program	Name		Phone Number
	<u>General</u> M	lain		CalPERS	Robert Dillman		
	😨 Business Relationship	S Add New					
	Name	CalPi	ERS ID	Progra	ım	Service Provided	Status
	No results found.						
	Contracts/Agreemen	ts					
	Contract/Agreement	Type Status	Date Status	Effective	Termination	Related	
	Direct Authorization Agr	eement Active	Changed 04/01/1978	Date 04/01/1978	Date	Parties	
	Concore Addition201001 Agr	Someric Active	0./01/15/0	01/01/10/0			

s mu ColDEDS	kip to: Content Footer	Welcome Bobbi	ie Customize	Help Cont	tact Us CalPE	ERS On-Line	Log out May 26, 2011
IIIy Carens							
Home Profile Repor	rting Person Information	Other Organiza	tions				
		other organiza	cions				
Summary Agreements	5						
Common Tasks 🛛 🔕	Summary						
Menu 💿	Profile						
Summary							Request Update
Contacts	CalPERS ID:	3897160905			Statu	s: Active	
	Federal Tax ID:	1234567-89			Nam	e: Direct Aut	horization
	Category:	Direct Authorizat	tion Organizati	on		organizat	1011
	Addresses		5				
	Physical:	7691 Farwell St	0 4567		Mailin	49 Mailing	street, Sacramento, CA
	Communication Inform	ation	0-4307			- 04307	
	Preferred Communic	ation: Email					
	Primary I	mail: robert@da	ocu.org	Primary I	Phone Numbe	r: 916-789-1	111
	Contacts Add New						View More Actions»
	Contact Type (Contact Type De	tail	Program	Name Rebert Dillmon		Phone Number
	<u>General</u>	lain		CalPERS	Robert Diliman		
	💿 Business Relationshi	DS Add New					
	Name	CalPi	ERS ID	Progra	ım	Service Provided	Status
	No results found.						
	Contracts/Agreemen	ts	Data Status	Effective	Tormination	Dolatod	
	Contract/Agreement	Type Status	Changed	Date	Date	Parties	
	Direct Authorization Ag	eement Active	04/01/1978	04/01/1978		1.0	

Update Business Partner Demographics

Similar to the address update process, select the **Communication Information** link within the Summary section to update your organization^s contact information within my|CalPERS.

Your organization"s current contact information displays within the Maintain Communication Details section.

my CalPERS	Skip to: Content Fool	er Welcome Bobbie C	ustomize Help	Contact Us CalPERS On-Line Log	out May 26, 2011
Home Profile Repo Summary Agreement	orting Person Informa	tion Other Organizations	1		
Common Tasks	Name: Direct Authori	calPERS	ID: 389716090)5	
Menu 📀 Summary	Maintain Preferre Preferre Communication	ed Communication Details red +	2.00		
Relationships Drivisions	Maintain Commu	nication Details			
Findings	Primary Phone Ty	pe Phone Number	Extension	International	
	Work	(707)421-5284		0	
	FAX	(707)421-6014		0	
	TYY			3	
	Other				
	Primary	Ema	lie		
	•	robert@deocu.org			
	Save Clear				

Note that you can select your organization's preferred method of communication in the Maintain Preferred Communication Details section so that CalPERS will contact your organization using your requested method of communication.

my CalPERS	kip to: Content Foot	er Welcome Bobbie C	ustomize Help	Contact Us CalPERS On-Line Li	og out May 26, 2011
Home Profile Repor	ting Person Informat	on Other Organizations	i 👘		
Summary Agreements					
Common Tasks	Name: Direct Authoria	ation CalPERS	ID: 38971609	05	
Menu 💿	Maintain Preferre	d Communication Details			
Summary	Preferr	ed Email +			
Contacts	Communicati	ón:			
Relationships	Querra	1 10 3 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			
Dryisións-	C Maintain Commun	ication Details			
Findings	Primary Phone Typ	e Phone Number	Extension	International	
	Work	(707)421-6284		D	
	E FAX	(707)421-6014		D	
	5 TYY			12	
	Celular		_		
	Other			10	
	Primary	Eme	fit		
		alice@daocu.org			
	-0	robert@deocu.org			
	-				
	Save Clear				

In this example, we selected "Email" from the **Preferred Communication** dropdown in the Maintain Preferred Communication Details section and entered a new primary email address ("alice@daocu.org" instead of "robert@daocu.org" in this example). Select the **Primary** radio button associated with the primary email address. You can also update phone numbers within the Maintain Communication Details section, which we did not do in this example. Select the **Save** button.

Note that in the Communication Information area of the Summary section, the Preferred Communication now displays as "Email" and the Primary Email displays as "alice@daocu.org".

my CalPERS	kip to: Content Footer Welco	ome Bobbie Customizo	e Help Cont	act Us CalPE	RS On-Line	Log out May 26, 2011
Home Profile Report	rting Person Information Other	Organizations				
Common Tasks 🛛 🔕						
Menu 💿	Profile					
Summary						Request Update
Contacts	CalPERS ID: 3897160	905		Statu	s: Active	
	Federal Tax ID: 1234567	-89		Name	e: Direct Auth Organizati	orization on
	Category: Direct /	Authorization Organizat	tion		9	
	Addresses 7691 Fa Physical: Addisor	arwell St a, CA 92020-4567		Mailing	49 Mailing 84567	Street, Sacramento, CA
	Communication Information Preferred Communication: E Primary Email: a	mail lice@daocu.org	Primary F	Phone Numbe	r: 916-789-11	111
	O Contacts Add New					View More Actions»
	Contact Type Contact	Type Detail	Program	Name Robert Dillman		Phone Number
	General Main		CalPERS	Nobert Diliniari		
	😡 Business Relationships 🔤 Add N	ew				
	Name	CalPERS ID	Progra	m f	Service Provided	Status
	No results found.					
	Contracts/Agreements					
	Contract/Agreement Type	Status Date Status Changed	s Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active 04/01/1978	04/01/1978			

Part 3: Business Partner Profile Maintenance

Business Partner Profile Maintenance

Establish a business partner contact

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact US Califers Off-Line May 20, 201
Welcome to mylCaIPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you

Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and select the **Accept** button.

The my|CalPERS Home page displays.

my CalPERS	kip to: Conten	t Footer N	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Li	ne Log out	May 26, 2011	
Home Profile Report	Home Profile Reporting Person Information Other Organizations							
My Home								
				View	More Actions»			
Menu 📀	My Cases Case ID	Case Title	Case Type	View Program	More Actions» Status			
Menu Person Search	My Cases Case ID 731879	Case Title	Case Type Initiate DA Agreement	View Program	More Actions» Status Closed			
Menu Image: Common Parson Person Search Change Password	 My Cases Case ID 731879 	Case Title	Case Type Initiate DA Agreement	View Program	More Actions» Status Closed			

If your organization is a school, public agency or State agency and the contact you are adding is a CalPERS covered employee, you will add them as a contact using their CalPERS ID. You can look up the person information for the contact to retrieve this information.

Select **Person Search** from the left-side navigation and then select the **Person Information** tab.



The *Person Search* page displays. Enter the Social Security number (SSN) of the contact in the **SSN / Federal or Individual Tax ID** field and then select the **Search** button.

The *Summary* page displays. The CalPERS ID of "Laura Tester" is displayed ("3846381465" in this example).

my CalPERS	the second s	Second
Home Profile Report	ting Person Information Loan Eligibility Search Educatio	Other Organizations
Summary Health Enroll	ment Benefit Application	
Common Tasks 🛛 🔕		
Menu 📀	Profile	
Appointment History		Update Personal Information
Payroll Information	SSN: xxx-xx-7336	CalPERS ID: 3846381465
Member Elections	Name: Laura Tester	Optional Member: No
Contributory	Date of Birth: 09/08/1971	Date of Death:
Appointment History	Prior School No.	Prior School
Report Death	Membership: NO	Membership Date:
	Restrictions: No	
	Communication	
		Undeliverable Date
	Preferred Communication: Mail	
	Primary Phone Number:	Update
	Primary Email Address:	Update
	Mailing Address: 555 BRIDGE ST VACAVILLE, CA 95687	Update
	Phone Authentication Code: No	

Make note of the CalPERS ID for "Laura Tester" ("3846381465" in this example) and then select the **Profile** global navigation tab.

If the individual you are adding has never been a member of CalPERS, they will not have a CalPERS ID and you can add them using **Add New Person** on the *Maintain Contact Details* page. See below for detailed instructions on how to do this.

my CalPERS	Skip to: Content Footer Welco rting Person Information Other (me Laura Cus Organizations	tomize Help	Contact Us C	CalPERS On-Line	Log out June 27, 2011
Common Tasks						
Menu Summary Contacts	CalPERS ID: 3047155 Federal Tax ID: Category: Direct A Addresses Physical: Communication Information Preferred Communication: Primary Email:	671 uthorization Org	janization Prim	S T M bary Phone Nu	tatus: Active Name: Direct Aut Credit Uni ailing: mber:	Request Update
				-		
	O Contacts Add New					View More Actions»
	Contact Type Contact	Type Detail	Progra	m Name	amala.	Phone Number
	General Main		CalPER: CalPER:	S Joelex S Laura	Redwood	(910)/89-3344
	Business Relationships Add New	<i>"</i>				
	Name	CalPERS ID	Pi	rogram	Service Provided	Status
	No results found.					
	© Contracts/Agreemen <u>ts</u>					
	Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	04/01/1980	04/01/1980		

The Business Partner Profile Summary page displays.

Select the Add New button in the Contacts section title banner.

The Maintain Contact Details page displays. This is a view of the entire page.

my CalPERS	kip to: Content	Footer Weld	come Robert	Customize	Help Contact Us Cal	PERS On-Line Log out 🛛 N	1ay 26, 2011
Home Profile Repo	rting Person In	nformation Othe	er Organizatio	ons			
Summary Agreements	5						
Common Tasks	Name: Direct A	Authorization	CalDE	PS ID: 30471	5671		
Menu 🖸	Organiz	ation Credit Unior		K3 ID. 304713	5071		
	0					*R	equired Fields
Contacts	💿 Maintain Co	ontact Details					
contacts	By indicating to purposes. The detail.	hat this contact y will also receive	is a Primary e automated	Contact, you a correspondenc	ere specifying that they se sent to contacts base	should be reached for comr ed upon contact type - con	nunication Itact type
	C	Contact Type:*			•	Contact Type	Detail:* 👻
	Progra	ms Supported:	CalPERS				
	riogra						
		Entity:*	Person	CalPERS ID:	dd New Densen		
			Other	iuai Name: 🖉	dd New Person		
			U Uller.				
		[Allow Syst	tem Access			
		l	Make Con	tact Viewable	to Other Organizations		
		l		ontact			
	🗑 Maintain P	referred Commun	ication Detai	is			
	Preferred Co	ommunication:	-				
	💿 Maintain Co	ontact Address D	etails				
	Exi	sting Business	None 👻				
	Pai	Address:*					
					_		
		Country:*	United States		-		
		City:*	Onited Otates				
		State:*	California				
		Zip Code:*	-		•		
	💿 Maintain Co	ommunication De	tails				
	Primary Pho	one Phone	Number	Extension	International		
	ту	pe			_		
	O Ho	ome					
	O Cel	llular					
	Ot	ther					
	© W	ork					
	© T	YY					
	© F/	AX					
	Primary		Email		Undeliverable		
					Date		
	©						
	©						
	O						
	Save Clear						

Maintain Contact Details	and the second				
By indicating that this contact i purposes. They will also receive detail.	s a Primary Contact, you are specifying that the automated correspondence sent to contacts ba	y should be reached for communication sed upon contact type - contact type			
Contact Type:*		Contact Type Detail:* -			
Programs Supported:	CalPERS				
Entity:	Person CalPERS ID:				
	D Individual Name: Add New Parson				
	Other:				
1	Allow System Access				
1	Make Contact Viewable to Other Organizations	£			
1	Primary Contact				

Step 1: Within the Maintain Contact Details section, select the appropriate contact type from the **Contact Type** dropdown. In most cases, this will be "General".

Step 2: Select the appropriate contact type detail from the **Contact Type Detail** dropdown.

Step 3: Select the appropriate checkbox(es) for Programs Supported.

Step 4: Select the **Person CalPERS ID Entity** radio button, and enter the CalPERS ID of the individual that you noted previously in the **Person CalPERS ID** field. Skip to **Step 7**.

Step 5: If the individual is not in my|CalPERS, select the **Individual Name Entity** radio button and then the **Add New Person** link.

no Brofilo Popo	rting Dore	on Informat	ion Othor Ora-	nizations	า					
	rung pers	on informat		mzacions						
mary Agreement	5									Phoneired
mon Tasks 💿	0	A REAL PROPERTY AND		_	-	_	_	_	_	Nequireu
u U	C Person	n Details								
acts	First Nan		2		ddle Nam				ast Name:	
onships	Fust num	dia.			uune manne	·.			ast manuer	
ons					te of Birth			-	Conder	1
N/75		53m.			ite or birth			=	Genuer,	
	Prefer	red Commu	nication Details	-						
	Preferre	d Commu	nication:							
				-						
	O Addre	ss Details								
		A	ddress Type:		*					
			Address:							
					_					
			Country:	United State	5		-			
			City:		-		-			
			State: (California		1				
			Zip Code:							
		_		_	_					
	Comm	unication D	etails							
	Primary	Phone	Phone Numb	er E	xtension	Internatio	mal			
		Cellular				1.00				
		Eav		-						
	1.0	Fax								
	0.	Home				- 8				
	0	Office								
	- 98	Other				0				
	13	TYY				0				
	Primary			Email						
	D									
	-	_								

The Person Details page displays.

Step 6: Enter the contact information for the contact person within the Person Details section. Note that the only required fields are **First Name** and **Last Name**, as indicated by the red asterisks. Including the **SSN** and **Date of Birth** will ensure that the contact is matched with their existing CalPERS ID if they have one. You will want to enter as much contact information as you have available, and then select the **Save** button.

Note that if you have the contact person"s Social Security number and date of birth, you can enter them in the **SSN** and **Date of Birth** fields, and after selecting the **Save** button, my|CalPERS will match the entered information to information already in the system, to prevent duplication of individual participant records. If information is not already in the system, then my|CalPERS will save the entered contact information and assign a new Participant CalPERS ID.



Traintain Contact Details	a successive statement of the second s	and the second
By indicating that this contact purposes. They will also receive detail.	is a Primary Contact, you are specifying that they a automated correspondence sent to contacts ba	y should be reached for communication sed upon contact type - contact type
Contact Type:*	•	Contact Type Detail:* 🔹
Programs Supported:	CalPERS	
Programs Supported: Entity:*	Person CalPERS ID: Individual Name: Add New Parson Other:	
	Allow System Access Make Contact Viewable to Other Organizations Primary Contact	

Step 8: Select the **Allow System Access** checkbox. If appropriate for this contact person, select the **Make Contact Viewable to Other Organizations** and/or the **Primary Contact** checkbox(es).

🔊 Maintain Preferred Communication Details
Preferred Communication:

Step 9: Select the preferred method of communication from the **Preferred Communication** dropdown within the Maintain Preferred Communication Details section.

💿 Maintain Contact Address D	etails
Existing Business Partner Address :	None
Address:*	
Country:*	United States
City:*	
State:*	California
Zip Code:*	

Step 10: Select the appropriate value from the **Existing Business Partner Address** dropdown if the business address is used for the contact person. Otherwise, enter the mailing address in the **Address** field, select the country from the **Country** dropdown, and enter the city in the **City** field, the state in the **State** field and the ZIP Code in the **ZIP Code** field within the Maintain Contact Address Details section. The Confirm Address page displays.

my CalPERS	cip to: Content Footer Welcome Sylvia Customize Help Contact Us CalPERS On-Line Log out June 16, 2011							
Home Profile Repo	ting Person Information Other Organizations							
Summary Agreements	3							
Common Tasks	Participant Name: Laura Tester CalPERS ID: 3047155671							
Menu 💿	O Confirm Address							
Search	We have unlikited your address actionst U.S. nestal reverte and no results have been found. Blaces calent the nerror?							
Contacts	address and cick Confirm to return to the address page.							
Relationships								
Findings	Entered Address: @ 1100 Fuller St, Visalia, CA 95432							
Divisions	U.S. Postal Service Matches:							
Capture Interaction Information	Continni							

Step 11: my|CalPERS searches for matching U.S. postal records and displays the results within the Confirm Address section. In this example, no results were found. Select the **Entered Address** radio button and then the **Confirm** button.

Primary	Phone Type	Phone Number	Extension	International	
0	Home				
0	Cellular				
0	Other				
0	Work	1			
0	TYY	1			
Ø	FAX				
Primary		Email		Undeliverable	
0				Date	
0					
0					
0					

Step 12: Within the Maintain Communication Details section, select the radio button associated with the appropriate primary phone type and enter the phone number and extension in the **Phone Number** and **Extension** fields. Use the **International** checkbox to indicate if it is an International phone number. Select the radio button associated with the primary email address and enter the email address.

Here is how the *Maintain Contact Details* page might look when completed:

Home Profile Repo	rting Pers	on Informa	tion Oth	er Organizatio	ons					
Summary Agreement	s			or organizatio						
Common Tasks	Prove States and				c-tere					
Menu 🕥	Participar	it Name: L	aura Test	er	CalPER	S ID; 30	047155071	"Required F		
Search	() Malata	la Contact	Datalle							
Contacts	By indicat	ing that th	is contact	is a Primary	Contact, you	re spec	ifving that they sh	ould be reached for communication		
Relationships	purposes.	They will a	ilso receiv	e automated	correspondent	ce sent	to contacts based	upon contact type - contact type		
Findings	Oetail.	Conta	+ Tumari	Canadal		-		Contact Tune Detailst Mair		
Capture Interaction		Deactivat	ion Date:	General	-	-		contact type betan. man		
Information	Programs Supported: V CalPERS				5					
	Programs supported.									
			chuty.	Individ	fual Name: 1	aura Te	ester			
				Other:						
				Allow Sys	tem Access			System Access		
		Make Contact Viewable				to Othe	er Organizations			
		2. Primary Contact								
	() Mainta	in Preferre	d Commu	nication Deta	ils					
	Preferre	Preferred Communication:								
	Quero			-						
	e Hamb	Maintain Contact Address Details Existing Business								
		Partner	Address :	None 💌						
	Address:* 1100 Fuller St									
						-				
		0	ountry:*	United States		-	1			
			City:*	Vișalia			-			
			State:	California						
		Zi	p Code:*	95432						
	Maintain Contact Communication Details									
		Phone	Phone	Number	Extension	Inter	ational			
	Drimary		Phone	number	EAtension	11100211	auonai			
	Primary	Туре					-			
	Primary	Home					0			
	Primary	Type Home Cellular	_							
	Primary	Type Home Cellular Other Work	209888432	24						
	Primary	Type Home Cellular Other Work TYY	209688432	24						
	Primary	Type Home Cellular Other Work TYY FAX	209688432	24						
	Primary D D D D	Type Home Cellular Other Work TYY FAX	209888432	24						
	Primary	Type Home Cellular Other Work TYY FAX	209888432	24 Email		Un	deliverable			
	Primary	Type Home Cellular Other Work TYY FAX	209688432	24 Email		Un	deliverable Date			
	Primary	Type Home Cellular Other Work TYY FAX	209888432 9.com	24 Email		Un	deliverable Date			
	Primary	Type Home Cellular Other Work TYY FAX	20988843; g.com	24 Email		Un	deliverable Date			

Step 13: Select the **System Access** link within the Maintain Contact Details section.

The System Access page displays.

	kip to: Co	ntent Footer Welcome Sylvia	Customize Help Contact Us CalPERS On-Line Log out June 16, 2013				
Home Profile Repo	orting Pe	rson Information Other Organiza	tions				
Summary Agreement	s						
Common Tasks	Participa	ant Name: Laura Tester	CalPERS ID: 3047155671				
Menu 🛈	0	Contraction in the local division in the loc	"Required Fields				
Contacts	Assi	ned Username Contact Name: Laura Tester					
Relationships	Conta	ct Username:* laurat	Usernames must consist of 6-35 characters with no spaces. Valid				
Findings			characters are numbers, letters, and the following special characters: at signs (@), periods (.), underscores (_), and hyphens (-). Usernames				
Capture Interaction			must also start with a letter. Usernames are not case sensitive.				
	-						
	C Assi	gn Roles					
	1000	Role					
	Authorized Personal Loan Representative						
	Business Partner AP/Billing						
	Business Partner AP/Billing RO Business Partner Direct Authonization						
						Business Partner Employer Inquiry	
		Business Partner Employer Maintenance					
	Business Partner Health Contracts						
	Business Partner Health Enrollment						
	Business Partner Health Enrollment RO						
	Business Partner IME/JA						
		Business Partner Limited					
	- 13	Business Partner PA Billing					
	Business Partner Payroll						
	Business Partner Payroll RO						
		Business Partner Reciprocal					
	0	Business Partner Retirement Contracts					
	PI	Business Partner Retirement	Enrolment				
	Business Partner Retirement Enrollment RO						
	11	Business Partner SCP Certific	ation				
	171	Business Partner Supplement	al Income Plan				
		Carrier					
	W	System Access Administrato					
	Select A						
	Save						

Step 14: Enter the assigned username for the new contact person in the **Contact Username** field, select the appropriate checkbox(es) in the Assign Roles section, and then select the **Save** button. Note that there are only two roles for direct authorization vendor organizations: Business Partner Direct Authorization and System Access Administrator. Some direct authorization vendor organizations are also CalPERS-contracting employers, so other roles may be appropriate for these organizations.

The *Password Maintenance* page displays. The username just created is assigned a temporary password.

. Si	kip to: Content Footer Welcome Sylvia Customize Help Contact Us CalPERS On-Line Log out June 16, 2011
mv CalPERS	
Home Profile Repo	rting Person Information Other Organizations
Summary Agreement	5
Common Tasks	Participant Name: Laura Tester CalPERS ID: 3047155671
Menu 💿	Password Maintenance
Search	The following Username has been created and assigned the displayed temporary password. This password will evolve in 30
Contacts	days:
Relationships	Username: laurat
Findings	Password: pg8he-gsQ
Divisions	
Capture Interaction Information	Continue

Step 15: <u>Be sure to capture this username and temporary password</u>. It is the only time the temporary password will be made available. Note that the temporary password will expire in 30 days.

Select the **Continue** button.
The Maintain Contact Details page displays.

my CalPERS	kip to: Cont	tent Foo	ter Weld	come Sylvia	Customize	Help Co	ontact Us CalPEF	S On-Line Log out	June 16, 2011	
Home Profile Repo	rting Pers	on Informa	ation Oth	er Organizati	ions					
Summary Agreements	s									
Common Tasks	Participar	nt Name:	Laura Test	er	CalPER	RS ID: 304	47155671		*Page ired Fields	
Menu 🙂	0	Contraction of		_	_	_			Required Pleids	
Contacts	By indicat	Wainten contact Details By indicating that this contact is a Primary Contact, you are specifying that they should be reached for communication								
Relationships	purposes.	They will	also receiv	e automated	corresponden	ce sent t	to contacts based	d upon contact type - contact type		
Findings	Contact Type:" Deactivation Date:			Canada				Contraction of the local division of the loc	Antalia Main -	
Divisions Capture Interaction				General		120		contact type i	Pecon Main A	
Information				12 CalPERS						
		ograms 3	Catitud.	Participation and						
			Enuty	Individual Name: Laura Tester			ter			
				Other	:					
				Allow Sys	stem Access			System Access		
				Make Cor	ntact Viewable	to Other	Organizations			
				Primary C	Contact					
	() Mainte	ala Broford	ad Commu	election Det	ile					
	Preferred Communication:									
	Onder the second second									
	Maintain Contact Address Details Existing Business									
	Partner Address: Address:			None •						
				1100 Fuller S	1					
				_		_				
				United States						
			City:				<u>.</u>			
			State:	California		1				
		2	ip Code:	95432 -						
		_				_				
	The Mainta	ain Contac	t Communic	tation Details	s .					
	Primary	Phone	Phone	Number	Extension	Interna	ational			
	D	Home				2	0			
	0	Cellular			-	1	2			
	-0-	Other	-		-		t.			
		Work	209888433	24		1	1			
	0	TYY				1	8			
	0	FAX				1	1			
	_									
	Primary			Email		Und	eliverable			
		laura@davo	rg.com				_			
	0									
	0						-			
	0						-			
	_					-				
	Save Clea	E.								

Step 16: Review the entire page to verify that the contact information entered is accurate and select the **Save** button.

The new contact person has been added successfully and now displays within the Contacts section.

Sk my CalPERS Home Profile Repor Summary Agreements	tip to: Content	t Footer Welco	ome Sylvia Cust r Organizations	:omize Help Cont	act Us CalPERS On-Lir	ne Log out	June 16, 2011
Common Tasks	Participant I	Name: Laura Teste	r -	CalPERS ID: 3047	155671		
Menu 💿	(Contacts	to Division					
Search	Contacts	to Despilay	Active: Yes				
Contacts			Program: All				
Relationships	(Control)		the second second				
Findings	LASPIAY						
Divisions	-						
Capture Interaction	Contacts	Abl.New					
Information	Contact	Contact Turne Detail	Program	Name	Phone	Active	Primary
-	General	Main	CalPERS	Laura Tester	(209)888-4324	Y	Y

Be sure to provide the username and temporary password to the new contact person so they can log in to establish their new password and responses to security questions.

Business Partner Contact Roles

Modify business partner contact roles

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the Business Partner radio button and then the Continue button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

:	5kip to: Content	t Footer	Welcome Bobbie Customize	e Help Contact Us	CalPERS On-Lin	e Log out	May 26, 2011
my CalPERS							
Home Profile Repo	rting Person I	nformation	Other Organizations				
My Home							
Common Tasks 🛛 🔕	My Cases			View	More Actions»		
Menu 🕥	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Character Charling and							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

my CalPERS	Skip to: Content Footer	Welcome Laura Cu	istomize Help	Contact Us C	CalPERS On-Line	Log out June 27, 2011
Home Profile Rep	orting Person Information	Other Organizations				
Summary Agreemer	its					
Common Tasks 🛛 🚨	Summary					
Menu	Profile					
Summary	Frome					Request Update
Contacts	CalPERS ID: 3	047155671		s	tatus: Active	
	Federal Tax ID:			r	Name: Direct Aut	horization Organization
	Category: D	irect Authorization O	rganization		Credit Uni	on
	Addresses					
	Physical:			M	<u>ailing:</u>	
	Communication Informa	tion				
	Preferred Communicati	ion:				
	Primary Em	ail:	Prim	ary Phone Nu	mber:	
	Contacts Add New					View More Actions»
	Contact Type Co	ntact Type Detail	Progra	im Name	ample	Phone Number
	General Ma	in	CalPER	S Joeex	Tester	(209)888-4324
	General Ma	in	CalPER	S Laura	Redwood	()
	💿 Business Relationships	Add New				
	Name	CalPERS II	D Pi	rogram	Service Provided	Status
	No results found.					
	• Contracts/Agreements		Data Status	Effective	Tormination	Polatod
	Contract/Agreement Ty	vpe Status	Changed	Date	Date	Parties
	Direct Authorization Agree	ement Active	04/01/1980	04/01/1980		

To modify a contact person's business partner contact role, select the link (**General** in this example) associated with the contact person ("Laura Tester" in this example) under the Contact Type column within the Contacts section.

my CalPERS	kip to: Cont	tent Foo	ter Weld	come Sylvia	Customize	Help	Contact Us CalPE	RS On-Line Log out	June 16, 2011	
Home Profile Repo	rting Pers	on Informa	ation Oth	er Organizati	ons					
<u>Summary</u> Agreements	5									
Monu Q	Participar	nt Name:	Laura Test	er	CalPER	IS ID:	3047155671		"Required Fields	
Search	() Mainta	in Contac	Details							
Contacts Relationships	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 detail.									
Findings	Contact Type:			General				Contact Type	Detail: Main 💌	
Capture Interaction	0	Deactiva	tion Date:			-				
Information	Pro	ograms S	upported:	V CalPERS						
			Entity:*	Perso	n CalPERS ID:	1				
				Indivi	dual Name: 1	aura 1	Tester			
				Other						
				Make Cor Primary C	stem Access htact Viewable Contact	to Ot	her Organizations	System Access		
	Maintain Preferred Communication Details Preferred Communication:									
	Maintain Contact Address Details Existing Business None									
		Partner	Address :	1100 Evillet S		_				
			4001033.	The Fuller of		-				
				2* United States						
			Country:*							
			City:	Visalia						
		7	ip Code:	95432 -		1.00				
		_			_					
	Maintain Contact Communication Details									
	Primary	Phone Type	Phone	Number	Extension	Inte	rnational			
	5	Home					2			
	0	Cellular					12			
	-0-	Other					0			
		Work	20988843	24	<u>.</u>		10			
	-0	TYY		_			8			
	- P.	FAX					0			
	Delevini			Frend		U	ndeliverable			
	Primary			emau			Date			
		laura@davo	rg.com							
						-				
	100						100			
	Save Clea	6								

The Maintain Contact Details page for "Laura Tester" displays.

You can modify the information within the Maintain Contact Details section, including the **Contact Type** and **Contact Type Detail** dropdowns, the **Deactivation Date** field and the **Programs Supported** checkboxes.

If applicable, you can enter a business partner contact deactivation date in the **Deactivation Date** field.

my CalPERS	kip to: Content Footer Welc	ome Edward Customize Help Cont	act Us CalPERS On-Line Log out May 26, 2011
Home Profile Repor	rting Person Information Othe	er Organizations	
Summary Agreements	5		
Common Tasks (a) Menu (c)	Name: Direct Authorization Organization Credit Union	CalPERS ID: 3047155671	*D-mind Field
Summary			Required Fields
Contacts	V Maintain Contact Details		
	By indicating that this contact purposes. They will also receive detail.	is a Primary Contact, you are specifyir a automated correspondence sent to c	ng that they should be reached for communication contacts based upon contact type - contact type
	Contact Type:*	General 🔹	Contact Type Detail:* Main 👻
	Deactivation Date:		
	Programs Supported:	🖉 Calendar - Windows In 🗖 🔲 💌	
	Entity:*	about:blank	
		< May > < 2011 >	t
		SMTWTFS	
		1 2 3 4 5 6 7	nizations
		15 16 17 18 19 20 21	
		22 23 24 25 26 27 28	
	💿 Maintain Preferred Commun	29 30 31 1 2 3 4	
	Preferred Communication:	<u>5678910</u> 11 <u>Today</u>	
	Existing Business	🌍 Internet Protec 🖓 🔻 🍕 100% 🔻	
	Partner Address :		-
	Address:*		
	Country:*	United States	
	City:*		

Enter a date in the **Deactivation Date** field or select the calendar icon to select the date. Since this is an optional field, we will go back to the previous screen to complete the modify contact role activity.

The Maintain Contact Details page displays.

my CalPERS	kip to: Conten	t Foote	er Welc	ome Sylvia	Customize	Help C	ontact Us CalPEI	RS On-Line Log out :	June 16, 2011		
Home Profile Repor	ting Person	Informat	tion Othe	er Organizati	ons						
Summary Agreements	3										
Common Tasks	Participant	Name: L	aura Teste	er	CalPER	ID: 30	47155671		a desta de la		
Menu 🕐	-					_			Required Fields		
Search	Maintain	🛈 Maintain Contact Details									
Relationships	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 detail.										
Divisions	Contact Type: Deactivation Date:			General		Contact Type De	tail: Main 💌				
Capture Interaction Information					-						
	Programs Supported: V CalPERS										
	Entity: Person CalPERS ID:										
			count.	Individ	dual Name: L	aura Tes	ster				
				Other:	1						
				Allow Sys	tem Access			System Access			
				Make Con	tact Viewable	to Other	r Organizations				
				Primary C	ontact	100					
	Residual Referent Communication Parts In										
	Preferred Communication Details										
	Maintain Contact Address Details										
	Partner Address : None +										
	Address: 1100 Fuller St					_					
		с	ountry:*	United States							
			City:*	Vișalia		_					
			State:*	California							
		Zi	p Code:*	95432							
	P	hone	and and	arron bertuit					_		
	Primary	Туре	Phone	Number	Extension	Intern	ational				
	0	Home							_		
	0 0	Cellular		_			8				
	-0	Other					0				
		Work	209888432	14			9				
	-0	TYY		-			5				
	- B.	FAX					9				
	Primary			Email		Und	Date				
	 laur 	ra@davorg	com								
	10.						-				
	0						-				
	10.						-				
	-										
	Save Clear										

Select the System Access link within the Maintain Contact Details section.

The Assigned Username page for "Laura Tester" displays.

vord

The system access administrator can reset a user's password by selecting the **Reset Password** link, or they may prevent a user from accessing my|CalPERS by selecting the **Prevent the user from accessing the site** checkbox to remove access privileges for a specific user within the Assigned Username section.

Note the previously selected **Role** checkboxes within the Assign Roles section, Business Partner Direct Authorization and System Access Administrator. These are the only roles available for direct authorization vendor organizations.

Home Profile Rep	orting Pers	son Information Other Organiza	ations				
Summary Agreemen	its	"					
Common Tasks	Participa	nt Name: Laura Tester	CalPERS ID: 3047155671				
Menu 💿	0	Contraction of the local division of the loc	"Required Fields				
Contacts	C Assign	ned Username ontact Name: Laura Tester					
Relationships Findings Divisions Capture Interaction Information	Contact	t Username:" laurat	Usernames must consist of 6-35 characters with no spaces. Valid characters are numbers, letters, and the following special characters: at signs (\oplus), periods (.), underscores (_), and hyphens (-). Usernames must also start with a letter. Usernames are not case sensitive.				
	O Assig	n Roles					
		Role					
	Authorized Personal Loan Representative						
		Business Partner AP/Billing					
		Business Partner AP/Billing R	0-				
	15	Business Partner Direct Auth	ionzation				
	34	Business Partner Employer Inquiry					
	123	Business Partner Employer Maintenance					
	11	Business Partner Health Contracts					
	10	Business Partner Health Enrollment					
	0	Business Partner Health Enro	ilment RO				
	0	Business Partner IME/JA					
		Business Partner Limited					
		Business Partner PA Billing					
	13	Business Partner Payroll					
		Business Partner Payroll RO					
		Business Partner Reciprocal					
	0	Business Partner Retirement	Contracts				
	1	Business Partner Retirement	Enrollment				
	13	Business Partner Retirement	Enrollment RO				
	13	Business Partner SCP Certific	cation				
	10	Business Partner Supplement	tal Income Plan				
		Carrier					
	12	System Access Administrato	z				
	Select All	System Access Administrato	r				

Select the appropriate system access administrator checkbox(es) and then select the **Save** button to update the business partner contact role.

Unlock a business partner contact account (SAA Only)

Your system access administrator can lock or unlock your account. Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the Business Partner radio button and then the Continue button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCaIPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them longing in. They anormally see arel onic content first, unless they have bookmarked	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password:
this page. This is temporary filler content until final content is decided.	Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS	ikip to: Conter	nt Footer N	Velcome Bobbie Customize	Help Contact Us	CalPERS On-Lir	ne Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks 🛛 🔕		5		View	More Actions»		
Menu 👽	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

\$	Skip to: Content Footer W	elcome Laura Cu	ıstomize Help	Contact Us (CalPERS On-Line	Log out June 27, 2011
my CalPERS						
Home Profile Repo	rting Person Information Ot	her Organizations]			
Summary Agreement	5					
Common Tasks 🛛 🙆						
Menu 💿	Profile					
Summary						Request Update
Contacts	CalPERS ID: 3047	155671		s	tatus: Active	
	Federal Tax ID:			I	Name: Direct Aut	horization Organization
	Category: Direc	ct Authorization O	rganization		Credit Uni	on
	Addresses					
	Physical:			M	aning:	
	Communication Informatio	<u>n</u> •				
	Primary Email	-	Prim	ary Phone Nu	mber:	
				,		
	O Contacts Add New					View More Actions»
	Contact Type Conta	act Type Detail	Progra	m Name	3	Phone Number
	General Main		CalPERS	5 Joe Ex	cample Toota	(916)789-3344
	General Main		CalPERS	5 Laura 5 Laura	Redwood	(209)888-4324
			Sul Ela	2.5010		
	💿 Business Relationships 🌆	dd New				
	Name	CalPERS I	D Pr	ogram	Service Provided	Status
	No results found.					
	O Contracts/Agreements					
	Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreeme	ent Active	04/01/1980	04/01/1980		

To unlock a contact"s account, select the link (**General** in this example) under the Contact Type column associated with the contact person ("Joe Example" in this example) within the Contacts section.

The *Maintain Contact Details* page for "Joe Example" displays.

5	Skip to: Cont	tent Footer	Welcome Laura	Customize	Help Contact Us CalP	ERS On-Line Log out	June 27, 2011
my CalPERS							
				_			
Home Profile Repor	rting Perso	on Information	Other Organization	ons			
Summary Agreements	5						
	Name: Dir	ect Authorizati dit Union	cal	PERS ID: 3047	7155671		*Required Fields
Summany			-11-				Required Fields
Contacts	By indicati	n Contact Det	ontact is a Primary	Contact you :	are specifying that they	should be reached for co	mmunication
	purposes. detail.	They will also	receive automated	correspondenc	ce sent to contacts base	ed upon contact type - c	contact type
		Contact T	ype:* General		•	Contact Type De	etail:* Main 💌
	ſ	Deactivation	Date:				
	Pro	grams Suppo	orted: 🗹 CalPERS				
		En	tity:* 💿 Persor	CalPERS ID:			
			Individe the second	Jual Name: J	oe Example		
				tom Access		System Access	
			Make Con	tact Viewable	to Other Organizations	<u>System Access</u>	
			Primary C	ontact			
		in Droforrod C	Communication Data	ile			
	Preferre	d Communica	ation:	115			
	V Maintai	in Contact Add Existing Bus	iress Details				
		Partner Add	ress : None				
		Addr	'ess:*		_		
					_		
		Cour	ntry:* United States		•		
			City:*				
		St	tate:* California		•		
		Zip C	ode:* -				
	💿 Mainta	in Communica	tion Details				
	Primary	Phone	Phone Number	Extension	International		
	0	Home					
	0	Cellular					
	0	Other					
	۲	Work 91	67893344				
	O	TYY					
	0	FAX					
					Undeliverable		
	Primary		Email		Date		
	• jo	e@davorg.com					
	0						
	0						
	Save Clear]					

Select the System Access link within the Maintain Contact Details section.

The Assigned Username page for "Joe Example" displays.

9	skip to: Content Footer Welcome Laura Customize Help Contact Us CalPERS On-Line Log out 🏾 J	lune 27, 2011
mv CalPERS		
Home Profile Repo	ting Person Information Other Organizations	
Summary Agreements	3	
	Direct Authorization Organization	
Common Tasks	Name: CalPERS ID: 3047155671	
Manu	Credit Union	-
Mellu 🔍		
Summary		logot Doggword
Contrata	N. N	eset Password
Contacts	Contact Name: Joe Example	
	Contact Username: jexample	
	Drevent the user from personing the site	
	Prevent the user from accessing the site	
	Prevent the user from accessing the site	

You can lock or unlock a contact person"s account by selecting or de-selecting the **Prevent the user from accessing the site** checkbox.

The *Maintain Contact Details* page for "Joe Example" displays.

s	Skip to: Conte	nt Footer	Welcome Laura	Customize	Help Contact Us Ca	alPERS On-Line Log out June 27, 2	2011
my CalPERS							
Home Profile Repor	ting Person	Information	Other Organizat	tions			
Summary Agreements	5						
Common Tasks 🔕	Dire	ct Authorization	Organization _		715571		
Menu 💿	Name: Cred	lit Union	- Ca	MPERS ID: 304	/1550/1	*Required F	ields
Summary	💿 Maintain	Contact Details	;				
Contacts	By indicating purposes. T detail.	g that this cont hey will also rec	act is a Primary eive automate	/ Contact, you a d correspondend	are specifying that the ce sent to contacts ba	y should be reached for communicatio ased upon contact type - contact type	n e
		Contact Type	e:* General		•	Contact Type Detail:* Main	n 💌
	De	eactivation Da	te:				
	Prog	rams Supporte	ed: 🔽 CalPERS	5			
		Entity	/:* 💿 Perso	on CalPERS ID:			
			Indiv	idual Name: J	oe Example		
			O Other	r:			
			Allow Sy	stem Access	to Other Organization	System Access	
			Primary	Contact	to Other Organizations	5	
			_ /				
	🔍 Maintain	Preferred Com	munication Det	ails			
	Preferred	communicatio	on:				
	💿 Maintain	Contact Addres	s Details				
	E	xisting Busine	None -				
		Address	5:*				
		Country	/:* United State	S	•		
		City	/:* ••* Oalifaasia				
		State Zin Code			•		
		zip coue					
	💿 Maintain	Communication	ı Details				
	Primary ^I	Phone Pho Type Pho	one Number	Extension	International		
	O	Home					
	0 (Cellular					
	O	Other					
	۲	Work 916789	93344				
	O	TYY					
	O	FAX					
	Primary		Email		Date		
	joe	@davorg.com					
	0						
	0						
	Save Clear						

Review the page to ensure that the information is accurate and then select the **Save** button.

The *Contacts to Display* page displays. Note that contact person "Joe Example" is now listed as an active contact as indicated by the "Y" under the Active column within the Contacts section.

	5kip to: Conten	t Footer '	Welcome Laura Cust	omize Help Cor	ntact Us CalPERS On-Line	Log out	June 27, 2011			
my Caipers										
Home Profile Repo	rting Person I	nformation	Other Organizations							
Summary Agreement	5									
Common Tasks 🛛 🙆	Name: Direct	Authorization (Organization CalPERS	ID: 3047155671						
Menu 💿	Contacts t	Contacts to Display								
Summary	Summary Active: Yes 🔻									
Contacts Program: All										
	Display									
	🔍 Contacts	Add New								
	<u>Contact</u> <u>Type</u>	Contact Type Detail	<u>Program</u>	<u>Name</u>	Phone Number	<u>Active</u>	<u>Primary</u>			
	General	Main	CalPERS	Laura Redwood		Y	Y			
	General	Main	CalPERS	Joe Example	(916)789-3344	Y	N			
	General	Main	CalPERS	Laura Tester	(209)888-4324	Y	N			

Reset a business partner contact's password (SAA Only)

Your system access administrator can reset your password. Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and select the **Accept** button.

The my|CalPERS *Hom*e page displays.

	Skip to: Conte	nt Footer V	Velcome Bobbie Customize	Help Contact Us	CalPERS On-Li	ne Log out	May 26, 2011
	5						
Home Profile Re	porting Person	Information C	other Organizations				
Common Tasks							
	🗧 🔍 My Case	5		View	More Actions»		
Menu 🤇	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge Questions							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

my CalPERS	Skip to: Content Footer Wel	come Laura Cu	stomize Help	Contact Us (CalPERS On-Line	Log out June 27, 2011
Home Profile Repo	rting Person Information Othe	er Organizations)			
Summary Agreement	s					
Common Tasks 🛛 🔕	O Summary					
Menu 🔽	Profile					
Summary Contacts	CalPERS ID: 30471 Federal Tax ID: Category: Direct Addresses Physical: Communication Information Preferred Communication: Primary Email:	.55671 : Authorization O	rganization Prin	S M nary Phone Nu	Status: Active Name: Direct Aut Credit Uni Iailing:	Request Update
	Contact Type Contac	ct Type Detail	Progra	am Name	2	Phone Number
	General Main		CalPER	S Joe E	xample	(916)789-3344
	General Main		CalPER	S Laura	Tester	(209)888-4324
	<u>General</u> Main		CalPER	S Laura	Redwood	
	💿 Business Relationships 🎿	New				
	Name	CalPERS II	D P	rogram	Service Provided	Status
	No results found.					
	Contracts/Agreements					
	Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreemen	t Active	04/01/1980	04/01/1980		

To reset a contact person's password, select the link (**General** in this example) under the Contact Type column associated with the contact person ("Laura Tester" in this example) under the Contact Type column within the Contacts section.

	kip to: Cont	tent Foo	ter Weld	come Sylvia	Customize	Help	Contact Us CalPE	RS On-Line Log out	June 16, 2011
Home Profile Repo	rting Pers	on Informa	ation Othe	er Organizati	ions				
<u>Summary</u> Agreements	5								
Common Tasks	Participar	nt Name:	Laura Test	er	CalPER	S ID:	3047155671		
Menu 💿	-				_				Required Fields
Search	Mainta	in Contact	Details						
Relationships	By indicat purposes.	ing that the They will	also receiv	e automated	Contact, you corresponden	ce sen	ecifying that they st t to contacts based	upon contact type	- contact type
Findings	detail.					-			
Divisions		Conta	ct Type:*	General				Contact Type	Detail: Main 💌
Capture Interaction Information		Deactiva	tion Date:						
	Pro	ograms S	upported:	V Calvers					
			Entity:*	Perso	n CalPERS ID:	-	Course of the second seco		
				Other	duarname: L	aura i	ester		
				Allow Sur	tem Access			Sustan Arrass	
	Make Contact Viewable to Other Organizations								
				2 Primary C	Contact		and the second		
	0		-			_			
	Preferre	an Preferr	inication:	nication Deta	nis				
						_			
	Existing Business								
		Partner Address : None							
			Address:*	1100 Fuller S	a.				
				_	_	_			
				11.2.1.0.1		_	-		
			City:	United States	1	-			
			State:	California		•			
		z	ip Code:*	95432 -	_				
	-	-			_				
	Mainta	in Contact	Communic	ation Details	5				
	Primary	Phone	Phone	Number	Extension	Inte	rnational		
	5	Home			-		8		
	0	Cellular					10		
	-0-	Other					10		
		Work	209888432	24			2		
	-0.	TYY					0		
	- P	FAX					12		
	Primary			Email		U	Date		
		laura@davo	g.com						
	0.						-		
	0					1	-		
	10.								
	Save Clea	3							

The Maintain Contact Details page for "Laura Tester" displays.

Select the System Access link within the Maintain Contact Details section.

The Assigned Username page for "Laura Tester" displays.



Select the **Reset Password** link within the Assigned Username section.

The *Password Maintenance* page displays. my|CalPERS assigns a temporary password.

S	kip to: Content Footer Welcome Sylvia Customize Help Contact Us CalPERS On-Line Log out June 16, 2011
mv CalPERS	
Home Profile Repo	rting Person Information Other Organizations
Summary Agreement	5
Common Tasks	Participant Name: Laura Tester CalPERS ID: 3047155671
Menu 💿	Password Maintenance
Search	The following Username has been created and assigned the displayed temporary password. This password will evoire in 30
Contacts	days:
Relationships	Username: laurat
Findings	Password: pg8he-gs0
Divisions	
Capture Interaction Information	Continue

<u>Be sure to capture the temporary password</u>. It is the only time the temporary password will be made available. Note that the temporary password will expire in 30 days.

Select the **Continue** button.

	kip to: Conten	t Footer	· Welco	me Sylvia	Customize	Help (Contact Us CalPEF	S On-Line Log out	June 16, 2011
Homo Brofile Popo	rting Borcon	Informatic	op) Othor	Organizatio					
Summary Agreements		Informatio		organizatio					
Common Tasks					c-lore				
Menu 🛈	Participant	Name: La	ura Tester		CallPER	(S ID; 3	04/1550/1		Required Fields
Search	Maintain	Contact D	etails						-
Contacts	By indicating	that this	contact is	a Primary	Contact, you	are spe	cifying that they sh	ould be reached for	communication
Relationships	purposes. Th detail.	ey will als	o receive	automated	corresponden	ce sent	to contacts based	upon contact type -	contact type
Divisions		Contact	Type: G	Seneral				Contact Type	Detail: Main 💌
Capture Interaction	De	activatio	n Date:		-				
Information	Progr	ams Sup	ported:	CalPERS					
		1	Entity:*	Person	CalPERS ID:	-			
	Individual Name: Laura Tester								
				Other:					
	Allow System Access System Access								
		Make Contact Viewable to Other Organizations							
	-					_			
	Maintain Preferred Communication Details								
	Preferred	Communi	ication:						
	Maintain Contact Address Details								
	E	artner Ad	Idress :	lone 👻					
		Ad	dress:* 1	100 Fuller St					
							-		
		Co	untry:* U	Inited States	-	_	-		
			City: V	alifornia					
		Zip	Code: 9	5432 -		121			
	💿 Maintain	Contact C	ommunicat	ion Details	i				
	Primary P	hone	Phone N	umber	Extension	Inter	national		
	5 1	Home			_		0		
	0 0	ellular					13		
	0	Other					0		
		Work 2	2098884324				1		
	-0	TYY				-	8		
	6.3	FAX					1		
	Primary		F	mail		Un	deliverable		
	a laur	alldanoo	com				Date		
	0	-Bonneight				1	-		
	0					1	-		
	10.						-		
	-								
	Save Clear								

The Maintain Contact Details page for "Laura Tester" displays.

Select the **Save** button.

The *Contacts to Display* page displays and lists your organization"s updated contact within the Contacts section.

	Skip to: Conten	t Footer V	Velcome Laura Cust	omize Help Cor	ntact Us CalPERS On-Line	Log out	June 27, 2011				
my CalPERS											
Home Profile Repo	rting Person I	nformation O	ther Organizations								
Summary Agreement	s										
Common Tasks 🛛 🔕	Name: Direct	Authorization O	rganization CalPERS	ID: 3047155671							
Menu 👽	Credit	onion									
Summany	• Contacts t	Contacts to Display									
Summary	Active: Yes										
Contacts Program: All											
	Display										
	Display										
	🔍 Contacts I	Add New									
	<u>Contact</u> <u>Type</u>	Contact Type Detail	<u>Program</u>	Name	Phone Number	Active	<u>Primary</u>				
	General	Main	CalPERS	Laura Redwood		Y	Y				
	General	Main	CalPERS	Joe Example	(916)789-3344	Y	N				
	General	Main	CalPERS	Laura Tester	(209)888-4324	Y	N				

The business partner contact"s password has been reset successfully.

my|CalPERS Agreement Administration and Deduction Processing for Direct Authorization Vendors

Part 1: Direct Authorization Agreement Administration

Setup a New Direct Authorization Agreement

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Review the conditions of use statement and then select the **Accept** button.

The my|CalPERS *Home* page displays.

my CalPERS	Skip to: Conten	t Footer ١	Welcome Bobbie Customi	ze Help Contact Us	CalPERS On-Li	ine Log out	May 26, 2011
Home Profile Repo	rting Person I	Information (Other Organizations				
My Home							
Common Tasks 🛛 🔕	🗑 My Cases			View	More Actions»		
Menu 👽	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement	:	Closed		
Change Password							
Change Challenge Questions							

Select the **Profile** global navigation tab.

The Business Partner Profile page displays.

s mv CalPERS	kip to: Content Footer Welco	ome Bobbie Customize	e Help Conta	act Us CalPE	RS On-Line	Log out May 26, 2011		
Home Profile Repor Summary Agreements	ting Person Information Other	Organizations						
Common Tasks 🛛 🙆								
Menu 💿	Profile							
Summary Contacts	CalPERS ID: 449908 Federal Tax ID: 1234567 Category: Direct /	9095 '-89 Authorization Organizat	ion	Status Name	: Active : Direct Author Credit Union	<u>Request Update</u> prization n		
	Addresses 49 Mailing Street, Sacramento, CA 49 Mailing Physical: 84567 Communication Information					ng Street, Sacramento, CA		
	Preferred Communication: E Primary Email: r	mail obert@daocu.org	Primary P	hone Number	: 916-789-11	11		
	Contacts Add New					View More Actions»		
	Contact TypeContactGeneralMain	Type Detail	Program CalPERS F	Name Robert Dillman		Phone Number		
	Business Relationships Add N	2W		c	ervice			
	Name No results found.	CalPERS ID	Prograr	n P	rovided	Status		
	• Contracts/Agreements							
	Contract/Agreement Type Direct Authorization Agreement	Status Date Status Changed Active 04/01/1978	5 Effective Date 04/01/1978	Termination Date	Related Parties			

Select the Agreements local navigation tab.

The Agreements page displays.

S	kip to: Content Footer W	elcome Ronald	d Customize	Help Contact (Js CalPERS O	n-Line Log out 🛛 🛚	lay 26, 2011
my CalPERS							
Home Profile Repo	ting Person Information O	ther Organizat	ions				
Summary Agreements	5						
Common Tasks 🛛 🙆	• Agreements Add New						
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and A Insurance	Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insur	ance Group

Select the Add New button within the Agreements section title banner.

The Add New Agreement page displays.

my CalPERS	kip to: Content Footer Welcome George Customize H	Help Contact Us CalPERS On-Line Log out June 15, 2011
Home Profile Repo	rting Person Information Other Organizations	
Summary Agreements	s	
Common Tasks 🛛 🔕		*Required Fields
	Direct Authorization Deductions	
	Direct Authorization Information Program:* Deduction Type:* Please confirm:* al Will the deductions be managed by a Third Party Ad Yes No Charter/Constitution/By-laws Contre Who will submit the Direct Authorization Deductions Sponsor Which organization should receive the deduction pay Sponsor	The contract between the organization and your carrier lows for the continuation of coverage into retirement. ministrator (TPA)?* act:* Provide Document Download Coversheet for this agreement?* yments?:*
	Save & Continue	

To setup a direct authorization agreement for the first time, you will need to enter the information as displayed on the Agreements screen.

Enter the appropriate information in the Direct Authorization Information area within the Direct Authorization Deductions section. Note that the red asterisks indicate required fields. This includes selecting the program from the **Program** dropdown ("CalPERS" in this example), the type of deduction from the **Deduction Type** dropdown ("Credit Union Deduction" in this example), the **Please confirm** checkbox, to indicate if "The contract between the organization and your carrier allows for the continuation of coverage into retirement.", and the **Yes** or **No** radio button, to indicate "Will the deductions be managed by a Third Party Administrator (TPA)?" ("No" in this example). Select which organization will submit the deductions for this agreement and which organization will receive the deduction payments ("Sponsor" was selected for both in this example).

To upload the appropriate Charter/Constitution/By-Laws Contract document(s), select the **Provide Document** link.

SI	ip to: Content Footer Welcome George Customize Help Contact Us CalPERS On-Line Log out	June 15, 2011
my CalPERS		
Home Profile Repo	ting Person Information Other Organizations	
Summary Agreements		
Common Tasks 🛛 🔕	Name: Direct Authorization CalPERS ID: 4499089095	
	Credit Union	*Required Fields
	⑦ Submit Documentation	
	For faster processing of the required documentation, you can upload documents directly to CalPERS. If a c generated when you submit, please print the cover sheet and submit it along with the document you are s CalPERS.	over sheet is ending to
	Document Category: Direct Authorization Agreement	
	Document Type:* Charter/Constitution/By-Laws Contract	
	Submission Method:* Upload -	
	Path:* Browse	
	Submit	

The Submit Documentation page displays.

Select **Upload from the Submission Method** dropdown. Browse to the appropriate document(s) and select for uploading to my|CalPERS.

The Direct Authorization Deductions section is updated with the information we entered. Note that **Date Constitution/Charter/bylaws Submitted** displays the date we uploaded the document ("6/15/2011" in this example), and a **View Document** link, which may be used to view the document.

Sk	ip to: Content Footer Welcome George Customize Help Contact Us CalPERS On-Line Log out June 15, 2011
my CalPERS	
Home Profile Repor	ting Person Information Other Organizations
Summary Agreements	
Common Tasks 🛛 🔕	*Required Fields
	♥ Direct Authorization Deductions
	Direct Authorization Information
	Program:* CalPERS
	Deduction Type:* Credit Union Deduction
	Please confirm:* 🗹 The contract between the organization and your carrier
	allows for the continuation of coverage into retirement.
	Will the deductions be managed by a Third Party Administrator (TPA)?* O Yes
	No
	Charter/Constitution/By-laws Contract:* Replace Document Download Coversheet Date Constitution/Charter/bylaws Submitted: 06/15/2011 View Document
	Who will submit the Direct Authorization Deductions for this agreement?* Sponsor
	Which organization should receive the deduction payments?:* Sponsor

Select the **Save & Continue** button.

The Direct Authorization Agreement page displays.

my CalPERS	kip to: Content Footer Welcome George Customize Help Contact Us CalPERS On-Line Log out June 15, 2011						
Home Profile Repo	ting Person Information Other Organizations						
Summary Agreements							
Common Tasks 🔕	Name: Direct Authorization Credit CalPERS ID: 4499089095 Union *Required Fields						
	CALIFORNIA PUBLIC EMPLOYEES' RETIREMENT SYSTEM AGREEMENT RELATING TO DEDUCTIONS FOR "Credit Union Deduction" Direct Authorization Credit Un., hereinafter referred to as Sponsor requests that the Executive Officer approve, as authorized in Section 581 Title 2, California Administrative Code, the filing directly with said Sponsor of authorizations for retirement allowance deductions of dues for the Sponsor charges under Section 21264, Government Code. In consideration of such approval and of forbearance by the Public Employees' Retirement System at the request of the Sponsor of the Board's right to require a waiver from retired persons of any liability for inadvertence or error as a condition of making such deductions and of benefits accruing to the Sponsor as a result of such forbearance, the Sponsor of the Board's right to require a waiver from retired persons of any liability for inadvertence or error as a condition of making such deductions and of benefits accruing to the Sponsor as a result of such forbearance, the Sponsor of the Board's right to require a waiver from retired persons of any liability for inadvertence or error as a condition of making such deductions received by it. 2. To supply to the Board statements, in such forms as the Executive Officer may prescribe, of deductions specified in authorizations received by it. 2. To save the State of California, Board of Administration, the Public Employees' Retirement System and its employees harmless from any liability for any errors in transmitting such dues, or charges except for liability to the Sponsor for money actually withheld but not transmitted. 3. To keep all authorizations received by it available for inspection by authorized representatives of the Board. The Sponsor further agrees that any amounts which have been deducted and paid to the Sponsor and which are refundable under the plan because of the death of a retired person shall be refunded to the Board for distribution under the Public Employees' Retirement Law. This a						
	🛇 e-Signature You Are Not Required to Complete This Transaction Electronically						
	If you <u>do not</u> wish to complete this transaction electronically, please call the CalPERS Customer Contact Center at 1-888- CalPERS (1-888-225-7377) for assistance. The TTY - For Speech & Hearing Impaired number is (916) 795-3240.						
	Electronic Signature Agreement You may complete this transaction electronically by selecting the "Sign Now" button which appears on your computer screen.						
	By completing this transaction electronically, you acknowledge and agree that:						
	(1) This transaction will be conducted by electronic means in accordance with the federal Electronic Signatures in Global and National Commerce Act (E-Sign), 15 U.S.C.A. sections 7001-7031 and the Uniform Electronic Transactions Act, California Civil Code sections 1633.1 to 1633.17;						
	(2) You have read and understand the terms and conditions regarding this transaction;						
	(3) You accept the terms and conditions of this Electronic Signature Agreement and the above terms and conditions regarding this transaction; and						
	(4) Completion of this transaction electronically shall have the same effect as if you signed your name in ink on a piece of paper to accomplish the transaction and CalPERS will store by electronic means an electronic record of this transaction.						
	* I have read and agree to the Electronic Signature Agreement above.						
	Sign Now						

Read the important information related to the direct authorization agreement, including the one-time administration fee and the deductions processing service charge for each deduction.

my|CalPERS uses e-Signature for electronic signatures in lieu of signing hard copy documents. You may submit your new agreement request by reviewing the agreement terms within the e-Signature section, selecting the checkbox associated with the statement "I have read and agree to the Electronic Signature Agreement above," and then selecting the **Sign Now** button. Note that red asterisks indicate required fields. Also note that if you do not wish to submit your new agreement request using e-Signature, there is information within the e-Signature section to instruct you how to submit the new agreement request via hard copy.

The *Direct Authorization Agreement* page displays. my|CalPERS displays the confirmation message "Thank you for submitting your information." Note that the **Agreement Status** indicates "Pending" within the Direct Authorization Deductions section.



Select the **Submit Agreement** radio button within the Available Actions section and then select the **Submit** button.

my|CalPERS displays the confirmation message "Thank you for your initial agreement submission. A CalPERS Contract Analyst will review the submitted information and documentation and will contact you with the next steps to complete your agreement submission." Once a CalPERS Contract Analyst reviews and approves the submitted new agreement, the **Agreement Status** will be updated to "Active".

my CalPERS	ip to: Content Footer Welcon	ne George Custom	ize Help Cor	ntact Us CalPER	S On-Line Log) out June 15, 2011
Home Profile Repor	ting Person Information Other	Organizations				
Summary Agreements						
Common Tasks 💿	Thank you for your initial agreen documentation and will contact	nent submission. A you with the next :	CalPERS Contra steps to comple	ct Analyst will rev ete your agreemer	view the submit nt submission.	ted information and
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	04/01/1978	04/01/1978		Atlas Credit Union
	Direct Authorization Agreement	Active	04/01/1978	04/01/1978		Atlas Credit Union
	Direct Authorization Agreement	Active	04/01/1978	04/01/1978		Atlas Credit Union
	Direct Authorization Agreement	Active	04/01/1978	04/01/1978		Atlas Credit Union
	Direct Authorization Agreement		04/01/1978	04/01/1978		Atlas Credit Union
	Direct Authorization Agreement		04/01/1978	04/01/1978		Atlas Credit Union
	Direct Authorization Agreement		04/01/1978	04/01/1978		Atlas Credit Union
	Direct Authorization Agreement Direct Authorization Agreement	Work In Progress	04/01/1978 06/15/2011	04/01/1978		Atlas Credit Union

Select the **Profile** global navigation tab.

The new direct authorization agreement is displayed as "Work In Progress" under the Status column within the Contracts/Agreements section.

Sk	tip to: Content Footer Wel	come George Customiz	e Help Cont	act Us CalPER	RS On-Line Log	g out June 15, 2011
my CalPERS						
Home Profile Repor	ting Person Information Oth	er Organizations				
Summary Agreements	1					
Common Tasks 🛛 🔕						
Menu 💿	Profile					
Contacts	FIGHE					Request Update
	CalPERS ID: 4499	089095		Status	s: Active	
	Federal Tax ID:			Name	e: Direct Authori	zation Credit
	Category: Direc	t Authorization Organiza	ition		Union	
	Addresses				9740 CMUTU CT	
	<u>Pnysicai:</u>			Mailing	SACRAMENTO	, CA 95825
	Communication Information	1				
	Preferred Communication:	:				
	Primary Email:	:	Primary I	Phone Number	r:	
	Contacts Add New Contact	act Type Detail	Drogram	Name	Dh	View More Actions»
			CalPERS			
	General Main		JRS	George Ada	ams	
			LRS			
			CalPERS			
	<u>General</u> Main		JRS JRS II	Sally Jones	5	
			LRS			
	Rusiness Relationships 44	d New				
			2		Service	01-1
	Name	CalPERS ID	Progra	P P	Provided	Status
	No results found.					
	© Contracts/Agreements					
	Contract/Agreement Type	Status	Date Status	Effective	Termination	Related Parties
	Direct Authorization Agreeme	nt Active	04/01/1978	04/01/1978	Direct Authori	zation Credit Union
	Direct Authorization Agreeme	nt Work In Progress	06/15/2011			
	Direct Authorization Agreemen	nt Active	04/01/1978	04/01/1978	Direct Authori	zation Credit Union
	Direct Authorization Agreemer	nt Active	04/01/1978	04/01/1978	Direct Authori	zation Credit Union
	Direct Addionzation Agreemen	Active	01/01/19/0	01/01/19/0	DirectAution	zation create offion

Sign the Hold Harmless agreement

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* screen displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCaIPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them loging in They ormally see preLogin content first, unless they have bookmarked	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password:
this page. This is temporary filler content until final content is decided.	Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS	kip to: Conten	it Footer N	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Lir	ne Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks 🛛 🔕				View	More Actions»		
Menu 💿	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

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my CalPERS							
Home Profile Repo	rting Person Informa	tion Other (Organizations				
Summary Agreements	3						
Common Tasks 🛛 🔕	Summary						
Menu 👽	Profile						
Contacts							Request Update
	CalPERS	S ID: 4499089	095		Statu	s: Active	
	Federal Tax	(ID:	therization Organiza	tion	Nam	e: Direct Author	ization Credit
	Categ	ory. Direct At	utionzation organiza	don		onion	
	Physi	ical:			Mailin	g: 8749 SMITH S	т
						SACRAMENT	O, CA 95825
	Communication In	formation					
	Preferred Comm	unication:		Duine and			
	Prima	ary Email:		Primary F	Phone Numbe	er:	
	O Contacts Add New						View More Actions»
	Contact Type	Contact	Type Detail	Program	Name	Ph	ione Number
				CalPERS			
	General	Main		JRS II	George Ad	ams	
				LRS			
	Conorol	Main		JRS	Colly, Jone	-	
	General	Main		JRS II	Sally Jone	5	
				LKS			
	😨 Business Relatio	nships Add New	1				
	Name		CalPERS ID	Progra	ım	Service Provided	Status
	No results found.					FIGVIDED	
			natatatatatatatatatatatatatatatatata				
	V Contracts/Agree	ments		Nato Statuc	Effective	Termination	Polatod
	Contract/Agreem	ent Type	Status	Changed	Date	Date	Parties
	Direct Authorization	Agreement	Active	04/01/1978	04/01/1978	Direct Author	ization Credit Union
	Direct Authorization	Agreement	Work In Progress	06/15/2011	04/01/1079	Direct Author	ization Credit Union
	Direct Authorization	Agreement	Active	01/01/19/0	0 //01/15/0	Direct Author	ization create onion
	Direct Authorization	n Agreement	Active	04/01/1978	04/01/1978	Direct Author	ization Credit Union

Select the Agreements local navigation tab.
The Agreements page displays.

S my CalPERS Home Profile Report Summary Agreements	kip to: Content Footer V	Velcome Ronald other Organizat	I Customize ions	Help Contact l	Js CalPERS O	n-Line Log out	May 26, 2011
Common Tasks	Agreements Add New Agreement Type Direct Authorization Agreement Direct Authorization Agreement	Status Active Active Active Active Active Active	Benefit Provided By 02/29/1988 03/01/1989 02/29/1988 02/29/1988 02/29/1988 02/29/1988	Effective Date 02/29/1988 03/01/1989 02/29/1988 02/29/1988 02/29/1988	Termination Date	Related Parties	
	Direct Authorization Agreement Direct Authorization Agreement	Terminated Terminated	05/31/1995 04/30/2001	02/29/1988 01/01/1995	05/31/1995 04/30/2001	WellbeingLife and Insurance The Personal1 Insu	Accident rance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column within the Agreement section for the agreement and organization for which you would like to sign the Hold Harmless Agreement.



The Direct Authorization Deductions page displays.

Select the **Sign Agreement** link to the right of the Date Hold Harmless Agreement Signed within the Direct Authorization Deductions section.

The Hold Harmless Agreement page displays.

S	xip to: Content Footer Welcome George Customize Help Contact Us CalPERS On-Line Log out June 15, 2011						
my CalPERS							
Home Profile Repo	rting Person Information Other Organizations						
Summary Agreement							
Common Tasks 🔕	Name: Direct Authorization Credit CalPERS ID: 4499089095						
	Union *Required Fields						
	AGREEMENT RELATING TO DEDUCTIONS FOR "Credit Union Deduction"						
	Direct Authorization Credit Un., hereinarter reterred to as Sponsor requests that the Executive Officer approve, as authorized in Section S81 Title 2, California Administrative Code, the filing directly with said Sponsor of authorizations for retirement allowance deductions of dues for the Sponsor charges under Section 21264, Government Code. In consideration of such approval and of forbearance by the Public Employees' Retirement System at the request of the Sponsor of the Board's right to require a waiver from retired persons of any liability for inadvertence or error as a condition of making such deductions and of benefits accruing to the Sponsor as a result of such forbearance, the Sponsor hereby agrees:						
	1. To supply to the Board statements, in such forms as the Executive Officer may prescribe, of deductions specified in authorizations received by it.						
	2. To save the State of California, Board of Administration, the Public Employees' Retirement System and its employees harmless from any liability for any errors in transmitting such dues, or charges except for liability to the Sponsor for money actually withheld but not transmitted.						
	3. To keep all authorizations received by it available for inspection by authorized representatives of the Board.						
	The Sponsor further agrees that any amounts which have been deducted and paid to the Sponsor and which are refundable under the plan because of the death of a retired person shall be refunded to the Board for distribution under the Public Employees' Retirement Law.						
	This agreement applies to authorization for deductions from retirement allowance of retirees who are members of the Direct Authorization Credit Union.						
	This agreement applies to the California Public Employees' Retirement System program.						
	By checking this box and clicking the Sign Now button, I am agreeing to conduct business electronically with the State of California and the California Public Retirement System on 06/07/2011 .						
	* I understand that transactions and/or signatures in records may not be denied legal effect solely because they are conducted, executed, or prepared in electronic form, and that if a law requires a record or signature to be in writing an electronic record or signature satisfies that requirement.						
	() a-Sianatura						
	You Are Not Required to Complete This Transaction Electronically						
	If you <u>do not</u> wish to complete this transaction electronically, please call the CalPERS Customer Contact Center at 1-888- CalPERS (1-888-225-7377) for assistance. The TTY - For Speech & Hearing Impaired number is (916) 795-3240.						
	Electronic Signature Agreement						
	You may complete this transaction electronically by selecting the "Sign Now" button which appears on your computer screen.						
	By completing this transaction electronically, you acknowledge and agree that:						
	(1) This transaction will be conducted by electronic means in accordance with the federal Electronic Signatures in Global and National Commerce Act (E-Sign), 15 U.S.C.A. sections 7001-7031 and the Uniform Electronic Transactions Act, California Civil Code sections 1633.1 to 1633.17;						
	(2) You have read and understand the terms and conditions regarding this transaction;						
	(3) You accept the terms and conditions of this Electronic Signature Agreement and the above terms and conditions regarding this transaction; and						
	(4) Completion of this transaction electronically shall have the same effect as if you signed your name in ink on a piece of paper to accomplish the transaction and CalPERS will store by electronic means an electronic record of this transaction.						
	* I have read and agree to the Electronic Signature Agreement above.						
	Sign Now						

Review the information within the Hold Harmless Agreement section and select the checkbox to the left of the statement "I understand that transactions and/or signatures in records may not be denied legal effect solely because they are conducted, executed, or prepared in electronic form, and that if a law requires a record or signature to be in writing an electronic record or signature satisfies that requirement." Review the information within the e-Signature section and select the checkbox to the left of the statement "I have read and agree to the Electronic Signature Agreement above." Select the **Sign Now** button.

The Date Hold Harmless Agreement Signed displays within the Direct Authorization Deductions section. You can view the agreement at any time by selecting the **View Hold Harmless Agreement** link.

	Skip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out May 26, 2011
my CalPERS	6
Home Profile Rep	sorting Person Information Other Organizations
Summary Agreemer	hts
Common Tasks 🔇	*Required Fields
	${f \widehat{v}}$ Direct Authorization Deductions
	Direct Authorization Information
	Agreement ID: 1000001557
	Program: California Public
	System
	Agreement Status: Pending
	Deduction Type: Credit Union Deduction
	Does this agreement provide for continuation to No
	beneficiaries and/or survivors who continue
	Will the deductions be managed by No
	a Third Party Administrator (TPA)?
	Does the contract between your Organization No
	and your Carrier allow for the continuation of
	coverage into retirement?
	Deductions for this agreement?
	Date Hold Harmless Agreement Signed: 05/26/2011 View Hold Harmless Agreement
	Diract Authorization Daymont Datails
	Which organization should receive the deduction payments?:*
	C Sporter
	Preferred Method of Payment: Check
	Check Payable Name: Direct Authorization Organization
	Address: 49 APPLE ST
	SACRAMENTO,
	99014 - 0000
	⑦ Available Actions
	Select an Available 💿 Add Third Party Administrator
	Action:* 💿 Replace Third Party Administrator
	Remove Third Party Administrator
	Terminate Agreement
	Submit

Manage Relationship with a Third Party Administrator

Add a third party administrator to an existing agreement

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Log In page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to my[CalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS	kip to: Conten	t Footer '	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Lir	ne Log out	May 26, 2011
Home Profile Repor	ting Person I	Information	Other Organizations				
Common Tacks							
	💿 My Cases			View	More Actions»		
Menu 🖸	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							

Select the **Profile** global navigation tab.

The Business Partner Profile page displays.

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my CalPERS							
Home Profile Repor	ting Person Information	Other Organiza	tions				
Summary Agreements	3						
Common Tasks 🛛 🔕							
Menu 💿	Profile						
Summary							Request Update
Contacts	CalPERS ID:	4499089095			Status	s: Active	
	Federal Tax ID:	1234567-89			Name	e: Direct Auth Organizatio	orization n Credit Union
	Category:	on					
	Addresses 49 Mailing Street, Sacramento			A		49 Mailing S	Street, Sacramento, CA
	Physical: 84567			Mailing: 84567			
	Communication Inform	nation ation: Email					
	Primary E	mail: robert@da	ocu.org	Primary F	Phone Numbe	r: 916-789-11	11
				-			
	Contacts Add New						View More Actions»
	Contact Type Concern	Contact Type Dei	tail	Program	Name Robert Dillman		Phone Number
		nam		CalPERS	KUDER DIIIIIaii		
	💿 Business Relationshi	DS Add New					
	Name	CalPI	RS ID	Progra	im s	Service	Status
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	Contracts/Agreemen	ts	Date Status	Effective	Termination	Pelated	
	Contract/Agreement	Type Status	Changed	Date	Date	Parties	
	Direct Authorization Ag	eement Active	04/01/1978	04/01/1978		1.00	

Select the Agreements local navigation tab.

The Agreements page displays.

my CalPERS	kip to: Content Footer V	/elcome Ronald	d Customize	Help Contact (Js CalPERS O	n-Line Log out	May 26, 2011
Home Profile Repor	ting Person Information O	ther Organizat	tions				
Summary Agreements							
Common Tasks 🛛 🔕	• Agreements Add New						
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Insurance	Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insu	urance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column within the Agreement section to which you would like to add a third party administrator.

	kip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out I	May 26, 2011
Home Profile Repor	rting Person Information Other Organizations	
Summary Agreements		
Common Tasks 🛛 🔕	*F	Required Fields
	${f \widehat{f v}}$ Direct Authorization Deductions	
	Direct Authorization Information	
	Program: CalPERS	
	Deduction Type: Association Dues	here bla
	a Third Party Administrator (TP/	A)?
	Third Party Administrator Information	-
	Third Party Administrator Name:* <u>Select</u> Fede	eral Tax ID:
	Which organization should receive the deduction payments?:* Sponsor 	
	Save & Continue	

To add a third party administrator to an existing agreement, select the "Third Party Administrator Name" **Select** link in the Third Party Administrator Information area within the Direct Authorization Deductions section.

The Organization Search page displays.

Skip to:	Content Footer Welcome William Customize Help Contact Us CalPERS On-Line Log out June 15, 2011,
my CalPERS	
Home Profile Reporting	Person Information Other Organizations
Organization Search	
If Exact Match for Name is lef	ft unchecked, the system will return results with a partial match.
Name:	Exact Match
Federal Tax ID:	
CalPERS ID:	
Search	

Enter the name of the Third Party Administrator organization in the **Name** field and then select the **Search** button.

The results of the organization search are displayed within the Search Results section.

	Skip to:	Content Footer V	Velcome Ronald	Customize Help	Contact Us	CalPERS On-Line	Log out	May 26, 2011
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Llong	Profile Reporting	Dorson Information	ther Organizatio	172				
Home	Profile Reporting		rther Organizatio					
💿 Org	anization Search							
If Exac	t Match for Name is lef	ft unchecked, the syst	em will return re	sults with a partial	match.			
	Name:	Sample TPA	Exact Mate	h				
	Federal Tax ID:							
	CalPERS ID:	· · · · · ·						
Search	1							
💿 Sea	rch Results Add New							
	Name Sample TPA 1					1		
0	Sample TPA 1			40 CHARLES BLVD, C	CHICAGO, IL 008.			
\odot	Sample TPA 2			5155 CHUPCAN PLA	CE CARPINTER	IA, CA 93013-		
\odot	Sample TPA 11			444E A STREET DO	OWAGIAC, MI 4	9047-0000		
0	Sample TPA 22			458 BELMONT PLA	CE CLAYTON,	CA 94517-0000		
O	Sample TPA 111			6 N DIVISION ST LOU	UIS, MO 54756			
Select								

Select the radio button associated with the appropriate organization (**Sample TPA 11** in this example) and then the **Select** button.

The *Direct Authorization Deductions* page displays the Third Party Administrator Name, "Sample TPA 11".

my CalPERS	Skip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out May 26	, 2011
Home Profile Repo	orting Person Information Other Organizations	
Summary Agreements		
Common Tasks 🛛 🔕	*Required	I Fields
	Direct Authorization Deductions	
	Direct Authorization Information	
	Program: CalPERS	
	Deduction Type: Association Dues	
	a Third Party Administrator (TPA)?	
	Third Party Administrator Information	
	Third Party Administrator Name:* Sample TPA 11 Select Federal Tax	c ID:
	Which organization should receive the deduction payments?:* Sponsor Third Party Administrator 	
	Save & Continue	

Select the **Third Party Administrator** radio button in the Third Party Administrator Information area within the Direct Authorization Payment Details section to indicate that the newly added third party administrator will be the organization that will receive the deduction payments. Select the **Save & Continue** button within the Direct Authorization Deductions section.

👽 Direct Authorization Payment Details	
Which organization should receive the deduction payments?:* Sponsor Third Party Administrator 	
Preferred Method of Payment: Check Check Payable Name: Direct Authorization Organization Address: 49 APPLE ST SACRAMENTO, 95814 - 0000	
Available Actions	
Select an Available Add Third Party Administrator Action:* Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement	

Select the **Add Third Party Administrator** radio button within the Available Actions section. The **Effective Date** field appears within the Available Actions section once one of the radio buttons is selected.

• Available Actions	
Select an Available Action:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement
	Effective Date: p6/01/2011

Submit

Enter the effective date of the business partner relationship with your organization"s third party administrator in the **Effective Date** field, or select the calendar icon to select the date and select the **Submit** button.

The confirmation message appears stating "Thank you for modifying your agreement. No further action is required at this time." Note that the Third Party Administrator has been updated as the organization which should receive the deduction payments within the Direct Authorization Payment Details section.



Replace the third party administrator for an existing agreement

You may add, replace or remove a third party administrator. Remember that carriers or third party administrators involved in direct authorization agreements with my|CalPERS must sign hold harmless agreements for each new direct authorization agreement.

When a business partner makes modifications to a direct authorization agreement, the effective date must fall within a specific range to be enacted on the desired effective date.

Generally, for a modification to be effective for the beginning of the next calendar month, the change must be submitted prior to the end of the current business month. For example, if December 15 is the end of the business month and a modification was made on December 11, then the modification would be effective on the first of January, the following calendar month.

If the effective date does not fall into the specific date range, my|CalPERS adjusts the effective date accordingly.



Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.

Select the Business Partner radio button and then the Continue button.

The *Business Partner Login* page displays. Your organization[®]'s system access administrator must first establish your username and password and provide this

login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

myCalPERS	Help Contact US Califers Off-Line May 20, 20
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. This is a welcome message for business partner. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password:

Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

Skip to: Content Footer Welcome Bobbie Customize Help Contact Us CalPERS On-Line Log out May 26, 2011 My CalPERS							
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks				View	More Actions»		
Menu 💿	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

S	kip to: Content Footer	Welcome Bobbi	e Customize	Help Cont	tact Us CalPE	RS On-Line	Log out May 26, 2011
my CalPERS							
Home Profile Repo	rting Person Information	Other Organiza	tions				
Summary Agreements	3						
Common Tasks 🛛 🔕							
Menu 💿	Profile						
Summary							<u>Request Update</u>
Contacts	CalPERS ID:	4499089095			Status	: Active	
	Federal Tax ID:	1234567-89			Name	Direct Author Organization	orization Credit Union
	Category:	Direct Authorizat	ion Organizatio	on		organization	
	Addresses	49 Mailing Street.	Sacramento, C	A		49 Mailing S	treet. Sacramento. CA
	Physical:	84567	,-		Mailing	84567	,
	Communication Inform	ation					
	Preferred Communica Primary E	mail: robert@da	ocu.org	Primary F	Phone Numbe	r: 916-789-111	1
		_					
	Contacts Add New						View More Actions»
	Contact Type C	ontact Type Del	ail I	Program	Name		Phone Number
	<u>General</u> M	ain		CalPERS	Robert Dillman		
	👽 Business Relationship	S Add New					
	Name	CalPI	RS ID	Progra	m s	Service	Status
	No results found.					rovided	
	Contracts/Agreement	5			T	0-1-4-1	
	Contract/Agreement 1	Type Status	Changed	Date	Date	Parties	
	Direct Authorization Agre	eement Active	04/01/1978	04/01/1978		1	

Select the Agreements local navigation tab.

The *Agreements List* page displays. Your organization"s direct authorization agreements display under the Agreement Type column within the Agreements section. The status of each agreement, effective dates and related parties may also be found in this section under the appropriate columns. Note that there are two terminated agreements on this screen, with the agreement termination dates displayed under the Termination Date column.

my CalPERS	kip to: Content Footer W	/elcome Ronald	l Customize	Help Contact (Js CalPERS O	n-Line Log out	May 26, 2011
Home Profile Repor	ting Person Information O	ther Organizat	ions				
Summary Agreements							
Common Tasks 🛛 🔕	O Agreements Add New						
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Agreement Type Status Benefit Provided By Effective Date Termination Date Related Parties Direct Authorization Agreement Active 02/29/1988 02/29/1988 02/29/1988 Direct Authorization Agreement Active 03/01/1989 03/01/1989 Direct Authorization Agreement Active 02/29/1988 02/29/1988 Direct Authorization Agreement Active 02/29/1988 02/29/1988 Direct Authorization Agreement Active 02/29/1988 02/29/1988						
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Insurance	Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insu	urance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column that is associated with the appropriate direct authorization agreement within the Agreement Type section.



The Direct Authorization Deductions page displays.

Select the **Replace Third Party Administrator** radio button within the Available Actions section.

• Available Actions	
Choose One:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement
	Effective Date:

Submit

The **Effective Date** field appears within the Available Actions section once one of the radio buttons is selected.

Available Actions	
Select an Available Action:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement
	Effective Date: p7/01/2011

Submit

Enter the date in the **Effective Date** field, or select the date by selecting the calendar icon and then select the **Submit** button.

The Direct Authorization Deductions section displays.

my CalPERS	Skip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out May ()	26, 2011
Home Profile Report	orting Person Information Other Organizations	
Common Tasks 🛛 🙆	*Requir	ed Fields
	Direct Authorization Deductions Direct Authorization Information Program: CalPERS Deduction Type: Association Dues Will the deductions be managed by M a Third Party Administrator (TPA)?	10
	Third Party Administrator Information Third Party Administrator Name:* Sample TPA 11 Select Federal T	ax ID:
	Which organization should receive the deduction payments?:* Sponsor Third Party Administrator 	
	Save & Continue	

Select the **Third Party Administrator** radio button and then the **Save & Continue** button within the Direct Authorization Deductions section.

The Organization Search page displays.

Skip to: (Content Footer Welcome William Customize Help Contact Us CalPERS On-Line Log out June 15, 2011
my CalPERS	
Home Profile Reporting	Person Information Other Organizations
Organization Search	
If Exact Match for Name is lef	ft unchecked, the system will return results with a partial match.
Name:	Exact Match
Federal Tax ID:	
CalPERS ID:	
Search	

Enter the name of the third party administrator organization in the **Name** field and select the **Search** button within the Organization Search section.

The page refreshes and the results ("Sample TPAs" in this example) are displayed in the Search Results section.

mv	skip to: CalPFRS	Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out	May 26, 2011
	Profile Poporting	Person Information Other Organizations	
Home	Prome Reporting		
U Org	janization Search t Match for Name is lef	it unchecked, the system will return results with a partial match.	
	Name:	Sample TPA Exact Match	
	Federal Tax ID:	· · · ·	
	CalPERS ID:		
Search	١		
💿 Sea	arch Results Add New		
	<u>Name</u>	Mailing Address	
\odot	Sample TPA 1	48 CHARLES BLVD, CHICAGO, IL 60811	
\odot	Sample TPA 2	5155 CHUPCAN PLACE CARPINTERIA, CA 93013-	
\odot	Sample TPA 11	444E A STREET DOWAGIAC, MI 49047-0000	
0	Sample TPA 22	458 BELMONT PLACE CLAYTON, CA 94517-0000	
0	Sample TPA 111	6 N DIVISION ST LOUIS, MO 54756	
Select			

Select the radio button associated with the appropriate third party administrator (**Sample TPA 11** in this example) and then the **Select** button.

The Direct Authorization Deductions section displays "Sample TPA 11" in the **Third Party Administrator Name** field within the Third Party Administrator Information subsection.

S	Skip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out M	lay 26, 2011
my CalPERS		
Home Profile Repo	rting Person Information Other Organizations	
Summary Agreement	s	
Common Tasks 🛛 🙆	*R	equired Fields
	Direct Authorization Deductions	
	Direct Authorization Information	
	Program: CalPERS	
	Deduction Type: Association Dues Will the deductions be managed	by No.
	a Third Party Administrator (TPA	A)?
	Third Party Administrator Information	
	Third Party Administrator Name:* Sample TPA 11 Select Feder	ral Tax ID:
	Which organization should receive the deduction payments?:*	
	Third Party Administrator	
	Save & Continue	

Select the Third Party Administrator radio button associated with the question Which organization should receive the deduction payments? and then select the **Save & Continue** button.



The Direct Authorization Deduction Payment Details page displays.

The confirmation message appears stating "Thank you for modifying your agreement. No further action is required at this time."

At the completion of this activity a direct authorization termination notification letter is sent to the sponsor and the previous third party administrator notifying them of the termination and effective date of the direct authorization agreement relationship. A contract agreement qualifications approval notice is sent to the sponsor and the new third party administrator notifying them of the direct authorization agreement approval.

When a direct authorization agreement makes a modification involving a third party administrator, my|CalPERS disables and enables deduction submission for

the previous and new third party administrator or payment recipient, updates all relationships associated with the direct authorization agreement, and reassigns pending deductions to the new third party administrator or payment recipient.

When a new third party administrator is added to a direct authorization agreement, a contract agreement qualifications approval notice is sent to the sponsor and the new third party administrator notifying them of the direct authorization agreement approval.

If the removed third party administrator was the payment recipient in a direct authorization agreement with an existing carrier, my|CalPERS then selects the carrier to receive payments.

Also, when a third party administrator is removed, a direct authorization termination notification is sent to the sponsor and the third party administrator notifying them of the termination and effective date of the direct authorization agreement relationship.

Remove a third party administrator from an existing agreement

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCaIPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login
More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	* Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS	ikip to: Conter	nt Footer N	Velcome Bobbie Customize	Help Contact Us	CalPERS On-Lir	ne Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks 🛛 🔕		5		View	More Actions»		
Menu 👽	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

S	kip to: Content Footer We	elcome Bobbie Customize	Help Contact Us	CalPERS On-Line Log o	out May 26, 2011
my CalPERS					
Home Profile Repo	rting Person Information Otl	ner Organizations			
Summary Agreement	5				
Common Tasks 🛛 🔕					
Menu 💿	Profile				
Summary					Request Update
Contacts	CalPERS ID: 4499	089095		Status: Active	
	Federal Tax ID: 1234	567-89		Name: Direct Authorizati Organization Cred	ion lit Union
Category: Direct Authorization Organization					
	Addresses 49 M	lailing Street, Sacramento, C	A	49 Mailing Street	Sacramento, CA
	Physical: 8456	57		Mailing: 84567	
	Communication Information	n Empil			
	Preferred Communication Primary Email	robert@daocu.org	Primary Phone	Number: 916-789-1111	
	Contacts Add New			١	/iew More Actions»
	Contact Type Conta	ct Type Detail	Program Nam	e Phor	ne Number
	<u>General</u> Main		CalPERS Robert	Diliman	
	💿 Business Relationships 🌆	ld New			
	Name	CalPERS ID	Program	Service	Status
	No results found.			Provided	
	Contracts/Agreements	Data Status	Effoctivo Term	ination Polatod	
	Contract/Agreement Type	Status Changed	Date Date	Parties	
	Direct Authorization Agreeme	nt Active 04/01/1978	04/01/1978	1. Sec. 1. Sec	

Select the Agreements local navigation tab.

The *Agreements List* page displays. Your organization"s direct authorization agreements display under the Agreement Type column within the Agreements section. The status of each agreement, effective dates and related parties may also be found in this section under the appropriate columns. Note that there are two terminated agreements on this screen, with the agreement termination dates displayed under the Termination Date column.

my CalPERS	kip to: Content Footer W	elcome Ronald	1 Customize	Help Contact (Js CalPERS O	n-Line Log out	May 26, 2011
Home Profile Repor	ting Person Information Of	ther Organizat	ions				
Summary Agreements	5						
Common Tasks 🛛 🔕	• Agreements Add New						
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Insurance	l Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Ins	urance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column that is associated with the appropriate direct authorization agreement within the Agreements section.



The Direct Authorization Deductions page displays.

Submit

Select the **Remove Third Party Administrator** radio button within the Available Actions section. The **Effective Date** field appears within the Available Actions section once one of the radio buttons is selected. Enter the date in the **Effective Date** field, or select the calendar icon to select the date, and then select the **Submit** button.

Effective Date: 06/01/2011

The confirmation message appears stating "Thank you for modifying your agreement. No action is required at this time. A CalPERS Contract Analyst will review the submitted information and/or documentation."

S	kip to: Content Footer We	lcome Ronald	Customize	Help Contact U	Js CalPERS OI	n-Line Log out May 26, 2011
my CalPERS						
Liomo Profile Ropor			000			
Home Profile Repor	ung Person Information Our	ier Organizat	ions			
Summary Agreements						
Common Tasks 🔕	Thank you for modifying your submitted information and/or	agreement. documentat	No action is re ion.	quired at this tim	e. A CalPERS C	ontract Analyst will review the
	O Agreements Add New					
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Accident Insurance
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insurance Group

At the completion of this activity a direct authorization termination notification letter is sent to the sponsor and the removed third party administrator notifying them of the third party administrator termination effective date of the direct authorization agreement relationship.

When a direct authorization agreement makes a modification involving a third party administrator, my|CalPERS disables and enables deduction submission for the previous and new third party administrator or payment recipient (if applicable), updates all relationships associated with the direct authorization agreement, and reassigns pending deductions to the new third party administrator or payment recipient (if applicable).

If applicable, when a new third party administrator is added to a direct authorization agreement, a contract agreement qualifications approval notice is sent to the sponsor and the new third party administrator notifying them of the direct authorization agreement approval.

If the removed third party administrator was the payment recipient in a direct authorization agreement with an existing carrier, my|CalPERS then selects the carrier (if applicable) to receive payments.

Also, when a third party administrator is removed, a direct authorization termination notification is sent to the sponsor and the third party administrator

notifying them of the termination and effective date of the direct authorization agreement relationship.

Carrier "Rollover" Terminate Agreement Scenario

Sponsoring business partners can change carriers one of two ways:

- 1. Terminate the existing direct authorization agreement and submit a new direct authorization agreement with the new approved carrier, or
- 2. Replace the current carrier with a carrier that the sponsoring business partner has already contracted with in another existing direct authorization agreement.

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



On the *Login* page select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my	Help Contact Us CalPERS On-Line May 26, 201
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password:
	Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the **Accept** button.

The my|CalPERS *Home* page displays.

my CalPERS	ikip to: Conten	t Footer V	Velcome Bobbie	Customize	Help Contact U	s CalPERS C	n-Line Log out	May 26, 2011
Home Profile Repo	rting Person	Information C	ther Organizatio	ns				
My Home								
Common Tasks 🛛 🔕		:			Viev	v More Actio	15.2	
Menu 💿	Case ID	Case Title	Case Type		Program	Status		
Person Search	731879		Initiate DA A	greement		Closed		
Change Password								
Change Challenge Questions								

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

	Skip to: Content Footer W	/elcome Bobbie Customize	e Help Contact Us (CalPERS On-Line Lo	g out May 26, 2011
Home Profile Repo	rting Person Information O	ther Organizations			
Summary Agreement	S				
Common Tasks 🛛 🔕					
Menu 💿	Profile				
Summary Contacts	CalPERS ID: 269	7553833	S	tatus: Active	Request Update
	Category: Dire	4307-83 ect Authorization Organizat	ion	Organization	ation
	Addresses 49 Physical: 845	Mailing Street, Sacramento, (567	CA Ma	49 Mailing Stre ailing: 84567	eet, Sacramento, CA
	Communication Information Preferred Communication Primary Emai	on n: Email il: robert@daocu.org	Primary Phone Nu	mber: 916-789-1111	
	Contacts Add New Contact Type Cont	act Type Detail	Program Name	Ph	view More Actions» ione Number
	General Main		CalPERS Robert Dil	lman	
	💿 Business Relationships 📕	Add New			
	Name	CalPERS ID	Program	Service Provided	Status
	No results found.				
	• Contracts/Agreements				
	Contract/Agreement Typ	e Status Date Status Changed	Effective Termina Date Date	tion Related Parties	
	Direct Authorization Agreem	ent Active 04/01/1978	04/01/1978		

Select the Agreements local navigation tab.

The Agreements List page displays.

my CalPERS	kip to: Content Footer W	elcome Ronald	d Customize	Help Contact (Js CalPERS O	n-Line Log out I	May 26, 2011
Home Profile Repor	ting Person Information 01	her Organizat:	ions				
Common Tasks 🛛 🙆	Agreements Add New						
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Insurance	Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insu	ance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column associated with the agreement that you would like to change carriers for within the Agreements section.

The Agreement Details page displays.



Select the **Terminate Agreement** radio button within the Available Actions section.

The **Effective Date** and **Termination Reason** fields appear in the Available Actions section once the **Terminate Agreement** radio button is selected.

• Available Actions						
Select an Available Action:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement 					
	Effective Date: 07/01/2011					
	Termination Reason: Changing Carriers					
	New Carrier					

Submit

Enter the agreement termination effective date in the **Effective Date** field, or select the calendar icon to select the date. Select "Changing Carriers" from the **Termination Reason** dropdown. Select "New Carrier" from the **New Carrier** dropdown. Select the **Submit** button.

The *Agreements List* page displays with the confirmation message "You have made the decision to terminate your agreement. A notification will be sent to you once the termination is effective. No further action is needed on your part."

my CalPERS	kip to: Content Footer Welco	me Ronald •	Customize He	lp Contact Us	CalPERS On-L	ine Log out May 26, 2011
Home Profile Report	rting Person Information Other	Organizations	5			
Common Tasks O You have made a decision to terminate your agreement. A notification will be sent to you once this termination is effective. No further action is needed on your part.						
	Agreement Type	Status	Benefit Provided Bv	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		New Carrier
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		Carrier A
	SIP - 457 Agreement	Active	12/28/1999	12/28/1999		
	Social Security Agreement (218)	Active	03/31/1957	03/31/1957		
	Direct Authorization Agreement	Terminated	07/01/2011	02/29/1988	07/01/2011	Old Carrier

A direct authorization termination notification letter is sent to the sponsor and the previous carrier notifying them of the termination and the termination effective date of the direct authorization agreement relationship.

For direct authorization agreements that have changed carriers, all pending deductions are rolled to the new agreement.

For direct authorization agreements that have been terminated, all pending deductions are cancelled.

Terminate an Agreement

When a direct authorization agreement is terminated, my|CalPERS disables deduction submission and relationships associated with the agreement, and creates a PeopleSoft receivable to collect remaining annual billing fees through the termination date, if a business partner is terminating their last remaining direct authorization agreement. If the business partner terminating the agreement has other existing agreements, the receivable is not created until the annual process is run.

my|CalPERS cancels future deductions if the agreement is terminated by the business partner and they have not selected a new carrier. my|CalPERS generates and sends an invoice for outstanding payments if the business partner is terminating their last remaining agreement. The invoice is not sent out if the business partner has additional existing agreements.

When a business partner terminates a direct authorization agreement, the effective date must fall within a specific range to be enacted on the desired effective date.

Generally, for a termination to be effective for the beginning of the next calendar month, the change must be submitted prior to the end of the current business month. For example, if December 15 is the end of the business month and a modification was made on December 11, then the modification would be effective on the first of January, the following calendar month.

If the effective date does not fall into the specific date range, my|CalPERS adjusts the effective date to be in accordance with the business rules.

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.

my|CalPERS Direct Authorization Vendor User Guide



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner *Login* page displays. Your organization's system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.
my|CalPERS Direct Authorization Vendor User Guide



Enter your username and password and select the **Log In** button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

my CalPERS	kip to: Conten	t Footer N	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Lir	ne Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks				View	More Actions»		
Menu 💿	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge							

Select the **Profile** global navigation tab.

The Business Partner Profile Summary page displays.

S	kip to: Content Footer	Welcome Bobbi	e Customize	Help Cont	tact Us CalPE	RS On-Line	Log out May 26, 2011
my CalPERS							
Home Profile Repo	rting Person Information	Other Organiza	tions				
Summary Agreements	3						
Common Tasks 🛛 🔕							
Menu 💿	Profile						
Summary							<u>Request Update</u>
Contacts	CalPERS ID:	4499089095			Status	: Active	
	Federal Tax ID:	1234567-89			Name	Direct Author Organization	orization Credit Union
	Category:	Direct Authorizat	ion Organizatio	on		organization	
	Addresses	49 Mailing Street.	Sacramento, C	A		49 Mailing S	treet. Sacramento. CA
	Physical:	84567	,-		Mailing	84567	,
	Communication Inform	ation					
	Preferred Communica Primary E	mail: robert@da	ocu.org	Primary F	Phone Numbe	r: 916-789-111	1
		_					
	Contacts Add New						View More Actions»
	Contact Type C	ontact Type Del	ail I	Program	Name		Phone Number
	<u>General</u> M	ain		CalPERS	Robert Dillman		
	👽 Business Relationship	S Add New					
	Name	CalPI	RS ID	Progra	m s	Service	Status
	No results found.					rovided	
	Contracts/Agreement	5			T	0-1-4-1	
	Contract/Agreement 1	Type Status	Changed	Date	Date	Parties	
	Direct Authorization Agre	eement Active	04/01/1978	04/01/1978		1	

Select the Agreements local navigation tab.

The *Agreements List* page displays. Your organization's direct authorization agreements display under the Agreement Type column within the Agreements section. The status of each agreement, effective dates and related parties may also be found in this section under the appropriate columns. Note that there are two terminated agreements already on this screen, with the agreement termination dates displayed under the Termination Date column.

my CalPERS	kip to: Content Footer W	/elcome Ronald	l Customize	Help Contact (Js CalPERS O	n-Line Log out	May 26, 2011
Home Profile Repor	rting Person Information O	ther Organizat	ions				
Summary Agreements	5						
Common Tasks 🛛 🔕	• Agreements Add New						
	Agreement Type	Status	Benefit Provided By	Effective Date	Termination Date	Related Parties	
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	03/01/1989	03/01/1989			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988			
	Direct Authorization Agreement	Terminated	05/31/1995	02/29/1988	05/31/1995	WellbeingLife and Insurance	l Accident
	Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Ins	urance Group

Select the **Direct Authorization Agreement** link under the Agreement Type column that is associated with the appropriate direct authorization agreement that you would like to terminate within the Agreements section.



The Direct Authorization Deductions page displays.

Select the Terminate Agreement radio button in the Available Actions section.

The **Effective Date** and **Termination Reason** fields appear in the Available Actions section once the **Terminate Agreement** radio button is selected.

• Available Actions										
Select an Available Action:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement 									
	Effective Date: 07/31/2011									
	Termination Reason: Business Partner not Qualified									
Submit										

Enter the agreement termination effective date in the **Effective Date** field, or select the calendar icon to select the date, and select the reason for the

agreement termination from the **Termination Reason** dropdown ("Business Partner Not Qualified" in this example) and then select the **Submit** button.

The following are examples of additional reasons that may be selected from the **Termination Reason** dropdown:

Termination Reason: Insufficient Documentation

• Available Actions	
Select an Available Action:*	 Add Third Party Administrator Replace Third Party Administrator Remove Third Party Administrator Terminate Agreement
	Effective Date: 07/31/2011

Submit

Termination Reason: Other

The **Please Explain** text field appears when Termination Reason "Other" is selected.

💿 Available Actions		
Choose One:* Terminate Agree 	ement	
Effective D	ate: 05/01/2011	
Termination Reason:	Other -	
Please Explain:	The sponsor is ending the agreement.	A

Submit

Enter the reason for the termination ("The sponsor is ending the agreement" in this example) and then select the **Submit** button.

The *Agreements List* page displays with the confirmation message "You have made a decision to terminate your agreement. A notification will be sent to you once this termination is effective. No further action is needed on your part." Note that the termination effective date is displayed under the Termination Date column within the Agreements section.

my CalPERS	kip to: Content Footer Welco	me Ronald •	Customize He	lp Contact Us	CalPERS On-L	ine Log out May 26, 2011
Home Profile Repo	rting Person Information Other	Organizations	5			
Common Tasks 🕢	You have made a decision to ter effective. No further action is no	rminate your eeded on you	agreement. A r ır part.	notification will be	e sent to you o	nce this termination is
	Agreement Type	Status	Benefit Provided Bv	Effective Date	Termination Date	Related Parties
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		New Carrier
	Direct Authorization Agreement	Active	02/29/1988	02/29/1988		Carrier A
	SIP - 457 Agreement	Active	12/28/1999	12/28/1999		
	Social Security Agreement (218)	Active	03/31/1957	03/31/1957		
	Direct Authorization Agreement	Terminated	07/01/2011	02/29/1988	07/01/2011	Old Carrier

A direct authorization termination notification letter is sent to the sponsor and the previous third party administrator notifying them of the termination and the termination effective date of the direct authorization agreement relationship. The deductions associated with the terminated direct authorization agreement are canceled.

Part 2: Direct Authorization Agreement Deduction Processing

Processing Deductions

Add a new deduction

You can search, create and modify participant deduction processing reports and deduction records.

A deduction processing report groups the details about direct authorization deductions and general information about the retirees who have authorized for deductions to be taken from their retirement benefit payment. These reports process at the end of each business month resulting in deductions from the retirees" benefit payments.

Within my|CalPERS, you can create new deduction processing reports, modify current deduction processing reports, or view historical processed reports. Only the business partner receiving the deduction payments is allowed to submit direct authorization deductions to restrict duplicate deduction submission.



Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.

Select the Business Partner radio button and then the Continue button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.

my CalPERS	Help Contact Us CalPERS On-Line May 26, 201
Welcome to my[CalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

my CalPERS	Skip to: Conter	nt Footer	Welcome Bobbie Cu	ustomize Help	Contact Us	CalPERS On-Line	e Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations]				
му ноте								
Common Tasks 🛛 🔕		-			View	More Actions		
Menu 🕡		, Case Title	Case Type		Program	Status		
Person Search	731879	Cube Inte	Initiate DA Agre	ement	rogram	Closed		
Change Password								
Change Challenge Questions								

Select the **Reporting** global navigation tab.

The Create or Edit Report section displays. Note that the most recently submitted reports display in the Direct Authorization Incoming Reports section.

	Skip to: Content Footer Weld	come Mary Custo	mize Help Coi	ntact Us (CalPERS On-Line Log	out May 26, 2011
my CalPERS						
Home Profile Repo	rting Person Information Other	Organizations				
Manage Reports						
Common Tasks	Name: Direct Authorization	CalPERS ID:	5233134842			
Menu 👽	Organization					*Required Fields
Preprocessing Area	😨 Create or Edit Report					····
File opload history	Method:* Add Direct Authorization [Deduction Information	Continue			
					naisisisisisisisisisisisisisisisisisisis	
	Work On Existing Payroll Rep Earned	orts Period /	tatus Donord	tTupo	Duo Dato Submi	t Dato Test
	Adjustr No results found	ient Date	tatus kepon	стуре	Due Date Subini	Report
	No results found.					Display
	Oirect Authorization Incoming	Reports				View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	31	31
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	3104	3104
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	1451	1451
	Direct Authorization	Manually enter	04/08/2011	04/2011	457	457
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	3859	3859

To edit the report by adding deduction request records, select "Add Direct Authorization Deduction Information" from the **Method** dropdown and then select the **Continue** button within the Create or Edit Report section.

The Create Direct Authorization Report section displays. Your organization's agreements will be listed within the Direct Authorization Agreements section. The Direct Authorization Organization in this example has eight agreements.

	Skip t	o: Content I	Footer Welco	ome Mary Custo	mize Help Contact	Us CalPERS On-Lin	e Log out 🛛 🛚	lay 26, 2011
my CalPERS								
Home Profile Repor	ting	Person Inform	ation Other C	Organizations				
Manage Reports	51			5				
Common Tasks 🛛 🔕	Nam	e: Direct Auth	orization	CalPERS ID:	5233134842			
Menu 💿		Organizatio	in				*0	loquirod Fielde
Preprocessing Area		Traata Diract A	uthorization Ro	nort			K	equired friends
File Upload History		Submi	tter Name: Dir	ect Authorization C	rganization Delive	ery Consideration:*	Manually enter	in data 💌
		Busine	ss Month:* 06	/2011 👻				
		Direct Authoriz	ation Agreemen	its			Third	Effective.
		ID	Туре	Program	Sponsor	Carrier	Party Administrato	Date
	۲	1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/1991
	0	1000001240	DA Deduction Dental	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization	1	09/01/1990
	O	1000001250	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			04/01/1992
	0	1000001271	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			05/01/2000
	O	1000001273	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/2000
	0	1000001776	DA Deduction Vision	California Public Employees' Retirement System	Direct Authorization Organization			02/01/1998
	O	1000001362	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			08/01/2007
	٢	1000001535	Association Dues	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		07/01/1990
	Crea	te Report						

Select "Manually enter in data" from the **Delivery Consideration** dropdown and select the appropriate business month from the **Business Month** dropdown within the Create Direct Authorization Report section. In this example, we are creating a Direct Authorization Report for the June 2011 business month for the Direct Authorization Organization. Select the radio button associated with the appropriate agreement within the Direct Authorization Agreements section (Agreement ID "1000001768" in this example).

The Deductions Information page displays.

my CalPERS	Skip to: Conte	nt Footer W	elcome Mary Custon	nize Help Contact Us	CalPERS On-Lin	e Logout Ma	ay 26, 2011
Home Profile Repo	rting Person I	nformation Oth	er Organizations				
Manage Reports							
Common Tasks						*Re	quired Fields
Menu 👽	O Deduction	Information					
Preprocessing Area File Upload History	В	Submitter: Jsiness Month: (Direct Authorization Org 06/2011	ganization			
		Participant ID:	 CalPERS ID Social Security Nur 	nber			
		CalPERS ID*					
	Participant	Social Security					
	Deduc	tion Amount:*					
	💿 Direct Aut	horization Agree	ments				
	Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
	1000001768	Life Insurance Deduction	California Public Employees' Retireme System	Direct Authorization nt Organization			12/01/1991
	Save & Continu	save & Add An	other				

You can only use the persons Social Security number as the participant identifier when you are adding a new deduction for a participant. When you are updating the amount of a deduction, or deleting a deduction, you must use the CalPERS ID and the last four digits of their SSN.

If the **Social Security Number** radio button was selected, the field would display as the **Social Security Number** field, as shown in the example below. Also, the **Participant Social Security Number-4** field would not display as this would be redundant information. In this example, we selected the **CaIPERS ID** radio button. Note that the field below the radio button displays as the **CaIPERS ID** field and the **Participant Social Security Number-4** field displays.

my CalPERS	Skip to: Conter	nt Footer V	Velcome Mary Customi	ze Help Contact Us	CalPERS On-Line	e Logout Ma	ay 26, 2011
Home Profile Repo	rting Person In	nformation Oth	ner Organizations				
Manage Reports							
Common Tasks 🛛 🔕						*Re	quired Fields
Menu 💿	O Deduction	Information					
Preprocessing Area File Upload History	Bu	Submitter: siness Month:	Direct Authorization Orga 06/2011	nization			
	1	Participant ID:	 CalPERS ID Social Security Num 	ber			
		CalPERS ID*					
	Participant S	Social Security					
	Deduc	tion Amount:*					
	🛈 Direct Aut	horization Agree	ments				
	Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
	1000001768	Life Insurance Deduction	California Public Employees' Retiremen System	Direct Authorization t Organization			12/01/1991
	Save & Continu	e Save & Add Ar	nother				

Enter the individual's CalPERS ID in the **CalPERS ID** field, the last four-digits of the individual's Social Security number in the **Participant Social Security Number-4** field, and the amount of the deduction in the **Deduction Amount** field. Note that the red asterisks indicate that these are all required fields. Select the **Save & Continue** button if you are finished entering new deductions, or the **Save & Add Another** button if you want to enter more new deductions. Note that if you enter an erroneous CalPERS ID and Participant Social Security Number-4 combination, my|CalPERS displays the error message "A Participant does not exist in the system for the reported CalPERS ID and SSN combination. Verify and update your entry."

	Skip to: Conte	nt Footer V	Velcome Mary Custo	mize Help Cor	ntact Us CalP	ERS On-Lin	e Log out M	ay 26, 2011
my CalPERS								
Home Profile Repo	orting Person 1	Information Ot	her Organizations					
Manage Reports								
Common Tasks 🛛 🔕							*Re	quired Fields
Menu ⑦ Preprocessing Area File Upload History	A Participan entry.	t does not exist	in the system for the	reported CalPERS	5 ID and SSN c	ombination.	. Verify and upda	ite your
	• Deduction	Information	California Correctional	Deace Officers	Association			
	Bu	isiness Month:	06/2011	Peace Officers P	ASSOCIATION			
		Participant ID:		mber				
		CalPERS ID*	2088292802					
	Participant	Social Security Number-4*	1939					
	Deduc	tion Amount:*	29.45]				
	💿 Direct Aut	horization Agree	ments					
	Agreement ID	Deduction Type	Program	Sponsor		Carrier	Third Party Administrator	Effective Date
	1000001768	Life Insurance Deduction	California Public Employees' Retireme System	California (ent Peace Offi Associatio	Correctional icers n			12/01/1991
	Save & Continu	e Save & Add Ar	nother					

my CalPE	RS Beno	Skip to: Content F	ooter ation	Welcome Ma	ary Customize	e Help (Contact Us CalPEI	RS On-Line Lo	og out May	26, 2011
Manage Reports				J						
Common Tasks Menu	() ()	Name: Direct Autho Organization	rization	Ca	IPERS ID: 523	3134842				
Preprocessing Are	a	💿 Search Direct A	uthoriza	ation Records						
File Upload History	/			5	CalPEF Sponsor/Empl	oyer: Dir	ect Authorization Or	g 💌		
		Search Clear			Error Mes	sage:		•		
		Direct Authoriza	ntion Re	cords Add New	1					
		Select All Delete			Nun	nber of Re	cords Submitted:	1	Number of	Errors: 0
		<u>CalPERS ID</u>	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
		2028292802	1887	William Jackson	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$27.94	
		Select All Delete								

In this example, we were returned to the Search Direct Authorization Records page and after entering a new direct authorization deduction with the following information: CalPERS ID "2029292802", Participant Social Security Number-4 "1887", Participant Name "William Jackson", Transaction Type "Add", Program "CalPERS", Sponsor / Employer "Direct Authorization Organization", Deduction Type "Life Insurance Deduction" and Deduction Amount "\$27.94".

Deductions Exceed Gross error message example:

my CalPERS	Skip to: Content Footer rting Person Information	Welcome Ma Other Organiza	ry Customize	: Help C	Contact Us CalPE	RS On-Line I	Log out Ma	ay 26, 2011
Common Tasks 🔕 Menu 📀	Name: Direct Authorization Organization	Cal	IPERS ID: 5233	3134842				
Preprocessing Area File Upload History	Search Direct Authorize	ation Records S	CalPER ponsor/Empl Error Mes:	RS ID: oyer: Dire sage:	ect Authorization Or	g 💌]	
	Direct Authorization Re Select All Delete	Cords Add New	Nun Transaction	iber of Re	cords Submitted: Sponsor/	1 Deduction	Number o	of Errors: 1 n Error
	<u>CalPERS ID</u> SSN-4	Name William Jackson	Type Add	Program CalPERS	Employer Direct Authorization Organization	Type Life Insurance Deduction	Amount \$10000.00	Message Deductions Exceed Gross.
	Select All Delete							

In this example, the information entered is the same as above with the exception of the Deduction Amount. To illustrate an example of an error message, we entered a Deduction Amount of \$10,000.00, which is higher than William Jackson's monthly retirement warrant. The "Deductions Exceed Gross" error is displayed under the Error Message column. This means that the deduction amount entered exceeds the amount of the gross monthly retirement warrant.

Search for deduction records

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the Business Partner radio button and then the Continue button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS	kip to: Conten	t Footer	Welcome Bobbie C	ustomize Help	Contact Us	CalPERS On-Line	e Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations					
My Home								
Common Tasks 🛛 🔕	💿 My Cases				View	More Actions»		
Menu 💿	Case ID	Case Title	Case Type	P	rogram	Status		
Person Search	731879		Initiate DA Agre	eement		Closed		
Change Password								
Change Challenge Questions								

Select the **Reporting** global navigation tab. The *Create Reports* page displays.

	Skip to: Content Footer	Welcome Walter Custo	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011
my Caipers						
Home Profile Repo	orting Person Information	n Other Organizations				
Manage Reports						
Common Tasks 🛛 🔕	Name: Direct Authorizat	tion CalPERS ID:	3696467826			
Menu 😨	Organization					*Required Fields
Preprocessing Area						
File Upload History	Create or Edit Repo	rt				
	Method.*		Continue			
	Work On Existing Pa	ayroll Reports				
	Schedule Name	Earned Period / Adjustment Date	Status Repor	t Type	Due Date Submi	t Date Test Report
	No results found.					
						Display
)
	O Direct Authorization	Incoming Reports				View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	3	0

Select the link under the Submitter Name column associated with the report you"d like to search within the Direct Authorization Incoming Reports section. If the report you are looking for is not displayed within the Direct Authorization Incoming Reports section, select the **View More Actions** link in the Direct Authorization Incoming Reports title banner.

s my CalPERS	kip to: Content Footer	Welcome Wal	ter Customiz	e Help	Contact Us CalPERS	On-Line Lo	ogout May	/ 25, 2011
Home Profile Repor	ting Person Information	Other Organiz	ations					
Common Tasks	Name: Direct Authorization	n C a	IPERS ID: 369	6467826				
Preprocessing Area	💿 Search Direct Authoriz	ation Records					tatalalalalalalalalalalalala	
File Upload History		5	CalPE Sponsor/Emp	RS ID:				
			Error Me	ssage:		•		
	Search Clear							
	O Direct Authorization Re	ecords Add New	1					
	Select All Delete		Numl	per of Reco	ords Submitted: 851		Number of	Errors: 0
	CalPERS ID SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u>1205290569</u> 6289	Edward Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$18.00	
	<u>7010576783</u> 6852	James Byerly	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$98.00	
	<u>4940520803</u> 0269	James Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.40	
	<u>4401277655</u> 0752	Randall Smith	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$40.70	
	<u>3087109662</u> 2680	William Crowe	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	
	<u>6087615767</u> 6052	Jack James	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	

The Search Direct Authorization Records page displays.

You can search for deduction records within the selected report by entering the CalPERS ID in the **CalPERS ID** field or by selecting the appropriate error message from the **Error Message** dropdown. Once you have located the deduction record, you can select the link under the CalPERS ID column within the Direct Authorization Records section.



Update deduction amount

From the my|CalPERS *Log In* page, select the **Business Partner** radio button and then the **Continue** button. The *Business Partner Login* page displays.

myCalPERS	
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter the username and password and select the **Log In** button. The Conditions of Use for Business Partners (Employers) page displays.

my CalPE	Skip to: Content Footer RS	Welcome Andrea	Customize Helj	o Contact Us	CalPERS On-Line	Log out	March 15, 2011
O Conditions of	Use for Business Partners (Em	ployers)				010101010101010101010101	
By accessing this with CalPERS.	application you acknowledge	that all informatio	on accessible to you	u will be used or	nly to assist you in	conducting	g official business

Accept Decline

Review the conditions of use statement and select the **Accept** button.

The my|CalPERS Home page displays.

my CalPERS	Skip to: Conten	t Footer	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Li	ne Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks 🛛 🔕	🗑 My Cases			View	More Actions»		
Menu 💿	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge Questions							

Select the **Reporting** global navigation tab.

my CalPERS	Skip to: Content Footer	Welcome Walter Cust	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011
Home Profile Repo	Person Information	Other Organizations				
Common Tasks	Name: Direct Authorization	on CalPERS ID:	: 3696467826			
Preprocessing Area	Create or Edit Report					*Required Fields
File Opload History	Method:*		▼ Continue			
	Work On Existing Pay Schedule Name	vroll Reports Earned Period /	Status Repor	t Type	Due Date Submi	t Date Test
	No results found.					Display
	Direct Authorization 1	incoming Reports				View More Actions»
	Submitter Name	Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization Organization Direct Authorization	Manually enter in data Manually enter in	04/08/2011	04/2011	851	851
	Organization Direct Authorization Organization	data Create Report from Interface	04/08/2011 05/26/2011	04/2011 05/2011	4022 3	4022 0

The Create Reports page displays.

Select the link under the Submitter Name column associated with the report you"d like to search within the Direct Authorization Incoming Reports section. If the report you are looking for is not displayed within the Direct Authorization Incoming Reports section, select the **View More Actions** link in the Direct Authorization Incoming Reports title banner.

s my CaIPERS	kip to: Content Fo	ooter We	elcome Walt Ner Organiz	ter Customiz ations	e Help (Contact Us CalPERS	On-Line Lo	og out May	7 25, 2011
Manage Reports	Name: Direct Auth Organizatio	orization	Ca	IPERS ID: 369	6467826				
Preprocessing Area File Upload History	Search Direct	Authorizatio	n Records S	CalPE Sponsor/Emp Error Mes	RS ID: loyer: DA		T		
	Search Clear	ration Recor	ds Add New	Numb	er of Reco	ords Submitted: 851	_	Number of	Errors: 0
	CalPERS ID	SSN-4 <u>Pa</u>	articipant ame	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u>1205290569</u>	6289 Ed Be	lward Innett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$18.00	
	<u>7010576783</u>	6852 Ja	mes Byerly	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$98.00	
	<u>4940520803</u>	0269 Jai Be	mes ennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.40	
	<u>4401277655</u>	0752 Ra Sm	indall nith	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$40.70	
	<u>3087109662</u>	2680 Wi Cre	illiam owe	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	
	<u>6087615767</u>	6052 Ja	ck James	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	

The Search Direct Authorization Records page displays.

You can search for deduction records within the selected report by entering the CalPERS ID in the CalPERS ID field or by selecting the appropriate error message from the **Error Message** dropdown. Once you have located the deduction record, select the link under the CalPERS ID column within the Direct Authorization Records section. In this example, we select CalPERS ID link "7010576783" for "James Byerly".

The *Edit Deduction Record* page displays.

my CalPEF	RS	Skip to: Conte	nt Footer M	/elcome Mary C	Customi	ize Help	Contact Us	CalPERS On-I	ine Log out	May 26, 2011
Home Profile F	Repor	ting Person I	nformation Oth	ner Organizations						
Manage Reports										
Common Tasks	٥									*Required Fields
Menu	\odot	© Deduction	Information							
Preprocessing Area	э	Bu	Submitter: isiness Month:	Direct Authorizati 06/2011	ion Orga	anization				
		1	Participant ID:	 CalPERS ID Social Securit 	ty Num	ber				
			CalPERS ID*	7010576783						
		Participant 9	Social Security Number-4*	6852						
		Deduc	tion Amount:*	75.00						
		💿 Direct Aut	horization Agree	ments						
		Agreement ID	Deduction Type	Program		Spon	sor	Carrie	Third er Party Administra	Effective Date
		1000001768	Life Insurance Deduction	California Publi Employees' Re System	ic tiremer	Direct. nt Organi	Authorization zation			06/01/2011
		Save & Continu	e Save & Add Ar	other						

Enter the updated deduction amount in the **Deduction Amount** field within the Deduction Information section and select the **Save & Continue** button.

The *Search Direct Authorization Records* page displays. The updated deduction amount of \$75.00 for "James Byerly" is displayed under the Deduction Amount column within the Direct Authorization Records section.

my CalPERS	kip to	: Content Fo	oter	Welcome Wal	ter Customiz	e Help (Contact Us CalPERS	On-Line Lo	gout May	25, 2011
Home Profile Repor	rting	Person Inform	nation	Other Organiz	ations					
Manage Reports	- 1									
Common Tasks 🛛 🔕	Nam	e: Direct Auth	orization	n Ca	IPERS ID: 369	6467826				
Menu 💿		Organizatio	n							
Preprocessing Area	05	earch Direct A	Authoriza	ation Records	CalPE	PS ID:				
File opload history				5	Sponsor/Emp	loyer: DA				
					Error Mes	isage:		•		
	Sea	rch Clear								
	U [irect Authoriz	ation Re	COrds Add New	Numb	er of Reco	ords Submitted: 851		Number of	Errors: 0
	<u>Sel</u>	ect All Delete	J							
		CalPERS ID	SSN-4	<u>Participant</u> Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> Message
		<u>1205290569</u>	6289	Edward Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$18.00	
		<u>7010576783</u>	6852	James Byerly	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$75.00	
		<u>4940520803</u>	0269	James Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.40	
		<u>4401277655</u>	0752	Randall Smith	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$40.70	
		<u>3087109662</u>	2680	William Crowe	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	
		<u>6087615767</u>	6052	Jack James	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	

Delete a deduction



From the my|CalPERS *Log In* page, select the **Business Partner** radio button and then the **Continue** button. The *Business Partner Login* page displays.

myCalPERS	
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Dassword: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter the username and password and then select the **Log In** button. The *Conditions of Use for Business Partners (Employers)* page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

my CalPERS	Skip to: Conten	t Footer	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Li	ne Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks 🛛 🔕	🗑 My Cases			View	More Actions»		
Menu 💿	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge Questions							

Select the **Reporting** global navigation tab.

The Create Reports page displays.

s	kip to: Content Footer	Welcome Walter Cust	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011
my CalPERS						
Home Profile Repo	rting Person Information	n Other Organizations				
Manage Reports						
Common Tasks 🛛 🔕	Name: Direct Authorizat	tion Vendor CallERS ID:	76222417/62			
Menu 💿	Credit Union	CalPERS ID.	7033241703			*Denvired Cielde
Preprocessing Area						Required Fields
File Upload History	Create or Edit Repo	rt				
	Method:*		✓ Continue			
		Earned Deried /				Tost
1	Schedule Name	Adjustment Date	Status Repor	t Type	Due Date Submi	t Date Report
	No results found.					
						Display
	Direct Authorization	Incoming Reports				View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	4	1

Select the link under the Submitter Name column associated with the report you"d like to search within the Direct Authorization Incoming Reports section. If the report you are looking for is not displayed within the Direct Authorization Incoming Reports section, select the **View More Actions** link in the Direct Authorization Incoming Reports title banner. The deduction records in the selected report are displayed within the Direct Authorization Records section.

my CalPERS	Skip to	o: Content F	ooter	Welcome Ma	ary Customiz	e Help	Contact Us	CalPERS On	-Line Log o	ut May 26, 2011
Home Profile Repor	ting	Person Inform	ation	Other Organiz	ations					
Common Tasks	Nam	Direct Auth	orizatior	Vendor		22417/62				
Menu 💿		e. Credit Unio	n		IIPERS ID. 703	3241703				
Adjustment Reports	U S	earch Direct #	luthoriza	ation Records	CalPE	RS ID:				
Preprocessing Area				:	Sponsor/Emp	loyer: D	AV Credit Unic	n 💌		
Retirement Contract					Error Me	isage:			•	
Summary	Sear	rch Clear								
									latalatatatatatatatatatata	
		Direct Authoriz	ation Re	COrds Add New	Nu	mber of R	ecords Subn	nitted: 4	Nu	mber of Errors: 3
	Sel	ect All Delete	ļ							
		<u>CalPERS ID</u>	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
		<u>6776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
		<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
		<u>5437786976</u>	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
		<u>17776670.87</u>	8D11	Brenda Johnston	CHG	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.
	Selec	t All Delete								

To delete a deduction record, select the checkbox(es) associated with the deduction records you would like to delete, and then select the **Delete** button within the Direct Authorization Records section.

my|CalPERS Direct Authorization Vendor User Guide

myCalPERS	Skip to: Content F	ooter	Welcome Ma	ary Customize	e Help	Contact Us	CalPERS On	·Line Log o	ut May 26, 2011
Home Profile Repor	ting Person Inform	ation	Other Organiz	ations					
Manage Reports									
Common Tasks	Name: Direct Auth Credit Unio	orization n	Vendor Ca	IPERS ID: 763	32417:63				
Menu 🔽	Search Direct A	uthoriza	tion Records						
Adjustment Reports				CalPE	RS ID:				
File Upload History				Sponsor/Emp Error Mes	loyer: D	AV Credit Unic	on 💌		
Retirement Contract	Search Clear				Suge.				
Summary									
	💿 Direct Authoriz	ation Red	cords Add New	1					
	Select All Delete			Nur	nber of R	ecords Subn	nitted: 3	Nu	mber of Errors:
	<u>CalPERS ID</u>	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u>6776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
	<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
	<u>17776670.87</u>	8011	Brenda Johnston	СНС	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.
	Select All Delete								

In this example, we deleted the deduction record for "Taylor Rock" from this report, so the remaining three deduction records are displayed within the Direct Authorization Records section.

Perform a Global Rate Change

Through the Internet, connect to my|CalPERS at <u>https://my.calpers.ca.gov</u>. The my|CalPERS *Log In* page displays.



Select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays. Your organization"s system access administrator must first establish your username and password and provide this login information to you. Your login information will be associated with a specific system user role that provides access to the screens you need to perform the business functions assigned to you.



Enter your username and password and then select the Log in button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

my CalPERS	ikip to: Conter	nt Footer N	Velcome Bobbie Customize	Help Contact Us	CalPERS On-Lir	ne Log out	May 26, 2011
Home Profile Repo	rting Person	Information	Other Organizations				
My Home							
Common Tasks 🛛 🔕		5		View	More Actions»		
Menu 👽	Case ID	Case Title	Case Type	Program	Status		
Person Search	731879		Initiate DA Agreement		Closed		
Change Password							
Change Challenge							

Select the **Reporting** global navigation tab.

The Business Partner Summary page displays.

S	kip to: Content Footer	Welcome Bobbie	e Customize	Help Cont	tact Us CalPEF	RS On-Line Lo	g out May 26, 2011
my CalPERS							
Home Profile Repor	ting Person Information	Other Organizat	ions				
Summary Agreements	3						
Common Tasks 🛛 🔕	Summary						
Menu 💿	Profile						
Summary							<u>Request Update</u>
Contacts	CalPERS ID:	2657553833			Status	: Active	ration
	rederar lax ID.	1254507-85			Name	Organization	zation
	Category:	Direct Authorizati	on Organizatio	on			
	Addresses	49 Mailing Street,	Sacramento, C	A		49 Mailing Stre	eet, Sacramento, CA
1	Physical:	84567			Mailing	84567	
	Preferred Communication	ation: Email					
	Primary E	mail: robert@dad	cu.org	Primary I	Phone Number	: 916-789-1111	
	Contacts Add New	ontact Type Det	ail	Drogram	Namo	D	View More Actions»
	General M	lain	(CalPERS	Robert Dillman		ione Number
	Business Relationship	5 Add New			S	ervice	
	Name	CalPE	RS ID	Progra	IM P	rovided	Status
	No results found.						
	© Contracts/Agreement	ts					
	Contract/Agreement	Type Status	Date Status	Effective	Termination	Related	
	Direct Authorization Agr	eement Active	04/01/1978	04/01/1978	Date	Parties	
)

Select the **Reporting** global navigation tab.

The *Reporting* page displays.

	Skip t	o: Content F	Footer Welco	ome Mary Custo	mize Help Contact	Us CalPERS On-Line	e Logout Ma	ay 26, 2011
my CalPERS								
Home Profile Repor	ting	Person Inform	nation Other (Organizations				
Manage Reports								
Common Tasks	Name	e: Direct Auth	orization	CalPERS ID: 2	2657553833			
Menu 💟		Organizatio	n				*Re	quired Fields
File Upload History	💿 с	reate Direct A	uthorization Re	port				
		Submi	tter Name: Dir	ect Authorization C	rganization Delive	ery Consideration:*	Global Rate Cha	nge 👻
		Busine	ss Month:* 06	/2011 💌				
	💿 d	irect Authoriz	ation Agreemen	its				
		Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
	0	1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/1991
	O	1000001240	DA Deduction Dental	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		09/01/1990
	O	1000001250	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			04/01/1992
	O	1000001271	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			05/01/2000
	O	1000001273	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/2000
	0	1000001776	DA Deduction Vision	California Public Employees' Retirement System	Direct Authorization Organization			02/01/1998
	O	1000001362	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			08/01/2007
	0	1000001535	Association Dues	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		07/01/1990
	Creat	e Report						

Select Global Rate Change from the **Delivery Consideration** dropdown and select the appropriate business month from the **Business Month** dropdown ("06/2011" in this example) within the Create Direct Authorization Report section.

	Skip to	o: Content F	Footer Welco	ome Mary Custor	mize Help Contact	Us CalPERS On-Line	e Logout 🛛	1ay 26, 2011
my CalPERS								
Home Profile Repor	ting	Person Inform	nation Other (Organizations				
Manage Reports								
Common Tasks	Name	e: Direct Auth	orization	CalPERS ID: 2	2657553833			
Menu V		Organizatio	in .				*R	equired Fields
File Upload History	О с	reate Direct A	uthorization Re	port				
		Submi	tter Name: Dir	ect Authorization O	rganization Delive	ery Consideration:*	Global Rate Ch	ange 🔻
		Busine	ss Month:* 06	/2011 🔻				
	🛈 d	irect Authoriz	ation Agreemen	ts				
		Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrato	Effective Date
	0	1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/1991
	0	1000001240	DA Deduction Dental	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		09/01/1990
	۲	1000001250	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			04/01/1992
	0	1000001271	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			05/01/2000
	O	1000001273	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/2000
	O	1000001776	DA Deduction Vision	California Public Employees' Retirement System	Direct Authorization Organization			02/01/1998
	O	1000001362	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			08/01/2007
	0	1000001535	Association Dues	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		07/01/1990
	Creat	e Report						

Select the **Agreement ID** radio button for the agreement (Agreement ID "1000001250" in this example) you would like to enter a global rate change for under the Agreement ID column within the Direct Authorization Agreements section.

The Global Rate Change page displays.

myCalPERS	Skip to: Content Footer Welcome Ronald Customi.	ze Help Contact Us CalPERS On-Line Log out	May 26, 2011
Home Profile Repo Manage Reports	orting Person Information Other Organizations		
Common Tasks 🙆 Menu 📀	Name: Direct Authorization CalPERS ID: 26 Organization	57553833	
Preprocessing Area File Upload History	Deduction Information Business Month: 06/2011 Deduction Type: Life Insurance Deduction Carrier: Age	Program: California Public Retirement Syst Sponsor: Direct Authorizati reement ID: 1000001250 Organization	Employees' tem on
	Global Rate Change Existing Deduction Amount:	New Deduction Amount: \$ \$ \$ \$ \$ \$ \$	
	Create Records Clear Add More Changes		

You can enter up to four global rate changes at a time. Enter the current deduction amounts in the **Existing Deduction Amount** field(s) and enter the new deduction amounts in the corresponding **New Deduction Amount** field(s) within the Global Rate Change section.

There is no limit to the total number of global rate changes which can be entered, as you can select the **Add More Changes** button to add more global rate changes. When you have finished entering global rate changes, select the **Create Records** button.

The *Manage Reports* page displays the confirmation message "The mass change updates have been submitted and are being processed. The records will be viewable on the next business day."

5	Skip to: Content Footer Welcome Ronald Customize Help Contact Us CalPERS On-Line Log out May 26, 2011
mv CalPERS	
Home Profile Repo	rting Person Information Other Organizations
Manage Reports	
Common Tasks 🛛 🔕	Name: Direct Authorization CalPERS ID: 2657553833
Menu 💿	Organization
Preprocessing Area	The mass change updates have been submitted and are being processed. The records will be viewable on the next
File Upload History	business day.
	\odot Search Direct Authorization Records
	CalPERS ID:
	Sponsor/Employer: DA ORG 💌
	Error Message:
	Search Clear
	Direct Authorization Records Add New Number of Records Submitted: 0 Number of Errors: 0
	Select All Delete
	CalPERS ID SSN-4 Participant Transaction Program Sponsor/ Deduction Deduction Error
	No results
	found.
	Select All Delete
Deductions Request File Submission

Submit a Deductions Request file using file upload

Direct authorization agreement deduction records can be entered manually into my|CalPERS using the online reporting method, or deduction record reports can be submitted using File Upload or File Transfer Protocol (FTP). The deduction record contains a list of the participants associated with the direct authorization deduction.

You can view existing reports listed by the earned period or adjustment date or you can create, upload, or edit direct authorization processing reports.

Extensible Markup Language (XML) direct authorization reports can be either uploaded to my|CalPERS or submitted using File Transfer Protocol (FTP). Reports submitted using FTP do not require login to my|CalPERS to submit the information.

Electronically uploaded direct authorization deduction report files are automatically checked by my|CalPERS against numerous criteria to ensure the completeness of the listed participant records. Common required information types include Business Partners (CalPERS ID), Participant (CalPERS ID) and Retirement Program ID.

If there are no errors, then all of the direct authorization deduction records are submitted to my|CalPERS automatically. If the criteria are not met, my|CalPERS indicates which deduction records have identified errors and return them to the business partner for resolution. Once errors are corrected, the record is automatically submitted for direct authorization deduction without any further manual intervention.

my|CalPERS Direct Authorization Vendor User Guide



From the my|CalPERS *Log In* page, select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays.

my	Help Contact Us CalPERS On-Line May 26, 20
	New User? Registering is easy. Register Now Business Partner Login
Welcome to mylCaIPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. Another Heading More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	* Required Please log in with your Username and Password. * Username: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter the username and password and select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and select the **Accept** button.

The my|CalPERS *Home* page displays.

my CalPERS	Skip to: Conten	nt Footer N	Velcome Bobbie Customiz	e Help Contact Us	CalPERS On-Li	ne Log out	May 26, 2011		
Home Profile Reporting Person Information Other Organizations									
Orana Tradia									
Common Tasks	👽 My Cases	;		View	More Actions»				
Menu 💿	Case ID	Case Title	Case Type	Program	Status				
Person Search	731879		Initiate DA Agreement		Closed				
Change Password									
Change Challenge									
Questions									

Select the **Reporting** global navigation tab.

The Manage Report page displays.

s	kip to: Content Footer	Welcome Walter Custo	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011
myCaipers						
Home Profile Repo	rting Person Informatio	n Other Organizations				
Manage Reports						
Common Tasks 🛛 🔕	Name: Direct Authoriza	tion CalPERS ID:	3696467826			
Menu 😨	Organization					*Required Fields
Preprocessing Area						
File Upload History	Create or Edit Repo	rt				
	Method:*		Continue			
		สระสงการการการการการการการการการการการการการก				
	Work On Existing P	ayroll Reports				
	Schedule Name	Earned Period / Adjustment Date	Status Repor	t Type	Due Date Submi	t Date Test Report
	No results found.					
						Display
	Oirect Authorization	Incoming Reports				View More Actions»
		Original		Business	Number of Records	Number of Records
	Submitter Name	Delivery Method	Delivery Date	Month	Submitted	Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	3	0

my CalPERS	ikip to: Content Footer	Welcome Walter Cus	tomize Help Co	ntact Us (CalPERS On-Line Li	og out May 25, 2011
Home Profile Repo	rting Person Informatio	Other Organizations				
Common Tasks	Name: Direct Authoriza	tion CalPERS ID	3696467826			
Menu 💿	Organization					Required Fields
File Unload History	Create or Edit Repo	rt				
Pas opiced restory	Method:* Upload File		Continue			
	Work On Existing P Schedule Name	ayroll Reports Earned Period / Adjustment Date	Status Repor	t Type	Due Date Subr	nit Date Test Report
	No results found.					Display
	Direct Authorization	1 Incoming Reports				View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Record Submitted	ls Number of Records Confirmed
	Direct Authorization Organiation	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022

To submit a file by using the File Upload reporting method, select "Upload File" from the **Method** dropdown and select the **Continue** button within the Create or Edit Report section.

The Upload File section displays and provides a window that will allow you to browse for the file for upload.

	5	kip to: Content Footer Welcome Walter Customize Help Contact Us CalPERS On-Line Log out	May 25, 2011
my CalPE	RS		
Home Profile	Repo	ting Person Information Other Organizations	
Manage Reports			
Common Tasks	٥	Name: Direct Authorization CalPERS ID: 3696467826	
Menu	O	Organization	*Required Fields
Preprocessing Are	a		
File Upload Histor	у	💟 Upload File	
		Use the Browse or Upload File buttons to upload a data file:	
		Path:* Browse	
		Upload File	

Select the **Browse** button and follow the path to the location where the file is located within your organization"s shared file directory or your individual personal computer. Once you have located the file, select the **Upload File** button.

The *File Upload History* page displays. You can display your organization's file upload history by selecting **File Upload History** from the left-side navigation Menu. You can review the File Type, Upload Date, File Status, Batch Job Status, File Name, Valid records, Error records and Total records.

my CalPER	sk S	ip to: Contei	nt Footer \	Welcome Walte	er Customize He	p Contact Us	: CalPERS On-Line Lo	g out	May 25,	, 2011
Home Profile Reporting Person Information Other Organizations										
Manage Reports										
Common Tasks	٥	🗑 File Unlo	ad History							
Menu 🤇	•	File Type	Upload Date	<u>File Status</u>	Batch Job Statu	5 File Name		<u>Valid</u>	<u>Error</u>	<u>Total</u>
Preprocessing Area		20016	05/25/2011	In Progress		201101121	55528_003_20016.xml			
File Upload History							Vie	ew Prepro	ocessing	Areas

Select the **File Upload History** link from the left-side navigation menu. Once the file is in the process of uploading, the screen will indicate that the upload is In Progress, as shown under the File Status column within the File Upload History section.

Once my|CalPERS receives the file, the File Status changes from "In Progress" to "Accepted". Note that the Batch Job Status now shows as "In Progress". You can refresh the screen to check the status. The File Status would display "Rejected" if the same file, or same filename, were submitted, as my|CalPERS only accepts a file one time.

After the upload is complete, my|CalPERS displays the status of "Accepted" under the File Status column and indicates the number of records that were validated and the count of those that were found to have errors within the File Upload History section. In this example, we have processed 16 valid records with no error records.

my CalPERS	kip to: Conte	nt Footer '	Welcome Walte	r Customize Help	Contact Us CalPERS On-Line I	Log out	May 25	, 2011		
Home Profile Reporting Person Information Other Organizations										
Manage Reports										
Common Tasks		ad History			la l					
Menu 💿	File Type	Upload Date	File Status	Batch Job Status	File Name	<u>Valid</u>	<u>Error</u>	<u>Total</u>		
Preprocessing Area	20016	05/25/2011	Accepted	Completed	20110112155528_005_20016.xml	16	0	16		
File Unload History	20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_004_20016.xml					
	20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_003_20016.xml			J		

my|CalPERS runs Level 1 validations to check the XML file structure, and if the file did not pass the Level 1 validation, the Batch Job Status would show as "Failed", as shown below.

	S	kip to: Contei	nt Footer \	Velcome Walte	er Customize Help	Contact Us CalPERS On-Line L	og out	May 25	, 2011
my CalPEF	RS								
Home Profile R	epor	ting Person	Information)ther Organiza	tions				
Manage Reports									
Common Tasks	٥	😨 File Unla	ad History						
Menu	\odot	File Type	Upload Date	<u>File Status</u>	Batch Job Status	File Name	<u>Valid</u>	Error	<u>Total</u>
Preprocessing Area		20016	05/25/2011	Accepted	Completed	20110112155528_005_20016.xml	0	0	0
File Unload History		20016	05/25/2011	Accepted	Completed	20110112155528_007_20016.xml	0	0	0
The opioda history		20016	05/25/2011	Accepted	Failed	20110112155528_008_20016.xml	0	0	0
		20016	05/25/2011	Rejected	Completed	20110112155528_006_20016.xml			
		20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_004_20016.xml			
		20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_003_20016.xml			
						V	iew Prepr	ocessing	Areas

This is an example of a Level 1 error message:

my CalPERS	Skip to: Content Footer Welcome o	cahp Customize Help Contact Us CalPERS On-Line Log out	May 27, 2011			
Home Profile Repo	rting Person Information Other Organ	lizations	_			
Common Tasks	Name: Direct Authorization C	CalPERS ID: 3696467826				
Menu 💿	Organization		*Required Fields			
Preprocessing Area File Upload History	File has failed level one validation. org.xml.sax.SAXParseException: cvc-complex-type.2.4.a: Invalid content was found starting with element 's01:TransactionCde'. One of '{"http://calpers.ca.gov/PSR/DADeductionRequestV1":TransactionCode}' is expected					
	🛈 Upload File					
	Use the Browse or Upload File buttor	ns to upload a data file:				
	Path:*	Browse				
	Upload File					

s	kip to: Conte	nt Footer \	Velcome Walte	er Customize Help	Contact Us CalPERS On-Line Lo	og out	May 25	, 2011		
my CalPERS										
Home Profile Repo	rting Person	Information C)ther Organiza	tions						
Manage Reports										
Common Tasks 🛛 🙆										
Menu 💿	than one y	he file is rejected due to the following reason: Submission Date must be today or a future date and cannot be more han one year in the future.								
Preprocessing Area										
File Upload History										
	😨 File Uplo	ad History								
	File Type	<u>Upload Date</u>	<u>File Status</u>	Batch Job Status	File Name	<u>Valid</u>	Error	<u>Total</u>		
	20016	05/25/2011	Accepted	Completed	20110112155528_005_20016.xml	0	0	0		
	20016	05/25/2011	In Progress		20110112155528_007_20016.xml					
	20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_006_20016.xml					
	20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_004_20016.xml					
	20016	05/25/2011	<u>Rejected</u>	Completed	20110112155528_003_20016.xml					
					Vi	ew Prepr	ocessing	Areas		

This file submission was rejected and the error message "The file is rejected due to the following reason: Submission Date must be today or a future date and cannot be more than one year in the future." displays on the *File Upload History* page.

Manage Deductions Request File Errors



Review deduction records in staging area

From the my|CalPERS *Log In* page, select the **Business Partner** radio button and then the **Continue** button.



The Business Partner Login page displays.

Enter the username and password and then select the **Log In** button. The *Conditions of Use for Business Partners (Employers)* page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

my CalPERS	kip to: Conten	t Footer	Welcome Bobbie Custo	mize Help	Contact Us	CalPERS On	Line Log out	May 26, 2011	
Home Profile Reporting Person Information Other Organizations									
My Home									
Common Tasks 🛛 🔕					View	More Actions	**		
Menu 😨	Case ID	Case Title	Case Type		Program	Status			
Person Search	731879		Initiate DA Agreeme	ent		Closed			
Change Password									
Change Challenge Questions									

Select the **Reporting** global navigation tab.

The Manage Report page displays.

my CalPERS	Skip to: Content Footer	Welcome Walter Custo	omize Help Co	ntact Us	CalPERS On-Line Lo	og out May 25, 2011
Home Profile Repo	rting Person Information	n Other Organizations				
Manage Reports						
Common Tasks 🔕	Name: Direct Authorizat	tion CalPERS ID:	3696467826			
	Ŭ					*Required Fields
File Upload History	Create or Edit Repo	rt				
	Method:*		Continue			
	🔍 Work On Existing P	ayroll Reports				
	Schedule Name	Earned Period / Adjustment Date	Status Repor	t Type	Due Date Subr	nit Date Test Report
	No results found.					
						Display
					alalalalalalalalalalalalalalalalalalal	
	Oirect Authorization	Incoming Reports				View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Record Submitted	ls Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	3	0

Select the **Preprocessing Area** link from the left-side navigation menu to review the information on the Preprocessing Area section.

The Preprocessing Area section displays. Note the Direct Authorization link under the Preprocessed Data column. The file in this example contains 4,873 records, all of which are shown as valid records under the valid column. There are no errors in this file. You can select file link for more detailed information.

9	Skip to: Content Footer Welcome Walter Customize Help Contact Us Cal	PERS On-Line	Log out	May 25, 2011
my CalPERS				
Home Profile Repo	rting Person Information Other Organizations			
Manage Reports				
Common Tasks 🛛 🔕	Preprocessing Area			
Menu 👽	Preprocessed Data	<u>Valid</u>	Error	<u>Total</u>
Preprocessing Area	Affected Subscriber List	4873	-	4873
File Uplead History	Census	-	-	-
File Opload History	Direct Authorization	4873	-	4873
	Health Carrier Rate Data	-	-	-
	Health Carrier ZIP Code Plan Relationship Data	-	-	-
	Health Enrollment	-	-	-
	Health Retiree List	-	-	-
	Medical Group Assignment List	-	-	-
	Payroll Reporting	-	-	-
	Retirement Enrollment	-	-	-]
		Upload Data	File Viev	v Upload History

The additional information is displayed within the Direct Authorization Incoming Reports section.

	kip to: Content Footer	Welcome Walter Custo	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011					
my CalPERS											
Home Profile Repo	rting Person Information	n Other Organizations									
Manage Reports											
Common Tasks 🛛 🔕	Name: Direct Authorizat	tion CalPERS ID:	3696467826								
Menu 💿	Organization					*Poquirod Fields					
Preprocessing Area						Required Fields					
File Upload History	Create or Edit Repo	rt									
	Method:* Continue										
	• Work On Existing P	ayroll Reports									
l	Schedule Name	Earned Period / Adjustment Date	Status Report	t Type	Due Date Submi	t Date Test Report					
	No results found.										
						Display					
	O Direct Authorization	Incoming Reports				View More Actions»					
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed					
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851					
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022					
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	4	1					



Correct deduction record errors

From the my|CalPERS *Log In* page, select the **Business Partner** radio button and then the **Continue** button.

The Business Partner Login page displays.

my CalPERS	Heip Contact Us CalPERS Un-Line May 26, 201
Welcome to mylCalPERS Business Partner This is a welcome message for business partner. They will see this message after they have selected their view or if they have bookmarked this login page. More-text that could talk about new features or issues that the user should see prior to them logging in. They normally see preLogin content first, unless they have bookmarked this page. This is temporary filler content until final content is decided.	New User? Registering is easy. Register Now Business Partner Login * Required Please log in with your Username and Password. * Username: sample-login * Desname: sample-login * Password: Log In Forgot Your Password? Please be sure to log out when you are done. For your security, we also recommend that you close all of your browser windows after you log out.

Enter the username and password and then select the **Log In** button. The *Conditions of Use for Business Partners (Employers)* page displays.

Skip to: Content Footer Welcome Andrea Customize Help Contact Us CalPERS On-Line Log out Mar My CalPERS	ch 15, 2011
© Conditions of Use for Business Partners (Employers)	
By accessing this application you acknowledge that all information accessible to you will be used only to assist you in conducting offic with CalPERS.	ial business

Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS Home page displays.

s my ∣CalPERS	kip to: Content	t Footer	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Li	ne Log out	May 26, 2011		
Home Profile Reporting Person Information Other Organizations									
My Home									
Common Tasks 🛛 🔕	🗑 My Cases			View	More Actions»				
				vicin.	more rections.				
Menu 👽	Case ID	Case Title	Case Type	Program	Status				
Menu 💿 Person Search	Case ID 731879	Case Title	Case Type Initiate DA Agreement	Program	Status Closed				
Menu Image: Change Password	Case ID 731879	Case Title	Case Type Initiate DA Agreement	Program	Status Closed				

Select the **Reporting** global navigation tab.

The Manage Report page displays.

	5kip to: Content Footer	Welcome Walter Cust	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011
Home Profile Repo	orting Person Information	n Other Organizations				
Manage Reports						
Common Tasks 🛛 🔕	Name: Direct Authoriza	ation CalPERS ID	: 7633241792			
Menu 👽	Credit Union					*Poquirod Fields
Preprocessing Area						Required Fields
File Upload History	💿 Create or Edit Repo	rt				
	Method:*		Continue			
	Work On Existing P	ayroll Reports				
	Schedule Name	Earned Period / Adjustment Date	Status Repor	t Type	Due Date Submi	t Date Test Report
	No results found.					
						Display
	Oirect Authorization	Incoming Reports				View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	3	0

The following steps will guide you through correcting errors using the online system.

If there are errors to be corrected, select the link for the appropriate *Staging* page. The preprocessing area you navigate to will depend on the type of file you submitted. In this example, we are submitting deduction requests, so we will select the **Direct Authorization** link under the Preprocessed Data column within the Preprocessing Area section.

Selecting the **Direct Authorization** link brings us to a screen showing all of our deduction request reports. The report that we just submitted is visible on this screen. As you submit reports, there will be more and more report history. If you do not see the report you submitted on this page, you may need to select the **View More Actions** link in the Direct Authorization Incoming Reports section title banner. Select the link of the report name you want to review under the Submitter Name column within the Direct Authorization Incoming Reports section.

	Skip to: Con	ntent Footer	Welcome Walter Custo	mize Help Co	ntact Us (CalPERS On-Line L	og out May 25, 2011			
myCaipers										
Home Profile Repo	rting Pers	son Information	Other Organizations							
Manage Reports										
Common Tasks 🛛 🙆	Name: [Direct Authoriza	ation CalPERS ID:	7633241792						
Menu 💿	C	Credit Union					*Required Fields			
Preprocessing Area										
File Upload History	Creat	e or Edit Repor	rt							
	Method:*									
	💿 Work	On Existing Pa	ayroll Reports							
	Schedul	e Name	Earned Period / S Adjustment Date	tatus Repor	t Type	Due Date Sub	mit Date Test Report			
	No result	ts found.								
							Display			
	💿 Direct	t Authorization	Incoming Reports				View More Actions»			
			Original		Business	Number of Record	ds Number of Records			
	Submitt	er Name	Delivery Method	Delivery Date	Month	Submitted	Confirmed			
	Direct Au Organiza	<u>ithorization</u>	Manually enter in data	04/08/2011	04/2011	851	851			
	Direct Au	uthorization	Manually enter in data	04/08/2011	04/2011	4022	4022			
	Direct Au	ithorization	Create Report	05/26/2011	05/2011	3	0			
	Urganiza		in the face							

The deduction report we uploaded displays. The two sections of the page are discussed in the next steps.

s mul CalDEDS	kip to: Content Fo	oter	Welcome Wal	ter Customiz	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
Home Profile Repor	ting Person Inforn	nation	Other Organiz	ations					
Manage Reports									
Common Tasks	Name: Direct Auth Credit Unic	norization on	¹ Ca	IPERS ID: 763	32417:63				
Menu 🔍	Search Direct	Authoriza	ation Records						
Adjustment Reports				CalPE	RS ID:				
File Uplead History				Sponsor/Emp	loyer: D	AV Credit Unio	n 💌		
Retirement Contract				Error Mes	isage:			-	
Summary	Search Clear								
	💿 Direct Authoriz	ation Re	cords Add New	1					
	Select All Delete			Nu	nber of R	ecords Subm	itted: 4	Nu	Imber of Errors: 3
	<u>CalPERS ID</u>	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u>6776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
	<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
	<u>5437786976</u>	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
	<u>17776670.87</u>	8011	Brenda Johnston	CHG	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.
	Select All Delete								

my CalPERS	kip to: Content	Footer	Welcome Wal	ter Customiz	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
Home Profile Repor	ting Person Inf	ormation	Other Organiz	ations					
Manage Reports									
Common Tasks	Name: Direct A Credit U	uthorizatio nion	n Ca	alPERS ID: 763	32417:63				
Menu V	😨 Search Dire	ct Authoriz	ation Records						
Adjustment Reports				CalPE	RS ID:				
File Unload History			:	Sponsor/Emp	loyer: D	AV Credit Unic	n 💌		
Retirement Contract				Error Mes	sage:			•	
Summary	Search Clear								
	🛈 Direct Autho	orization R	ecords Add New	1					
	Select All De	lete		Nu	mber of R	ecords Subn	nitted: 4	NL	Imber of Errors: 3
	<u>CalPERS</u>	ID SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u>67766253</u>	<u>43</u> 8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
	<u>56187196</u>	<u>72</u> 6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
	<u>54377869</u>	<u>76</u> 5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
	<u>17776670</u>	.87 8011	Brenda Johnston	CHG	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.
	Select All Dele	e							

The Search Direct Authorization Records section includes search criteria. You can search the report for a record by entering a particular CalPERS ID in the **CalPERS ID** field.

If the file contains deduction reports for more than one sponsor, you can search for a partcular sponsor or employer by selecting the appropriate value from the **Sponsor/Employer** dropdown.

You also can search by error message. To search for particular records, choose the appropriate error message search criteria from the **Error Message** dropdown and select the **Search** button.

The Direct Authorization Records section shows the individual records in the report and any associated errors.

my CalPERS	kip to: Content Footer	Welcome Wal	ter Customize	e Help	Contact Us	CalPERS On	·Line Log o	ut May 25, 2011
Home Profile Repor	ting Person Information	Other Organiz	ations					
Common Tasks Menu Adjustment Reports Preprocessing Area File Upload History Retirement Contract	Name: Direct Authorization Credit Union Search Direct Authorize	n Ca ation Records	IPERS ID: 763 CalPE Sponsor/Emp Error Mes	32417'63 RS ID: loyer: D sage:	AV Credit Unio	n 💌	•	
Summary	Search Clear	Participant	Nur	mber of R Program	ecords Subm Sponsor/	itted: 4 Deduction	Nu	Imber of Errors: 3
	<u>6776625343</u> 8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	Message
	<u>5618719672</u> 6016	Linda Johns	Update	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
	54 <u>37786976</u> 5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
	<u>17776670.87</u> 8011 Select All Delete	Brenda Johnston	CHG	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.

To correct errors, select the appropriate **CaIPERS ID** link under the CaIPERS ID column within the Direct Authorization Records section for the record you want to correct.

The error in the second record on the page (CalPERS ID "5618719672" in this example) is due to a mismatch between the last four digits of the Social Security number in the record and the Social Security number associated with "Linda Johns". Select the CalPERS ID link for "Linda Johns".

The *Deduction Information* page for "Linda Johns" displays.

s my CalPERS	kip to: Content	t Footer W	elcome Walter Custom	ize Help Contact U	s CalPERS On	Line Log out Ma	ay 25, 2011			
Home Profile Repo	rting Person I	nformation Ot	her Organizations							
Manage Reports										
Common Tasks 🛛 🔕	Name: Direc	t Authorization	CalPERS ID: 7	533241792						
Menu 😨	Credi	t Union				*Re	quired Fields			
Adjustment Reports	O Deduction	Information								
Preprocessing Area		Submitter:	Direct Authorization Cre	dit Union						
File Upload History	B	Business Month: 06/2011								
Retirement Contract		Particinant ID	CalPERS ID							
Summary		r ur de pune 10.	Social Security Nun	nber						
			5619710619							
			010/19010							
	Participant	Social Security	6011							
		Name:*	Linda Johns Selec	t -						
	Deduc	tion Amount:*	100.00	2						
			100.00							
	O Direct Aut	thorization Agre	ements							
	Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date			
		Credit Union	California Public	Direct Authoriz	ation					
	1000001110	Deduction	Employees' Retireme System	nt Credit Union			01/01/1987			
	Save & Continu	Je Save & Add A	nother							

Enter the correct last four digits of "Linda Johns" Social Security number ("6011" in this example) in the **Participant Social Security Number – 4** field within the Deduction Information section and then select the **Save & Continue** button.

The Deductions Exceed Gross error message associated with the third record on the page (CalPERS ID "5437786976" in this example) indicates that there are not enough funds in the participant's retirement warrant available to cover the deduction amount.

my CalPERS	kip to:	Content Fo	oter	Welcome Wal	ter Customize	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
Home Profile Repor	ting	Person Inform	ation	Other Organiz	ations					
Common Tasks	Nam	e: Direct Auth Credit Unio	orizatior n	ר Ca	IPERS ID: 763	32417:63				
Adjustment Reports	© s	Gearch Direct #	uthoriza	ation Records	CalPE	RS ID:				
Preprocessing Area File Upload History					Sponsor/Emp Error Mes	loyer: D	AV Credit Unic	on 💌		
Retirement Contract Summary	Sea	rch Clear								
	0)irect Authoriz	ation Re	cords Add New	1					
	Sel	ect All Delete]		Nui	nber of R	ecords Subn	nitted: 4	Nu	umber of Errors: 3
		<u>CalPERS ID</u>	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
		<u>6776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
		<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
		<u>5437786976</u>	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
		<u>17776670.87</u>	8011	Brenda Johnston	CHG	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.
	Selec	t All Delete								

Select the CalPERS ID link for "Taylor Rock".

The Deduction Information page for "Taylor Rock" displays.

s	kip to: Content	: Footer We	lcome Walter Customiz	e Help Contact I	Us CalPERS On	-Line Log out M	ay 25, 2011
my CalPERS							
Home Profile Repo	rting Person I	nformation Oth	ner Organizations				
Manage Reports							
Common Tasks 🙆	Name: Direct	t Authorization	CalPERS ID: 763	3241792			
Menu 🔽	Crear	t Union				*Re	quired Fields
Adjustment Reports	O Deduction	Information					
Preprocessing Area		Submitter:	Direct Authorization Cred	it Union			
File Upload History	Bu	isiness Month:	06/2011				
Retirement Contract		Participant ID:	CalPERS ID				
Summary		•	Social Security Number Social Security Number	er			
		CalPERS ID*	5437786976				
	Participant	Social Security	15109				
		Number-4*	5105				
		Name:*	Taylor Rock <u>Select</u>				
	Deduc	tion Amount:*	100.00				
	🔽 Direct Aut	horization Agree	ments				
	Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
		Credit Union	California Public	Direct Authori	zation		
	1000001110	Deduction	Employees' Retirement System	Credit Union			01/01/1987
	Save & Continu	save & Add Ar	nother				

Enter the correct deduction amount ("\$100.00" in this example) in the **Deduction Amount** field within the Deduction Information section and then select the **Save & Continue** button.

my|CalPERS Direct Authorization Vendor User Guide

	kip to: Content Fo	oter \	Nelcome Wali	ter Customize	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
myCaipers									
Home Profile Repor	ting Person Inform	ation	Other Organiz	ations					
Manage Reports									
Common Tasks 🛛 🔕	Name: Direct Auth	orization n	Ca	IPERS ID: 763	32417:63				
Menu 💿	Search Direct A	uthoriza	tion Records						
Adjustment Reports				CalPE	RS ID:				
Preprocessing Area			5	Sponsor/Emp	loyer: D	AV Credit Unic	on 💌		
Retirement Contract				Error Mes	sage:			-	
Summary	Search Clear								
				-					
	Direct Authoriza	ation Red	Cords Add New	Nu	nher of R	ecords Subn	nitted: 4	Ni	under of Errors: 3
	Select All Delete				inder of R		inteed.		
	<u>CalPERS ID</u>	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u>6776625343</u>	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
	<u>5618719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
	<u>5437786976</u>	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
	<u>17776670.87</u>	8011	Brenda Johnston	CHG	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.
	Select All Delete								

The page also allows us to add deduction records. To add a record to the report, Select the **Add New** button in the Direct Authorization Records section title banner.

The Deduction Information page displays.

s my CalPERS	kip to: Content Footer N	Welcome Walter Custor	nize Help Contact Us	CalPERS On-	Line Log out M	ay 25, 2011
Home Profile Repor	ting Person Information (Other Organizations				
Manage Reports						
Common Tasks (A) Menu (文)	Name: Direct Authorization Credit Union	CalPERS ID: 1	7633241792		*R(equired Fields
Adjustment Reports	O Deduction Information					
Preprocessing Area	Submitte	r: Direct Authorization Cr	edit Union			
File Upload History	Business Mont	h: 06/2011				
Retirement Contract Summary	Participant I	 D: O CalPERS ID O Social Security Nu 	mber			
	CalPERS II)*				
	Participant Social Securit	by				
	Number-4	• • • • • • • • • • • • • • • • • • •				
	Deduction Amount	*				
	💿 Direct Authorization Agr	reements				
	Agreement Deduct ID Type	ion Program	Sponsor	Carrier	Third Party Administrator	Effective Date
	O 1000001110 Credit U Deduction	Inion California Public on Employees' Ret System	Direct Authoriz rement Credit Union	ation		01/01/1987
	Save & Continue Save & Add	Another				

Update the information within the Deduction Information section and then select the **Save & Continue** button if you are finished adding deduction records, or the **Save & Add Another** button if you want to add more deduction records.

Delete a deduction record or report

If you want to remove a deduction record or a complete deduction report that you added in error before the cutoff date for that months processing, you can do so.



From the my|CalPERS *Log In* page, select the **Business Partner** radio button and then the **Continue** button.



The Business Partner Login page displays.

Enter the username and password and then select the Log In button.

The Conditions of Use for Business Partners (Employers) page displays.



Accept Decline

Review the conditions of use statement and then select the Accept button.

The my|CalPERS *Home* page displays.

	Sk	ip to: Conten	t Footer	Welcome Bobbie Customize	Help Contact Us	CalPERS On-Line	e Log out	May 26, 2011
mv CalPER	S							
Home Profile Re	port	ing Person 1	Information	Other Organizations				
My Home								
inty frome	-							
Common Tasks 🤇	9				View	More Actions»		
Menu (•	Case ID	Case Title	Case Type	Program	Status		
Person Search		731879		Initiate DA Agreement		Closed		
Change Password								
Change Challenge								
Questions								

Select the **Reporting** global navigation tab.

	Skip to: Content Footer	- Welcome Walter Custo	omize Help Co	ntact Us (CalPERS On-Line Log	out May 25, 2011
myCaiPERS						
Home Profile Repo	rting Person Informatio	on Other Organizations				
Manage Reports						
Common Tasks	Name: Direct Authoriz	ation CalPERS ID:	7633241792			
Menu 👽	credit onion					*Required Fields
File Upload History	Create or Edit Repo	ort				
	Method:*		▼ Continue			
	Work On Existing P	ayroll Reports				Tost
	Schedule Name	Adjustment Date	Status Repor	t Type	Due Date Submi	t Date Report
	No results found.					
						Display
	• Direct Authorization	n Incoming Reports				View More Actions»
	Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
	Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
	Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	3	0

The Manage Report page displays.

As you submit reports, there will be more and more report history displayed within the Direct Authorization Incoming Reports section. If you do not see the report you submitted on this page, you may need to select the **View More Actions** link in the Direct Authorization Incoming Reports section title banner. Select the link of the report name you want to delete under the Submitter Name column within the Direct Authorization Incoming Reports section. The deduction report we want to delete displays within the Direct Authorization Records section.

my CalPERS	kip to: Co	ontent Fo	oter	Welcome Wal	ter Customize	e Help	Contact Us	CalPERS On	-Line Log o	ut May 25, 2011
Home Profile Repor	ting Per	rson Inform	ation	Other Organiz	ations					
Manage Reports										
Common Tasks 🛛 🔕	Name:	Direct Auth	orization	Ca	IPERS ID: 763	32417:63				
Menu 💿	💿 Sear	rch Direct /	uthoriza	ation Records						
Adjustment Reports					CalPE	RS ID:				
Preprocessing Area				:	Sponsor/Emp	loyer: D	AV Credit Unic	on 💌		
Retirement Contract					Error Mes	sage:			-	
Summary	Search	Clear								
	💿 Dire	ct Authoriz	ation Re	cords Add New						
	<u>Select</u>	All Delete]		Nu	nber of R	ecords Subn	nitted: 3	Nu	Imber of Errors:
	<u>C</u> a	alPERS ID	SSN-4	<u>Participant</u> <u>Name</u>	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	<u>Error</u> <u>Message</u>
	<u> </u>	76625343	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
	<u>56</u>	<u>18719672</u>	6016	Linda Johns	Update	CalPERS	Direct Authorizatior Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
	<u>17</u>	<u>776670.87</u>	8011	Brenda Johnston	СНС	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.
	Select A	Delete								

Select one or more of thecheck boxes within the Direct Authorization Records section or use the **Select All** link

The deduction record checkboxes will display as selected within the Direct Authorization Records section.

, SI	kip to: Co	ntent Fo	oter	Welcome Wal	ter Customize	e Help	Contact Us	CalPERS On-	-Line Log o	ut May 25, 2011
my CalPERS										
Home Profile Repor	ting Per	son Inform	ation	Other Organiz	ations					
Manage Reports										
Common Tasks 🔕	Name:	Direct Auth Credit Unio	orization	Ca	IPERS ID: 763	32417:63				
Menu 💿	💿 Sear	ch Direct A	uthoriza	ation Records						
Adjustment Reports					CalPE	RS ID:				
Preprocessing Area					Sponsor/Emp	loyer: D	AV Credit Unic	on 💌		
Retirement Contract					Error Mes	sage:			•	
Summary	Search	Clear								
	\sim									
	🔍 Direc	ct Authoriz	ation Re	cords Add New	-	1 (0				1 (5
	O Direct	ct Authoriz All Delete	ation Re	cords Add New	Nur	nber of R	ecords Subn	nitted: 3	Nu	mber of Errors:
	© Direct	ct Authoriz	ation Re SSN-4	Cords Add New Participant Name	Nur Transaction Type	nber of R Program	ecords Subn Sponsor/ Employer	nitted: 3 Deduction Type	Nu Deduction Amount	mber of Errors: Error Message
	© Direct	ct Authoriz	ation Re SSN-4	Participant Name	Nur Transaction Type	nber of R Program	ecords Subn Sponsor/ Employer Direct	nitted: 3 Deduction Type Credit	Nu Deduction Amount	imber of Errors: <u>Error</u> <u>Message</u>
	♥ Direct <u>Select</u> <u>Ca</u>	ct Authoriz All Delete htpers ID 76625343	SSN-4 8551	Participant Name Helen Nelson	Nur Transaction Type Update	nber of R Program CalPERS	ecords Subn Sponsor/ Employer Direct Authoization Credit Union	Deduction Type Credit Union Deduction	Nu Deduction Amount \$40.00	mber of Errors: <u>Error</u> <u>Message</u>
	♥ Direct Select ♥ 67	ct Authoriz All Delete	SSN-4 8551	Participant Name Helen Nelson Linda	Nur Transaction Type Update	nber of R Program CalPERS	ecords Subn Sponsor/ Employer Direct Authoization Credit Union Direct	Deduction Type Credit Union Deduction Credit	Nu Deduction Amount \$40.00	The Social Security Number
	 ✓ Direct <u>Select</u> <u>Ca</u> ✓ 67 ✓ 56 	ct Authoriz AlL Delete hIPERS ID 76625343 18719672	ation Re SSN-4 8551 6016	Participant Name Helen Nelson Linda Johns	Nur Transaction Type Update Update	nber of R Program CalPERS CalPERS	Sponsor/ Employer Direct Authoization Credit Union Direct Authorizatior Credit Union	Deduction Type Credit Union Deduction Credit Union Deduction	Nu Deduction Amount \$40.00 \$100.00	The Social Security Number (SSN) reported was invalid.
	♥ Direc <u>Select</u> ▼ <u>67</u> ▼ <u>56</u>	ct Authoriz All_ Delete hIPERS ID 76625343 18719672	ation Re SSN-4 8551 6016	Participant Name Helen Nelson Linda Johns	Nur Transaction Type Update Update	nber of R Program CalPERS CalPERS	Sponsor/ Employer Direct Authoization Credit Union Direct Authorizatior Credit Union Direct	Deduction Type Credit Union Deduction Credit Union Deduction Credit	Nu Deduction Amount \$40.00 \$100.00	The Social Security Number (SSN) reported was invalid. Please enter a
	♥ Direct Select ☑ 67 ☑ 56 ☑ 17	ct Authoriz All Delete IPERS ID 76625343 18719672 776670.87	ation Re SSN-4 8551 6016 8011	Participant Name Helen Nelson Linda Johns Brenda Johnston	Nur Transaction Type Update Update CHG	nber of R Program CalPERS CalPERS CalPERS	ecords Subn Sponsor/ Employer Direct Authoization Credit Union Direct Authorization Credit Union	Deduction Type Credit Union Deduction Credit Union Deduction Credit Union Deduction	Deduction \$40.00 \$100.00 \$400.00	The Social Security Number (SSN) reported was invalid. Please enter a valid Transaction Code.

Select the **Delete** button.

All of the deduction records in the selected report have been deleted, as it now displays "No results found" within the Direct Authorization Records section.



my|CalPERS Direct Authorization Vendor User Guide

Common Tasks 🛛 🔕	Name: Direct Authorization CalPERS ID: 7633241763
Menu 👽	© Search Direct Authorization Records
Adjustment Reports	CalPERS ID:
Preprocessing Area	Sponsor/Employer: DAV.CoditUpion
File Upload History	Fror Message:
Retirement Contract Summary	Search Clear
	Image: Select All Delete Number of Records Submitted: 0 Number of Errors: 0
	CalPERS ID SSN-4 Participant Transaction Program Sponsor/ Deduction Deduction Error Employer Type No results found. Select All Delete Select All Delete

my|CalPERS Reports for Direct Authorization Vendors

Part 1: Configuring Internet Explorer

Setup Internet options

General	Security	Privacy	Content	Connectio	Progra	ams Advar	nced
Inte	ernet	Local intrar	nge secul	ted sites	Restricted sites		3
~	Trusto This zo trust n your fil	ed sites ne contains ot to damag les,	websites je your co	that you mputer or		Sites	
Trusted	sites						ΣĽS
1	You cithis zo	an add and one will use	remove w the zone's	ebsites from s security se	n this zone. ttings,	All websites	in F
Add t	You ci this zo his websi	an add and one will use te to the zo alpers.ca.go	remove w the zone's ne:	ebsites from security se 5 s/cai-bin/co	this zone. ttings.	All websites	e in E
Add t http	You co this zo his websi os://my.co	an add and one will use te to the zo alpers.ca.go	remove w the zone's ne: ov/report:	ebsites from s security se 5 s/cgi-bin/cc	n this zone. ttings. ognos.c [All websites	: in 6
Add t http: Webs *.cc http:	You co this websi os://my.co ites: cn.psr alpers.ca. o://*,saba	an add and one will use te to the zo alpers.ca.go gov anow.net	remove w the zone's ne: ov/report:	ebsites from s security se 5 s/cgi-bin/cc	ognos.c	All websites Add Remove	e in
Add t http Webs *.ac *.ca http	You ci this zo his websi os://my.ca ites: cn.psr alpers.ca. o://*.saba o://calper	an add and one will use te to the zo alpers.ca.go .gov anow.net s.sabanow.	remove w the zone's ne: ov/reports	ebsites from s security se 5 s/cgi-bin/cc	ognos.c	All websites Add Remove	6
Add t http Webs *.ac *.ca http http 	You ci this zo his websi os://my.ca ites: cn.psr alpers.ca. o://*.saba o://calper equire ser	an add and one will use te to the zo alpers.ca.go gov anow.net s.sabanow.	remove w the zone's ne: ov/reports net tion (http:	ebsites from s security se 5 s/cgi-bin/cc s/cgi-bin/cc	ognos.c	All websites Add Remove	7

- 1. Select Security Tab.
- 2. Select Trusted Sites.
- 3. Select Sites.
- 4. Make sure the box is not checked.
- 5. Enter https://my.calpers.ca.gov/reports/cgi-bin/cognos.cgi to add this website to the zone.
- 6. Select Add.
- 7. Select Close.

Modify Trusted Site Options

Follow the instructions below to modify the options of the Trusted Sites zone and set the "Enable XSS Filter" property to "Disable." Back on the 'Internet Options' dialog, with 'Trusted Sites' still selected, select the **Custom Level** button.

nternet Op	otions						? ×
General	Securit	Privacy	Content	Connect	ions Pi	rograms	Advanced
Select a	zone tr	o view or chan	ge roow	hu cotting	s.	>	1
Inte	ernet	Local intrane	t Trust	ed sites	Restrie site	cted s	
	Trust	ted sites			1		
~	This z trust r your f You h	one contains v not to damage îles. ave websites i	vebsites t your con n this zor	that you nputer or ne.		210	
Securi	ty level	for this zone		_			
	C	ustom Custom settin - To change ti - To use the r	gs. he setting ecommen	gs, dick Cu ided settir	ustom le igs, click	vel. Default	level.
	Enable	Protected Mo	le (requi	rec rectar	ting Inte	rnet Exp	lorer)
			Cust	tom level	•	Default	level
				Reset all	zones ti	o default	level
			OK		Canc	el	Apply

In the 'Security Settings' dialog, scroll down to find the "Downloads" setting.

rity Settin	igs - Trusted Sites Zone	
ettings		
0) Prompt	· ·
Down	loads	- C - C - C - C - C - C - C - C - C - C
A 29	utomatic prompting for file downloa	ads
Q	Disable	
() Enable	
ES F	ile download	
C	Disable	
) Enable	
E F	ont download	
C) Disable	
) Enable	
C) Prompt	
Enable Enable	le .NET Framework setup	
O D	isable	
. O E	nable	
Micro	Ilananie	1 6
*Takes eff	ect atter you restart Internet Expl	orer
anat queta	maattinga	
esercusio	in securigs	
eset to:	Medium (default)	▼ Reset
		OK Cancel
	-	

Change the setting for "Automatic prompting for file downloads' from 'Disable' to Enable."

ettings			
C	Disable		*
	Enable Enable		
\$ A	Mow websites to prompt for	information using s	scripted winda
C	Disable		
(Enable		
劉E	nable XSS filter		
0) Disable		
) Enable		
· 图 2	cripting of Java applets		
9	Disable		
(Enable		
(Ca () Prompt		
User User	Authentication		_
95 L	ogon		
0	Anonymous logon		+
4			+
Takes eff	fect after you restart Intern	et Explorer	
eset custo	om settings		-
eset to:	Medium (default)	•	Reset
		01	

Continue scrolling down to find the 'Enable XSS filter' setting.

ettings		
0	Disable	14
	Enable	
雪1	llow websites to prompt for information usi	ng scripted wind
0	Disable	
1	Enable	
寫 E	nable XSS filter	
(Disable	
0) Enable	
图 5	cripting of Java applets	
0	Disable	
(Enable	
0) Prompt	
User User	Authentication	
25	ogon	
	Anonymous logon	-
		+
*Takes eff	ect after you restart Internet Explorer	
Reset custo	m settings	
Reset to:	Medium (default)	Reset
		-
		-
	OK	Cancel

Change the setting for 'Enable XSS filter' from 'Enable' to 'Disable', then select the **OK** button.



When prompted to change settings for this zone, select the **Yes** button.

	n	la contra	1200.001		1	Line 1
General	Security	Privacy	Content	Connections	Programs	Advanced
Select a	a zone to v	iew or cha	ange securi	ty settings.	0	
Int	ernet L	ocal intrar	net Trust	ed sites Res	stricted sites	
-	Truste	sites			-	- 1
*	trust no your file You hav	t to damag s. e websites	ge your con s in this zon	nputer or ne.		
Secur	ity level fo	r this zone				
	Cus Cu -1 -1	tom ustom sett To change To use the	ings. the setting recommen	gs, click Custon ded settings, c	n level. dick Default	level.
E	Enable Pr	otected M	ode (requir	es restarting I	nternet Exp	lorer)
			Cust	com level	Default	level
				Reset all zone	s to default	level

Back on the 'Internet Options' dialog, select the **OK** button.

Part 2: Generating Reports in my|CalPERS

Accessing reports in Cognos®

- 1. Log into my|CalPERS
- 2. From the *My Home* page select the up arrow to expand Common Tasks from the left navigation menu.

my CalPERS	o: Content Footer	Welcome City Cus	tomize Help Col	ntact Us CalPE	RS On-Line Lo
Home Profile Repor	ting Person Informatio	on Loan Eligibility S	earch Education		
My Home Requests					
Common Tasks				View	Aore Actions»
Menu 😏	Case ID	Case Title	Case Type	Program	Status
Person Search	No results found.				
Organization Search					
Change Password					
Change Challenge Questions					
Home and Personal Loan					
<					>

3. Select the **Reports** link.

	Skip t My CalPERS Home Profile Repor My Home Requests	ting Person Information	Velcome City Cusi	tomize Help Cor earch Education	ntact Us CalPE	RS On-Line Lo, ♠
\langle	Common Tasks (C) Reports Document History Inquiry List Submit Inquiry Menu (C)	My Cases Case ID No results found.	Case Title	Саѕе Туре	View M Program	Aore Actions» Status
	Person Search Organization Search Change Password					×

4. After selecting the **Reports** link, select the **My Home** link
| IBM" COGNOS" 8 | Tr | aci Veteto | Log On Log Off |
|--------------------------------|-----|------------|----------------|
| My Content | | | |
| My home | | | |
| IBM Cognos cont | ent | | |
| V Show this page in the future | | | Quick Tour |
| | | | IBM. |

5. Select and open the **PSR_REPORTS_ENV98** folder highlighted in yellow.

🏉 https://internal.calpers.ca.gov/?b_action=xts.run&m=portal/cc.xts&m_folder=i2D9F4DFB6FC049819B8 - Windo 💼 💼 📧					
IBM Cognos Connection	Traci Veteto Log On 🔻 🔯	⊠ ▼ Å ▼ å ▼ ?▼			
Public Folders My Folders					
Public Folders	:	II 🗀 🔮 📽 🖬 🗙 🔄 💏			
	Entries:	1 - 4 💽			
🔲 🛛 Name 🗢	Modified 😂	Actions			
PSR Operational Reporting Env98	September 25, 2011 2:08:20 AM	More			
SR Reporting Envise	September 25, 2011 5:51:21 PM	More			
PSR REPORTS ENV98	September 23, 2011 1:50:19 PM	More			
PSR Security Reporting Env98	September 25, 2011 2:11:58 AM	More			
	✓ Trusted sites Protected Mode: O	ff 🖓 🔻 🔍 100% 🔻 🚊			

This folder contains predefined reports for business partners. The list of available reports is filtered for each business partner based on programs contracted with CalPERS and the system access of the business contact who is logged in.

my|CalPERS Direct Authorization Vendor User Guide

🌾 https://my.calpers.ca.gov/?b_action=xts.run&m=portal/cc.xts&m_fold	ler=i768A02600485462A949B58930 - Win	dows Internet Ex 🗖 🔲 🔀
IBM Cognos Connection Laur	a Log On 🔻 📑	⊠ ▼ ≜ ▼ 8 ▼ ?▼
Public Folders My Folders		4
Public Folders > PSR_REPORTS_ENV98	III 33	📫 🐮 📽 👪 🗙 🛃 🏤
	Entries: 1	- 15 💽
mame ⇔	Modified	Actions
Saved Reports	October 27, 2011 3:38:56 PM	More
ColFERS ID and SSN Report	October 24, 2011 12:09:06 PM	😭 🕨 🐻 <u>More</u>
Deduction File Report	October 26, 2011 5:41:25 PM	🚰 🕨 🔣 More
Deduction Register Report	October 25, 2011 6:47:53 PM	😭 🕨 🖾 <u>More</u>
Dental Memo Report	October 26, 2011 5:52:38 PM	😭 🕨 🐻 <u>More</u>
Employer Health Event Notification Report	October 22, 2011 2:20:39 PM	😭 🕨 🐻 <u>More</u>
Employer Retroactive Health Adjustment Report	October 22, 2011 2:20:39 PM	🚰 🕨 🐻 <u>More</u>
Health Plan Statement Employer Report	October 27, 2011 1:03:01 PM	🚰 🕨 🐻 <u>More</u>
Monthly Employer Billing Roster Report	October 27, 2011 11:28:36 AM	🚰 🕨 🐻 <u>More</u>
Operational Deduction Register Report	October 22, 2011 2:25:48 PM	🖅 🕨 🐻 <u>More</u>
Service Credit Payment Scheduled Changes	October 22, 2011 2:20:35 PM	🖅 🕨 🐻 <u>More</u>
📄 嶎 Shortcut to Financial Metrics - GL Detail	September 29, 2011 10:45:31 AM	🚰 More
📄 嶎 Shortcut to Financial Metrics - Receivables	September 28, 2011 10:10:57 AM	More
🔲 🔝 Shortcut to Remittance Advice Report	September 27, 2011 12:56:37 PM	More
🔲 🔈 Shortcut to State ARP Data File Error Report	September 26, 2011 10:37:47 AM	More

6. Select Saved Reports.

Generating the Calpers ID SSN Report

In order to generate the CalPERS ID and SSN report, the business contact must have Direct Authorization access privileges assigned to their roll and be a contact for either the deduction submitting organization or the organization that receives the warrants for the deductions.

- 1. Log into my|CalPERS
- 2. Follow the steps Accessing Reports in Cognos ® section above.
- 3. Select the **CalPERS ID and SSN Report** Link. There are two methods for finding the report.
 - a. You can use the search box and the navigation buttons to locate the report. Type "CalPERS id" into the window and select the magnifying glass icon on the right.
 - b. Use the page forward buttons to scroll through the pages until you find the report.

IBM Cognos Connection	Laura Log On * 🛛 🔯	0 • i • i	÷ ? •
Public Folders My Folders			
Public Folders > PSR_REPORTS_ENV98 > Saved Reports	a	III II 🖬 📽 👪 🗙	12° M
		Entries: 1 - 15 🔘 🖤	++ > >
Name #	Modified 😫	Actions	1
Add Drop Change List Report_103682_0	November 11, 2011 11:2	9:12 PM 💣 💽 More	b
Add Drop Change List Report_88784_0	October 16, 2011 1:25:2	1 AM 📑 💽 More	
E Benefit Roll Employer Distribution_100376_0	November 8, 2011 3:43:	34 AM 📑 💽 More	•
📃 🗒 Benefit Roll Employer Distribution_101608_0	November 9, 2011 5:08:	28 AM	
Esteration_102607_0	November 10, 2011 6:06	:40 AM	
📄 🛃 Benefit Roll Employer Distribution_103544_0	November 11, 2011 4:08	:16 AM 📑 💽 More	
🔲 🖺 Benefit Roll Employer Distribution_103684_0	November 11, 2011 10:1	2:14 PM 💣 💽 More	
Benefit Roll Employer Distribution_105630_0	November 16, 2011 1:08	:44 AM	
Benefit Roll Employer Distribution 114558 0	November 30, 2011 5:14	:16 AM 📑 💽 More	
Benefit Roll Employer Distribution_82642_0	September 28, 2011 4:32	2:59 AM	
🔲 🛃 Benefit Roll Employer Distribution_84066_0	October 3, 2011 5:28:57	AM 💣 📑 More	
📄 🖺 Benefit Roll Employer Distribution_85094_0	October 6, 2011 8:03:26	AM. More	
📄 🖺 Benefit Roll Employer Distribution_86125_0	October 11, 2011 12:37:	56 AM 💣 💽 More	
📄 🗒 Benefit Roll Employer Distribution_86946_0	October 12, 2011 8:27:0	3 AM	
E Benefit Roll Employer Distribution_87483_0	October 13, 2011 9:37:0	1 AM 💣 💽 More	

4. In this example, the report was found using the search functionality. Select the **View Output Versions of This report** icon for the report date you want to view.

ear	ch			Laura Log On * 🔯 🏠 🐂 🕯 * ? *
Seam	ch: <u>N</u>	tame field 🗸		×
Calp	ers i	1	Search 👩 Advanced 🕸	
				Entries: 1 - 15 🔘 🔲 🗰 🕨 🕅
		···> Name @		Actions
	8	> CalPERS ID and SSN Report_100672_0 Last modified on: November 8, 2011 2:52:54 PM		More
	副	> CalPERS ID and SSN Report_100679_0 Last modified on: November 8, 2011 3:18:28 PM		More
	8	> CalPERS ID and S5N Report_100819_0 Last modified on: November 8, 2011 12:18:50 PM		😭 🔂 More
	-	> CalPERS ID and SSN Report_101108_0 Last modified on: November 8, 2011 5:09:51 PM		📅 💽 More
	围	CalPERS ID and SSN Report_101345_0 Last modified on: November 8, 2011 5:01:45 PM		📅 👰 More
	5	> CalPERS ID and SSN Report_101588_0 Last modified on: November 8, 2011 6:41:44 PM		📅 💽 More
	围	> CalPERS ID and SSN Report_101935_0 Last modified on: November 9, 2011 4:11:48 PM		📅 👰 More
		> CalPERS ID and SSN Report_102583_0 Last modified on: November 10, 2011 5:55:39 AM		📅 🗓 More
	8	> CalPERS ID and SSN Report_102622_0 Last modified on: November 10, 2011 10:07:20 AM		🖀 🕼 More
	围	Anno 2010 And SSN Report_102737_0 Last modified on: November 10, 2011 2:43:00 PM		📷 🕡 More
	盟	> CalPERS ID and SSN Report_102798_0 Last modified on: November 10, 2011 2:29:10 PM		🔡 🛅 More
		> CalPERS ID and SSN Report_103834_0 Last modified on: November 14, 2011 9:03:13 AM		證 👘 More
	1	> CalPERS ID and SSN Report_110107_0 Last modified on: November 22, 2011 8:07:44 AM		🔡 🔀 <u>More</u>
		> CalPERS ID and SSN Report_110456_0 Last modified on: November 22, 2011 4:18:27 PM		😭 🗓 More
	1	*** > CalPERS ID and SSN Report_83567_0 Last modified on: September 30, 2011 9:14:44 AM		🖀 🕼 More

5. This report is only available in HTML. Select the **HTML** link.

View report output versions - CalPERS I	ID and SSN Report_100672_0	<u>Help</u> X
Select an output version to view by clicking	on a Format hyperlink.	
Version: November 8, 2011 2:52:54 PM 🔻]	
		Entries: 1 - 1 🔕 14 44 🕨 🕅
Formats	Languages 🗖	Actions
TTML	English	

Generating the Deduction Register Report

In order to generate the Deduction Register report, the business contact must have Direct Authorization access privileges assigned to their roll and be a contact for either the deduction submitting organization or the organization that receives the warrants for the deductions.

- 6. Log into my|CalPERS
- 7. Follow the steps Accessing Reports in Cognos ® section above.
- 8. Select the **Deduction Register Report** Link. There are two methods for finding the report.
 - a. You can use the search box and the navigation buttons to locate the report. Type "deduction register" into the window and select the magnifying glass icon on the right.
 - b. Use the page forward buttons to scroll through the pages until you find the report.

IBM Cognos Connection	Laura Log On * 🛛 🖉	D- 1	* 🛛 🕈 ? *
De Public Folders My Folders		1	
Public Folders > PSR REPORTS ENV98 > Saved Reports	a		1×12 m
		Entries: 1 - 15 🔘	
Name #	Modified 😫	Actions	
Add Drop Change List Report_103682_0	November 11, 2011 11:2	29:12 PM 🛛 🔐 More	b
🔲 🖺 Add Drop Change List Report_88784_0	October 16, 2011 1:25:2	11 AM	
📄 🔡 Benefit Roll Employer Distribution_100376_0	November 8, 2011 3:43:	34 AM 📑 🔯 More	•
🔲 뿶 Benefit Roll Employer Distribution_101608_0	November 9, 2011 5:08:	28 AM	
🔲 🖺 Benefit Roll Employer Distribution_102607_0	November 10, 2011 6:00	5:40 AM	
📄 🔡 Benefit Roll Employer Distribution_103544_0	November 11, 2011 4:08	8:16 AM 📑 🔂 More	
📄 🖺 Benefit Roll Employer Distribution_103684_0	November 11, 2011 10:1	12:14 PM	
Benefit Roll Employer Distribution_105630_0	November 16, 2011 1:08	8:44 AM	
Benefit Roll Employer Distribution 114558 0	November 30, 2011 5:14	1:16 AM	
Benefit Roll Employer Distribution_82642_0	September 28, 2011 4:3	2:59 AM	
🔲 🛃 Benefit Roll Employer Distribution_84066_0	October 3, 2011 5:28:57	AM 💣 👰 More	
🔲 🗒 Benefit Roll Employer Distribution_85094_0	October 6, 2011 8:03:26	AM.	
🔲 🖺 Benefit Roll Employer Distribution_86125_0	October 11, 2011 12:37:	56 AM 💣 💽 More	
📄 🗒 Benefit Roll Employer Distribution_86946_0	October 12, 2011 8:27:0	3 AM 💣 🔯 More	
🔲 🔡 Benefit Roll Employer Distribution_87483_0	October 13, 2011 9:37:0	1 AM	

9. In this example, the report was found using the search functionality.

Search				Laura Log O	n + 🔯	1 🏦 🕈	1 1 - ? -
Search	Name field -						×
Jeauchi: <u>Name heid</u> - Jeduction register	Search 🔯	<u>Advanced</u> &					
				Entries: 1	- 2	0	
	> Name ⊜				Acti	ons	
					ď	More.	<u></u>
	> Report View of Deduction Register Report_32191 Last modified on: October 28, 2011 11:42:03 AM			_	ď	More.	<u></u>

10. Notice there are reports generated on different dates. Select the icon to view output versions of the report you want to view.

lect an output version to view by clicking on a For	mat hyperlink.	
ersion: November 14, 2011 12:53:33 PM 👻		
		Entries: 1 - 4
Formats	Languages 🖬	Actions
Delimited text (CSV)1053662662	English	e
Delimited text (CSV) 1053662662	English	e
Delimited text (CSV) 1053662662	English	e
Delimited text (CSV)1053662662	English	a

11. You will see reports for each deduction type you manage.

ielect an output version to view by clicking on a Fo	rmat hyperlink.		
Version:			
November 14, 2011 12:53:33 PM 🝷			
		Entries: 1 -	4 0
Formats	Languages 🖬		Actions
Delimited text (CSV)1053662662	English		
Delimited text (CSV)1055052652	English		B
Delimited text (CSV)1053662662	English		e
E Delimited text (CSV)1053662662	English		

12. Select your report.

File Downl	oad 🗾				
Do you	want to open or save this file?				
	Name: qd92qwCGl84dwsqv8ljwl8CM9Id99vy9y8hlydsv.xls Type: Microsoft Excel 97-2003 Worksheet, 126KB From: my.calpers.ca.gov				
	Open Save Cancel				
V Alway	s ask before opening this type of file				
?	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?				

13. You will be prompted to open or save the file.

Microsoft	t Excel	x
	The file you are trying to open, '44C9dGvCGC82yldvwlCl4q8wdGjjM2qM2vlMvwh2w[1].xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is fron trusted source before opening the file. Do you want to open the file now?	a
	Yes No Help	

a. If you select the **Open** button, you may see the message above. Select the **Yes** button After the file opens, you can format it and save it as a .csv file from Excel or save it as a worksheet if you prefer.

· Errore - Gamar	4	+ >	 -
File name:	qd92qwCG84dwsqv8lyw8CM91d99vy9y8hlydsv.xls		•
Save as type.	Microsoft Excel 97-2003 Worksheet		•
	Microsoft Eacol 97 (2003 Wurktheet		
a statute	All Files		
Pide Folders			Serve Server

b. If you select the **Save** button, you can use the **Save as Type** dropdown and save the file as an Excel worksheet or select "all files" from the dropdown and save the file with a .csv or .txt extention to make it a comma separated values or text file.