



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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line March 08, 2011

my|CalPERS

Log In

* First, tell us who you are:

Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

[Copyright](#) | [Conditions of Use](#) | [Site Requirements](#)
Build: 110306_210653_v1_Int.5030 Baseline: 110306_210653_v1_Int.5030 Creator: Build & Deploy Team
you are using IE 8.0
Username: N/A Datasource: null Schema owner: null Server: ENV10_node1
Last imported dataset name: null Current patch level: null

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

my|CalPERS Direct Authorization Vendor User Guide

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

my|CalPERS Help | Contact Us | CalPERS On-Line March 8, 2011

* Required Fields

Business Partner
Please log in with your Username and Password.

Username: *
filereporter

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.

New User
Registering is easy.
[Register Now](#)

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.

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

my|CalPERS Help | Contact Us | CalPERS On-Line May 24, 2011

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.

Business Partner Login * Required

Please log in with your Username and Password.

* Old Password

* New Password

* Confirm New Password

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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.

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line **May 26, 2011**

my|CalPERS

Security Agreement

CalPERS is committed to protecting your confidential member information and has taken extra steps to ensure your information is protected. To continue the registration process you must review and agree to the CalPERS Security Agreement below. Your future use of this Web site acknowledges that you have read, understood, and agreed to the Security Agreement Terms and Conditions. These terms and conditions include responsibilities for both CalPERS and for you. Following these guidelines will greatly reduce the risk to your personal information.

Last Revised: November 2009

Terms | & | Conditions

CalPERS Responsibilities

- CalPERS will use Internet security technology to protect your online information, including powerful data encryption, program time-outs, and Password authentication.
- Every attempt is made to ensure the information provided is accurate and access is available at all times. However, CalPERS accepts no responsibility for problems that occur as a result of interruption, inability to access the service for any reason, or user error.

Your Role in Security

- Review the CalPERS [Privacy Policy](#) and [Security Policy](#) for further security information.
- Protect your personal online "assets" by not revealing your Username and Password to anyone. CalPERS staff will never ask you for your password.
- Change your Password regularly, and contact CalPERS if an unauthorized person gets access to your Username, Password, Challenge Questions or Answers, or if you discover unauthorized activity.
- Don't walk away from your computer if you are in the middle of a session. Log out and completely shut down your browser first.

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.

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 Questions

Please modify your Challenge questions and answers below:

Question 1:*

Answer 1:*

Question 2:*

Answer 2:*

Question 3:*

Answer 3:*

Question 4:*

Answer 4:*

Question 5:*

Answer 5:*

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 Questions

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?

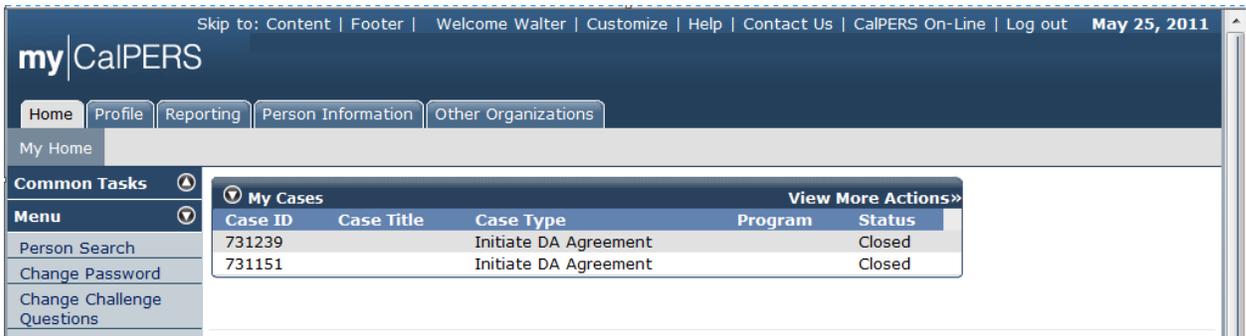
Answer 5:* Strawberry

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



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.



Log in to my|CalPERS after initial log in

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

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line May 26, 2011

my|CalPERS

Log In

* First, tell us who you are:

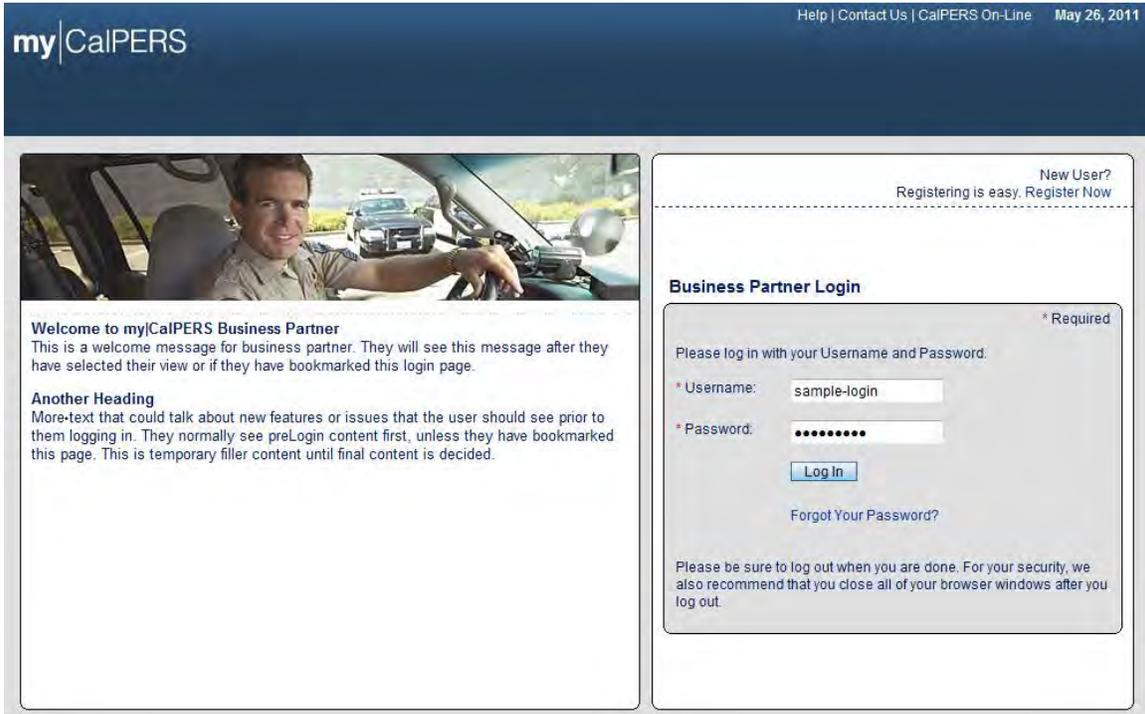
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

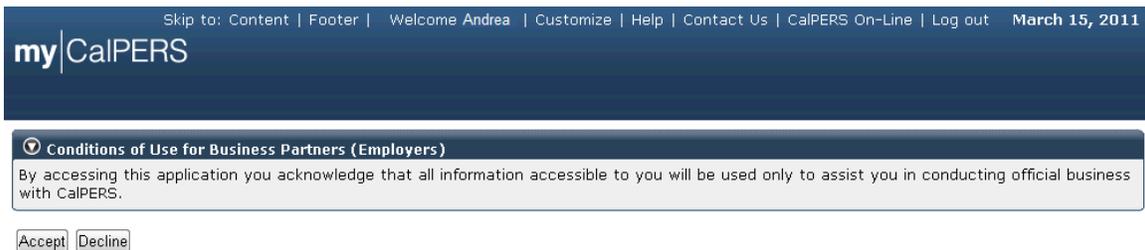
Select the **Business Partner** radio button and then the **Continue** button.

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.

Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out **May 26, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

My Home

Common Tasks (up arrow)

Menu (down arrow)

- Person Search
- Change Password
- Change Challenge Questions

My Cases View More Actions»

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

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

Help | Contact Us | CalPERS On-Line **May 26, 2011**

my|CalPERS

New User? Registering is easy. Register Now

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.

Business Partner Login * Required

Please log in with your Username and Password.

* Username:

* 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.

my|CalPERS Help | Contact Us | CalPERS On-Line **May 26, 2011**

You have entered an incorrect Username and Password combination. Please try again.



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:

* 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.

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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

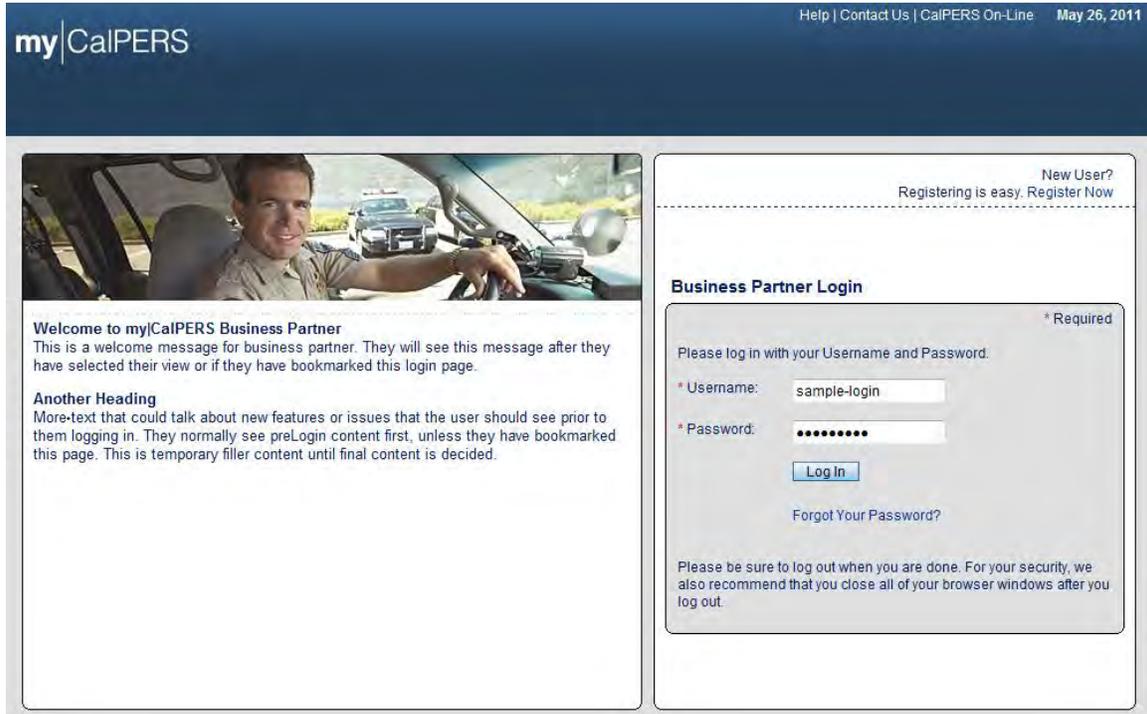
Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.



The screenshot shows the my|CalPERS website interface. At the top, there is a navigation bar with the my|CalPERS logo on the left and links for 'Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line' followed by the date 'May 26, 2011' on the right. Below the navigation bar is a large image of a diverse group of people in an office setting. To the right of the image is a 'Log In' section. Below the 'Log In' header, there is a form with the instruction '* First, tell us who you are:'. There are two radio button options: 'Participant' and 'Business Partner'. The 'Business Partner' option is selected. Below the 'Business Partner' option is a list of roles: 'Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider'. A 'Continue' button is located at the bottom right of the form.

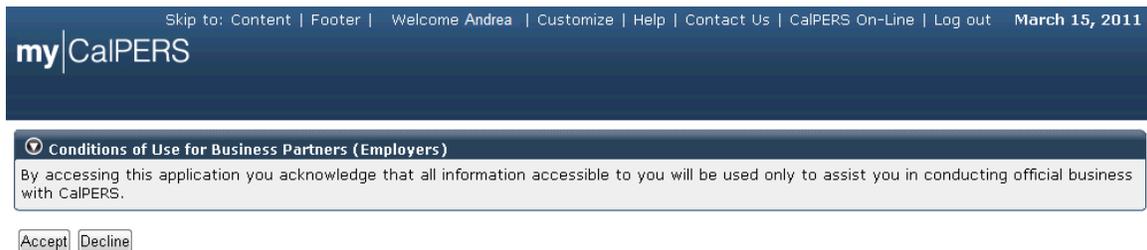
Select the **Business Partner** radio button and then the **Continue** button.

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.

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

Profile

CalPERS ID: 3897160905 **Status:** Active [Request Update](#)

Federal Tax ID: 1234567-89 **Name:** Direct Authorization Organization

Category: Direct Authorization Organization

Addresses

Physical: 49 Mailing Street, Sacramento, CA 95677 **Mailing:** 49 Mailing Street, Sacramento, CA 95677

Communication Information

Preferred Communication: Email **Primary Email:** robert@daocu.org **Primary Phone Number:** 916-789-1111

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	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.

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out. The date is May 26, 2011. Below the navigation bar are tabs: Home, Profile, Reporting, Person Information, and Other Organizations. The main content area is titled 'Direct Authorization Organization' with CalPERS ID: 3897160905. The 'Maintain Address Details' section is active, showing a form with the following fields: Address Type: Physical Address, Start Date: 05/25/2011, Address: 49 Mailing St, Country: United States, City: Sacramento, State: California, and Zip Code: 84567. There are 'Save' and 'Clear' buttons at the bottom of the form.

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out. The date is May 26, 2011. Below the navigation bar are tabs: Home, Profile, Reporting, Person Information, and Other Organizations. The main content area is titled 'Direct Authorization Organization' with CalPERS ID: 3897160905. The 'Maintain Address Details' section is active, showing a form with the following fields: Address Type: Physical Address, Start Date: 05/25/2011, Address: 7691 Farwell St, Country: United States, City: Addison, State: California, and Zip Code: 92020 - 4567. There are 'Save' and 'Clear' buttons at the bottom of the form.

Enter the revised address information in the Maintain Address Details section. In this example, we entered "7691 Farwell 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.

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line March 15, 2011

my|CalPERS

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 Farwell Street, Addison, CA 92020

U.S. Postal Service Matches: 7691 FARWELL STREET, ADDISON, CA 92020-4567

Confirm

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

Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out May 26, 2011

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks Name: Direct Authorization Organization CalPERS ID: 3897360905

Menu Summary Contacts Relationships Divisions Findings

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

City: Addison

State: California

Zip Code: 92020 - 4567

Save Clear

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.

Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out **May 26, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks ▲

Menu ▼

Summary

Contacts

Summary

Profile [Request Update](#)

CalPERS ID: 3897160905 **Status:** Active

Federal Tax ID: 1234567-89 **Name:** Direct Authorization Organization

Category: Direct Authorization Organization

Addresses

Physical: 7691 Farwell St
Addison, CA 92020-4567

Mailing: 49 Mailing Street, Sacramento, CA
84567

Communication Information

Preferred Communication: Email

Primary Email: robert@daocu.org **Primary Phone Number:** 916-789-1111

Contacts [Add New](#) [View More Actions»](#)

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships [Add New](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		

Update Business Partner Demographics

Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out | **May 26, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks ▲

Menu ▼

Summary

Contacts

Summary

Profile

CalPERS ID: 3897160905 **Status:** Active [Request Update](#)

Federal Tax ID: 1234567-89 **Name:** Direct Authorization Organization

Category: Direct Authorization Organization

Addresses

Physical: 7691 Farwell St
Addison, CA 92020-4567

Mailing: 49 Mailing Street, Sacramento, CA
84567

Communication Information

Preferred Communication: Email

Primary Email: robert@daocu.org **Primary Phone Number:** 916-789-1111

Contacts [Add New](#) [View More Actions»](#)

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships [Add New](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		

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.

Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out | May 26, 2011

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks Name: Direct Authorization Organization CalPERS ID: 3897160905

Menu

- Summary
- Contacts
- Relationships
- Divisions
- Findings

▼ Maintain Preferred Communication Details

Preferred Communication: Preferred

▼ Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Work	(707)421-6284		<input type="checkbox"/>
<input type="radio"/>	FAX	(707)421-6014		<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary Email: robert@daocu.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.

Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out | May 26, 2011

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks Name: Direct Authorization Organization CalPERS ID: 3897160905

Menu

- Summary
- Contacts
- Relationships
- Divisions
- Findings

▼ Maintain Preferred Communication Details

Preferred Communication: Email

▼ Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Work	(707)421-6284		<input type="checkbox"/>
<input type="radio"/>	FAX	(707)421-6014		<input type="checkbox"/>
<input type="radio"/>	TTY			<input type="checkbox"/>
<input type="radio"/>	Cellular			<input type="checkbox"/>
<input type="radio"/>	Other			<input type="checkbox"/>

Primary Email: alice@daocu.org

robert@daocu.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".

Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out **May 26, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks **Menu**

Summary
Contacts

Summary

Profile [Request Update](#)

CalPERS ID: 3897160905 **Status:** Active
Federal Tax ID: 1234567-89 **Name:** Direct Authorization Organization

Category: Direct Authorization Organization

Addresses

Physical: 7691 Farwell St
Addison, CA 92020-4567 **Mailing:** 49 Mailing Street, Sacramento, CA 84567

Communication Information

Preferred Communication: Email
Primary Email: alice@daocu.org **Primary Phone Number:** 916-789-1111

Contacts [Add New](#) [View More Actions»](#)

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships [Add New](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	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

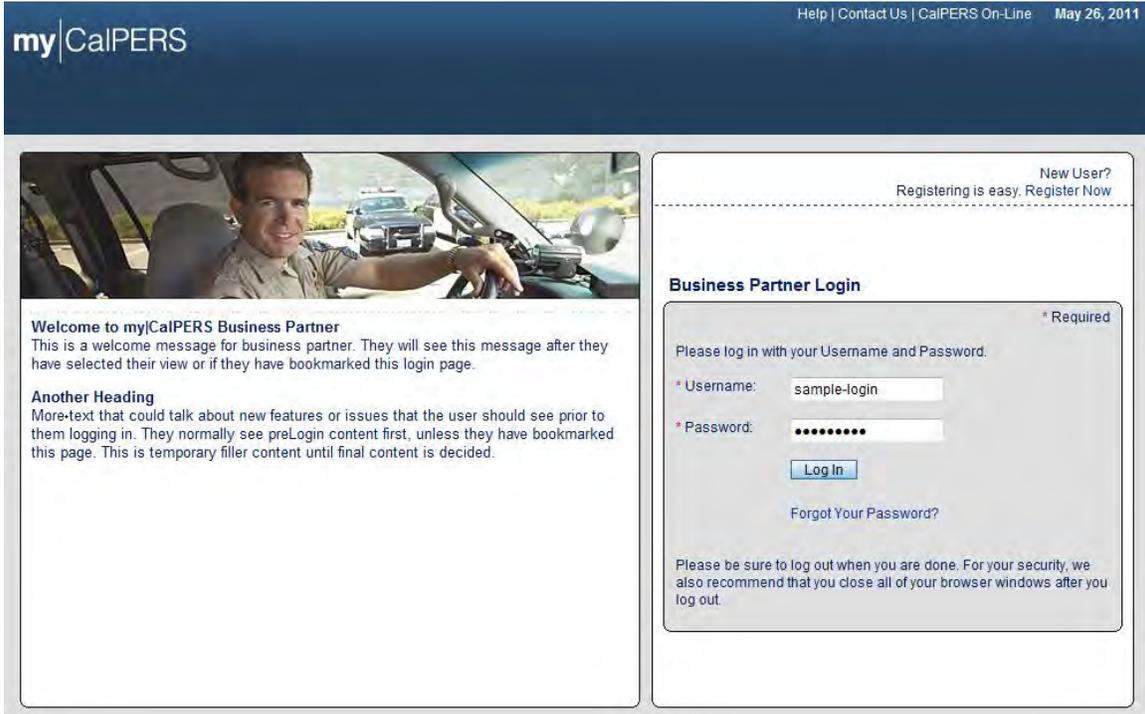
Through the Internet, connect to my|CalPERS at <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.



The screenshot shows the my|CalPERS website interface. At the top, there is a navigation bar with the my|CalPERS logo on the left and links for 'Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line' followed by the date 'May 26, 2011' on the right. Below the navigation bar is a large image of a diverse group of people in an office setting. To the right of the image is a 'Log In' section. Below the 'Log In' header, there is a form with the instruction '* First, tell us who you are:'. There are two radio button options: 'Participant' and 'Business Partner'. The 'Business Partner' option is selected. Below the 'Business Partner' option is a list of roles: 'Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider'. A 'Continue' button is located at the bottom right of the form.

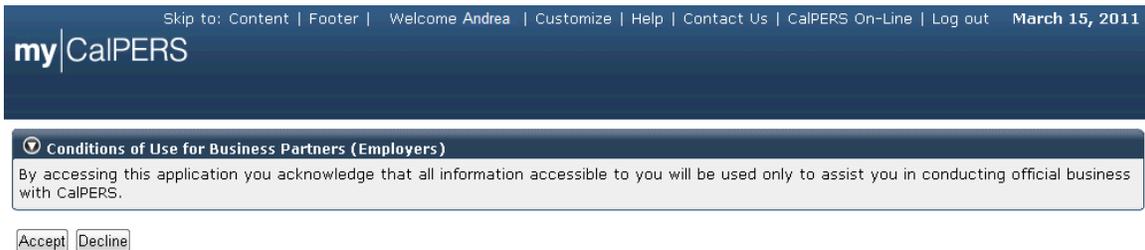
Select the **Business Partner** radio button and then the **Continue** button.

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.



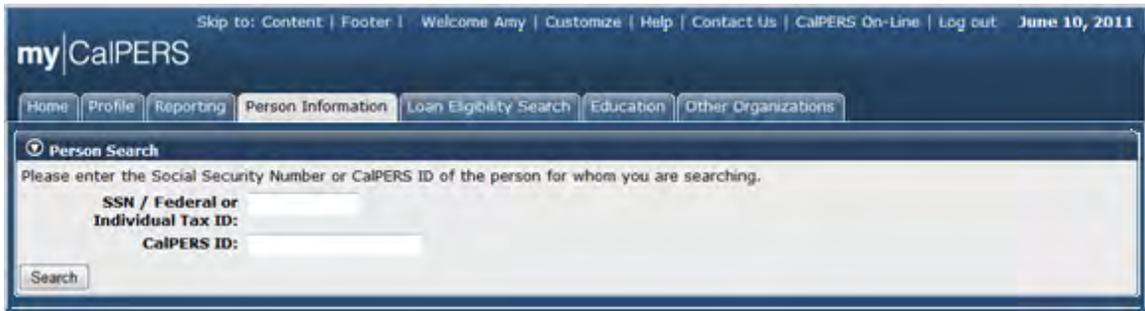
Review the conditions of use statement and select the **Accept** button.

The my|CalPERS *Home* page displays.



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).



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.

The *Business Partner Profile Summary* page displays.

Skip to: Content | Footer | Welcome Laura | Customize | Help | Contact Us | CalPERS On-Line | Log out **June 27, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks ▲
Menu ▼
 Summary
 Contacts

Summary

Profile

CalPERS ID: 3047155671 **Status:** Active [Request Update](#)
 Federal Tax ID: **Name:** Direct Authorization Organization
 Credit Union
 Category: Direct Authorization Organization

Addresses

[Physical:](#) [Mailing:](#)

Communication Information

Preferred Communication:
 Primary Email: Primary Phone Number:

Contacts [Add New](#) [View More Actions»](#)

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Joe Example	(916)789-3344
General	Main	CalPERS	Laura Redwood	

Business Relationships [Add New](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1980	04/01/1980		

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.

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Summary | Contacts

Name: Direct Authorization **CalPERS ID:** 3047155671
 Organization Credit Union *Required Fields

▼ Maintain Contact Details

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

Contact Type:* **Contact Type Detail:***

Programs Supported: CalPERS

Entity:* Person CalPERS ID:
 Individual Name: [Add New Person](#)
 Other:

Allow System Access
 Make Contact Viewable to Other Organizations
 Primary Contact

▼ Maintain Preferred Communication Details

Preferred Communication:

▼ Maintain Contact Address Details

Existing Business Partner Address : None

Address:*

Country:* United States

City:*

State:* California

Zip Code:* -

▼ Maintain Communication Details

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

Primary	Email	Undeliverable Date
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

Maintain Contact Details

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

Contact Type: * **Contact Type Detail:** *

Programs Supported: CalPERS

Entity: *

Person CalPERS ID:

Individual Name: [Add New Person](#)

Other:

Allow System Access

Make Contact Viewable to Other Organizations

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.

The *Person Details* page displays.

my|CalPERS

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Menu

- Contacts
- Relationships
- Divisions
- Findings

Person Details *Required Fields

Prefix:

First Name: * Middle Name: Last Name: *

Suffix:

SSN: Date of Birth: Gender:

Preferred Communication Details

Preferred Communication:

Address Details

Address Type:

Address:

Country: United States

City:

State: California

Zip Code:

Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Fax	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Office	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary Email

Save Cancel Clear

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.

Step 7: The *Contact Details* page displays.

Maintain Contact Details

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

Contact Type: * [dropdown] **Contact Type Detail:** * [dropdown]

Programs Supported: CalPERS

Entity: * Person CalPERS ID: [text field]
 Individual Name: [Add New Person](#)
 Other: [text field]

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: [dropdown]

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

Maintain Contact Address Details

Existing Business Partner Address: [dropdown: None]

Address: * [text field]

Country: * [dropdown: United States]

City: * [text field]

State: * [dropdown: California]

Zip Code: * [text field] - [text field]

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.

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.

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:

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my|CalPERS

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Summary Agreements

Common Tasks **Participant Name:** Laura Tester **CalPERS ID:** 3047155671 *Required Fields

Menu

- Search
- Contacts
- Relationships
- Findings
- Divisions
- Capture Interaction Information

Maintain Contact Details

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

Contact Type: * General **Contact Type Detail:** * Main

Deactivation Date:

Programs Supported: CalPERS

Entity: * Person CalPERS ID:
 Individual Name: Laura Tester
 Other:

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

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address:

Address: 1100 Fuller St

Country: * United States

City: * Visalia

State: * California

Zip Code: * 95432

Maintain Contact Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="radio"/>	Work	2098884324	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	laura@davorg.com	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

Save Clear

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

The *System Access* page displays.

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my|CalPERS

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Summary Agreements

Common Tasks **Participant Name:** Laura Tester **CalPERS ID:** 3047155671 *Required Fields

Menu

- Search
- Contacts
- Relationships
- Findings
- Divisions
- Capture Interaction Information

Assigned Username

Contact Name: Laura Tester

Contact Username: Usernames must consist of 6-35 characters with no spaces. Valid characters are numbers, letters, and the following special characters: at signs (@), periods (.), underscores (_), and hyphens (-). Usernames must also start with a letter. **Usernames are not case sensitive.**

Assign Roles

Select All

Role
<input type="checkbox"/> Authorized Personal Loan Representative
<input type="checkbox"/> Business Partner AP/Billing
<input type="checkbox"/> Business Partner AP/Billing RO
<input checked="" type="checkbox"/> Business Partner Direct Authorization
<input type="checkbox"/> Business Partner Employer Inquiry
<input type="checkbox"/> Business Partner Employer Maintenance
<input type="checkbox"/> Business Partner Health Contracts
<input type="checkbox"/> Business Partner Health Enrollment
<input type="checkbox"/> Business Partner Health Enrollment RO
<input type="checkbox"/> Business Partner IME/JA
<input type="checkbox"/> Business Partner Limited
<input type="checkbox"/> Business Partner PA Billing
<input checked="" type="checkbox"/> Business Partner Payroll
<input type="checkbox"/> Business Partner Payroll RO
<input type="checkbox"/> Business Partner Reciprocal
<input type="checkbox"/> Business Partner Retirement Contracts
<input type="checkbox"/> Business Partner Retirement Enrollment
<input type="checkbox"/> Business Partner Retirement Enrollment RO
<input type="checkbox"/> Business Partner SCP Certification
<input type="checkbox"/> Business Partner Supplemental Income Plan
<input type="checkbox"/> Carrier
<input checked="" type="checkbox"/> System Access Administrator

Select All

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.

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome Sylvia | Customize | Help | Contact Us | CalPERS On-Line | Log out | June 16, 2011. Below this is the my|CalPERS logo and a set of tabs: Home, Profile, Reporting, Person Information, and Other Organizations. The main content area is titled 'Summary' and 'Agreements'. On the left, there is a 'Common Tasks' menu with options: Search, Contacts, Relationships, Findings, Divisions, Capture Interaction, and Information. The main content area displays 'Participant Name: Laura Tester' and 'CalPERS ID: 3047155671'. A 'Password Maintenance' section is highlighted, containing the text: 'The following Username has been created and assigned the displayed temporary password. This password will expire in 30 days:'. Below this text, the 'Username: laurat' and 'Password: pq8he-qsQ' are listed. A 'Continue' button is located at the bottom of this section.

Step 15: Be sure to capture this username and temporary password. 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.

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my|CalPERS

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- Findings
- Divisions
- Capture Interaction Information

Participant Name: Laura Tester **CalPERS ID:** 3047155671 *Required Fields

Maintain Contact Details

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

Contact Type: * General **Contact Type Detail:** * Main

Deactivation Date:

Programs Supported: CalPERS

Entity: * **Person CalPERS ID:**

Individual Name: Laura Tester

Other:

Allow System Access [System Access](#)

Make Contact Viewable to Other Organizations

Primary Contact

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address:

Address: * 1100 Fuller St

Country: * United States

City: * Visalia

State: * California

Zip Code: * 95432

Maintain Contact Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="radio"/>	Work	2098884324	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	laura@davorg.com	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

Save Clear

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.

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome Sylvia | Customize | Help | Contact Us | CalPERS On-Line | Log out | June 16, 2011. Below this is a breadcrumb trail: Home | Profile | Reporting | Person Information | Other Organizations. The main content area is titled 'Participant Name: Laura Tester' and 'CalPERS ID: 3047155671'. There are two tabs: 'Summary' (selected) and 'Agreements'. A 'Common Tasks' section is visible on the left. A 'Menu' section lists: Search, Contacts, Relationships, Findings, Divisions, and Capture Interaction Information. The 'Contacts to Display' section has 'Active: Yes' and 'Program: All' dropdown menus, and a 'Display' button. Below this is a table of contacts.

Contact Type	Contact Type Detail	Program	Name	Phone Number	Active	Primary
Create	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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

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my|CalPERS

Log In

* First, tell us who you are:

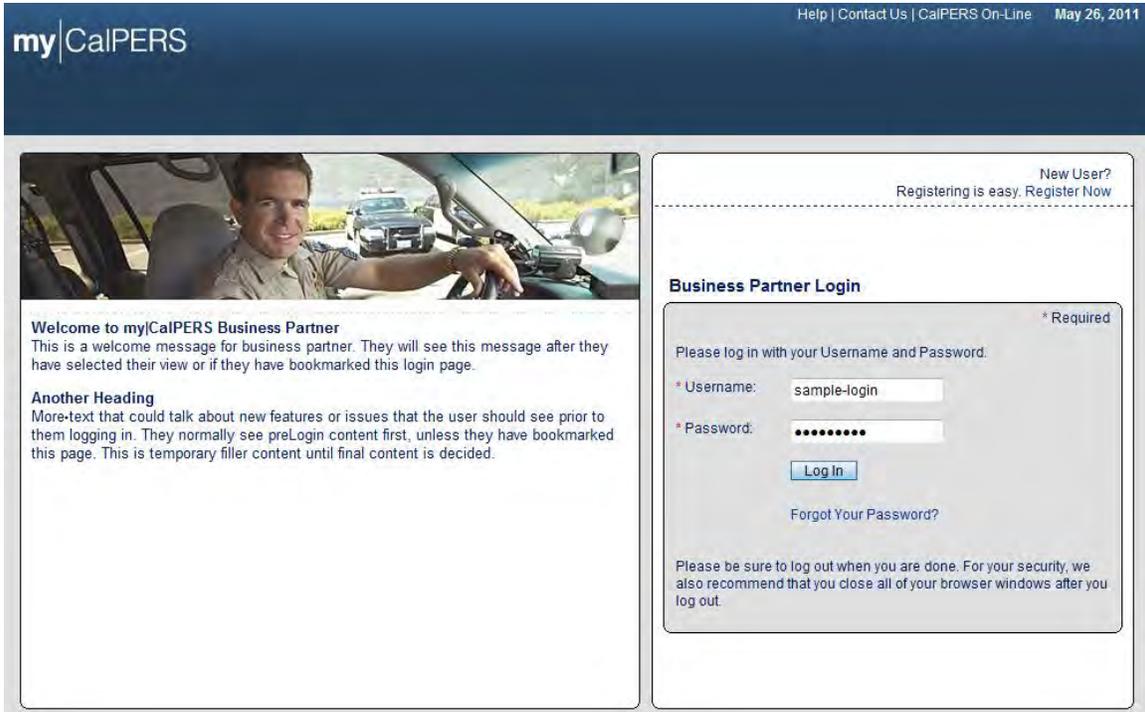
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

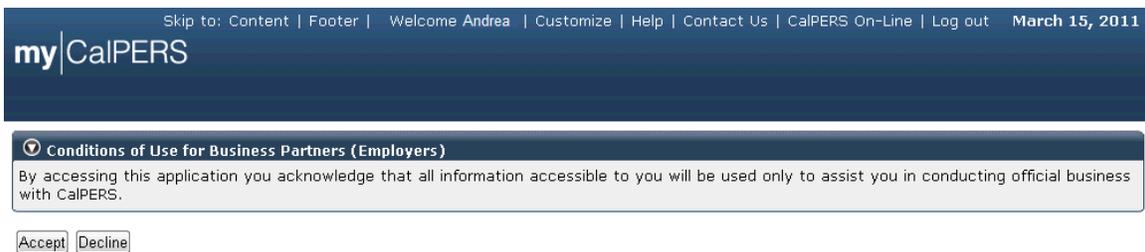
Select the **Business Partner** radio button and then the **Continue** button.

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.

Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

Case ID	Case Title	Case Type	Program	Status
731879	Initiate DA Agreement			Closed

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Joe Example	(916)789-3344
General	Main	CalPERS	Laura Tester	(209)888-4324
General	Main	CalPERS	Laura Redwood	

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	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.

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

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 Contacts
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 Findings
 Divisions
 Capture Interaction Information

Participant Name: Laura Tester **CalPERS ID:** 3047155671 *Required Fields

Maintain Contact Details

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

Contact Type: * General **Contact Type Detail:** * Main

Deactivation Date:

Programs Supported: CalPERS

Entity: * Person CalPERS ID:
 Individual Name: Laura Tester
 Other:

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

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address: None

Address: * 1100 Fuller St

Country: * United States

City: * Visalia

State: * California

Zip Code: * 95432

Maintain Contact Communication Details

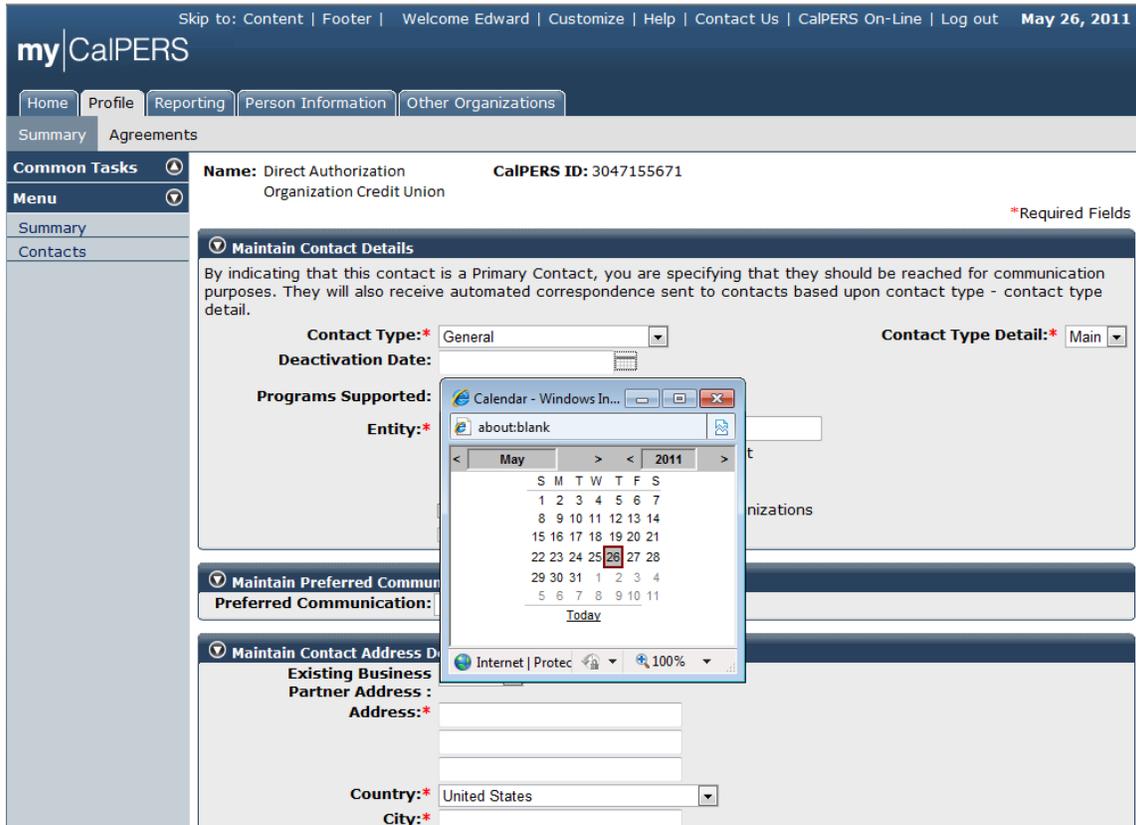
Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="radio"/>	Work	209884324	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	laura@davorg.com	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

Save Clear

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.



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.

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Summary Agreements

Common Tasks **Participant Name:** Laura Tester **CalPERS ID:** 3047155671 *Required Fields

Menu

- Search
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- Divisions
- Capture Interaction Information

Maintain Contact Details

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

Contact Type: * General **Contact Type Detail:** * Main

Deactivation Date:

Programs Supported: CalPERS

Entity: * Person CalPERS ID:
 Individual Name: Laura Tester
 Other:

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

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address:

Address: 1100 Fuller St

Country: * United States

City: * Visalia

State: * California

Zip Code: * 95432

Maintain Contact Communication Details

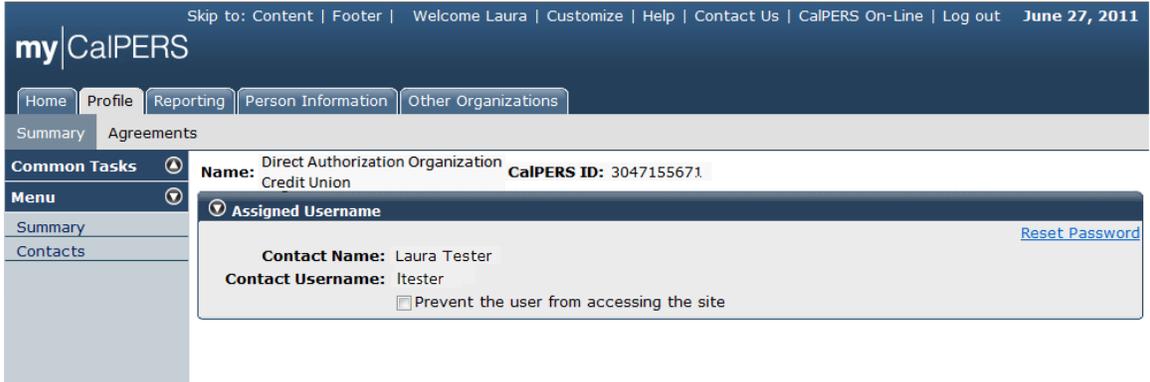
Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="radio"/>	Work	2098884324	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	laura@davorg.com	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

Save Clear

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

The Assigned Username page for "Laura Tester" displays.



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.

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Summary Agreements

Common Tasks Participant Name: Laura Tester CalPERS ID: 3047155671

Menu

Search

Contacts

Relationships

Findings

Divisions

Capture Interaction Information

Assigned Username

Contact Name: Laura Tester

Contact Username: Required Fields

Usernames must consist of 6-35 characters with no spaces. Valid characters are numbers, letters, and the following special characters: at signs (@), periods (.), underscores (_), and hyphens (-). Usernames must also start with a letter. **Usernames are not case sensitive.**

Assign Roles

Select All

Role	Selected
<input type="checkbox"/> Authorized Personal Loan Representative	
<input type="checkbox"/> Business Partner AP/Billing	
<input type="checkbox"/> Business Partner AP/Billing RO	
<input checked="" type="checkbox"/> Business Partner Direct Authorization	
<input type="checkbox"/> Business Partner Employer Inquiry	
<input type="checkbox"/> Business Partner Employer Maintenance	
<input type="checkbox"/> Business Partner Health Contracts	
<input type="checkbox"/> Business Partner Health Enrollment	
<input type="checkbox"/> Business Partner Health Enrollment RO	
<input type="checkbox"/> Business Partner IME/JA	
<input type="checkbox"/> Business Partner Limited	
<input type="checkbox"/> Business Partner PA Billing	
<input type="checkbox"/> Business Partner Payroll	
<input type="checkbox"/> Business Partner Payroll RO	
<input type="checkbox"/> Business Partner Reciprocal	
<input type="checkbox"/> Business Partner Retirement Contracts	
<input type="checkbox"/> Business Partner Retirement Enrollment	
<input type="checkbox"/> Business Partner Retirement Enrollment RO	
<input type="checkbox"/> Business Partner SCP Certification	
<input type="checkbox"/> Business Partner Supplemental Income Plan	
<input type="checkbox"/> Carrier	
<input checked="" type="checkbox"/> System Access Administrator	

Select All

Save

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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

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my|CalPERS

Log In

* First, tell us who you are:

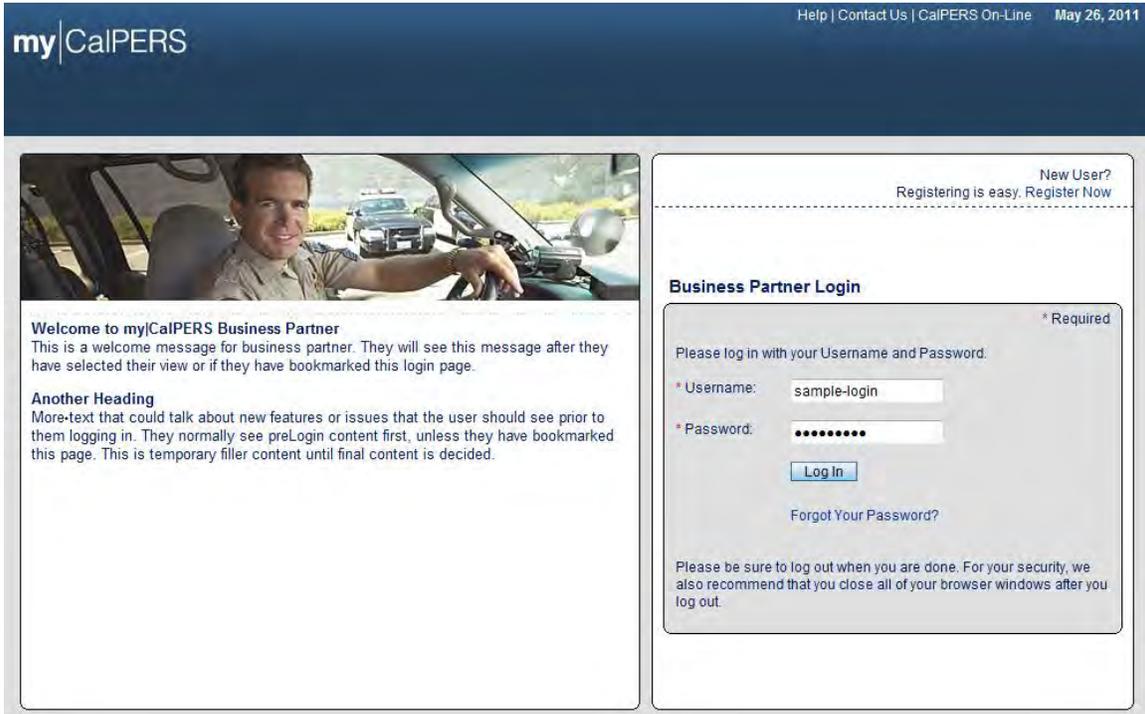
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

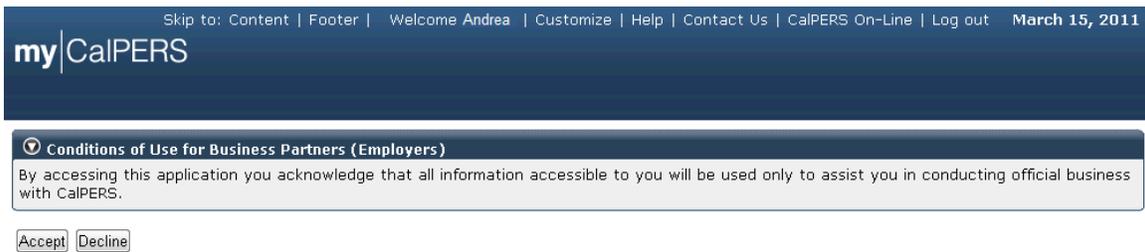
Select the **Business Partner** radio button and then the **Continue** button.

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.



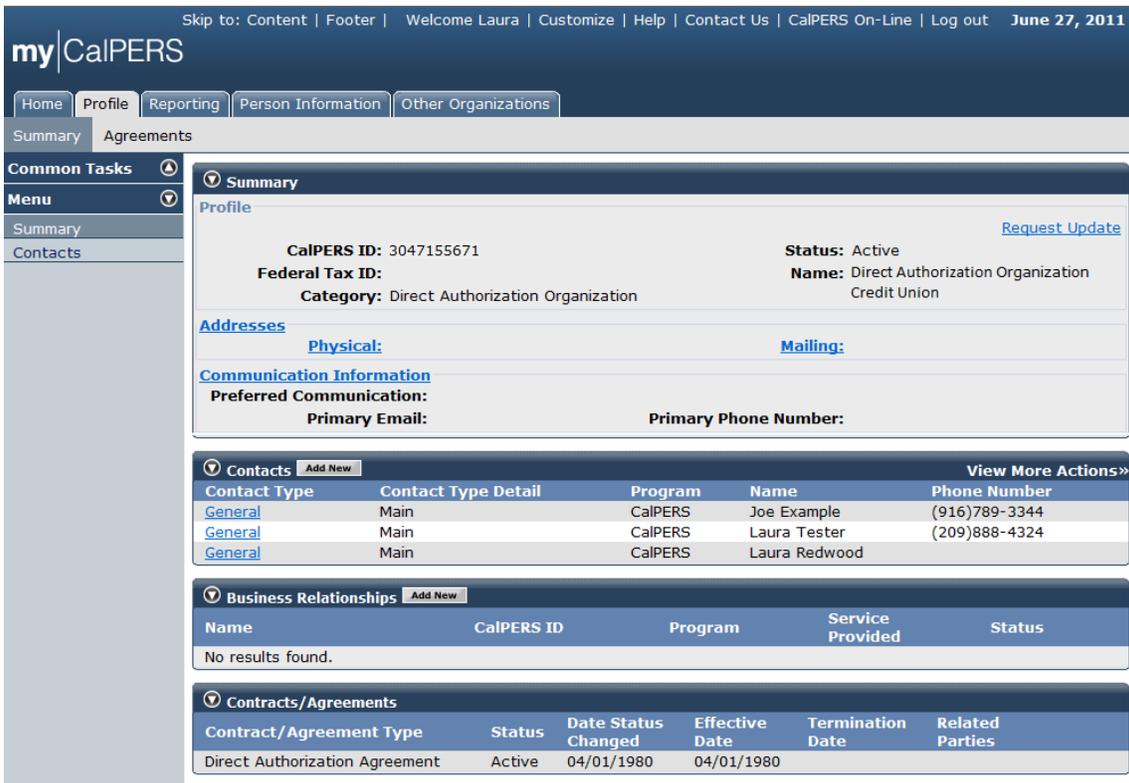
Review the conditions of use statement and then select the **Accept** button.

The my|CalPERS *Home* page displays.



Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.



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.

Skip to: Content | Footer | Welcome Laura | Customize | Help | Contact Us | CalPERS On-Line | Log out **June 27, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks **Menu**

Summary Contacts

Name: Direct Authorization Organization **CalPERS ID:** 3047155671 *Required Fields

Direct Authorization Organization **Credit Union**

Maintain Contact Details

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

Contact Type:* General **Contact Type Detail:*** Main

Deactivation Date:

Programs Supported: CalPERS

Entity:* Person CalPERS ID:
 Individual Name: Joe Example
 Other:

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

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address: None

Address:*

Country:* United States

City:*

State:* California

Zip Code:* -

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="radio"/>	Work	9167893344	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TYY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	joe@davorg.com	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

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

The *Assigned Username* page for "Joe Example" displays.

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome Laura | Customize | Help | Contact Us | CalPERS On-Line | Log out | June 27, 2011. Below this is a dark blue header with the my|CalPERS logo and a menu with tabs: Home, Profile, Reporting, Person Information, and Other Organizations. A secondary menu shows Summary and Agreements. On the left, there is a sidebar with sections: Common Tasks (with an up arrow), Menu (with a down arrow), Summary, and Contacts. The main content area displays the 'Assigned Username' page for a contact named 'Joe Example'. It shows the following information: Name: Direct Authorization Organization Credit Union, CalPERS ID: 3047155671. Under the 'Assigned Username' section, it lists Contact Name: Joe Example and Contact Username: jexample. There is a 'Reset Password' link in the top right of this section. At the bottom, there is a checkbox labeled 'Prevent the user from accessing the site' which is currently unchecked.

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.

Skip to: Content | Footer | Welcome Laura | Customize | Help | Contact Us | CalPERS On-Line | Log out **June 27, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks **Menu**

Summary Contacts

Name: Direct Authorization Organization **CalPERS ID:** 3047155671 *Required Fields

Direct Authorization Organization **Credit Union**

Maintain Contact Details

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

Contact Type:* General **Contact Type Detail:*** Main

Deactivation Date:

Programs Supported: CalPERS

Entity:* Person CalPERS ID:
 Individual Name: Joe Example
 Other:

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

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address: None

Address:*

Country:* United States

City:*

State:* California

Zip Code:* -

Maintain Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="radio"/>	Work	9167893344	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	joe@davorg.com	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

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.

Skip to: Content | Footer | Welcome Laura | Customize | Help | Contact Us | CalPERS On-Line | Log out June 27, 2011

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks ▲

Menu ▼

Summary

Contacts

Name: Direct Authorization Organization Credit Union CalPERS ID: 3047155671

▼ **Contacts to Display**

Active: Yes ▼

Program: All ▼

Display

▼ **Contacts** Add New

Contact Type	Contact Type Detail	Program	Name	Phone Number	Active	Primary
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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line May 26, 2011

my|CalPERS

Log In

* First, tell us who you are:

Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

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, 2011

New User?
Registering is easy. Register Now

Business Partner Login * Required

Please log in with your Username and Password.

* Username:

* 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 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 March 15, 2011

my|CalPERS

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 official business with CalPERS.

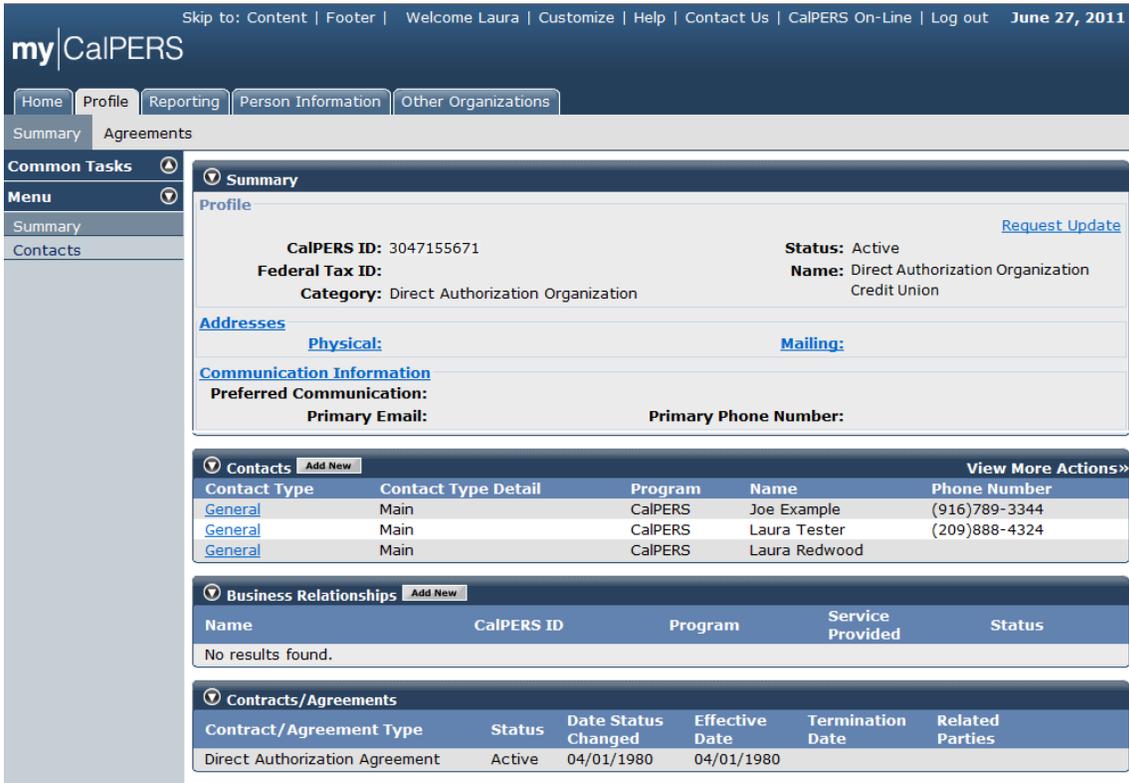
Review the conditions of use statement and select the **Accept** button.

The my|CalPERS *Home* page displays.



Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.



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.

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

Skip to: Content | Footer | Welcome Sylvia | Customize | Help | Contact Us | CalPERS On-Line | Log out **June 16, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Participant Name: Laura Tester **CalPERS ID:** 3047155671 *Required Fields

Maintain Contact Details

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

Contact Type: * General **Contact Type Detail:** * Main

Deactivation Date:

Programs Supported: CalPERS

Entity: * Person CalPERS ID:
 Individual Name: Laura Tester
 Other:

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

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address: None

Address: * 1100 Fuller St

Country: * United States

City: * Visalia

State: * California

Zip Code: * 95432

Maintain Contact Communication Details

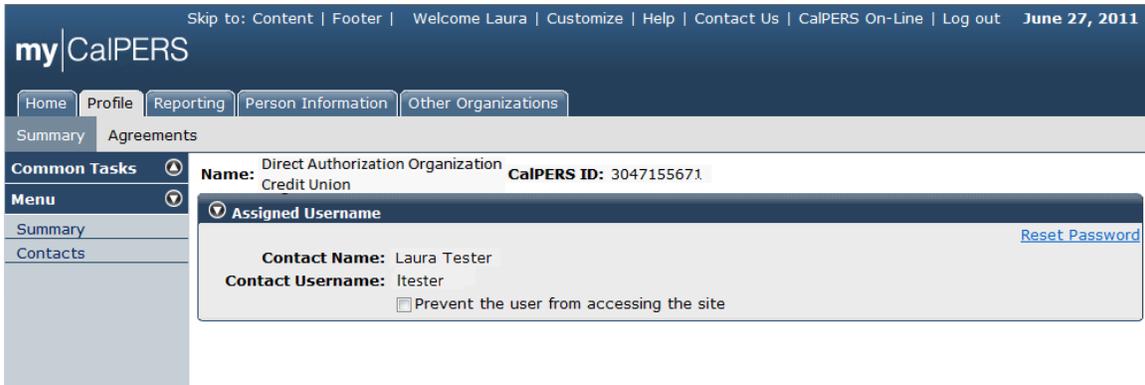
Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="radio"/>	Work	2098884324	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	laura@davorg.com	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

Save Clear

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.



Be sure to capture the temporary password. 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 for “Laura Tester” displays.

Skip to: Content | Footer | Welcome Sylvia | Customize | Help | Contact Us | CalPERS On-Line | Log out **June 16, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Participant Name: Laura Tester **CalPERS ID:** 3047155671 *Required Fields

Maintain Contact Details

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

Contact Type: * General **Contact Type Detail:** * Main

Deactivation Date:

Programs Supported: CalPERS

Entity: * Person CalPERS ID:
 Individual Name: Laura Tester
 Other:

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

Maintain Preferred Communication Details

Preferred Communication:

Maintain Contact Address Details

Existing Business Partner Address: None

Address: * 1100 Fuller St

Country: * United States

City: * Visalia

State: * California

Zip Code: * 95432

Maintain Contact Communication Details

Primary	Phone Type	Phone Number	Extension	International
<input type="radio"/>	Home	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Cellular	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	Other	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input checked="" type="radio"/>	Work	2098884324	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	TTY	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	FAX	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Primary	Email	Undeliverable Date
<input checked="" type="radio"/>	laura@davorg.com	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>

Save Clear

Select the **Save** button.

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

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links for Home, Profile, Reporting, Person Information, and Other Organizations. Below this is a sub-navigation bar with Summary and Agreements. The main content area displays the organization's name as 'Direct Authorization Organization Credit Union' and the CalPERS ID as '3047155671'. There is a section titled 'Contacts to Display' with filters for 'Active' (set to 'Yes') and 'Program' (set to 'All'). A 'Display' button is located below these filters. At the bottom, there is a table of contacts with columns for Contact Type, Contact Type Detail, Program, Name, Phone Number, Active, and Primary.

Contact Type	Contact Type Detail	Program	Name	Phone Number	Active	Primary
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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line May 26, 2011

my|CalPERS

Log In

* First, tell us who you are:

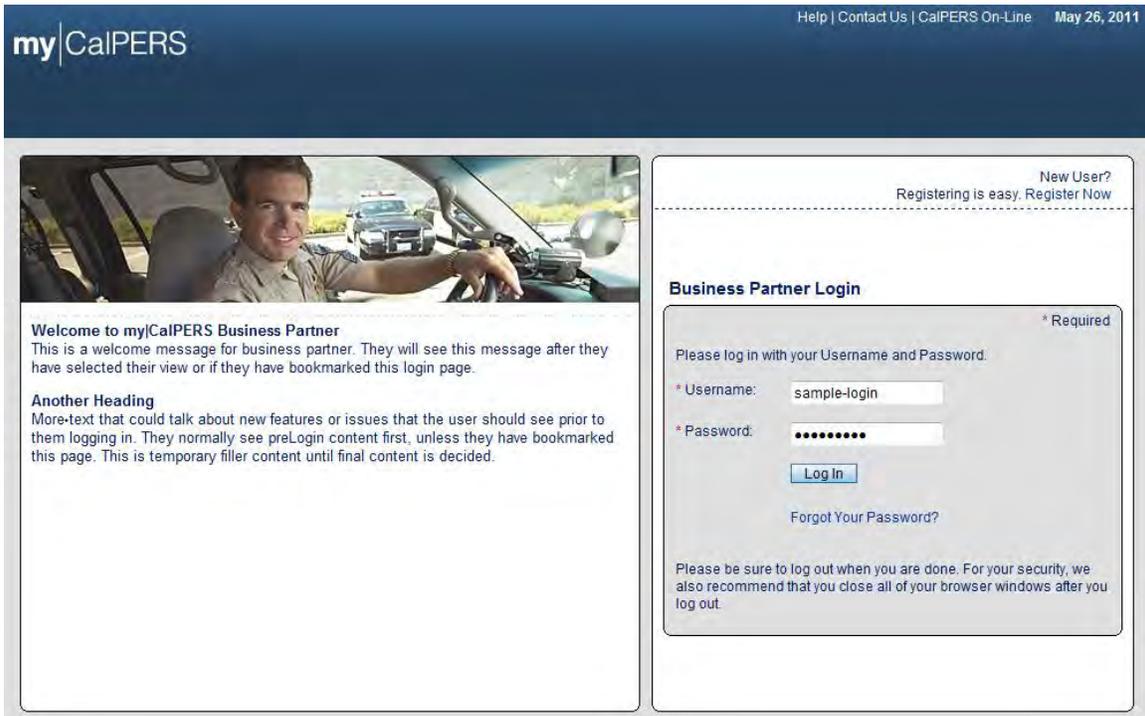
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

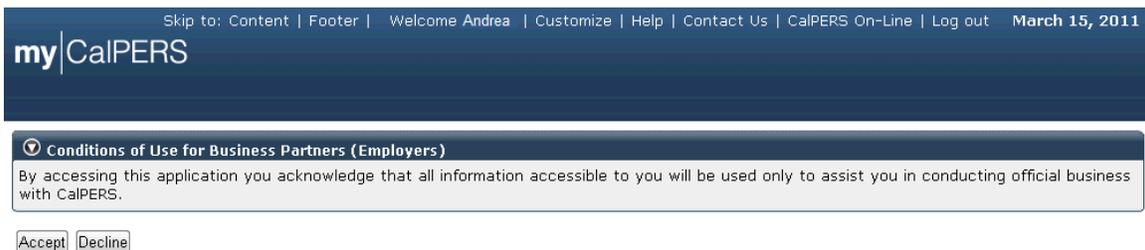
Select the **Business Partner** radio button and then the **Continue** button.

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.

Common Tasks

Menu

- Person Search
- Change Password
- Change Challenge Questions

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

Select the **Profile** global navigation tab.

The *Business Partner Profile* page displays.

Summary

Agreements

Common Tasks

Menu

- Summary
- Contacts

Summary

Profile

CalPERS ID: 4499089095
 Federal Tax ID: 1234567-89

Status: Active [Request Update](#)

Name: Direct Authorization Credit Union

Category: Direct Authorization Organization

Addresses

Physical: 49 Mailing Street, Sacramento, CA 84567
 Mailing: 49 Mailing Street, Sacramento, CA 84567

Communication Information

Preferred Communication: Email
 Primary Email: robert@daocu.org
 Primary Phone Number: 916-789-1111

Contacts [Add New](#)

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships [Add New](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		

Select the **Agreements** local navigation tab.

The *Agreements* page displays.

Skip to: Content | Footer | Welcome Ronald | Customize | Help | Contact Us | CalPERS On-Line | Log out **May 26, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

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 Accident Insurance
Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insurance Group

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

The *Add New Agreement* page displays.

Skip to: Content | Footer | Welcome George | Customize | Help | Contact Us | CalPERS On-Line | Log out **June 15, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks **Direct Authorization Deductions** *Required Fields

Direct Authorization Information

Program:*

Deduction Type:*

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)?*

Yes

No

Charter/Constitution/By-laws Contract:* [Provide Document](#) [Download Coversheet](#)

Who will submit the Direct Authorization Deductions for this agreement?*

Sponsor

Which organization should receive the deduction payments?*

Sponsor

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.

The *Submit Documentation* page displays.

Skip to: Content | Footer | Welcome George | Customize | Help | Contact Us | CalPERS On-Line | Log out June 15, 2011

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks **Name:** Direct Authorization Credit Union **CalPERS ID:** 4499089095 *Required Fields

Submit Documentation

For faster processing of the required documentation, you can upload documents directly to CalPERS. If a cover sheet is generated when you submit, please print the cover sheet and submit it along with the document you are sending to CalPERS.

Document Category: Direct Authorization Agreement
Document Type: * Charter/Constitution/By-Laws Contract
Submission Method: * Upload
Path: *

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.

The screenshot shows the my|CalPERS web interface. At the top, there is a navigation bar with links for Home, Profile, Reporting, Person Information, and Other Organizations. Below this is a sub-navigation bar with Summary and Agreements. The main content area is titled "Direct Authorization Deductions" and contains the following fields and options:

- Program:** A dropdown menu set to "CalPERS".
- Deduction Type:** A dropdown menu set to "Credit Union Deduction".
- Please confirm:** A checked checkbox with the text: "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)?**: Radio buttons for "Yes" and "No", with "No" selected.
- Charter/Constitution/By-laws Contract:** Two links: "Replace Document" and "Download Coversheet".
- Date Constitution/Charter/bylaws Submitted:** The date "06/15/2011" and a "View Document" link.
- Who will submit the Direct Authorization Deductions for this agreement?**: Radio buttons for "Sponsor" (selected) and another option.
- Which organization should receive the deduction payments?:** Radio buttons for "Sponsor" (selected) and another option.

At the bottom of the form is a "Save & Continue" button. A "*Required Fields" label is visible in the top right corner of the form area.

Select the **Save & Continue** button.

The *Direct Authorization Agreement* page displays.

Skip to: Content | Footer | Welcome George | Customize | Help | Contact Us | CalPERS On-Line | Log out **June 15, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks ▲

Name: Direct Authorization Credit Union **CalPERS ID:** 4499089095 *Required Fields

Hold Harmless Agreement

**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 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.

e-Signature

You Are Not Required to Complete This Transaction Electronically

If you do not 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.

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.

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links like 'Skip to: Content | Footer | Welcome George | Customize | Help | Contact Us | CalPERS On-Line | Log out' and the date 'June 15, 2011'. Below this is the my|CalPERS logo and a menu with 'Home', 'Profile', 'Reporting', 'Person Information', and 'Other Organizations'. The main content area is titled 'Direct Authorization Deductions' and contains the following information:

- Agreement ID:** 1000001557
- Program:** California Public Employees' Retirement System
- Agreement Status:** Pending
- Deduction Type:** Credit Union Deduction
- Sign Administration Fee:** [View Administration Fee](#)
- Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit?** No
- Will the deductions be managed by a Third Party Administrator (TPA)?** No
- Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement?** Yes
- Who will submit the Direct Authorization Deductions for this agreement?** Sponsor
- Date Hold Harmless Agreement Signed:** [Sign Agreement](#)
- Charter/Constitution/By-laws Contract:** [Provide Document](#) [Download Coversheet](#)

Below this information is the 'Direct Authorization Payment Details' section, which asks 'Which organization should receive the deduction payments?:*' with a radio button selected for 'Sponsor'. The 'Available Actions' section has two radio buttons: 'Submit Agreement' (selected) and 'Cancel Agreement'. A 'Submit' button is located at the bottom left of the form area.

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”.

The screenshot shows the my|CalPERS user interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome George | Customize | Help | Contact Us | CalPERS On-Line | Log out | June 15, 2011. Below this is the my|CalPERS logo and a set of global navigation tabs: Home, Profile, Reporting, Person Information, and Other Organizations. The Profile tab is selected. Underneath, there are sub-tabs: Summary and Agreements. The Agreements sub-tab is active, displaying a green 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." Below the message is a table titled "Agreements" with an "Add New" button. The table has columns for Agreement Type, Status, Benefit Provided By, Effective Date, Termination Date, and Related Parties. It lists eight entries, seven with status "Active" and one with status "Work In Progress".

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	Work In Progress	06/15/2011			

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.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks **Menu** **Contacts**

Summary

Profile [Request Update](#)

CalPERS ID: 4499089095 **Status:** Active
Federal Tax ID: **Name:** Direct Authorization Credit Union
Category: Direct Authorization Organization

Addresses

Physical: **Mailing:** 8749 SMITH ST
 SACRAMENTO, CA 95825

Communication Information

Preferred Communication:
Primary Email: **Primary Phone Number:**

Contacts [Add New](#) [View More Actions»](#)

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS JRS JRS II LRS	George Adams	
General	Main	CalPERS JRS JRS II LRS	Sally Jones	

Business Relationships [Add New](#)

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		Direct Authorization Credit Union
Direct Authorization Agreement	Work In Progress	06/15/2011			
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		Direct Authorization Credit Union
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		Direct Authorization Credit Union
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		Direct Authorization Credit Union

Sign the Hold Harmless agreement

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

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my|CalPERS

Log In

* First, tell us who you are:

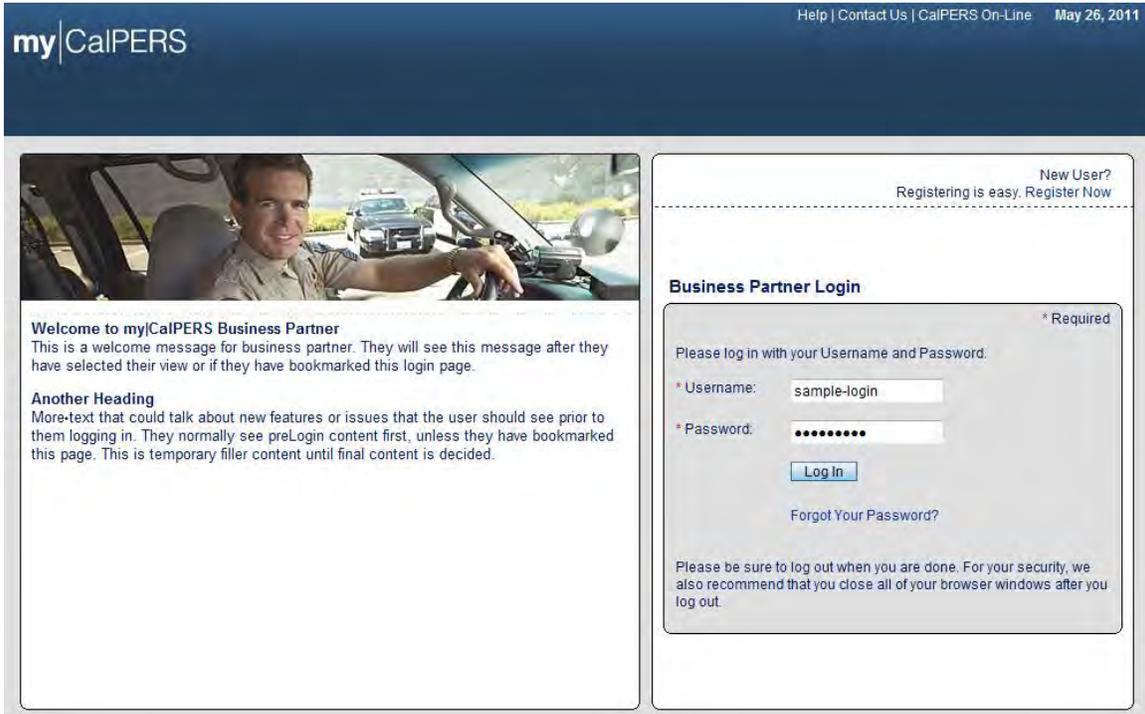
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

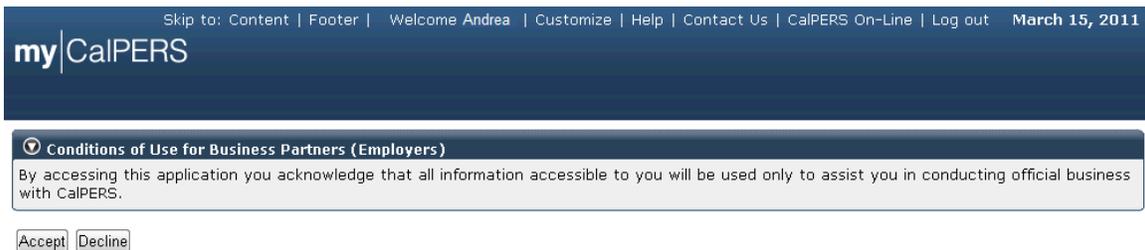
Select the **Business Partner** radio button and then the **Continue** button.

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.

Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

Select the **Agreements** local navigation tab.

The *Agreements* page displays.

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	Wellbeing Life and Accident Insurance
Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insurance 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.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks Required Fields

Direct Authorization Deductions

Direct Authorization Information [Edit Details](#)

Agreement ID: 1000001557
Program: California Public Employees' Retirement System
Agreement Status: Pending
Deduction Type: Credit Union Deduction
Sign Administration Fee: [View Administration Fee](#)

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? No
Will the deductions be managed by a Third Party Administrator (TPA)? No
Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes
Who will submit the Direct Authorization Deductions for this agreement? Sponsor
Date Hold Harmless Agreement Signed: [Sign Agreement](#)
Charter/Constitution/By-laws Contract: [Provide Document](#) [Download Certificate](#)

Direct Authorization Payment Details

Which organization should receive the deduction payments?:*

Sponsor

Available Actions

Select an Available Action:*

Submit Agreement
 Cancel Agreement

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.

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Summary Agreements

Common Tasks ▲

Name: Direct Authorization Credit Union **CalPERS ID:** 4499089095 *Required Fields

Hold Harmless Agreement

**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 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.

e-Signature

You Are Not Required to Complete This Transaction Electronically

If you do not 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.

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.

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my|CalPERS

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Summary Agreements

Common Tasks *Required Fields

Direct Authorization Deductions

Direct Authorization Information

Agreement ID: 1000001557
Program: California Public Employees' Retirement System
Agreement Status: Pending
Deduction Type: Credit Union Deduction

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? No

Will the deductions be managed by a Third Party Administrator (TPA)? No

Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? No

Who will submit the Direct Authorization Deductions for this agreement? Sponsor

Date Hold Harmless Agreement Signed: 05/26/2011 [View Hold Harmless Agreement](#)

Direct Authorization Payment Details

Which organization should receive the deduction payments?:*

Sponsor

Preferred Method of Payment: Check
Check Payable Name: Direct Authorization Organization
Address: 49 APPLE ST
 SACRAMENTO,
 95814 - 0000

Available Actions

Select an Available Action:*

Add Third Party Administrator
 Replace Third Party Administrator
 Remove Third Party Administrator
 Terminate Agreement

Manage Relationship with a Third Party Administrator

Add a third party administrator to an existing agreement

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

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my|CalPERS

Log In

* First, tell us who you are:

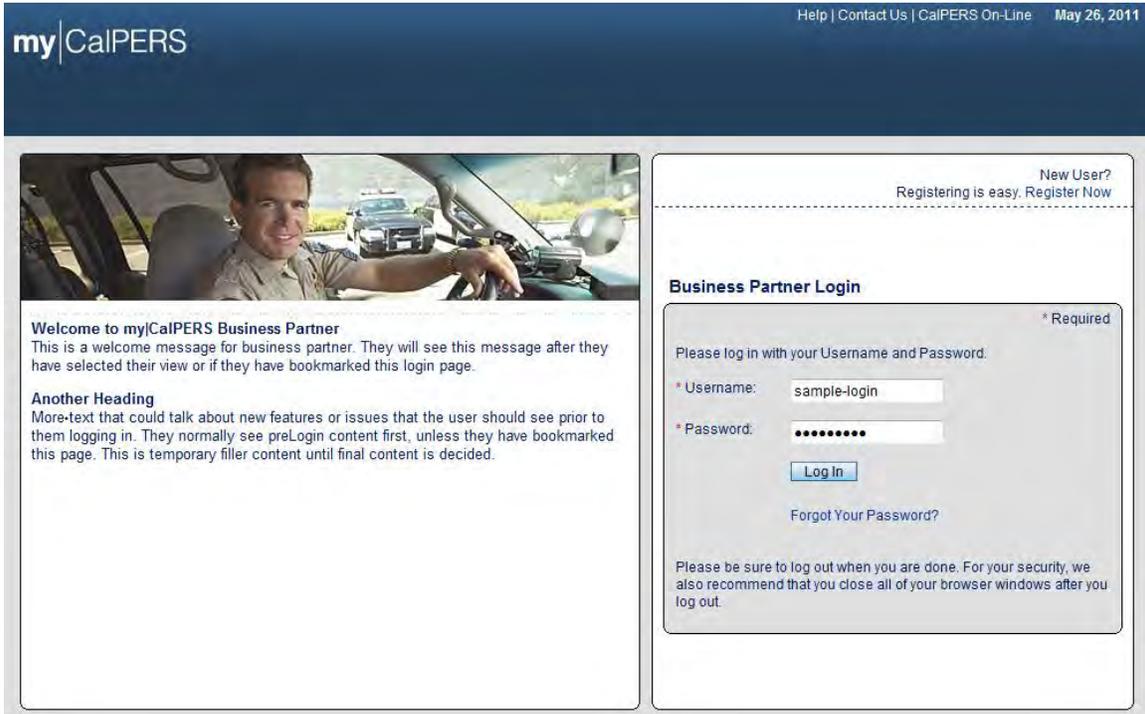
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

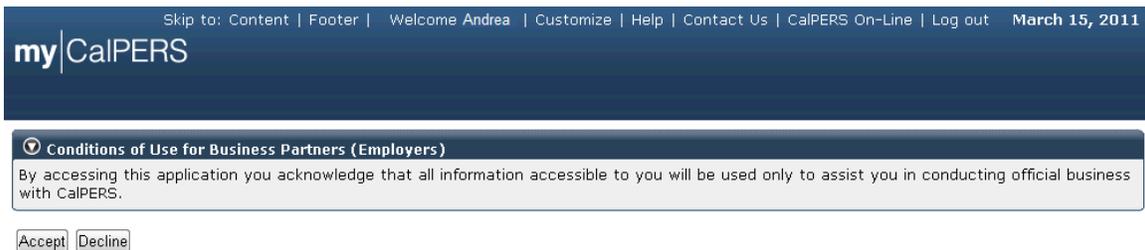
Select the **Business Partner** radio button and then the **Continue** button.

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.



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

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My Home

Common Tasks

Menu

Person Search

Change Password

Change Challenge Questions

My Cases View More Actions»

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

Select the **Profile** global navigation tab.

The *Business Partner Profile* page displays.

my|CalPERS

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Summary Agreements

Common Tasks

Menu

Summary

Contacts

Summary Profile Request Update

CalPERS ID: 4499089095 Status: Active

Federal Tax ID: 1234567-89 Name: Direct Authorization Organization Credit Union

Category: Direct Authorization Organization

Addresses

Physical: 49 Mailing Street, Sacramento, CA 95857 Mailing: 49 Mailing Street, Sacramento, CA 95857

Communication Information

Preferred Communication: Email

Primary Email: robert@daocu.org Primary Phone Number: 916-789-1111

Contacts Add New View More Actions»

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships Add New

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		

Select the **Agreements** local navigation tab.

The *Agreements* page displays.

The screenshot shows the my|CalPERS interface with the 'Agreements' section selected. A table lists several 'Direct Authorization Agreement' records. The table has columns for Agreement Type, Status, Benefit Provided By, Effective Date, Termination Date, and Related Parties.

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	Wellbeing Life and Accident Insurance
Direct Authorization Agreement	Terminated	04/30/2001	01/01/1995	04/30/2001	The Personal1 Insurance 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.

The screenshot shows the 'Direct Authorization Deductions' form. It includes sections for 'Direct Authorization Information' and 'Third Party Administrator Information'. The 'Third Party Administrator Name' field has a 'Select' link next to it, which is the target for adding a third party administrator.

Direct Authorization Information
 Program: CalPERS
 Deduction Type: Association Dues
 Will the deductions be managed by a Third Party Administrator (TPA)? No

Third Party Administrator Information
 Third Party Administrator Name:* [Select](#) Federal 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.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Organization Search

If Exact Match for Name is left 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.

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my|CalPERS

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Organization Search

If Exact Match for Name is left unchecked, the system will return results with a partial match.

Name: Sample TPA Exact Match

Federal Tax ID:

CalPERS ID:

Search

Search Results [Add New](#)

	Name	Mailing Address
<input type="radio"/>	Sample TPA 1	48 CHARLES BLVD, CHICAGO, IL 60811
<input type="radio"/>	Sample TPA 2	5155 CHUPCAN PLACE CARPINTERIA, CA 93013-
<input type="radio"/>	Sample TPA 11	444 E A STREET DOWAGIAC, MI 49047-0000
<input type="radio"/>	Sample TPA 22	458 BELMONT PLACE CLAYTON, CA 94517-0000
<input type="radio"/>	Sample TPA 111	6 N DIVISION ST LOUIS, 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”.

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.

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: 

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.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks *Required Fields

Thank you for modifying your agreement. No further action is required at this time.

Direct Authorization Deductions

Direct Authorization Information

Agreement ID: 1000002164

Program: California Public Employees' Retirement System

Agreement Status: Active

Deduction Type: Association Dues

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? No

Will the deductions be managed by a Third Party Administrator (TPA)? No

Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? No

Who will submit the Direct Authorization Deductions for this agreement? Sponsor

Date Hold Harmless Agreement Signed: 02/29/1988 [View Hold Harmless Agreement](#)

Direct Authorization Payment Details

Which organization should receive the deduction payments?:*

Sponsor
 Third Party Administrator

Preferred Method of Payment: Check

Check Payable Name: California State Employees Association CPS

Address: 525 J STREET
SACRAMENTO,
95814 - 0000

Available Actions

Select an Available Action:*

- Add Third Party Administrator
- Replace Third Party Administrator
- Remove Third Party Administrator
- Terminate Agreement

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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

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my|CalPERS

Log In

* First, tell us who you are:

Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

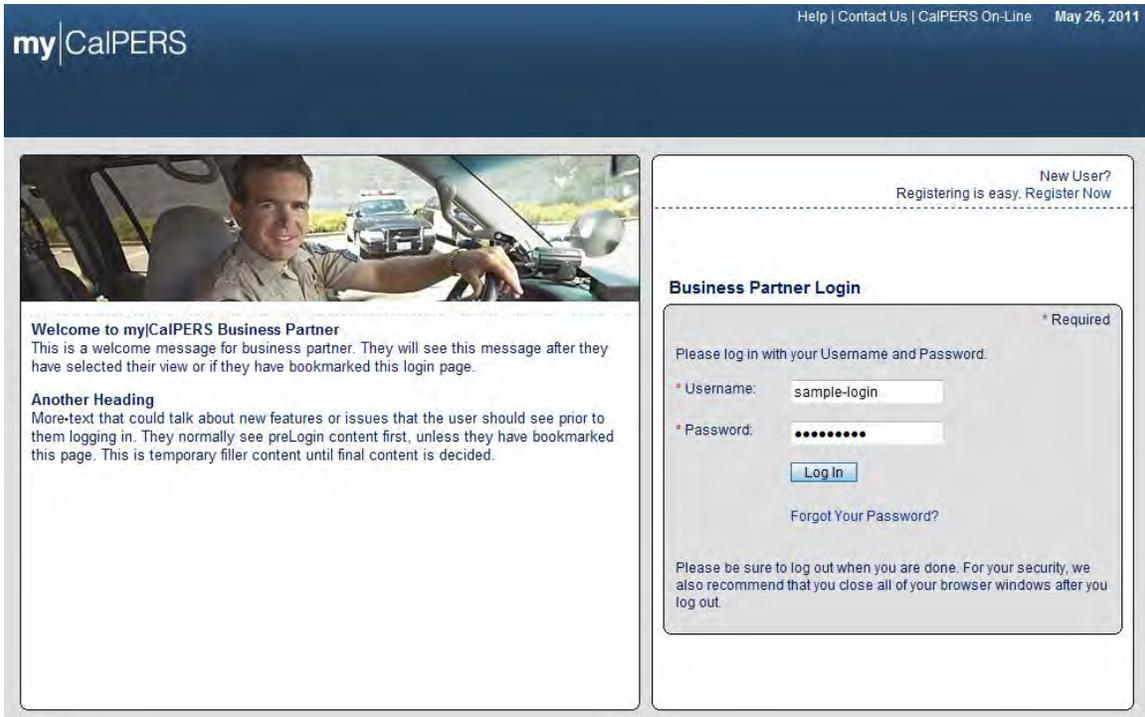
Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

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.

Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

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.

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

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.

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Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks *Required Fields

Direct Authorization Deductions

Direct Authorization Information

Agreement ID: 1000002164
Program: California Public Employees' Retirement System
Agreement Status: Active
Deduction Type: Association Dues

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? No
Will the deductions be managed by a Third Party Administrator (TPA)? No
Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? No
Who will submit the Direct Authorization Deductions for this agreement? Sponsor
Date Hold Harmless Agreement Signed: 02/29/1988 [View Hold Harmless Agreement](#)

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 TPA
Address: 5167 S STREET
 SACRAMENTO,
 95814 - 0000

Available Actions

Select an Available Action:*

Add Third Party Administrator
 Replace Third Party Administrator
 Remove Third Party Administrator
 Terminate Agreement

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:

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: 07/01/2011

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.

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Summary Agreements

Common Tasks

*Required Fields

Direct Authorization Deductions

Direct Authorization Information

Program: CalPERS
Deduction Type: Association Dues

Will the deductions be managed by a Third Party Administrator (TPA)?
No

Third Party Administrator Information

Third Party Administrator Name: Sample TPA 11 Select Federal Tax 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.

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Home Profile Reporting Person Information Other Organizations

Organization Search

If Exact Match for Name is left 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.

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Home Profile Reporting Person Information Other Organizations

Organization Search

If Exact Match for Name is left unchecked, the system will return results with a partial match.

Name: Exact Match

Federal Tax ID:

CalPERS ID:

Search

Search Results

Name	Mailing Address
<input type="radio"/> Sample TPA 1	48 CHARLES BLVD, CHICAGO, IL 60811
<input type="radio"/> Sample TPA 2	5155 CHUPCAN PLACE CARPINTERIA, CA 93013-
<input type="radio"/> Sample TPA 11	444 E A STREET DOWAGIAC, MI 49047-0000
<input type="radio"/> Sample TPA 22	458 BELMONT PLACE CLAYTON, CA 94517-0000
<input type="radio"/> 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.

The screenshot shows the my|CalPERS web interface. At the top, there is a navigation bar with links for Home, Profile, Reporting, Person Information, and Other Organizations. Below this, there are tabs for Summary and Agreements. The main content area is titled "Direct Authorization Deductions" and contains the following information:

- Direct Authorization Information**
 - Program: CalPERS
 - Deduction Type: Association Dues
 - Will the deductions be managed by No a Third Party Administrator (TPA)?
- Third Party Administrator Information**
 - Third Party Administrator Name: * Sample TPA 11 [Select](#)
 - Federal Tax ID:
- Which organization should receive the deduction payments?:***
 - Sponsor
 - Third Party Administrator

At the bottom of the form, there is a "Save & Continue" button. A red asterisk indicates required fields.

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 screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links for Home, Profile, Reporting, Person Information, and Other Organizations. Below this, there are tabs for Summary and Agreements. A 'Common Tasks' sidebar is on the left. The main content area features a green confirmation message: 'Thank you for modifying your agreement. No further action is required at this time.' Below this is a section titled 'Direct Authorization Deductions' containing 'Direct Authorization Information' with fields for Agreement ID (1000002164), Program (California Public Employees' Retirement System), Agreement Status (Active), Deduction Type (Association Dues), and several yes/no questions regarding continuation of benefits and coverage. The 'Direct Authorization Payment Details' section includes a radio button selection for 'Which organization should receive the deduction payments?*' (Sponsor or Third Party Administrator), and fields for 'Preferred Method of Payment' (Check), 'Check Payable Name' (Direct Authorization Organization), and 'Address' (49 APPLE ST, SACRAMENTO, 95814 - 0000). The 'Available Actions' section lists options like 'Add Third Party Administrator', 'Replace Third Party Administrator', 'Remove Third Party Administrator', and 'Terminate Agreement'. A 'Submit' button is located at the bottom left of the form area.

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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line May 26, 2011

my|CalPERS

Log In

* First, tell us who you are:

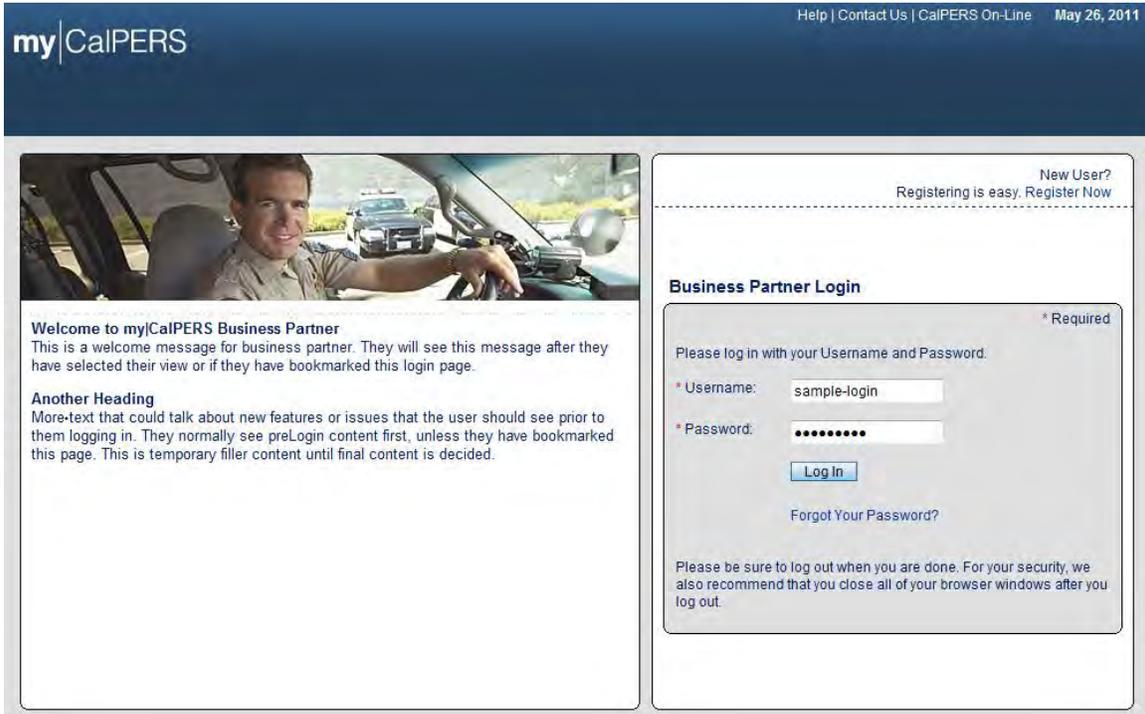
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

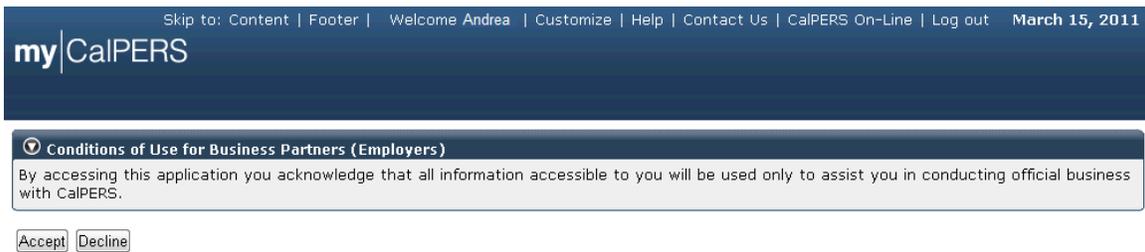
Select the **Business Partner** radio button and then the **Continue** button.

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: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out May 26, 2011

Home Profile Reporting Person Information Other Organizations

My Home

Common Tasks

Menu

Person Search

Change Password

Change Challenge Questions

My Cases

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

my|CalPERS

Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out May 26, 2011

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks

Menu

Summary

Contacts

Summary

Profile

Request Update

CalPERS ID: 4499089095

Federal Tax ID: 1234567-89

Status: Active

Name: Direct Authorization Organization Credit Union

Category: Direct Authorization Organization

Addresses

Physical: 49 Mailing Street, Sacramento, CA 95857

Mailing: 49 Mailing Street, Sacramento, CA 95857

Communication Information

Preferred Communication: Email

Primary Email: robert@daocu.org

Primary Phone Number: 916-789-1111

Contacts

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		

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.

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

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.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks *Required Fields

Direct Authorization Deductions

Direct Authorization Information

Agreement ID: 100002164
Program: California Public Employees' Retirement System
Agreement Status: Active
Deduction Type: Association Dues

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? No
Will the deductions be managed by a Third Party Administrator (TPA)? No
Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? No
Who will submit the Direct Authorization Deductions for this agreement? Sponsor
Date Hold Harmless Agreement Signed: 02/29/1988 [View Hold Harmless Agreement](#)

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 TPA
Address: 5167 S STREET
 SACRAMENTO,
 95814 - 0000

Available Actions

Select an Available Action:*

Add Third Party Administrator
 Replace Third Party Administrator
 Remove Third Party Administrator
 Terminate Agreement

Submit

Available Actions

Select an Available Action:*

Add Third Party Administrator
 Replace Third Party Administrator
 Remove Third Party Administrator
 Terminate Agreement

Effective Date:

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.

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.”

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome Ronald | Customize | Help | Contact Us | CalPERS On-Line | Log out | May 26, 2011. Below this is a menu with tabs: Home, Profile, Reporting, Person Information, and Other Organizations. The main content area has a sub-menu with Summary and Agreements. A green message box displays the confirmation text. Below the message is a table titled 'Agreements' with an 'Add New' button. The table has columns for Agreement Type, Status, Benefit Provided By, Effective Date, Termination Date, and Related Parties.

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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line May 26, 2011

my|CalPERS

Log In

* First, tell us who you are:

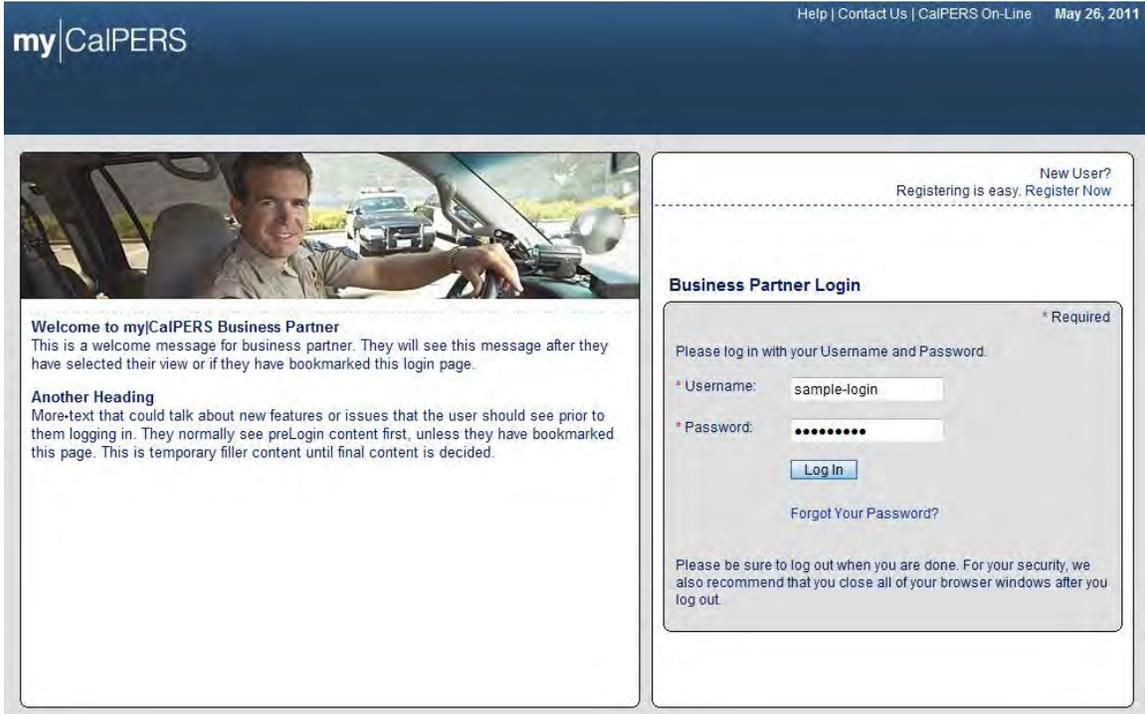
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

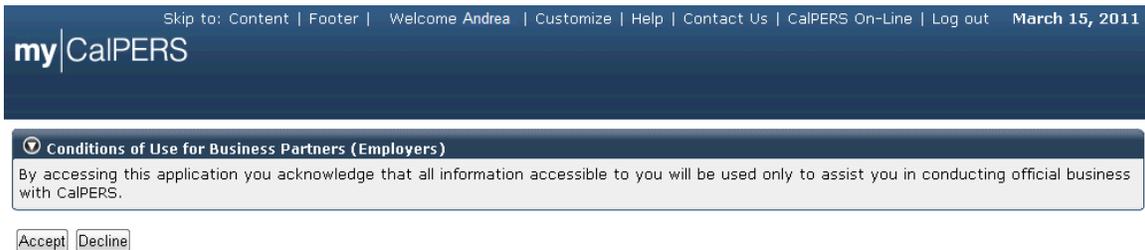
On the *Login* page select the **Business Partner** radio button and then the **Continue** button.

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.



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.

Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out **May 26, 2011**

my|CalPERS

Home Profile Reporting Person Information Other Organizations

My Home

Common Tasks

Menu

Person Search

Change Password

Change Challenge Questions

My Cases View More Actions»

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks

Menu

Summary

Contacts

Summary Request Update

CalPERS ID: 2657553833 Status: Active

Federal Tax ID: 1234567-89 Name: Direct Authorization Organization

Category: Direct Authorization Organization

Addresses

Physical: 49 Mailing Street, Sacramento, CA 84567 Mailing: 49 Mailing Street, Sacramento, CA 84567

Communication Information

Preferred Communication: Email

Primary Email: robert@daocu.org Primary Phone Number: 916-789-1111

Contacts Add New View More Actions»

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships Add New

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		

Select the **Agreements** local navigation tab.

The *Agreements List* page displays.

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

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.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks *Required Fields

Direct Authorization Deductions

Direct Authorization Information

Agreement ID: 100000969
Program: California Public Employees' Retirement System
Agreement Status: Active
Deduction Type: DA Deduction Medical

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? Yes

Will the deductions be managed by a Third Party Administrator (TPA)? No

Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? Yes

Who will submit the Direct Authorization Deductions for this agreement? Sponsor

Date Hold Harmless Agreement Signed: 12/01/2005 [View Hold Harmless Agreement](#)

Carrier Information

Direct Authorization Carrier Name: Besthealth **Federal Tax ID:** 940360524
Date Hold Harmless Agreement Signed: 12/01/2005 [View Hold Harmless Agreement](#)

Direct Authorization Payment Details

Which organization should receive the deduction payments?:*

Sponsor
 Carrier

Preferred Method of Payment: Check
Check Payable Name: Direct Authorization Organization
Address: P O BOX 15
 ALHAMBRA, CA
 91569

Available Actions

Select an Available Action:*

Add Third Party Administrator
 Replace Third Party Administrator
 Remove Third Party Administrator
 Terminate Agreement

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:

Termination Reason:

New Carrier:

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.”

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks

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.

Agreements

Agreement Type	Status	Benefit Provided By	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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line May 26, 2011

my|CalPERS



Log In

* First, tell us who you are:

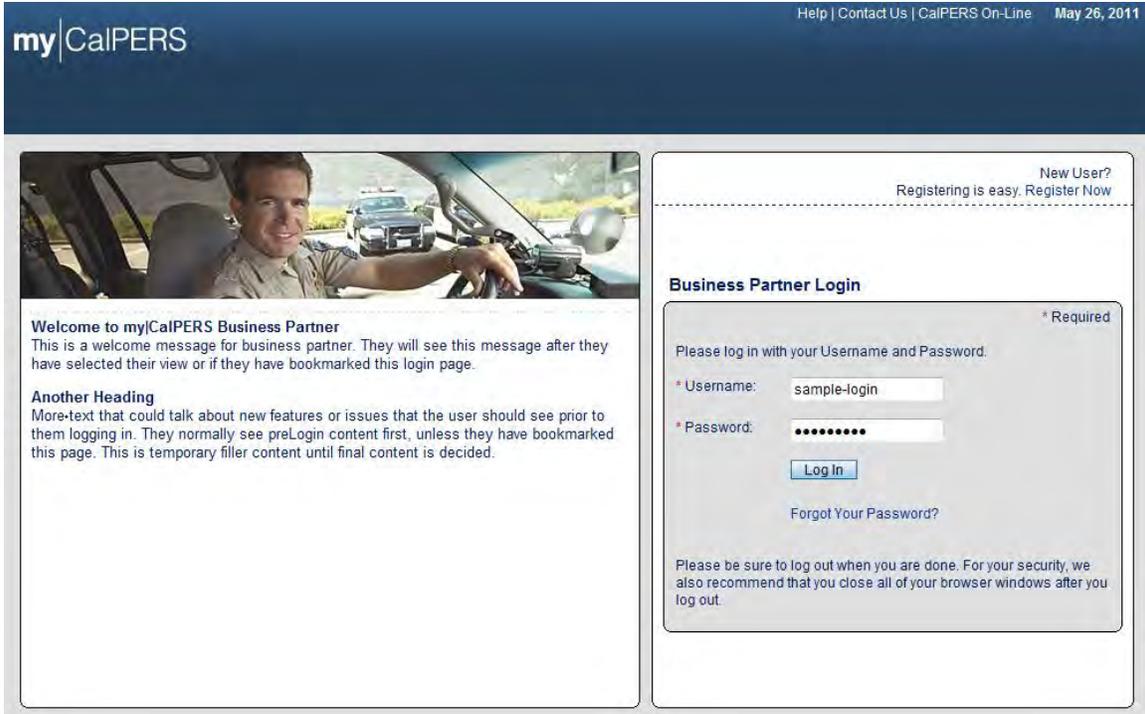
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

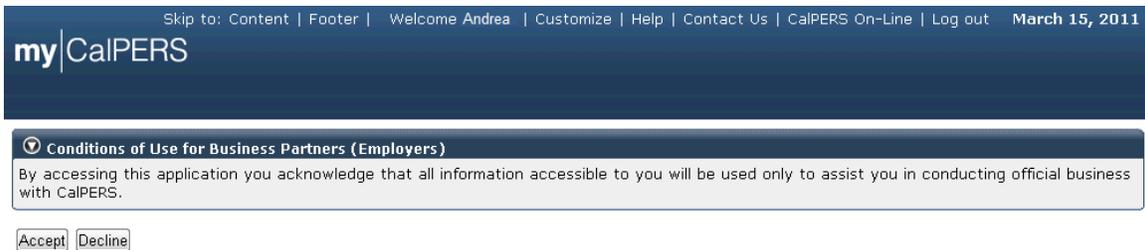
Select the **Business Partner** radio button and then the **Continue** button.

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 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.

Common Tasks

Menu

- Person Search
- Change Password
- Change Challenge Questions

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

Select the **Profile** global navigation tab.

The *Business Partner Profile Summary* page displays.

Summary

Agreements

Common Tasks

Menu

- Summary
- Contacts

Summary

Profile

CalPERS ID: 4499089095
 Federal Tax ID: 1234567-89
 Status: Active
 Name: Direct Authorization Organization Credit Union
 Category: Direct Authorization Organization

Addresses

Physical: 49 Mailing Street, Sacramento, CA 94567
 Mailing: 49 Mailing Street, Sacramento, CA 94567

Communication Information

Preferred Communication: Email
 Primary Email: robert@daocu.org
 Primary Phone Number: 916-789-1111

Contacts

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		

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.

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

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.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Summary Agreements

Common Tasks *Required Fields

Direct Authorization Deductions

Direct Authorization Information

Agreement ID: 1000002164
 Program: California Public Employees' Retirement System
 Agreement Status: Active
 Deduction Type: Association Dues

Does this agreement provide for continuation to beneficiaries and/or survivors who continue receiving a benefit? No
 Will the deductions be managed by a Third Party Administrator (TPA)? No
 Does the contract between your Organization and your Carrier allow for the continuation of coverage into retirement? No
 Who will submit the Direct Authorization Deductions for this agreement? Sponsor
 Date Hold Harmless Agreement Signed: 02/29/1988 [View Hold Harmless Agreement](#)

Direct Authorization Payment Details

Which organization should receive the deduction payments?*:
 Sponsor

Preferred Method of Payment: Check
 Check Payable Name: Direct Authorization Organization
 Address: 49 APPLE ST
 SACRAMENTO,
 95814 - 0000

Available Actions

Select an Available Action:*
 Add Third Party Administrator
 Replace Third Party Administrator
 Remove Third Party Administrator
 Terminate Agreement

Submit

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

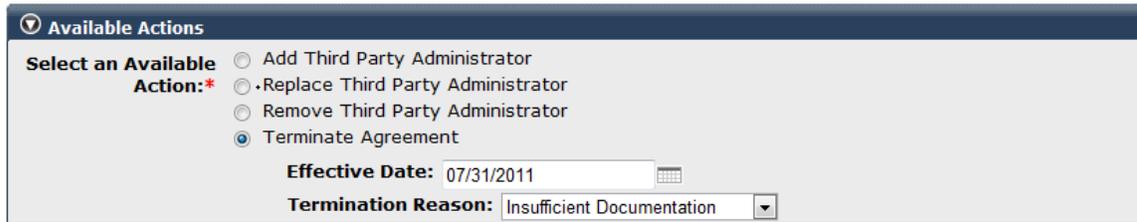
Submit

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

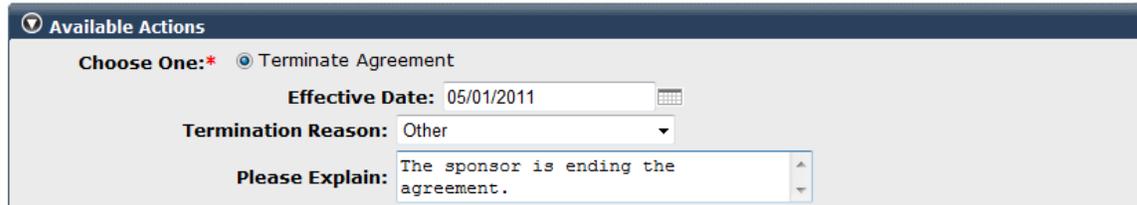


The screenshot shows a form titled "Available Actions" with a dark blue header. Below the header, there is a section "Select an Available Action:" with four radio button options: "Add Third Party Administrator", "Replace Third Party Administrator", "Remove Third Party Administrator", and "Terminate Agreement". The "Terminate Agreement" option is selected. Below the radio buttons, there is a date field labeled "Effective Date:" with the value "07/31/2011" and a calendar icon. Below the date field, there is a dropdown menu labeled "Termination Reason:" with the value "Insufficient Documentation".

Submit

Termination Reason: Other

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



The screenshot shows the same "Available Actions" form. The "Terminate Agreement" radio button is selected. The "Effective Date:" field shows "05/01/2011". The "Termination Reason:" dropdown menu is set to "Other". Below the dropdown menu, there is a text field labeled "Please Explain:" containing the text "The sponsor is ending the agreement.".

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.

The screenshot shows the my|CalPERS user interface. At the top, there is a navigation bar with links for 'Skip to: Content | Footer | Welcome Ronald | Customize | Help | Contact Us | CalPERS On-Line | Log out' and the date 'May 26, 2011'. Below this is a menu with 'Home', 'Profile', 'Reporting', 'Person Information', and 'Other Organizations'. The main content area is titled 'Agreements' and contains a green 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.' Below the message is a table of agreements.

Agreement Type	Status	Benefit Provided By	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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

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my|CalPERS

Log In

* First, tell us who you are:

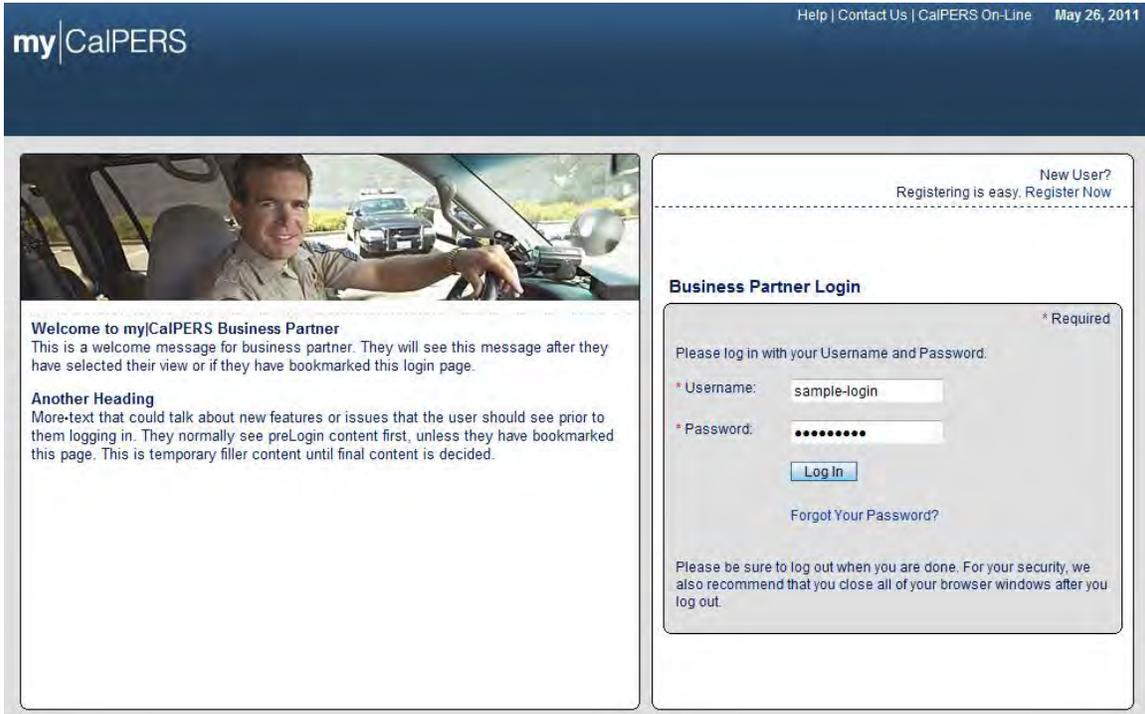
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

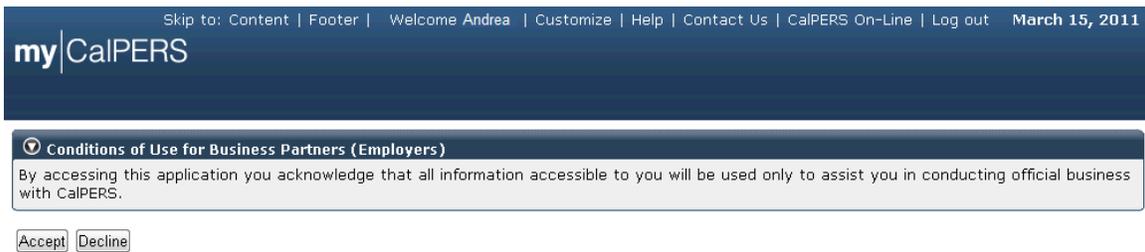
Select the **Business Partner** radio button and then the **Continue** button.

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.

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.

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 Organization	Manually enter in data	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.

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links for Home, Profile, Reporting, Person Information, and Other Organizations. Below this is a 'Manage Reports' section with a 'Common Tasks' menu. The main content area is titled 'Create Direct Authorization Report' and includes the following fields:

- Name:** Direct Authorization Organization
- CalPERS ID:** 5233134842
- Delivery Consideration:** * Manually enter in data (dropdown menu)
- Business Month:** * 06/2011 (dropdown menu)

Below the form is a section titled 'Direct Authorization Agreements' containing a table with the following data:

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
<input checked="" type="radio"/> 1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/1991
<input type="radio"/> 1000001240	DA Deduction Dental	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		09/01/1990
<input type="radio"/> 1000001250	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			04/01/1992
<input type="radio"/> 1000001271	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			05/01/2000
<input type="radio"/> 1000001273	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/2000
<input type="radio"/> 1000001776	DA Deduction Vision	California Public Employees' Retirement System	Direct Authorization Organization			02/01/1998
<input type="radio"/> 1000001362	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			08/01/2007
<input type="radio"/> 1000001535	Association Dues	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		07/01/1990

At the bottom of the table is a 'Create Report' button.

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.

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my|CalPERS

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Manage Reports

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Preprocessing Area

File Upload History

▼ Deduction Information

Submitter: Direct Authorization Organization
Business Month: 06/2011

Participant ID: CalPERS ID
 Social Security Number

CalPERS ID*

Participant Social Security Number-4*

Deduction Amount*

▼ Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/1991

Save & Continue Save & Add Another

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 **CalPERS ID** radio button. Note that the field below the radio button displays as the **CalPERS ID** field and the **Participant Social Security Number-4** field displays.

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Manage Reports

Common Tasks ▲ *Required Fields

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Preprocessing Area

File Upload History

▼ Deduction Information

Submitter: Direct Authorization Organization

Business Month: 06/2011

Participant ID: CalPERS ID
 Social Security Number

CalPERS ID*

Participant Social Security Number-4*

Deduction Amount:*

▼ Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/1991

Save & Continue Save & Add Another

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.”

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Preprocessing Area

File Upload History

*Required Fields

A Participant does not exist in the system for the reported CalPERS ID and SSN combination. Verify and update your entry.

▼ Deduction Information

Submitter: California Correctional Peace Officers Association
Business Month: 06/2011
Participant ID: CalPERS ID Social Security Number
CalPERS ID* 2088292802
Participant Social Security Number-4* 1939
Deduction Amount:* 29.45

▼ Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001768	Life Insurance Deduction	California Public Employees' Retirement System	California Correctional Peace Officers Association			12/01/1991

Save & Continue | Save & Add Another

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my|CalPERS

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Manage Reports

Common Tasks **Name:** Direct Authorization **CalPERS ID:** 5233134842
Organization

Menu

Preprocessing Area
File Upload History

Search Direct Authorization Records

CalPERS ID:
Sponsor/Employer: Direct Authorization Org
Error Message:

Direct Authorization Records **Number of Records Submitted:** 1 **Number of Errors:** 0

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 2028292802	1887	William Jackson	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$27.94	

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:

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my|CalPERS

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Manage Reports

Common Tasks **Name:** Direct Authorization **CalPERS ID:** 5233134842
Organization

Menu

Preprocessing Area
File Upload History

Search Direct Authorization Records

CalPERS ID:
Sponsor/Employer: Direct Authorization Org
Error Message:

Direct Authorization Records **Number of Records Submitted:** 1 **Number of Errors:** 1

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 2028292802	1887	William Jackson	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$10000.00	Deductions Exceed Gross.

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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

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my|CalPERS

Log In

* First, tell us who you are:

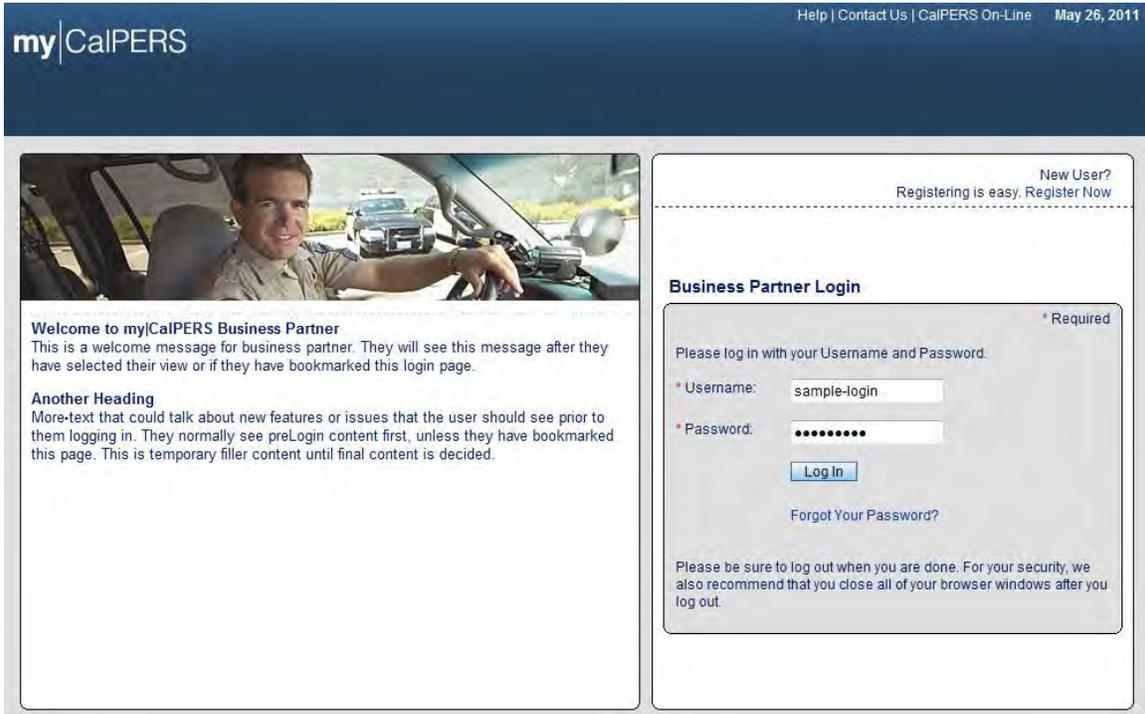
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

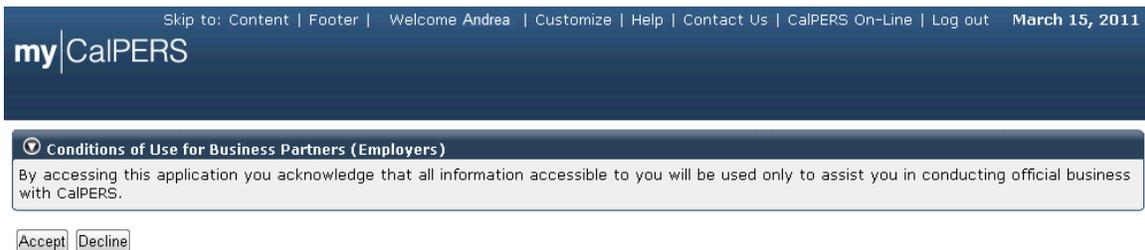
Select the **Business Partner** radio button and then the **Continue** button.

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.

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my|CalPERS

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My Home

Common Tasks

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Person Search

Change Password

Change Challenge Questions

My Cases View More Actions»

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

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

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my|CalPERS

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Preprocessing Area

File Upload History

Name: Direct Authorization Organization **CalPERS ID: 3696467826**

*Required Fields

Create or Edit Report

Method:

Work On Existing Payroll Reports

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Test Report
No results found.						

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.

The *Search Direct Authorization Records* page displays.

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Common Tasks **Menu**

Preprocessing Area
File Upload History

Name: Direct Authorization Organization **CalPERS ID:** 3696467826

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAVO

Error Message:

Direct Authorization Records

Number of Records Submitted: 851 **Number of Errors:** 0

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 1205290569	6289	Edward Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$18.00	
<input type="checkbox"/> 7010576783	6852	James Byerly	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$98.00	
<input type="checkbox"/> 4940520803	0269	James Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.40	
<input type="checkbox"/> 4401277655	0752	Randall Smith	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$40.70	
<input type="checkbox"/> 3087109662	2680	William Crowe	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	
<input type="checkbox"/> 6087615767	6052	Jack James	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	

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

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my|CalPERS

Log In

* First, tell us who you are:

Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

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

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my|CalPERS

New User?
Registering is easy. Register Now

Business Partner Login * Required

Please log in with your Username and Password.

* Username: sample-login

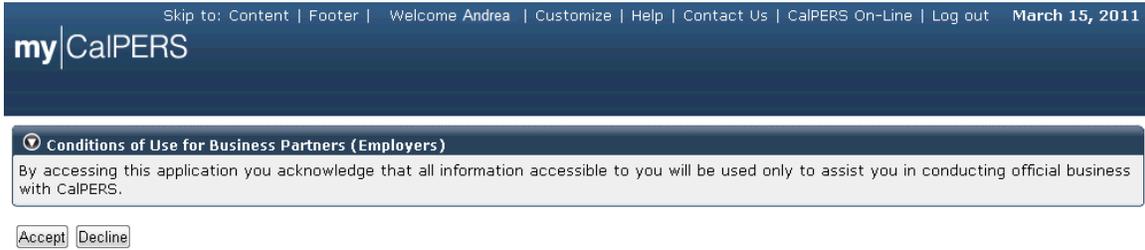
* Password:

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.



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

The my|CalPERS *Home* page displays.



Select the **Reporting** global navigation tab.

The *Create Reports* page displays.

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my|CalPERS

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Common Tasks ▲

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Preprocessing Area

File Upload History

Name: Direct Authorization **CalPERS ID:** 3696467826
Organization

*Required Fields

▼ **Create or Edit Report**

Method:*

▼ **Work On Existing Payroll Reports**

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Test Report
No results found.						

▼ **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.

The *Search Direct Authorization Records* page displays.

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Common Tasks **Menu**

Preprocessing Area
File Upload History

Name: Direct Authorization Organization **CalPERS ID:** 3696467826

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAVO

Error Message:

Direct Authorization Records

Number of Records Submitted: 851 **Number of Errors:** 0

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 1205290569	6289	Edward Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$18.00	
<input type="checkbox"/> 7010576783	6852	James Byerly	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$98.00	
<input type="checkbox"/> 4940520803	0269	James Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.40	
<input type="checkbox"/> 4401277655	0752	Randall Smith	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$40.70	
<input type="checkbox"/> 3087109662	2680	William Crowe	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	
<input type="checkbox"/> 6087615767	6052	Jack James	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	

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.

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Manage Reports

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Menu ▼

Preprocessing Area
File Upload History

▼ Deduction Information

Submitter: Direct Authorization Organization
Business Month: 06/2011
Participant ID: CalPERS ID
 Social Security Number
CalPERS ID*:
Participant Social Security Number-4*:
Deduction Amount*:

▼ Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/2011

Save & Continue Save & Add Another

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.

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Preprocessing Area

File Upload History

Name: Direct Authorization **CalPERS ID:** 3696467826
Organization

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAVO

Error Message:

Direct Authorization Records

Number of Records Submitted: 851 **Number of Errors:** 0

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 1205290569	6289	Edward Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$18.00	
<input type="checkbox"/> 7010576783	6852	James Byerly	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$75.00	
<input type="checkbox"/> 4940520803	0269	James Bennett	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.40	
<input type="checkbox"/> 4401277655	0752	Randall Smith	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$40.70	
<input type="checkbox"/> 3087109662	2680	William Crowe	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	
<input type="checkbox"/> 6087615767	6052	Jack James	Add	CalPERS	Direct Authorization Organization	Life Insurance Deduction	\$17.68	

Delete a deduction

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Log In

* First, tell us who you are:

Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

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

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my|CalPERS

New User?
Registering is easy. Register Now

Business Partner Login * Required

Please log in with your Username and Password.

* Username: sample-login

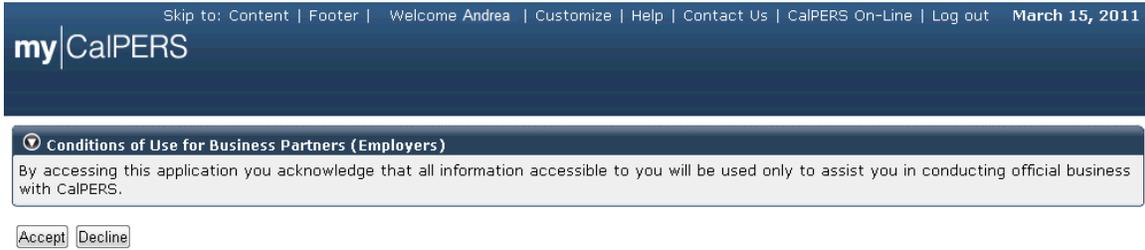
* Password:

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 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.



Select the **Reporting** global navigation tab.

The *Create Reports* page displays.

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Preprocessing Area

File Upload History

Name: Direct Authorization Vendor **CalPERS ID:** 7633241763
Credit Union

*Required Fields

Create or Edit Report

Method:

Work On Existing Payroll Reports

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Test Report
No results found.						

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.

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my|CalPERS

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Manage Reports

Common Tasks

Menu

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Vendor **CalPERS ID:** 7633241763
Credit Union

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAV Credit Union

Error Message:

Direct Authorization Records

[Select All](#) **Number of Records Submitted:** 4 **Number of Errors:** 3

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 6776625343	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
<input type="checkbox"/> 5618719672	6016	Linda Johns	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
<input checked="" type="checkbox"/> 5437786976	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
<input type="checkbox"/> 1777667087	8011	Brenda Johnston	CHG	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.

[Select All](#)

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.

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Manage Reports

Common Tasks **Menu**

Adjustment Reports
Preprocessing Area
File Upload History
Retirement Contract Summary

Name: Direct Authorization Vendor Credit Union **CalPERS ID:** 7633241763

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAV Credit Union

Error Message:

Direct Authorization Records

[Select All](#) **Number of Records Submitted:** 3 **Number of Errors:**

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 6776625343	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
<input type="checkbox"/> 5618719672	6016	Linda Johns	Update	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
<input type="checkbox"/> 1777667087	8011	Brenda Johnston	CHG	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.

[Select All](#)

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 <https://my.calpers.ca.gov>. The my|CalPERS *Log In* page displays.

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my|CalPERS

Log In

* First, tell us who you are:

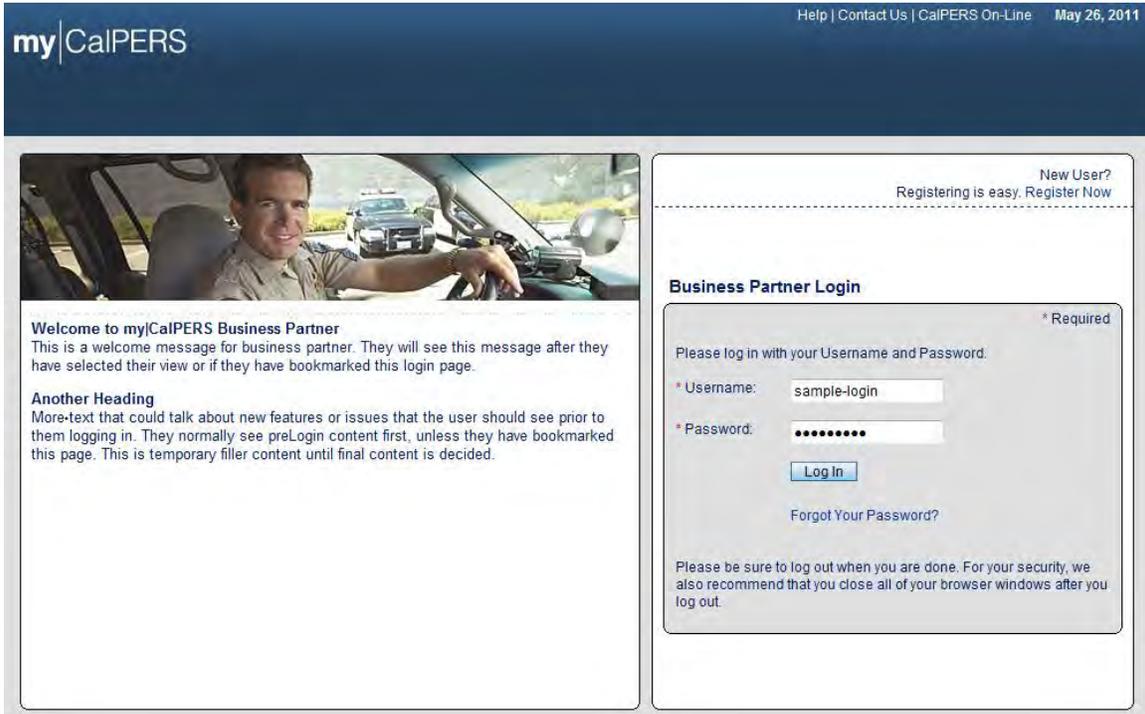
Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

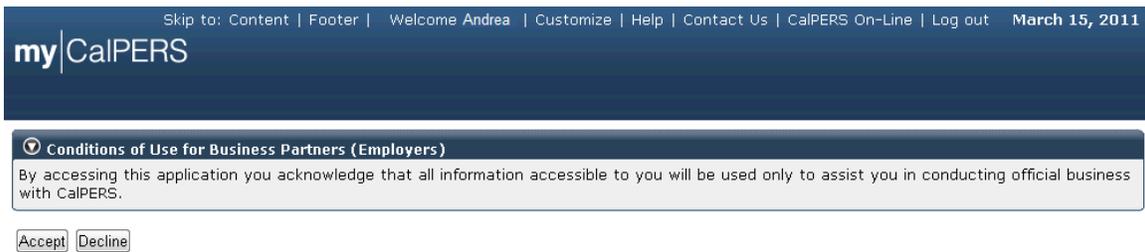
Select the **Business Partner** radio button and then the **Continue** button.

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

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My Home

Common Tasks

Menu

Person Search

Change Password

Change Challenge Questions

My Cases View More Actions»

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

Select the **Reporting** global navigation tab.

The *Business Partner Summary* page displays.

my|CalPERS

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Summary Agreements

Common Tasks

Menu

Summary

Contacts

Summary Profile Request Update

CalPERS ID: 2657553833 Status: Active

Federal Tax ID: 1234567-89 Name: Direct Authorization Organization

Category: Direct Authorization Organization

Addresses

Physical: 49 Mailing Street, Sacramento, CA 94567 Mailing: 49 Mailing Street, Sacramento, CA 94567

Communication Information

Preferred Communication: Email

Primary Email: robert@daocu.org Primary Phone Number: 916-789-1111

Contacts Add New View More Actions»

Contact Type	Contact Type Detail	Program	Name	Phone Number
General	Main	CalPERS	Robert Dillman	

Business Relationships Add New

Name	CalPERS ID	Program	Service Provided	Status
No results found.				

Contracts/Agreements

Contract/Agreement Type	Status	Date Status Changed	Effective Date	Termination Date	Related Parties
Direct Authorization Agreement	Active	04/01/1978	04/01/1978		

Select the **Reporting** global navigation tab.

The *Reporting* page displays.

The screenshot shows the my|CalPERS Reporting page. At the top, there is a navigation bar with links for Home, Profile, Reporting, Person Information, and Other Organizations. Below this is a 'Manage Reports' section. The main content area displays the following information:

Name: Direct Authorization Organization **CalPERS ID:** 2657553833

Create Direct Authorization Report

Submitter Name: Direct Authorization Organization **Delivery Consideration:** * Global Rate Change

Business Month: * 06/2011

Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
<input type="radio"/> 1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/1991
<input checked="" type="radio"/> 1000001240	DA Deduction Dental	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		09/01/1990
<input type="radio"/> 1000001250	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			04/01/1992
<input checked="" type="radio"/> 1000001271	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			05/01/2000
<input type="radio"/> 1000001273	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/2000
<input checked="" type="radio"/> 1000001776	DA Deduction Vision	California Public Employees' Retirement System	Direct Authorization Organization			02/01/1998
<input type="radio"/> 1000001362	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			08/01/2007
<input checked="" type="radio"/> 1000001535	Association Dues	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		07/01/1990

At the bottom of the table, there is a 'Create Report' button.

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.

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Manage Reports

Common Tasks **Name:** Direct Authorization **CalPERS ID:** 2657553833
Menu Organization

Preprocessing Area *Required Fields
 File Upload History

Create Direct Authorization Report

Submitter Name: Direct Authorization Organization **Delivery Consideration:*** Global Rate Change
Business Month:* 06/2011

Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
<input type="radio"/> 1000001768	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			12/01/1991
<input type="radio"/> 1000001240	DA Deduction Dental	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		09/01/1990
<input checked="" type="radio"/> 1000001250	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			04/01/1992
<input type="radio"/> 1000001271	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			05/01/2000
<input type="radio"/> 1000001273	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			06/01/2000
<input type="radio"/> 1000001776	DA Deduction Vision	California Public Employees' Retirement System	Direct Authorization Organization			02/01/1998
<input type="radio"/> 1000001362	Life Insurance Deduction	California Public Employees' Retirement System	Direct Authorization Organization			08/01/2007
<input type="radio"/> 1000001535	Association Dues	California Public Employees' Retirement System	Direct Authorization Organization	Direct Authorization Organization		07/01/1990

Create 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.

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Preprocessing Area

File Upload History

Name: Direct Authorization Organization **CalPERS ID:** 2657553833

▼ Deduction Information

Business Month: 06/2011 **Program:** California Public Employees' Retirement System

Deduction Type: Life Insurance Deduction **Sponsor:** Direct Authorization Organization

Carrier: **Agreement ID:** 1000001250

▼ Global Rate Change

Existing Deduction Amount:		New Deduction Amount:	
\$	<input type="text"/>	\$	<input type="text"/>
\$	<input type="text"/>	\$	<input type="text"/>
\$	<input type="text"/>	\$	<input type="text"/>
\$	<input type="text"/>	\$	<input type="text"/>

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.”

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Common Tasks

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Preprocessing Area
File Upload History

Name: Direct Authorization **CalPERS ID:** 2657553833
Organization

The mass change updates have been submitted and are being processed. The records will be viewable on the next business day.

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DA ORG

Error Message:

Direct Authorization Records

[Select All](#) **Number of Records Submitted:** 0 **Number of Errors:** 0

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/Employer	Deduction Type	Deduction Amount	Error Message
No results found.								

[Select All](#)

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.

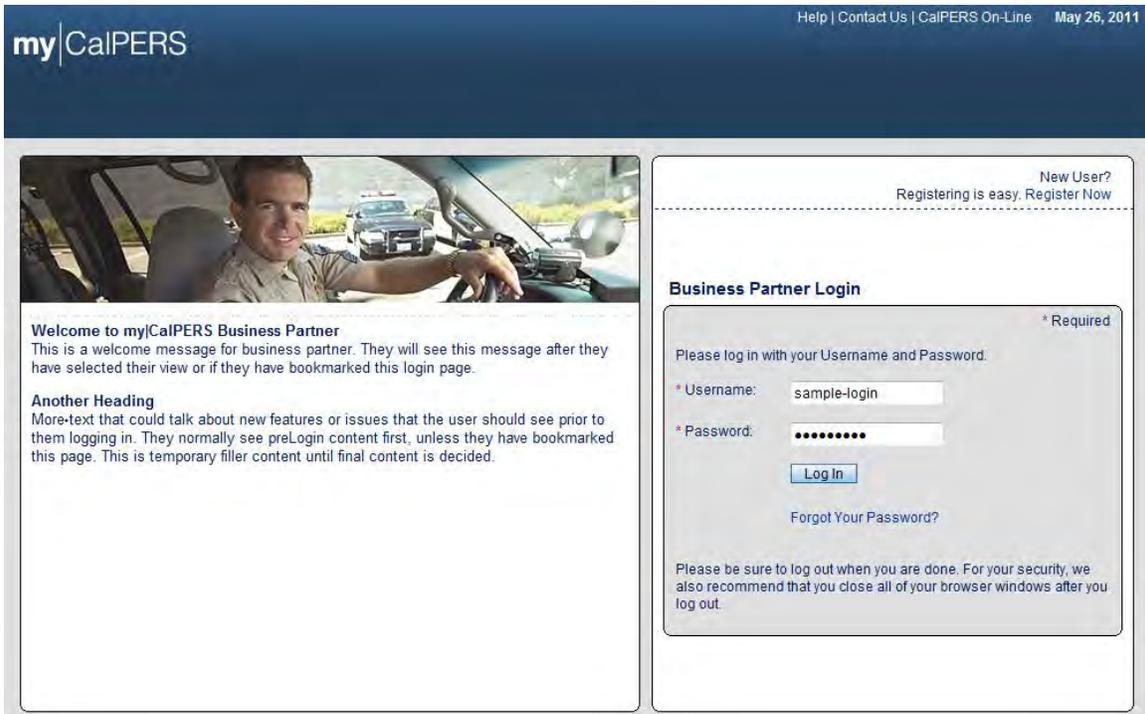
Electronically uploaded direct authorization deduction report files are automatically checked by my|CalPERS against numerous criteria to ensure the completeness of the listed participant records. Common required information types include Business Partners (CalPERS ID), Participant (CalPERS ID) and Retirement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



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 select the **Log In** button.

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



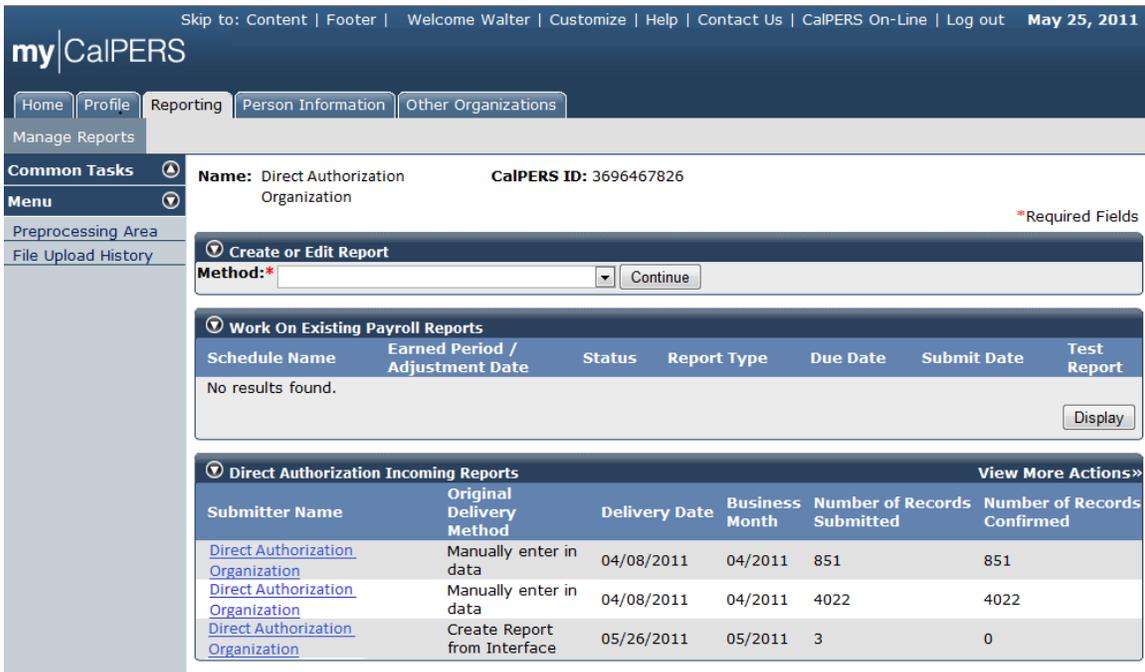
Review the conditions of use statement and select the **Accept** button.

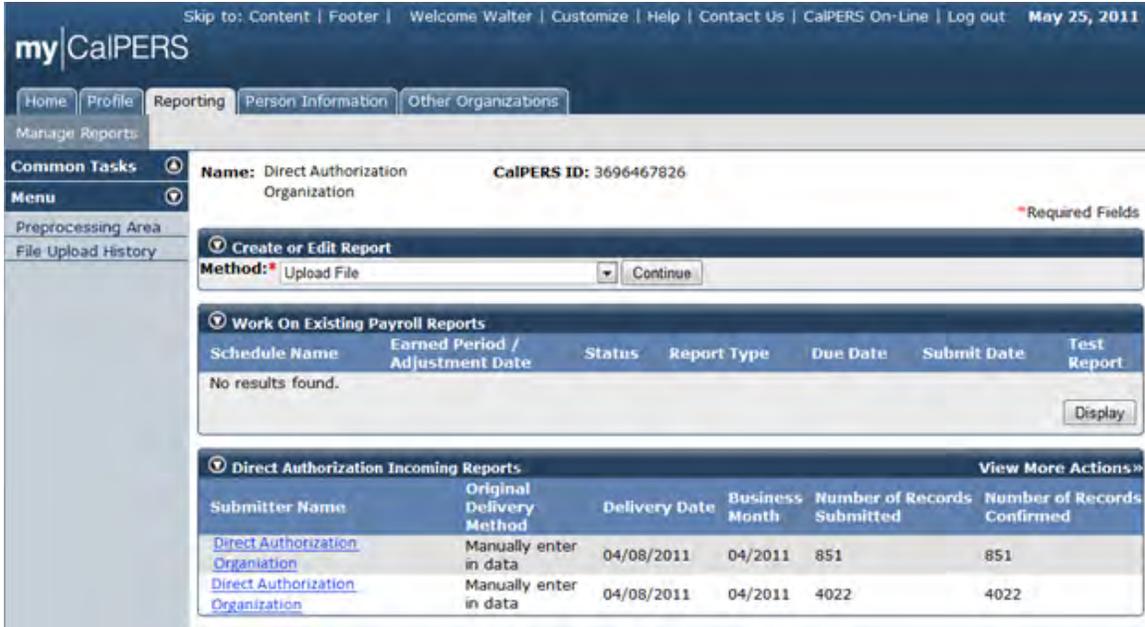
The my|CalPERS *Home* page displays.



Select the **Reporting** global navigation tab.

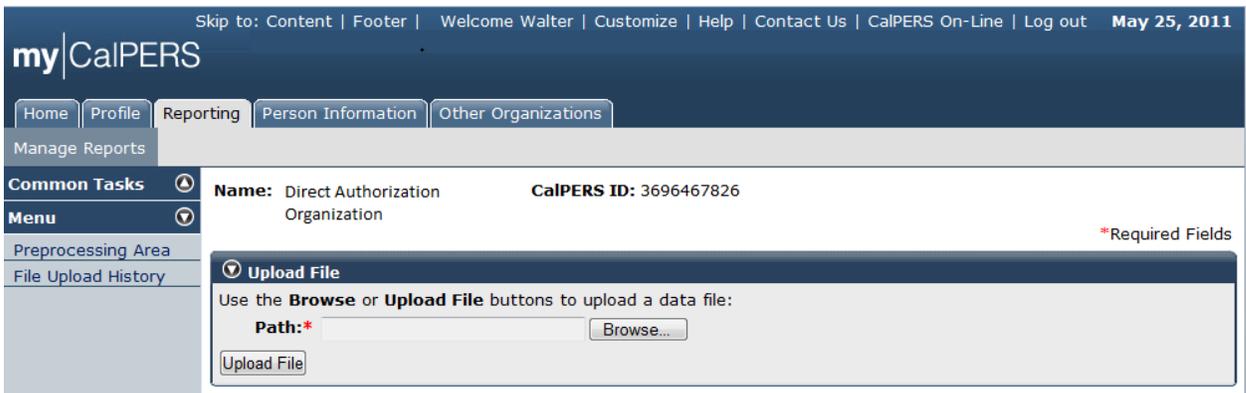
The *Manage Report* page displays.





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.



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.

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome Walter | Customize | Help | Contact Us | CalPERS On-Line | Log out | May 25, 2011. Below this is the my|CalPERS logo and a set of navigation tabs: Home, Profile, Reporting, Person Information, and Other Organizations. Under the Reporting tab, there is a 'Manage Reports' section. On the left, a 'Common Tasks' menu is expanded to show 'File Upload History'. The main content area displays a table titled 'File Upload History' with the following data:

File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
20016	05/25/2011	In Progress		20110112155528_003_20016.xml			

Below the table, there is a link: [View Preprocessing 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.

The screenshot shows the my|CalPERS interface. At the top, there is a navigation bar with links: Skip to: Content | Footer | Welcome Walter | Customize | Help | Contact Us | CalPERS On-Line | Log out | May 25, 2011. Below this is the my|CalPERS logo and a set of navigation tabs: Home, Profile, Reporting, Person Information, and Other Organizations. Under the Reporting tab, there is a 'Manage Reports' section. On the left, a 'Common Tasks' menu is expanded to show 'File Upload History'. The main content area displays a table titled 'File Upload History' with the following data:

File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
20016	05/25/2011	Accepted	Completed	20110112155528_005_20016.xml	16	0	16
20016	05/25/2011	Rejected	Completed	20110112155528_004_20016.xml			
20016	05/25/2011	Rejected	Completed	20110112155528_003_20016.xml			

Below the table, there is a link: [View Preprocessing Areas](#)

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.

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Preprocessing Area

File Upload History

File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total
20016	05/25/2011	Accepted	Completed	20110112155528_005_20016.xml	0	0	0
20016	05/25/2011	Accepted	Completed	20110112155528_007_20016.xml	0	0	0
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	Rejected	Completed	20110112155528_004_20016.xml			
20016	05/25/2011	Rejected	Completed	20110112155528_003_20016.xml			

[View Preprocessing Areas](#)

This is an example of a Level 1 error message:

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my|CalPERS

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Preprocessing Area

File Upload History

Name: Direct Authorization Organization **CalPERS ID: 3696467826**

*Required Fields

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** buttons to upload a data file:

Path:

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Preprocessing Area

File Upload History

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.

File Upload History								
File Type	Upload Date	File Status	Batch Job Status	File Name	Valid	Error	Total	
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	Rejected	Completed	20110112155528_006_20016.xml				
20016	05/25/2011	Rejected	Completed	20110112155528_004_20016.xml				
20016	05/25/2011	Rejected	Completed	20110112155528_003_20016.xml				

[View Preprocessing 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



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my|CalPERS

Log In

* First, tell us who you are:

Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

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.

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

The my|CalPERS *Home* page displays.

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my|CalPERS

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My Home

Common Tasks

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Person Search

Change Password

Change Challenge Questions

My Cases View More Actions»

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

Select the **Reporting** global navigation tab.

The *Manage Report* page displays.

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Manage Reports

Common Tasks

Menu

Preprocessing Area

File Upload History

Name: Direct Authorization Organization CalPERS ID: 3696467826

*Required Fields

Create or Edit Report

Method:* Continue

Work On Existing Payroll Reports

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Test 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	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.

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Preprocessing Area

File Upload History

Preprocessed Data	Valid	Error	Total
Affected Subscriber List	4873	-	4873
Census	-	-	-
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](#) [View Upload History](#)

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

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Preprocessing Area

File Upload History

Name: Direct Authorization **CalPERS ID:** 3696467826
Organization

*Required Fields

Create or Edit Report

Method: *

Work On Existing Payroll Reports

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Test Report
No results found.						

Direct Authorization Incoming Reports [View More Actions»](#)

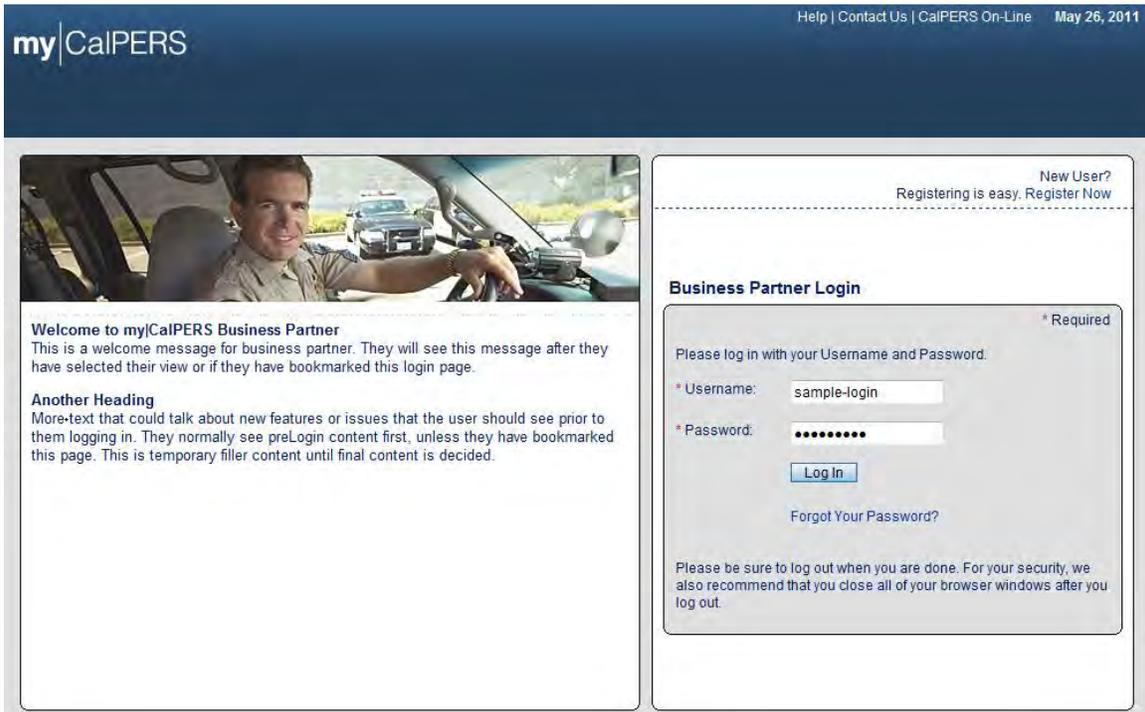
Submitter Name	Original Delivery Method	Delivery Date	Business Month	Number of Records Submitted	Number of Records Confirmed
Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	851	851
Direct Authorization Organization	Manually enter in data	04/08/2011	04/2011	4022	4022
Direct Authorization Organization	Create Report from Interface	05/26/2011	05/2011	4	1

Correct deduction record errors

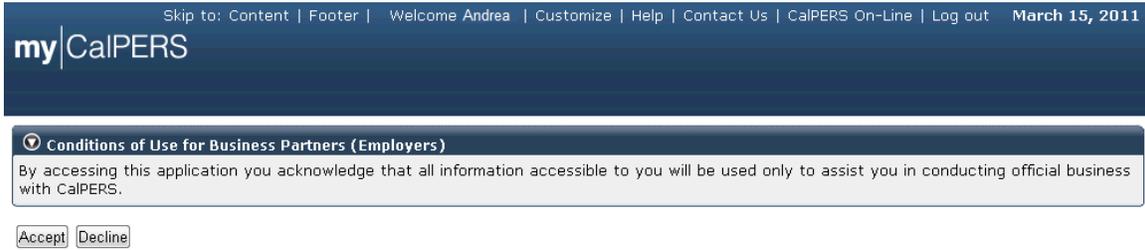


From the my|CalPERS *Log In* page, select the **Business Partner** radio button and then the **Continue** button.

The *Business Partner Login* page displays.



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



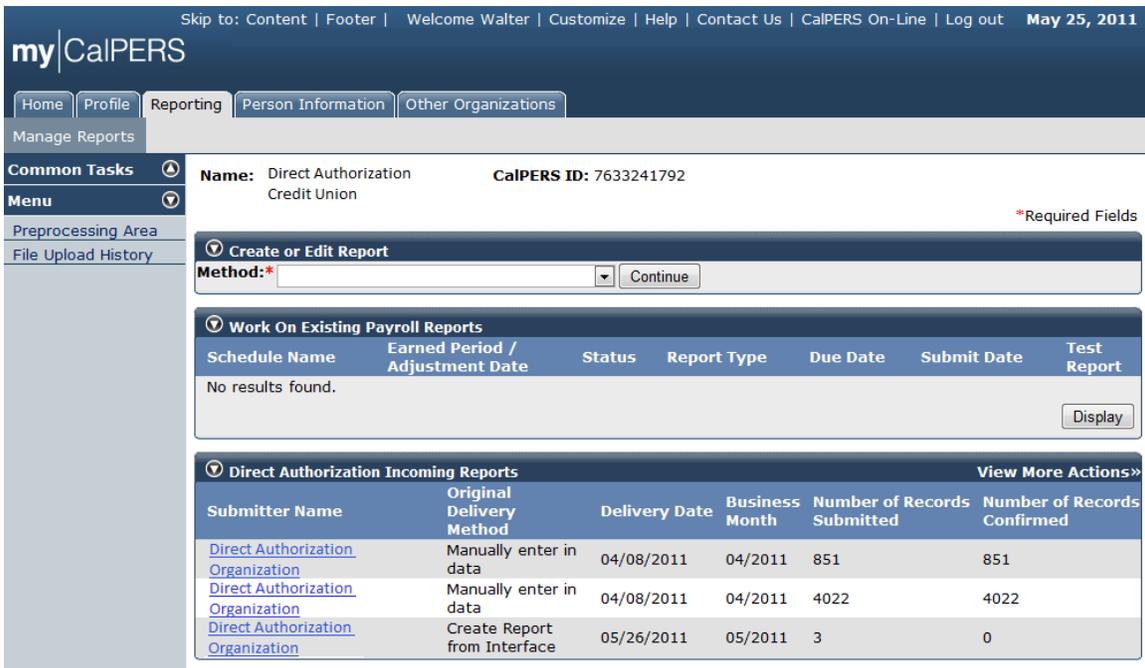
Review the conditions of use statement and then select the **Accept** button.

The my|CalPERS *Home* page displays.



Select the **Reporting** global navigation tab.

The *Manage Report* page displays.



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.

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Common Tasks ▲

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Preprocessing Area

File Upload History

Name: Direct Authorization **CalPERS ID:** 7633241792
Credit Union

*Required Fields

▼ **Create or Edit Report**

Method:*

▼ **Work On Existing Payroll Reports**

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Test Report
No results found.						

▼ **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

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

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Manage Reports

Common Tasks **Menu**

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241763

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer:

Error Message:

Direct Authorization Records

Number of Records Submitted: 4 **Number of Errors:** 3

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 6776625343	8551	Helen Nelson	Update	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$40.00	
<input type="checkbox"/> 5618719672	6016	Linda Johns	Update	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
<input type="checkbox"/> 5437786976	5109	TAYLOR ROCK	Update	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
<input type="checkbox"/> 1777667087	8011	Brenda Johnston	CHG	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Manage Reports

Common Tasks **Menu**

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241763

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAV Credit Union

Error Message:

Direct Authorization Records

Number of Records Submitted: 4 **Number of Errors:** 3

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 6776625343	8551	Helen Nelson	Update	CalPERS	Direct Authorization Union Credit Union	Credit Union Deduction	\$40.00	
<input type="checkbox"/> 5618719672	6016	Linda Johns	Update	CalPERS	Direct Authorization Union Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
<input type="checkbox"/> 5437786976	5109	TAYLOR ROCK	Update	CalPERS	Direct Authorization Union Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
<input type="checkbox"/> 1777667087	8011	Brenda Johnston	CHG	CalPERS	Direct Authorization Union Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.

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 particular 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

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Home Profile Reporting Person Information Other Organizations

Manage Reports

Common Tasks ▲

Menu ▼

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241763

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAV Credit Union

Error Message:

Direct Authorization Records

Number of Records Submitted: 4 **Number of Errors:** 3

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/Employer	Deduction Type	Deduction Amount	Error Message
6776625343	8551	Helen Nelson	Update	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$40.00	
5618719672	6016	Linda Johns	Update	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
5437786976	5109	TAYLOR ROCK	Update	CalPERS	Direct Authorization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
1777667087	8011	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 **CalPERS ID** link under the CalPERS 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.

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Manage Reports

Common Tasks ▲

Menu ▼

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241792 *Required Fields

▼ Deduction Information

Submitter: Direct Authorization Credit Union
Business Month: 06/2011

Participant ID: CalPERS ID
 Social Security Number

CalPERS ID*:

Participant Social Security Number-4*:

Name*: Linda Johns [Select](#)

Deduction Amount*:

▼ Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001110	Credit Union Deduction	California Public Employees' Retirement System	Direct Authorization	Credit Union		01/01/1987

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.

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Manage Reports

Common Tasks ▲

Menu ▼

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241763

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAV Credit Union ▼

Error Message:

Direct Authorization Records

Number of Records Submitted: 4 **Number of Errors:** 3

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 6776625343	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
<input checked="" type="checkbox"/> 5618719672	6016	Linda Johns	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
<input type="checkbox"/> 5437786976	5109	TAYLOR ROCK	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
<input checked="" type="checkbox"/> 1777667087	8011	Brenda Johnston	CHG	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.

Select the CalPERS ID link for “Taylor Rock”.

The *Deduction Information* page for “Taylor Rock” displays.

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Manage Reports

Common Tasks ▲

Menu ▼

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241792

*Required Fields

▼ Deduction Information

Submitter: Direct Authorization Credit Union

Business Month: 06/2011

Participant ID: CalPERS ID
 Social Security Number

CalPERS ID*:

Participant Social Security Number-4*:

Name*: Taylor Rock [Select](#)

Deduction Amount*:

▼ Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
1000001110	Credit Union Deduction	California Public Employees' Retirement System	Direct Authorization	Credit Union		01/01/1987

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.

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Manage Reports

Common Tasks

Menu

Adjustment Reports
Preprocessing Area
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Retirement Contract Summary

Name: Direct Authorization **CalPERS ID:** 7633241763
Credit Union

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAV Credit Union

Error Message:

Direct Authorization Records

Number of Records Submitted: 4 **Number of Errors:** 3

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/ Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 6776625343	8551	Helen Nelson	Update	CalPERS	Direct Authorization Union Credit Union	Credit Union Deduction	\$40.00	
<input type="checkbox"/> 5618719672	6016	Linda Johns	Update	CalPERS	Direct Authorization Union Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
<input type="checkbox"/> 5437786976	5109	TAYLOR ROCK	Update	CalPERS	Direct Authorization Union Credit Union	Credit Union Deduction	\$10000.00	Deductions Exceed Gross.
<input type="checkbox"/> 17776670.87	8011	Brenda Johnston	CHG	CalPERS	Direct Authorization Union Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.

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.

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my|CalPERS

Home | Profile | Reporting | Person Information | Other Organizations

Manage Reports

Common Tasks ▲

Menu ▼

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241792

***Required Fields**

▼ Deduction Information

Submitter: Direct Authorization Credit Union

Business Month: 06/2011

Participant ID: CalPERS ID
 Social Security Number

CalPERS ID*:

Participant Social Security Number-4*:

Deduction Amount*:

▼ Direct Authorization Agreements

Agreement ID	Deduction Type	Program	Sponsor	Carrier	Third Party Administrator	Effective Date
<input type="radio"/> 1000001110	Credit Union Deduction	California Public Employees' Retirement System	Direct Authorization Credit Union			01/01/1987

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.



The screenshot shows the my|CalPERS website interface. At the top, there is a dark blue header with the my|CalPERS logo on the left and navigation links (Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line) and the date (May 26, 2011) on the right. Below the header is a large image of a group of people in an office setting. To the right of the image is a 'Log In' section. A dashed line separates the 'Log In' title from the content below. The content is enclosed in a light gray box with a border. It starts with the text '* First, tell us who you are:'. Below this text are two radio button options. The first option is 'Participant', which is currently selected. The second option is 'Business Partner', which is not selected. Below the radio buttons is a 'Continue' button.

my|CalPERS

Skip to: Content | Footer | Help | Contact Us | CalPERS On-Line May 26, 2011

Log In

* First, tell us who you are:

Participant
Member, non-member, power of attorney, retiree, community property payee, beneficiary, survivor, subscriber or dependent.

Business Partner
Representative of a public agency, State of California, school, reciprocal and non-reciprocal retirement system, health carrier, medical vendor group, independent medical examiner, job assessor, direct authorization organization or service provider

Continue

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.

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

The my|CalPERS *Home* page displays.

The screenshot shows the my|CalPERS Home page. At the top, there is a navigation bar with the following links: Skip to: Content | Footer | Welcome Bobbie | Customize | Help | Contact Us | CalPERS On-Line | Log out. The date May 26, 2011 is displayed on the right. Below the navigation bar, there are five tabs: Home, Profile, Reporting, Person Information, and Other Organizations. The Home tab is selected. Below the tabs, there is a 'My Home' section. On the left, there is a 'Common Tasks' menu with the following items: Person Search, Change Password, and Change Challenge Questions. On the right, there is a 'My Cases' table with the following data:

Case ID	Case Title	Case Type	Program	Status
731879		Initiate DA Agreement		Closed

Select the **Reporting** global navigation tab.

The *Manage Report* page displays.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Manage Reports

Common Tasks ▲

Menu ▼

Preprocessing Area

File Upload History

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241792 *Required Fields

▼ **Create or Edit Report**

Method:*

▼ **Work On Existing Payroll Reports**

Schedule Name	Earned Period / Adjustment Date	Status	Report Type	Due Date	Submit Date	Test Report
No results found.						

▼ **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

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.

The screenshot shows the myCalPERS web application interface. At the top, there is a navigation bar with links for Home, Profile, Reporting, Person Information, and Other Organizations. Below this, there is a section for "Direct Authorization Credit Union" with a CalPERS ID of 7633241763. A search bar is present with fields for CalPERS ID, Sponsor/Employer (set to DAV Credit Union), and Error Message. Below the search bar, there is a table titled "Direct Authorization Records" with 3 records submitted and 0 errors. The table has columns for CalPERS ID, SSN-4, Participant Name, Transaction Type, Program, Sponsor/Employer, Deduction Type, Deduction Amount, and Error Message. Three records are listed, each with a checkbox for selection. The first record is for Helen Nelson with a deduction of \$40.00. The second record is for Linda Johns with a deduction of \$100.00 and an error message: "The Social Security Number (SSN) reported was invalid." The third record is for Brenda Johnston with a deduction of \$400.00 and an error message: "Please enter a valid Transaction Code." There are "Select All" and "Delete" buttons at the top and bottom of the table.

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/Employer	Deduction Type	Deduction Amount	Error Message
<input type="checkbox"/> 6776625343	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
<input type="checkbox"/> 5618719672	6016	Linda Johns	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
<input type="checkbox"/> 1777667087	8011	Brenda Johnston	CHG	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.

Select one or more of the check 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.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Manage Reports

Common Tasks ▲

Menu ▼

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241763

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer: DAV Credit Union ▼

Error Message:

Search Clear

Direct Authorization Records [Add New](#)

[Select All](#) [Delete](#) **Number of Records Submitted:** 3 **Number of Errors:**

CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/Employer	Deduction Type	Deduction Amount	Error Message
<input checked="" type="checkbox"/> 6776625343	8551	Helen Nelson	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$40.00	
<input checked="" type="checkbox"/> 5618719672	6016	Linda Johns	Update	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$100.00	The Social Security Number (SSN) reported was invalid.
<input checked="" type="checkbox"/> 1777667087	8011	Brenda Johnston	CHG	CalPERS	Direct Authoization Credit Union	Credit Union Deduction	\$400.00	Please enter a valid Transaction Code.

[Select All](#) [Delete](#)

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.

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my|CalPERS

Home Profile Reporting Person Information Other Organizations

Manage Reports

my|CalPERS Direct Authorization Vendor User Guide

Common Tasks ▲

Menu ▼

- Adjustment Reports
- Preprocessing Area
- File Upload History
- Retirement Contract Summary

Name: Direct Authorization Credit Union **CalPERS ID:** 7633241763

Search Direct Authorization Records

CalPERS ID:

Sponsor/Employer:

Error Message:

Direct Authorization Records

Number of Records Submitted: 0 **Number of Errors:** 0

[Select All](#)

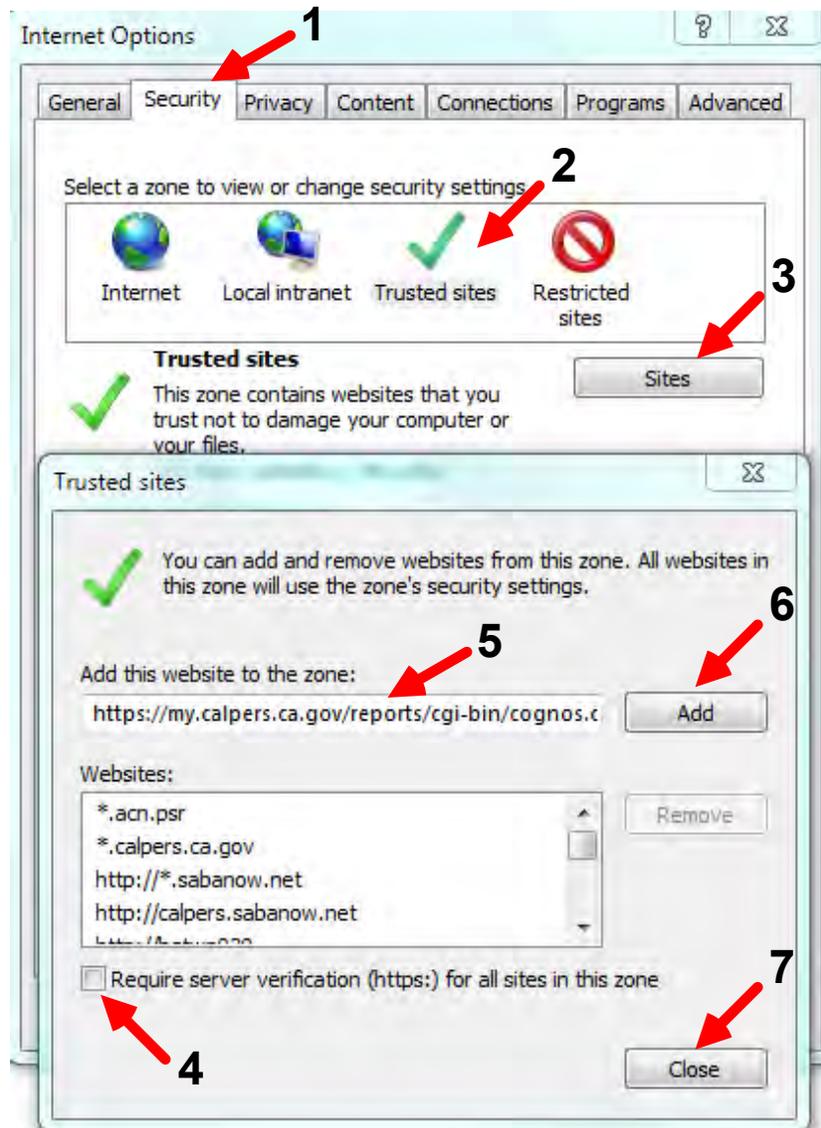
CalPERS ID	SSN-4	Participant Name	Transaction Type	Program	Sponsor/Employer	Deduction Type	Deduction Amount	Error Message
No results found.								

[Select All](#)

my|CalPERS Reports for Direct Authorization Vendors

Part 1: Configuring Internet Explorer

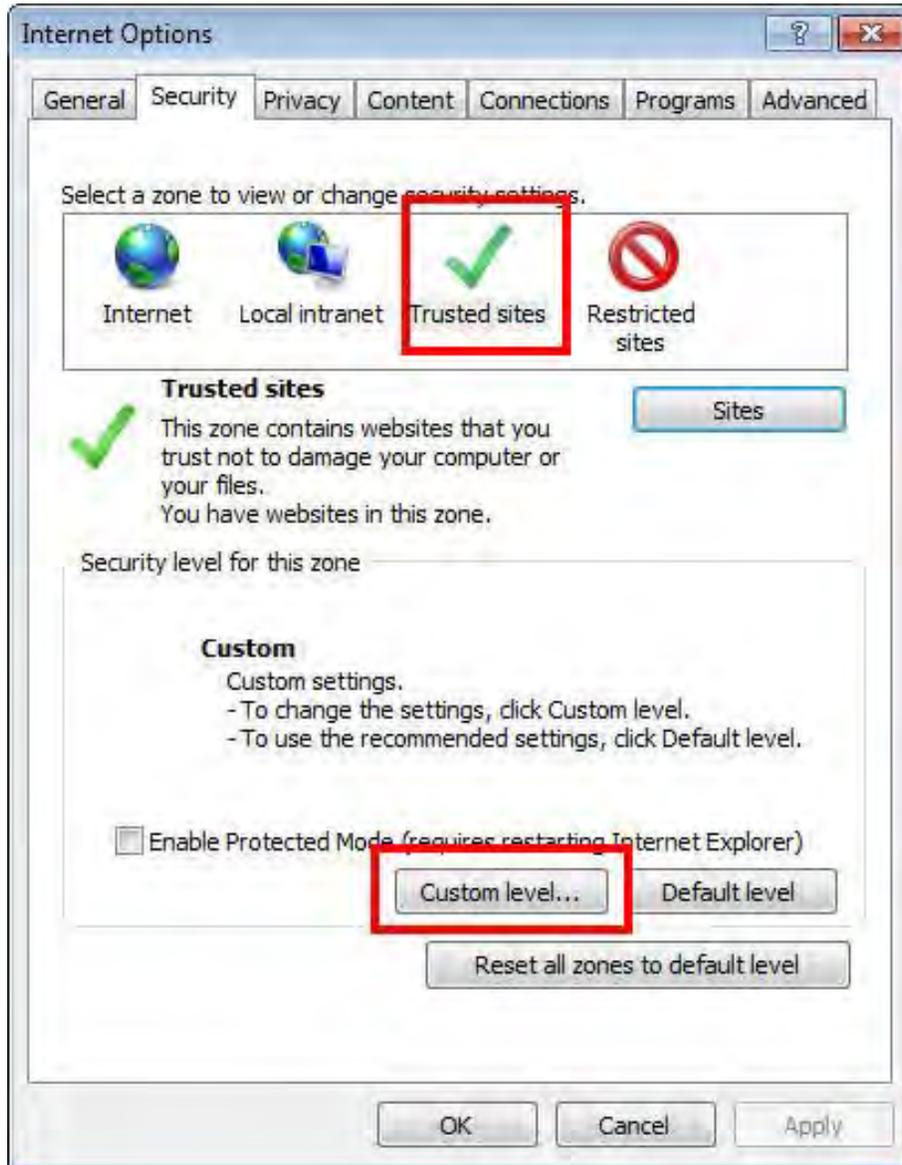
Setup Internet options



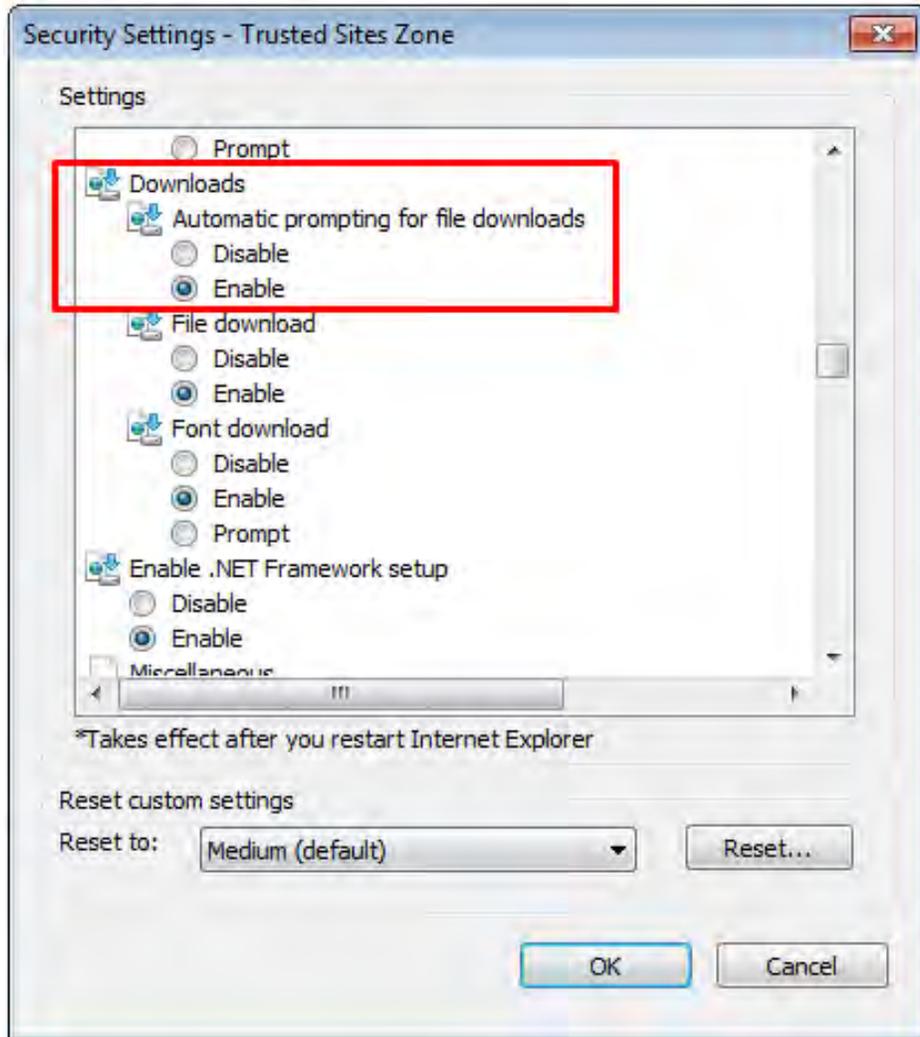
1. Select Security Tab.
2. Select Trusted Sites.
3. Select Sites.
4. Make sure the box is not checked.
5. Enter <https://my.calpers.ca.gov/reports/cgi-bin/cognos.cgi> to add this website to the zone.
6. Select Add.
7. Select Close.

Modify Trusted Site Options

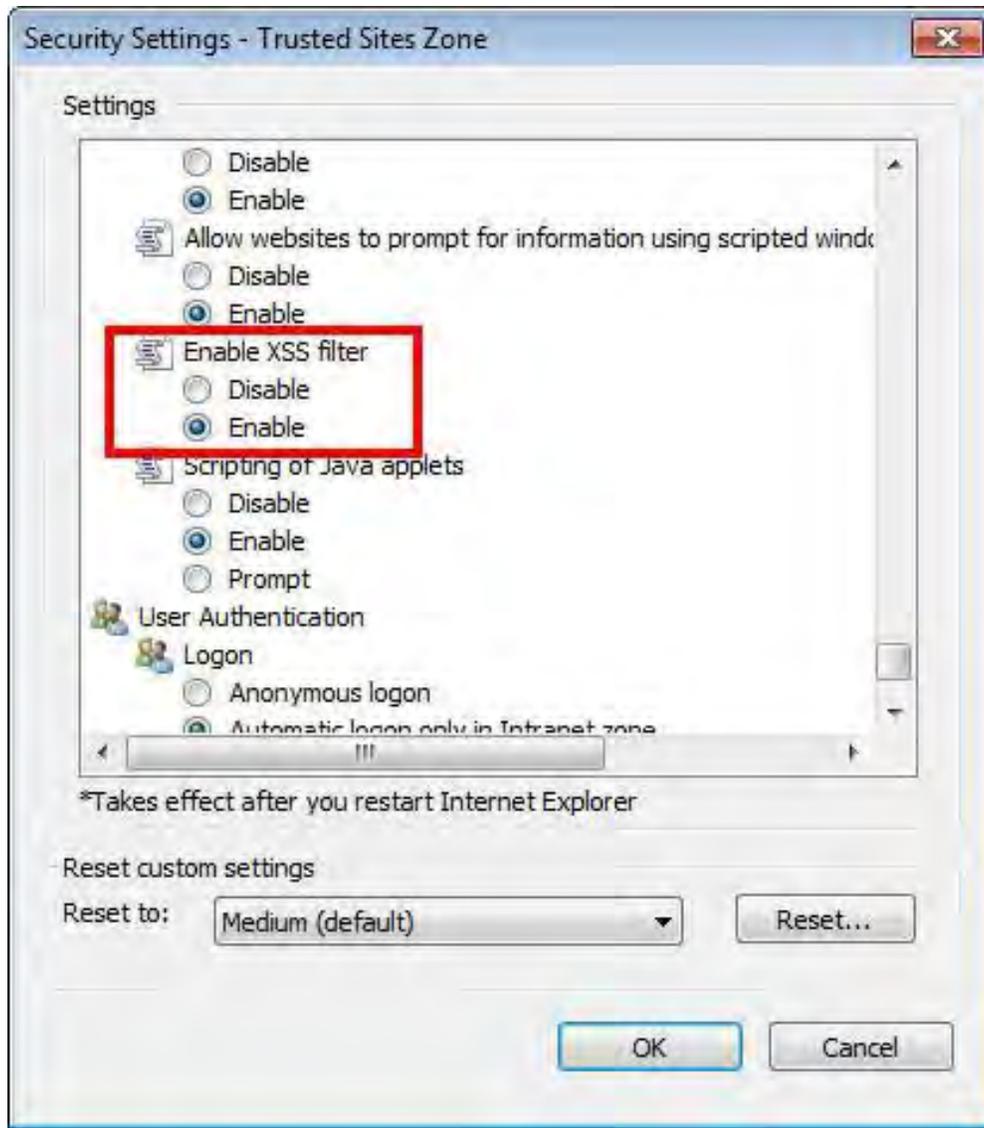
Follow the instructions below to modify the options of the Trusted Sites zone and set the "Enable XSS Filter" property to "Disable." Back on the 'Internet Options' dialog, with 'Trusted Sites' still selected, select the **Custom Level** button.



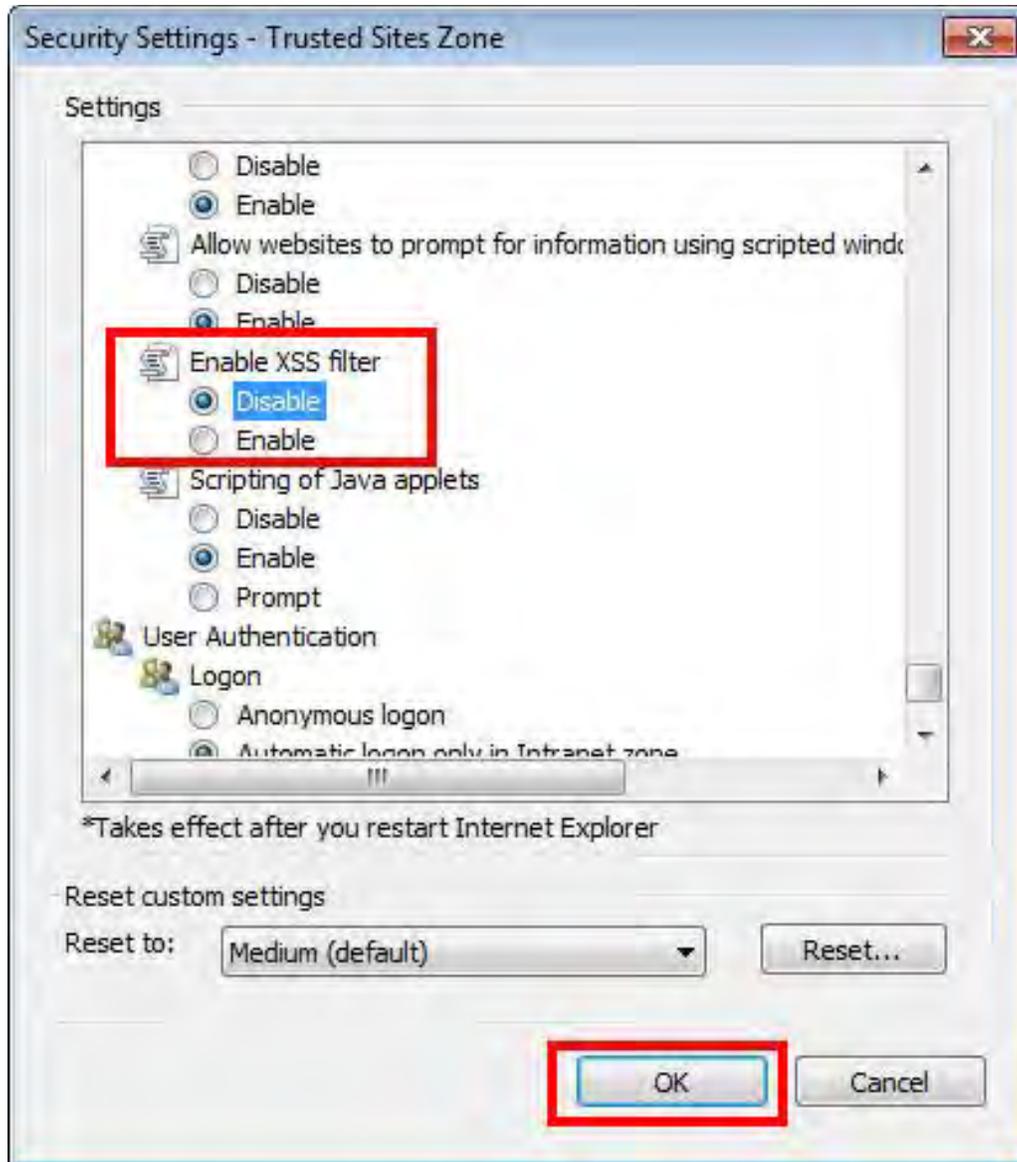
In the 'Security Settings' dialog, scroll down to find the „Downloads“ setting.



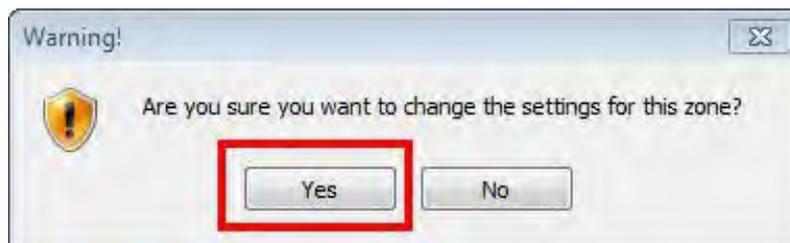
Change the setting for „Automatic prompting for file downloads' from 'Disable' to Enable.”



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



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.



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

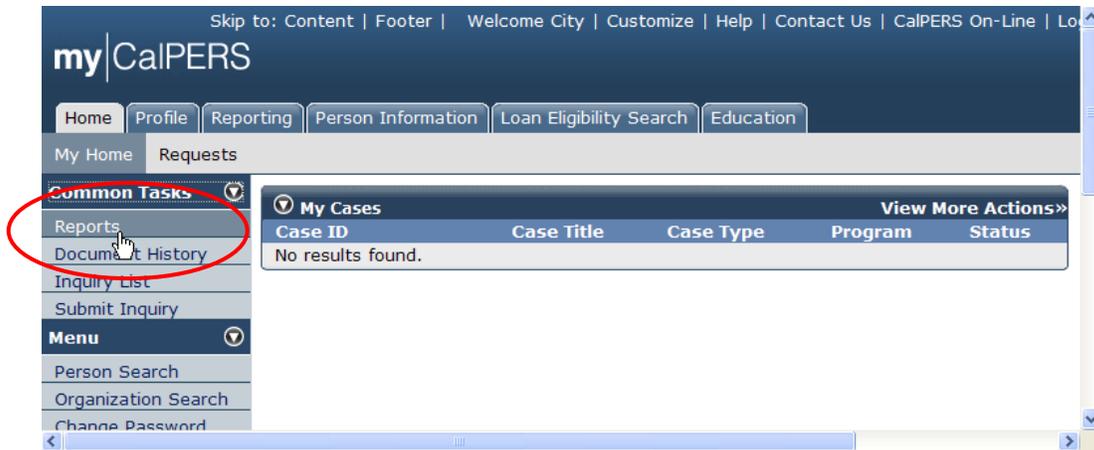
Part 2: Generating Reports in my|CalPERS

Accessing reports in Cognos®

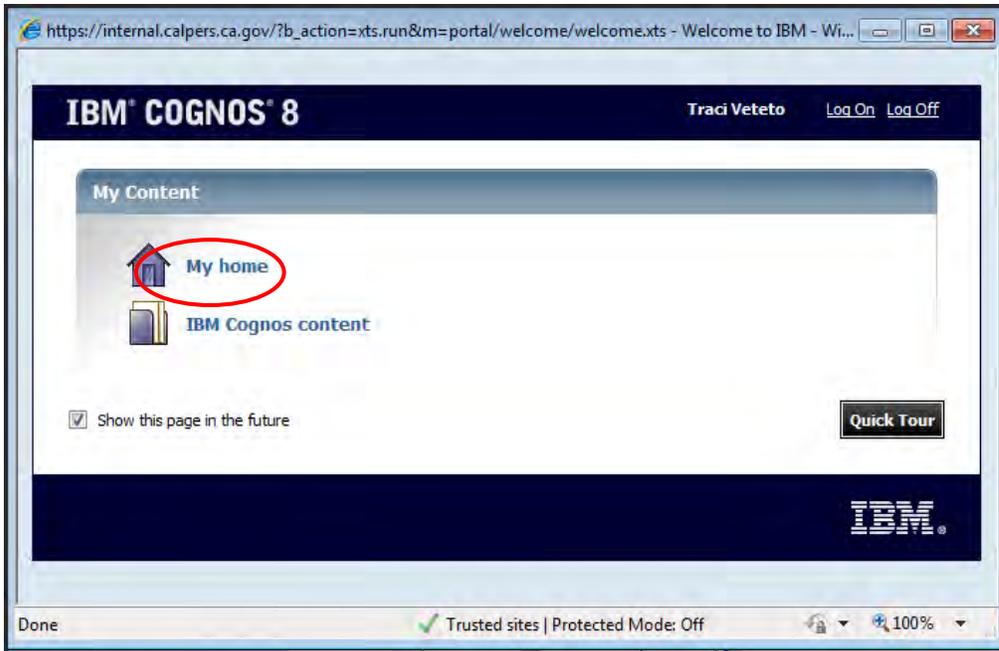
1. Log into my|CalPERS
2. From the *My Home* page select the up arrow to expand Common Tasks from the left navigation menu.



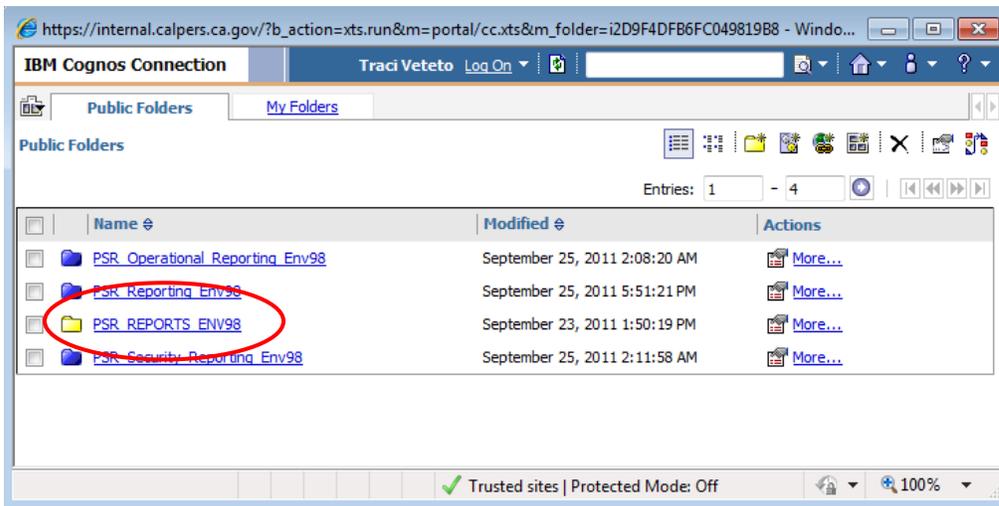
3. Select the **Reports** link.



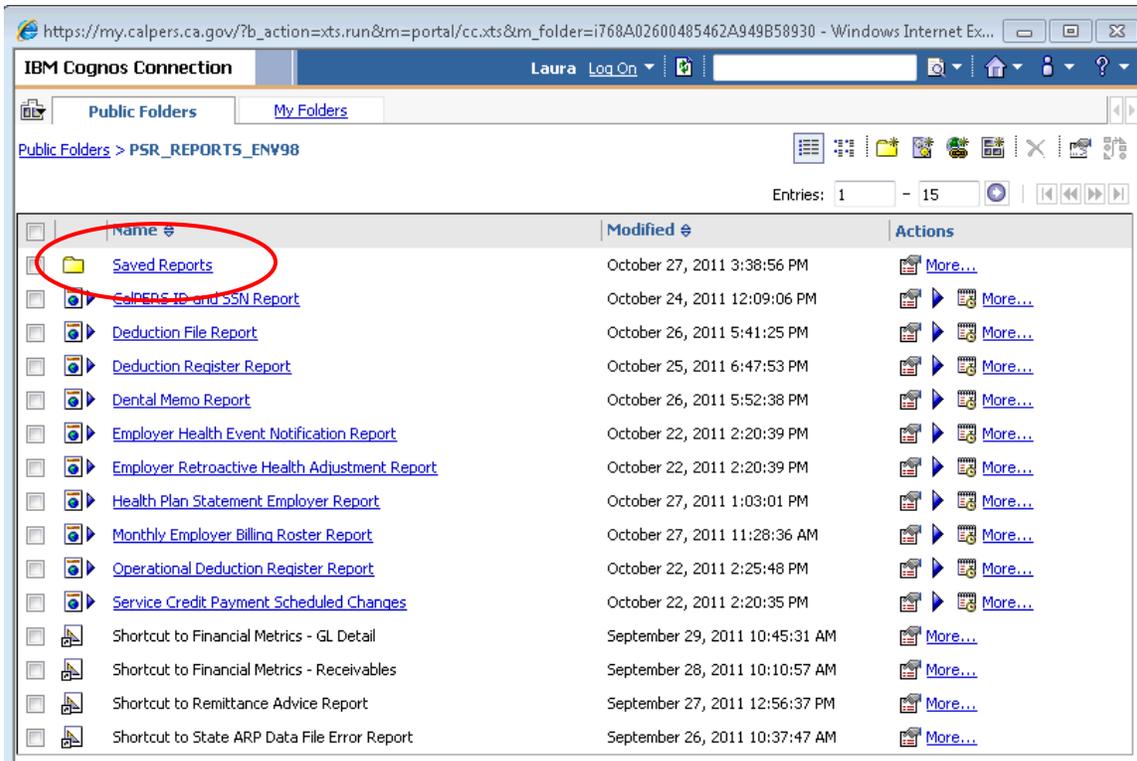
4. After selecting the **Reports** link, select the **My Home** link



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



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.

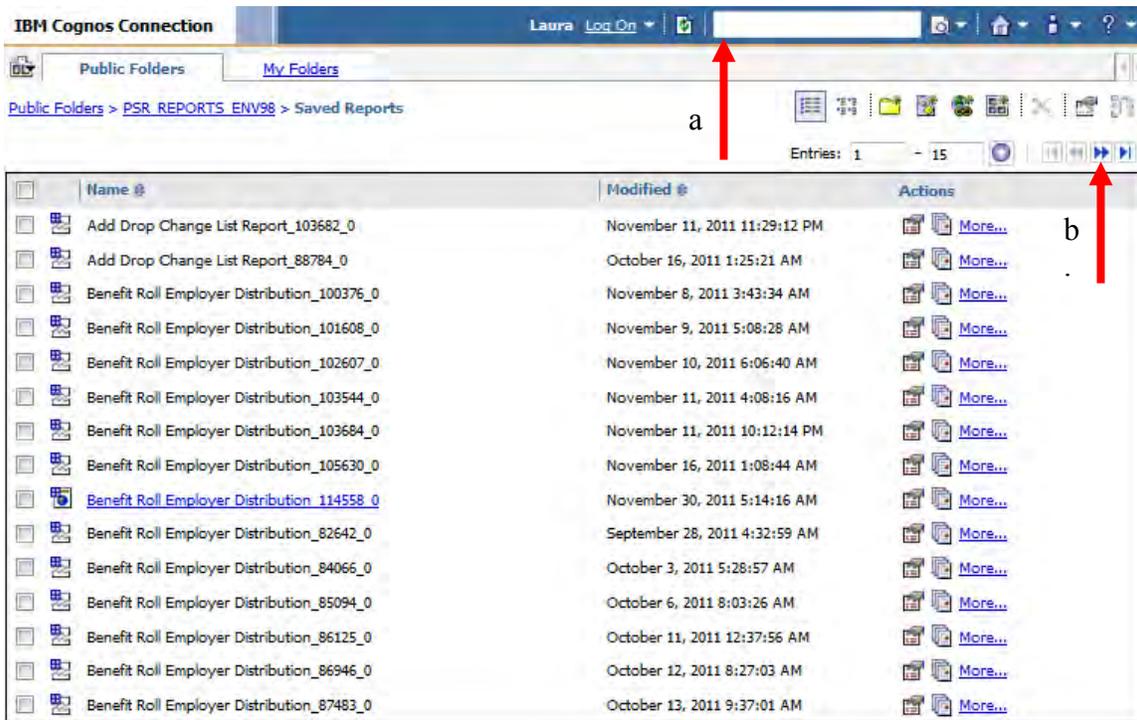


6. Select **Saved Reports**.

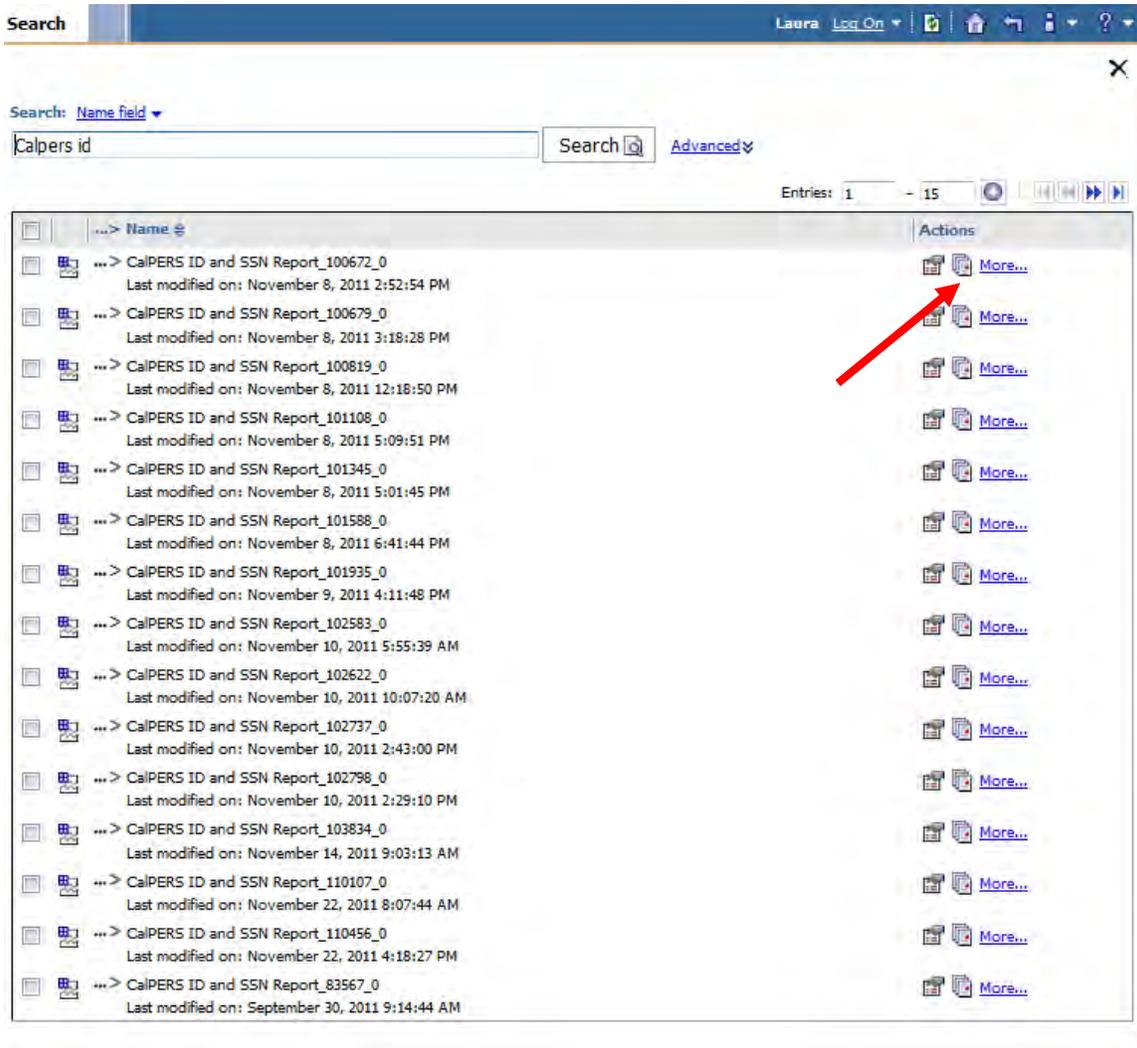
Generating the Calpers ID SSN Report

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.

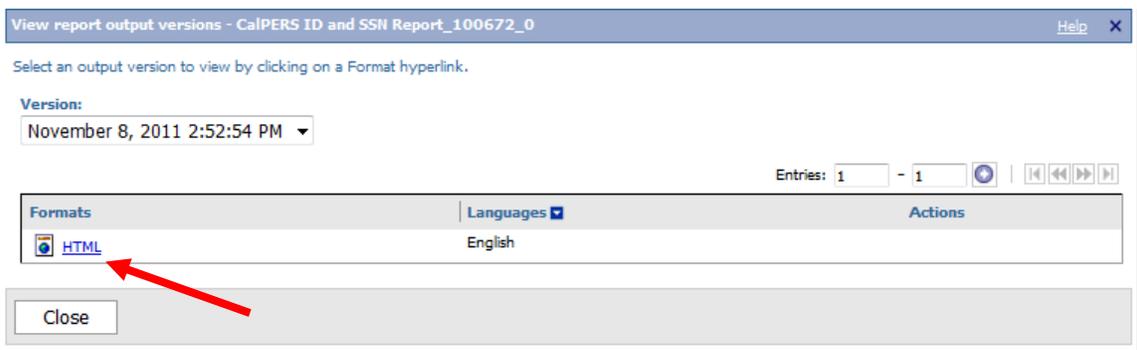
1. Log into my|CalPERS
2. Follow the steps Accessing Reports in Cognos ® section above.
3. Select the **CalPERS ID and SSN Report** Link. There are two methods for finding the report.
 - a. You can use the search box and the navigation buttons to locate the report. Type “CalPERS id” into the window and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



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.



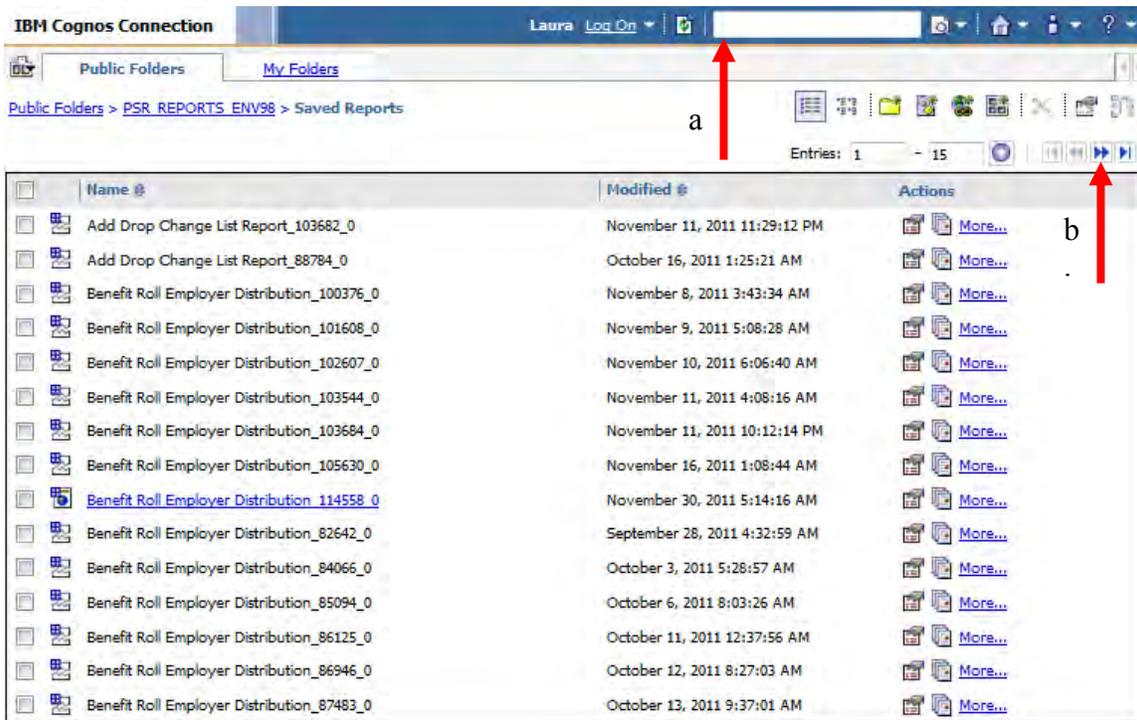
5. This report is only available in HTML. Select the **HTML** link.



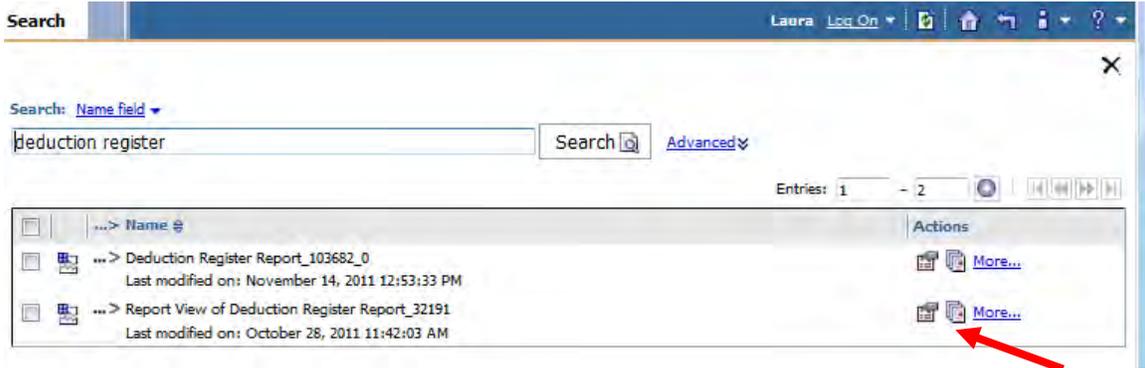
Generating the Deduction Register Report

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.

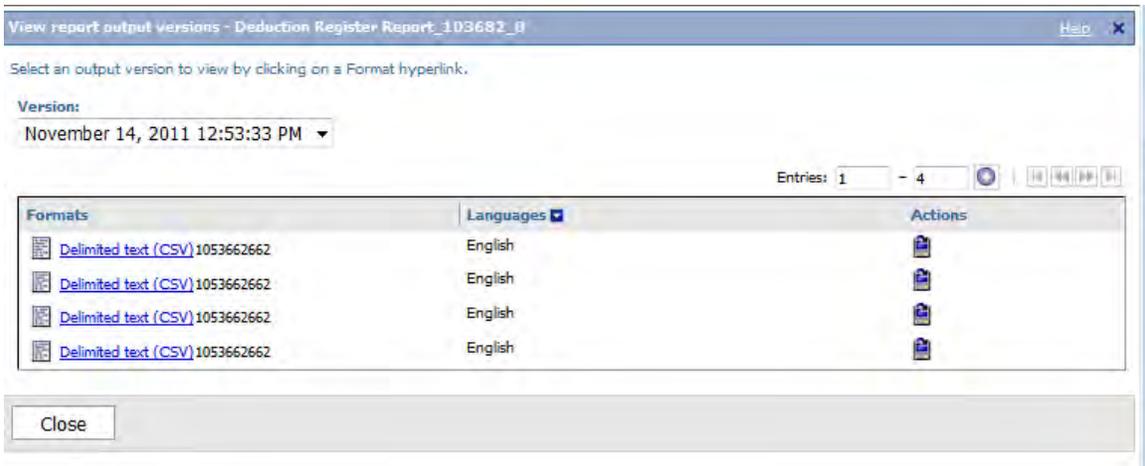
6. Log into my|CalPERS
7. Follow the steps Accessing Reports in Cognos ® section above.
8. Select the **Deduction Register Report** Link. There are two methods for finding the report.
 - a. You can use the search box and the navigation buttons to locate the report. Type “deduction register” into the 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.



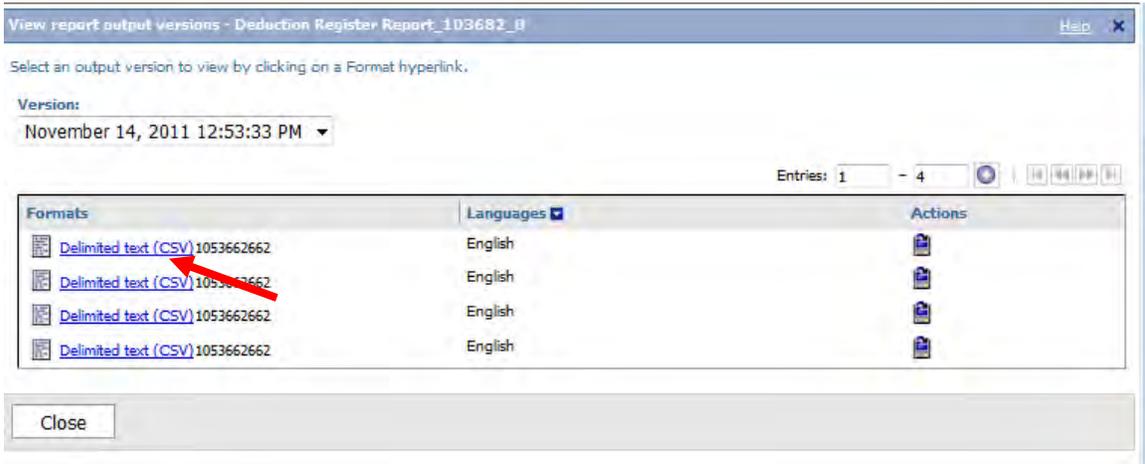
9. In this example, the report was found using the search functionality.



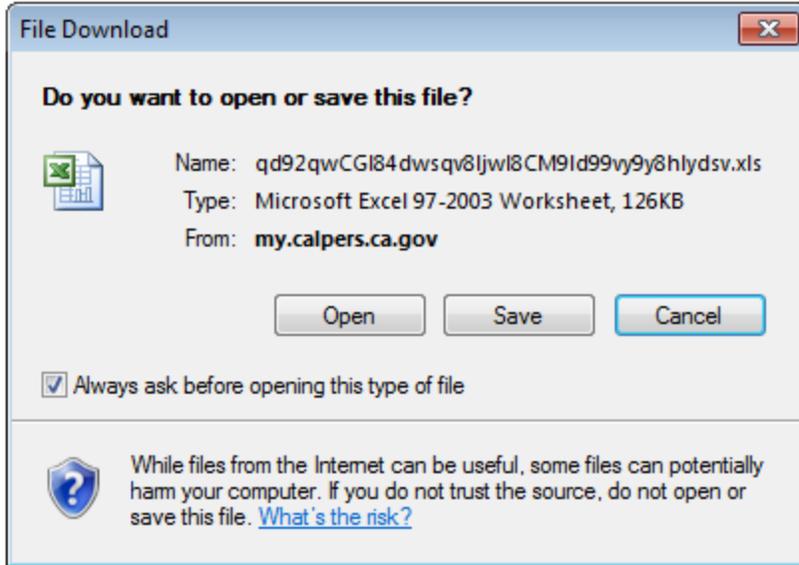
10. Notice there are reports generated on different dates. Select the icon to view output versions of the report you want to view.



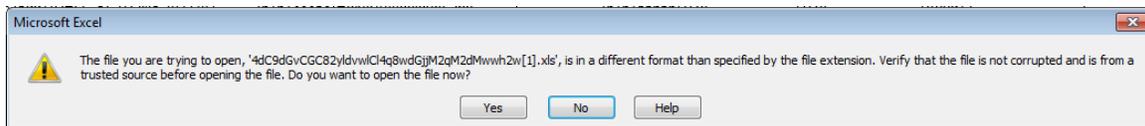
11. You will see reports for each deduction type you manage.



12. Select your report.



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



- 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.



- 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 extension to make it a comma separated values or text file.