Education & Training Classes by Business Role

We offer training classes and resources to assist you with your CalPERS-related business. Our instructor-led and self-paced online classes are designed to help you better understand the laws and rules associated with your agency's retirement and/or health contract as well as how to navigate and process transactions in myCalPERS. To help you to identify the most useful trainings, we have categorized classes based on business roles.

To find training dates or to enroll in a class, log in to myCalPERS and then select the **Education** tab.

For employer education questions and training requests, email the Employer Education team.

CalPERS

Online Training

Instructor-Led Training & Student Guides

General Training
For those conducting business with CalPERS

About CalPERS
- CalPERS 101: More Than Just a Retirement System
- Additional CalPERS Benefit Programs
- CalPERS Overview
- Key CalPERS Resources & Online Tools
- When Changing Retirement Systems

myCalPERS Overview
- Navigation
- Submit an Inquiry

Other myCalPERS Topics
- Run & Schedule Employer Reports

Business Rules Instructor-Led Training
- Health
- Retirement

myCalPERS Student Guides
- Introduction to myCalPERS for Business Partners
- Employer Reports (Cognos)

Payroll Reporting
For those who use myCalPERS to submit payroll reports and adjustments

Business Rules for Payroll Reporting
- Special Compensation for Public Agencies & Schools
- The Importance of Accurately Reporting Payroll

myCalPERS Payroll
- Copy Forward an Earned Period Report
- Maintain Payroll Records
- Manage Records in a Payroll Report
- Report a Zero Payroll Record
- Reporting Earnings Over the Compensation Limit
- Request Extension for an Earned Period Report
- Adjustment Reports
- View Service & Transaction History
- Reporting & Adjusting Special Compensation

Other myCalPERS Topics
- Out-of-Class Reporting
- Retirement Appointment Reconciliation: Reconcile by Appointments
- Retirement Appointment Reconciliation: Reconcile by Earned Period Report
- Retirement Appointment Reconciliation: Reconcile by Rate Plan Receivables
- Certify a Leave of Absence Service Credit Purchase Request
- Service Credit Purchase & Arrears

Business Rules Instructor-Led Training
- Payroll Reporting
- Special Compensation Reporting
- Advanced Compensation Reporting

myCalPERS Instructor-Led Training
- Payroll Reporting
- Payroll Adjustments

myCalPERS Student Guides
- Payroll Reporting
- Payroll Adjustments
- Payroll Receivables Reconciliation
- Projected Contributions
- Retirement Appointment Reconciliation
- Out-of-Class Reporting
- Employment Certification Functionality
- Central-State Active Health Premium Reconciliation

Online Training

Instructor-Led Training & Student Guides

Membership Enrollment

For those who enroll members in CalPERS and maintain appointments

Business Rules for Membership
– Qualifications for California State Universities
– Qualifications for Public Agencies, State Agencies & Schools
– Requirements for Public Agencies & Schools
– Working After Retirement

myCalPERS Retirement Enrollment
– Add a New Appointment
– Add Appointment Events
– Enrolling a Retired Annuitant
– Edit Reciprocal Information

Other myCalPERS Topics
– Retirement Appointment Reconciliation: Reconcile by Appointments
– Retirement Appointment Reconciliation: Reconcile by Earned Period Report
– Retirement Appointment Reconciliation: Reconcile by Rate Plan Receivables
– Certify a Leave of Absence Service Credit Purchase Request
– Service Credit Purchase & Arrears

Business Rules Instructor-Led Training
– Membership Qualifications for State, Public Agencies & Schools, and California State Universities
– Advanced Membership

myCalPERS Instructor-Led Training
– Retirement Enrollment

myCalPERS Student Guides
– Retirement Enrollment
– Out-of-Class Reporting
– Retirement Appointment Reconciliation
– Employment Certification Functionality
– Retirement Contract

	Online Training	**Instructor-Led Training & Student Guides**

Health Benefits Enrollment

For those who enroll employees and their dependents in health benefits

Business Rules Health
- Contracting Agency Health Billing (public agency & schools only)
- Health Benefits Into Retirement
- Health Benefits Officer Roles & Responsibilities
- Health Eligibility Requirements
- Health Enrollment
- Health Plan Options
- Retiree Dental & Vision Coverage (state only)
- Survivor Health Benefits

myCalPERS Health Enrollment
- New Enrollment
- Non-PERS and CalSTRS New Enrollment
- Non-PERS Continued Health Into Retirement
- Add a Dependent
- Delete Dependents
- Change Plan
- Cancellation
- Rescission
- Set Up Direct Pay
- COBRA Enrollment for Employees
- COBRA Enrollment for Deleted Dependents
- Dental Enrollment Into Retirement
- Billing Reconciliation
- Reconcile State-Active Premiums (state only)

Business Rules Instructor-Led Training
- Health Enrollment

myCalPERS Instructor-Led Training
- Health Enrollment

myCalPERS Student Guides
- Health Enrollment
- Health Transaction Verification
- Health Dependent Eligibility Verification
- Health Billing Reconciliation
- Health Contract
- Central-State Active Health Premium Reconciliation

Financials/Payments

For those responsible for making payments through myCalPERS, including retirement contributions and health premiums

myCalPERS Payments
- Add a Payment Account
- View Billing & Payment Summary & Payment History
- Paying a Receivable
- Projected Contributions

myCalPERS Student Guides
- Electronic Funds Transfer
- Health Billing Reconciliation
- Payroll Receivables Reconciliation
- Projected Contributions

	Online Training	**Instructor-Led Training & Student Guides**

System Access Administration
For those who manage user access to myCalPERS

myCalPERS System Access Administration
– Maintain Your Agency's Address & Communication Information
– Add & Maintain Business Partner Contacts
– Change Username, Unlock Account & Reset Password

myCalPERS Student Guides
– Business Partner Relationships
– System Access Administration
– System Privileges for Business Partner Roles

Contracts
For those who use myCalPERS to manage an agency's retirement and/or health contract

Business Rules
– Retirement Contracts for Public Agencies & Schools

myCalPERS Contracts
– Navigate Your Retirement Contract Benefits
– Add a Position Title

myCalPERS Student Guides
– Retirement Contract
– Health Contract

Visit the **CalPERS website** for a comprehensive list of available Business Rules & myCalPERS classes.

CalPERS