

# myCalPERS Health Enrollment Supplement

Student Guide

**August 10, 2024**



## Introduction

This guide contains additional health enrollment transactions that you may process in myCalPERS. For step actions on more common transactions, refer to the [myCalPERS Health Enrollment \(PDF\)](#) student guide.

For confirming employee-submitted transactions in myCalPERS, refer to the [myCalPERS Health Transaction Verification student guide \(PDF\)](#).

### myCalPERS Health Aid

The [myCalPERS Health Aid: Health Event Types and Reasons for Employers \(PDF\)](#) can assist in determining which health event type, reasons, and dates to use for your transactions.

### Disclaimer

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

### System Access

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

### Training Opportunities

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

### Contents

- Unit 1: Affidavit of Parent-Child Relationship (HBD-40) – Page 3
- Unit 2: Direct Payment Authorization (HBD-21) – Page 7
- Unit 3: Group Continuation Coverage/COBRA (HBD-85) – Page 17
- Unit 4: Non-PERS and CalSTRS Profile and Appointment Changes for Public Agency & School Employees – Page 26
- Unit 5: Health Benefits Into Retirement for Public Agency & School Employees – Page 30
- Unit 6: Dental Benefits Into Retirement for State Employees – Page 36
- Unit 7: Discontinue Health Benefits Before Retirement – Page 39
- CalPERS Resources – Page 41
- CalPERS Contacts – Page 43

## Unit 1: Affidavit of Parent-Child Relationship (HBD-40)

In this unit, you will learn how to recertify a parent-child relationship and how to verify a parent-child relationship expiration date. The employee must provide a new HBD-40 and supporting documents for each dependent in a parent-child relationship.

For steps on adding a parent-child relationship dependent, refer to the [myCalPERS Health Enrollment \(PDF\)](#) student guide, unit 1, Scenario 2: Add Dependent.

### Expiration Date

If the parent-child relationship dependent is not recertified before the first of the month of the subscriber's birthday, then the system will automatically delete the dependent from the health benefits effective the first of the month following the subscriber's birthday.

### Health Reports

- **Parent-Child Relationship Dependent With Expiring Certification Report**
- **Employer Health Enrollee Report-Ext** includes a Parent-Child Relationship Certification End Date column for all dependents in a parent-child relationship

### Timeframes

#### 90 Days

Recertify no earlier than 90 days before the parent-child relationship certification renewal date.

#### 30 days

- If recertification is not completed at least 30 days before the parent-child relationship certification renewal date, the system will apply a termination date.
- If you approve the employee's recertification after the system applies a termination with a future date, you can rescind the termination, then recertify the dependent.
- If the termination date has recently passed and you approve the recertification, you must contact CalPERS to request a rescission, then recertify the dependent.

### Contents

- Scenario 1: Recertify a Dependent in a Parent-Child Relationship – Page 4
- Scenario 2: Review Parent-Child Relationship and Certification Expiration Date – Page 6

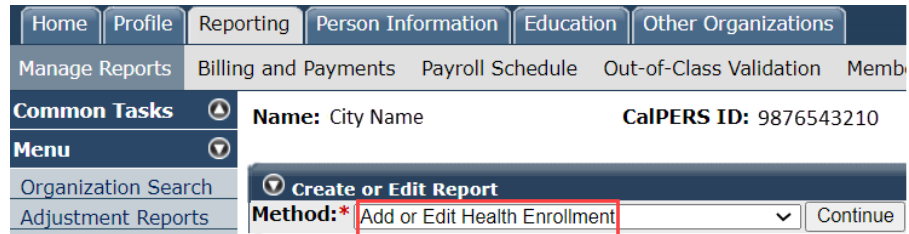
## Scenario 1: Recertify a Dependent in a Parent-Child Relationship

### Step Actions (13 Steps)

#### Add Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

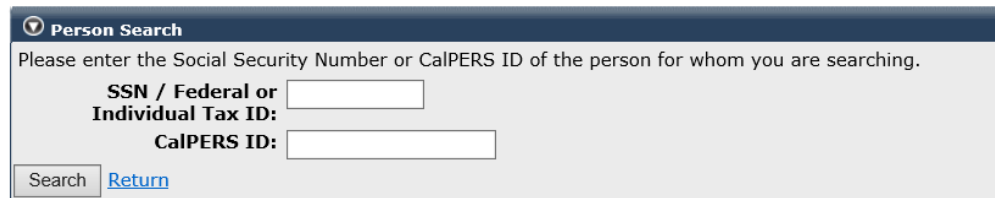


The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs for Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Membership. A 'Common Tasks' section is expanded to show a 'Menu' with options for Organization Search and Adjustment Reports. A 'Create or Edit Report' section is also expanded, showing a 'Method:' dropdown menu with 'Add or Edit Health Enrollment' selected and highlighted with a red box. A 'Continue' button is visible to the right of the dropdown.

Step 3 Select the **Continue** button.

#### Search for the Subscriber

Step 4 Complete the Person Search section.



The screenshot shows a 'Person Search' form with the instruction: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are three input fields: 'SSN / Federal or Individual Tax ID:', 'CalPERS ID:', and a 'Search' button. A 'Return' link is also present.

Step 5 Select the **Search** button.

Step 6 Are you recertifying more than 30 days prior to the first of the month of the subscriber's birthday (dependent hasn't been deleted)?

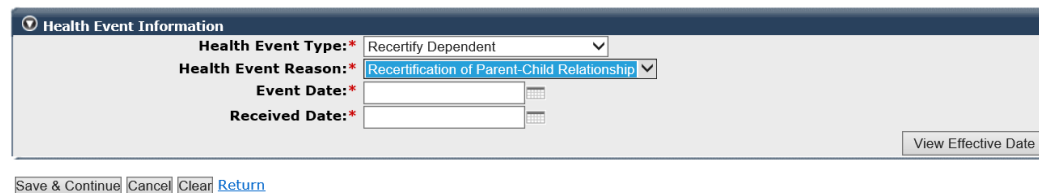
**Yes:** Continue to step 7.

**No:** Rescind the deletion before recertifying the dependent. For step actions, refer to the [myCalPERS Health Enrollment \(PDF\)](#) student guide, Unit 2: Rescission.

#### Recertify Parent Child Relationship

Step 7 Complete the Health Event Information section.

**Event Date:** 1<sup>st</sup> of the month following the subscriber's birth date.



The screenshot shows a 'Health Event Information' form with the following fields: 'Health Event Type:' (Recertify Dependent), 'Health Event Reason:' (Recertification of Parent-Child Relationship), 'Event Date:', and 'Received Date:'. There is a 'View Effective Date' button at the bottom right. At the bottom of the form are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 8 Select the **View Effective Date** button at bottom right.

Step 9 Select the **Save & Continue** button.

---

Step 10 Within the Parent-Child Relationship Certification section, select the **Certify Dependent** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
FIONA PHAM	07/31/2021	<input checked="" type="checkbox"/> Certify Dependent

Step 11 Select the **disclaimer** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kitty Kooper	03/31/2025	<input checked="" type="checkbox"/> Certify Dependent

\* I am a duly appointed and qualified representative of the agency/department.

I have reviewed the above affidavit, supporting documentation, and verified the identity of the subscriber submitting this affidavit.

I retained copies of the subscriber's health and dental enrollment form(s) and all supporting documents to enroll/recertify the eligibility of the employee's dependent in a PCR.

Based on the review of the documentation and information provided I recommend enrolling/recertifying this dependent in a PCR based on the information provided and documentation attached [per CCR §599.500(o)].

Step 12 Select the **Save & Continue** button.

---

Step 13 Select the first link in the health transaction confirmation to verify the transaction updated correctly.

**Health Transaction Confirmation**

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

**You have completed this scenario.**

---

## Scenario 2: Review Parent-Child Relationship and Certification Expiration Date

Verify the parent-child certification expiration date for the dependent.

### Step Actions (8 Steps)

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

Step 2 Complete the Person Search section.

Step 3 Select the **Search** button.

Step 4 Select the **Health Enrollment** local navigation link.

Step 5 Select the **CalPERS Employment** link.

Step 6 Within the Covered Persons Summary section, is the dependent listed?

**Yes:** Continue to step 7.

**No:** Within the Covered Persons Summary section, select the **View More Actions** link to display the full list of dependents.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
JOE JONES	05/02/1958	Self	NA	Basic	No	No
SUEZENGKY MODERWELL	10/18/1965	Spouse	No	Basic	No	No

Step 7 Select the **name** link for the dependent that has a parent-child relationship.

Step 8 Confirm the Parent-Child Relationship Certification Expiration date is updated.

**You have completed this scenario.**

## Unit 2: Direct Payment Authorization (HBD-21)

In this unit, you will learn how to continue a subscriber's health benefits with direct pay. Direct pay is voluntary, and the subscriber is responsible for paying the full monthly premium directly to their health plan. Some examples of when someone may elect to go on direct pay:

- An employee on an unpaid leave of absence
- An enrolled state permanent intermittent or part-time employee has no earnings for one or more months
- A permanently separated employee is pending retirement

### Contents

- Scenario 1: Direct Pay for an Employee – Page 8
- Scenario 2: Direct Pay for a Retiring Employee – Page 12

## Scenario 1: Direct Pay for an Employee

Your employee is going on an unpaid leave and has elected to go on direct pay.

### System Logic

- Most leave of absences will automatically cancel health benefits the first day of the second month after their last day on payroll before their leave begins.
- Family Medical Leave and Maternity/Paternity Leave do not change the employee's health coverage or employer deductions. **Change Premium Payment Method** health event type and **Chg to deduct-FMLA-Batch** health event reason will display in the health enrollment history.
- For cancelled health benefits, rescind the cancellation prior to processing a direct pay.

### All Agencies-Return to Work

Update the employee's appointment to reflect the end of their leave.

- On direct pay: The system will change the subscriber from direct pay to standard deduction.
- Not on direct pay (health benefits is cancelled) and employee is re-enrolling: Process a Health Event Type: **New Enrollment**, Health Event Reason: **Return from Off Pay Status**.

### Step Actions (29 Steps)

#### Leave of Absence

Step 1 Has the leave of absence event been processed?

**Yes:** Employee's appointment has a leave of absence:

- Public agencies and schools, skip to step 9.
- State agencies, skip to step 21.

**No:** Employee's appointment does not reflect a leave of absence:

- Public agencies, schools, and non-central state agencies, go to step 2.
- Central-state agencies will enter the leave in PIMS, then skip to step 21.

---

#### Public Agencies, Schools, and Non-Central State Agencies: Process the Leave of Absence

Step 2 Select the **Person Information** global navigation tab.

Step 3 Complete the Person Search.

Step 4 Select the **Search** button.

Step 5 Within the Appointment History section, select the **Employer** link that is for the employee's active appointment.



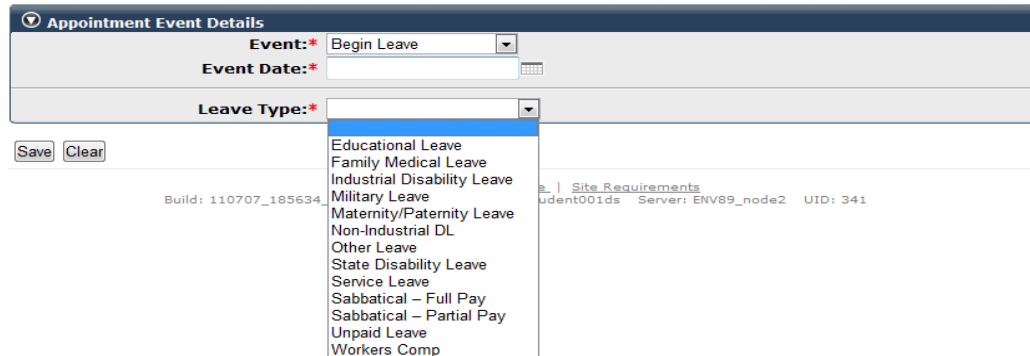
Appointment History	Add New	
Employer	Division	Appointment Type
<a href="#">City Name</a>		Regular



Step 6 Within the Appointment Event History section, select the **Add New** button.

---

Step 7 Complete the Appointment Event Details section.



Appointment Event Details

Event:\* Begin Leave

Event Date:\*

Leave Type:\*

Save Clear

Build: 110707\_185634

Site Requirements  
Student001ds Server: ENV89\_node2 UID: 341

Step 8 Select the **Save** button.

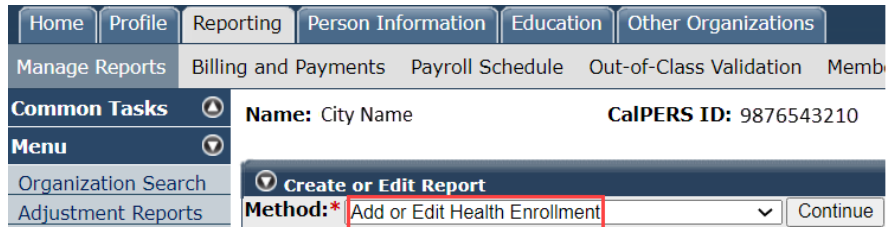
**Note:** Non-central state agencies, skip to step 21.

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### Public Agencies and Schools-Rescind the Health Cancellation

Step 9 Select the **Reporting** global navigation tab.

Step 10 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.



Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation Memb

Common Tasks

Menu

Organization Search

Adjustment Reports

Name: City Name CalPERS ID: 9876543210

Create or Edit Report

Method:\* Add or Edit Health Enrollment

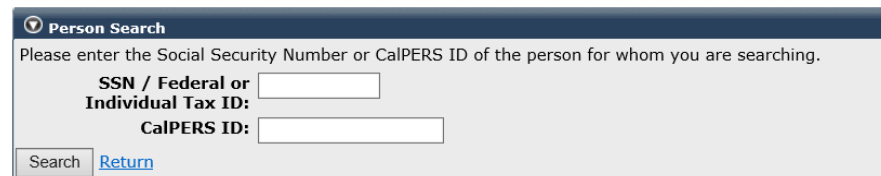
Continue

Step 11 Select the **Continue** button.

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### Search for the Subscriber

Step 12 Complete the Person Search section.



Person Search

Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

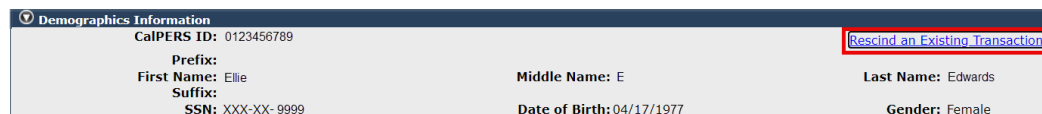
CalPERS ID:

Search Return

Step 13 Select the **Search** button.

---

Step 14 Within the Demographics Information section, select the **Rescind an Existing Transaction** link.



Demographics Information

CalPERS ID: 0123456789

Prefix:

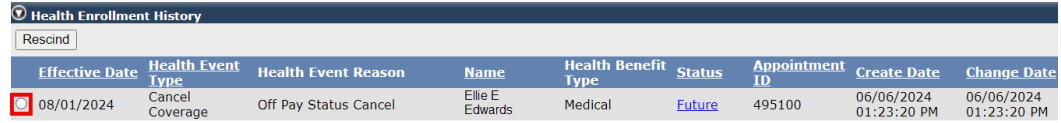
First Name: Ellie Middle Name: E Last Name: Edwards

Suffix:

SSN: XXX-XX-9999 Date of Birth: 04/17/1977 Gender: Female

Rescind an Existing Transaction

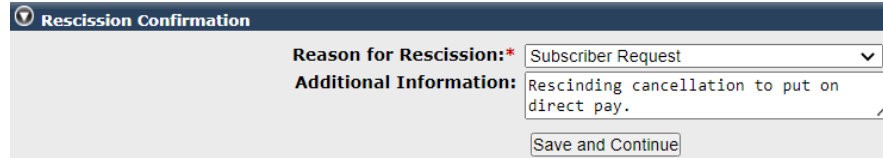
Step 15 Within the Health Enrollment History section, select the radio button associated to the future health event to be rescinded.



Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status	Appointment ID	Create Date	Change Date
<input checked="" type="radio"/> 08/01/2024	Cancel Coverage	Off Pay Status Cancel	Elle E Edwards	Medical	Future	495100	06/06/2024 01:23:20 PM	06/06/2024 01:23:20 PM

Step 16 In the upper left, select the **Rescind** button.

Step 17 At the bottom, complete the Rescission Confirmation section.



**Reason for Rescission:**\* Subscriber Request

**Additional Information:** Rescinding cancellation to put on direct pay.

Save and Continue

Step 18 Select the **Save and Continue** button.

Step 19 From the Health Event Information section, select the **Save & Continue** button.

Step 20 Select the **Add another transaction for this subscriber** link, then skip to step 26.

### Process the Direct Pay

Step 21 Select the **Reporting** global navigation tab.

Step 22 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.



Home Profile Reporting Person Information Education Other Organizations

Manage Reports Billing and Payments Payroll Schedule Out-of-Class Validation Memb

**Common Tasks** Name: City Name CalPERS ID: 9876543210

**Menu**

Organization Search

Adjustment Reports

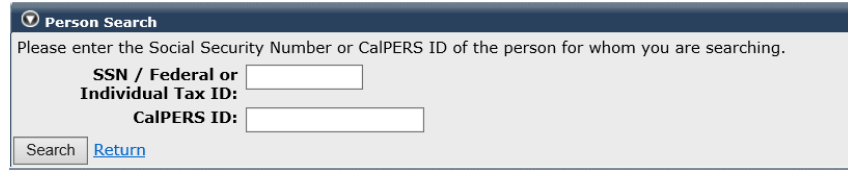
**Create or Edit Report**

**Method:**\* Add or Edit Health Enrollment Continue

Step 23 Select the **Continue** button.

## Search for the Subscriber

Step 24 Complete the Person Search section.



**Person Search**

Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

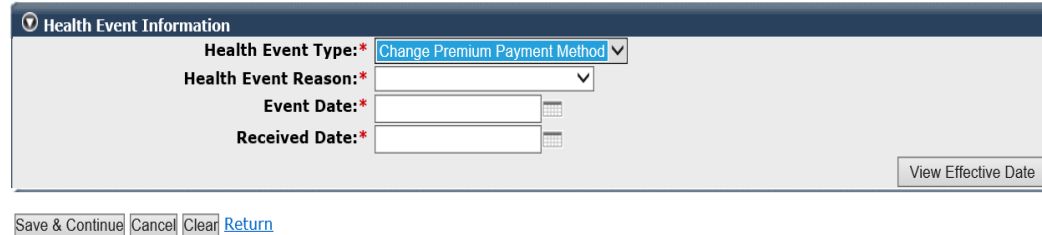
CalPERS ID:

[Return](#)

Step 25 Select the **Search** button.

## Input Health Event Information

Step 26 Complete the Health Event Information section.



**Health Event Information**

Health Event Type:\*

Health Event Reason:\*

Event Date:\*

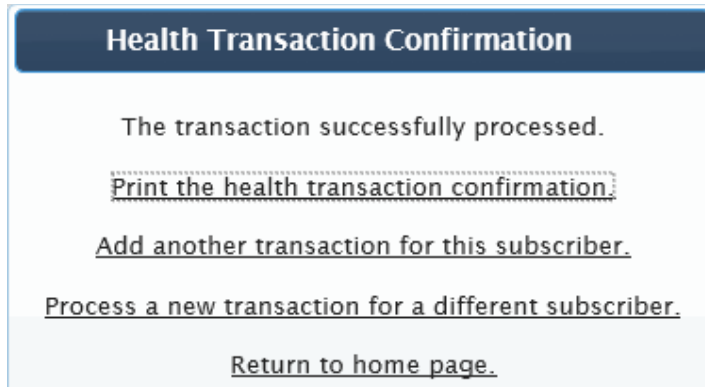
Received Date:\*

[Return](#)

Step 27 Select the **View Effective Date** button at bottom right.

Step 28 Select the **Save & Continue** button.

Step 29 Select one of the four option links in the health transaction confirmation.



**Health Transaction Confirmation**

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

**You have completed this scenario.**

## Scenario 2: Direct Pay for a Retiring Employee

Your separated employee has elected direct pay because their retirement payments will be delayed. They will make direct payments for their full premium to their health plan, so they will show covered. After they start receiving their retirement payments, they can contact their health plan for reimbursement of their direct payments.

### Step Actions (45 Steps)

#### Permanent Separation

Step 1 Has the permanent separation event been added to the appointment?

**Yes:** Skip to step 9.

**No:** Permanently separate the employee:

- Public agencies, schools, and non-central state agencies, go to step 2.
- Central-state agencies will enter the separation in PIMS, wait 1-2 days for the permanent separation to update myCalPERS, then skip to step 9.

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#### Public Agencies, Schools, and Non-Central State Agencies Process the Permanent Separation

Step 2 Select the **Person Information** global navigation tab.

Step 3 Complete the Person Search.

Step 4 Select the **Search** button.

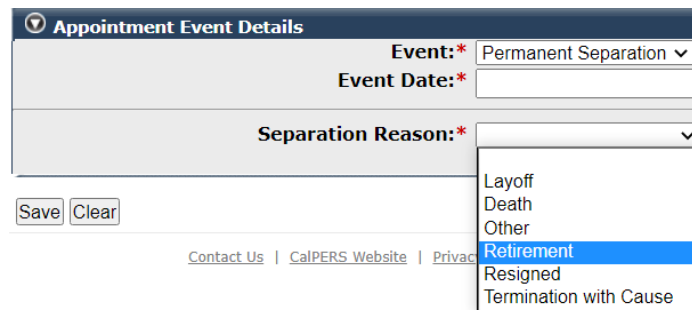
Step 5 Within the Appointment History section, select the **Employer** link that is for the employee's active appointment.



Employer	Division	Appointment Type
<a href="#">City Name</a>		Regular

Step 6 Within the Appointment Event History section, select the **Add New** button.

Step 7 Complete the Appointment Event Details section.



Appointment Event Details

Event:\* Permanent Separation

Event Date:\*

Separation Reason:\*

Save Clear

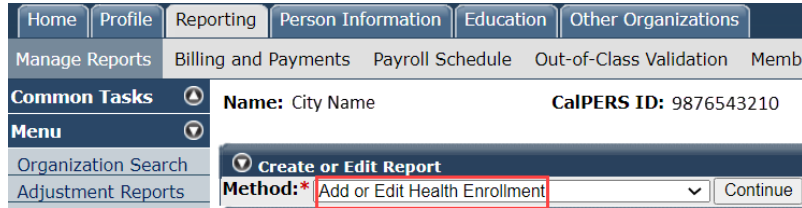
Contact Us | CalPERS Website | Privacy

Step 8 Select the **Save** button.

## Process the Direct Pay

Step 9 Select the **Reporting** global navigation tab.

Step 10 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

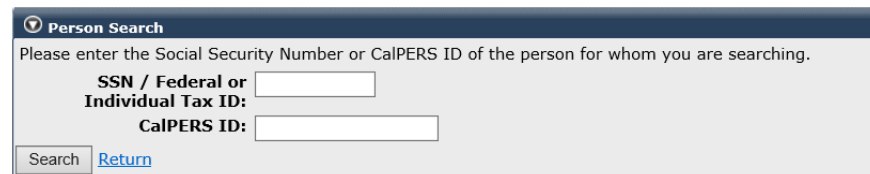


The screenshot shows a navigation menu with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Membership. A 'Common Tasks' section is expanded to show a 'Menu' with options: Organization Search, Adjustment Reports, and 'Create or Edit Report'. The 'Create or Edit Report' section is further expanded to show a 'Method:' dropdown menu with 'Add or Edit Health Enrollment' selected and highlighted with a red box. A 'Continue' button is visible to the right of the dropdown. The page also displays 'Name: City Name' and 'CalPERS ID: 9876543210'.

Step 11 Select the **Continue** button.

## Search for the Subscriber

Step 12 Complete the Person Search section.

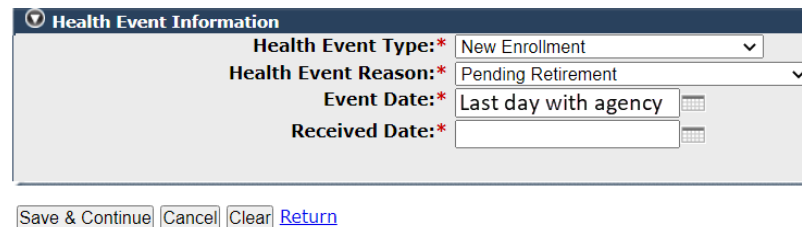


The screenshot shows the 'Person Search' form. It contains the following fields: 'SSN / Federal or Individual Tax ID:' with an input field, 'CalPERS ID:' with an input field, and a 'Search' button. A 'Return' link is also present at the bottom of the form.

Step 13 Select the **Search** button.

## Input Health Event Information

Step 14 Complete the Health Event Information section.



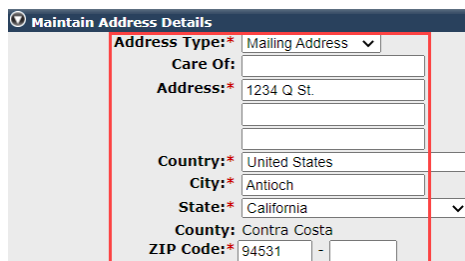
The screenshot shows the 'Health Event Information' form. It contains the following fields: 'Health Event Type:\*' with a dropdown menu set to 'New Enrollment', 'Health Event Reason:\*' with a dropdown menu set to 'Pending Retirement', 'Event Date:\*' with a date picker set to 'Last day with agency', and 'Received Date:\*' with a date picker. At the bottom of the form are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 15 Select the **View Effective Date** button at bottom right, and verify the effective date is the same date their coverage ended.

Step 16 Select the **Save & Continue** button.

## Update Subscriber Details

Step 17 Update the Maintain Address Details section if needed.



The screenshot shows the 'Maintain Address Details' form. It contains the following fields: 'Address Type:\*' with a dropdown menu set to 'Mailing Address', 'Care Of:' with an input field, 'Address:\*' with an input field containing '1234 Q St.', 'Country:\*' with a dropdown menu set to 'United States', 'City:\*' with an input field containing 'Antioch', 'State:\*' with a dropdown menu set to 'California', 'County:' with an input field containing 'Contra Costa', and 'ZIP Code:\*' with an input field containing '94531'. A red box highlights the 'Address Type', 'Address', 'City', 'State', 'County', and 'ZIP Code' fields.

Step 18 **Optional:** If you populate the Maintain Communication Details section, select the **Primary** radio button so the phone number and/or email address displays on the subscriber's Profile page.

Step 19 Complete the Appointment Details section:

- **Medical Group:** For public agencies and schools, choose the subscriber's medical group based on your agency's health contract.
- **Affiliated Association:** Select if they are a dues-paying member.

Step 20 Select the **Save & Continue** button.

Step 21 Did you update the address?

**Yes:** Select the correct **Entered Address** or **U.S. Postal Service Matches** radio button.

**No:** Skip to step 24.

Step 22 Select the **Confirm** button.

Step 23 Select the **Save & Continue** button.

### Add Dependents

Step 24 Is the employee enrolling dependents?

**Yes:** Select the **Add New** button.

**No:** Skip to step 41.

Step 25 Is the dependent listed in the Existing Relationships Eligible for Health section?  
**Yes:** Select the dependent's radio button.

Existing Relationships Eligible for Health [Add New](#)

Select a dependent below. If a dependent is not listed, select the **Add New** button.

	Name	Date of Birth	Relationship	Medical
<input type="radio"/>	Jones, Joey	07/30/2015	Child	No
<input type="radio"/>	Jones, Jill	11/03/1983	Spouse	No
<input type="radio"/>	Jones, Jake	11/17/2017	Child	No

[Continue](#) [Cancel](#) [Return](#)

**No:** Skip to step 28.

---

Step 26 Select the **Continue** button.

---

Step 27 Skip to step 29.

---

Step 28 Select the **Add New** button.

Existing Relationships Eligible for Health [Add New](#)

Select a dependent below. If a dependent is not listed, select the **Add New** button.

	Name	Date of Birth	Relationship	Medical
No results found.				

[Continue](#) [Cancel](#) [Return](#)

---

Step 29 Complete or update the Person Details section if necessary. You may update if the dependent is not an active employee at a PERS-contracting agency.

---

Step 30 Does the dependent have the same address as your employee?  
**Yes:** Skip to step 34.

**No:** Deselect the Address is the same as Primary Subscriber check box.

Address Details

Address is the same as Primary Subscriber

Address Type:\* [Mailing Address](#) ▼

---

Step 31 Complete the Address Details section.

---

Step 32 Select the **Save & Continue** button.

---

Step 33 Select the **Confirm** button.

---

Step 34 Select the **Save & Continue** button.

---

Step 35 Is this dependent in a parent-child relationship?

**Yes:** Select the **Maintain Certification** link.

Dependent Information		
Parent-Child Relationship Information		
Certification Submitted: No <a href="#">Maintain Certification</a>		
Benefit Type		
Benefit Type	Enrollment	Change Enrollment?
Medical	No	<input checked="" type="checkbox"/>

**No:** Skip to step 40.

Step 36 Select the **Certify Dependent** check box.

Step 37 Select the **disclaimer** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kitty Kooper	03/31/2025	<input checked="" type="checkbox"/> Certify Dependent

I am a duly appointed and qualified representative of the agency/department.  
I have reviewed the above affidavit, supporting documentation, and verified the identity of the subscriber submitting this affidavit.  
I retained copies of the subscriber's health and dental enrollment form(s) and all supporting documents to enroll/recertify the eligibility of the employee's dependent in a PCR.  
Based on the review of the documentation and information provided I recommend enrolling/recertifying this dependent in a PCR based on the information provided and documentation attached [per CCR §599.500(o)].

Step 38 Select the **Save & Continue** button.

Step 39 Below the Dependent Information section, select the **Save & Continue** button.

Step 40 Do they have additional dependents?

**Yes:** Return to step 24.

**No:** Continue to step 41.

Step 41 Select the **Save & Continue** button.

### Select Health Plan

Step 42 Select the **medical plan** radio button.

Medical Plan Selections		
Plan Name	Party	Premium
<input checked="" type="radio"/> Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68
<input type="radio"/> Health Net SmartCare - Region 1	Self/B and 1/B	2001.04

Step 43 Enter a medical provider(s) if the employee indicated a primary care physician.

Provider Information		
Name	Dependent Type	Medical Provider
Jane Jones	Self	<input type="text"/>
Jill Jones	Natural Born Child	<input type="text"/>

Step 44 Select the **Save & Continue** button.

Step 45 Select one of the four option links in the health transaction confirmation.

**You have completed this scenario.**



## Unit 3: Group Continuation Coverage/COBRA (HBD-85)

In this unit, you will learn how to continue subscriber and dependent(s) health benefits with Consolidated Omnibus Budget Reconciliation Act (COBRA). When an employee is cancelled or a dependent is deleted, a confirmation is sent to them with the HBD-85 and COBRA information. If electing COBRA, the form would be completed and returned to your agency for processing.

COBRA is voluntary. The subscriber is responsible for paying the full monthly premium plus 2% administrative fee directly to their health plan.

Some examples of when an employee or dependent involuntarily loses coverage and may elect COBRA:

- An employee resigns and permanently separates
- A former dependent has been deleted due to divorce
- A child turned 26
- A state permanent-intermittent employee didn't work enough hours in the control periods
- An employee's appointment changes to a reduced time base

### Contents

- Scenario 1: New COBRA Enrollment for an Employee – Page 18
- Scenario 2: New COBRA Enrollment for a Former Dependent – Page 22

## Scenario 1: New COBRA Enrollment for an Employee

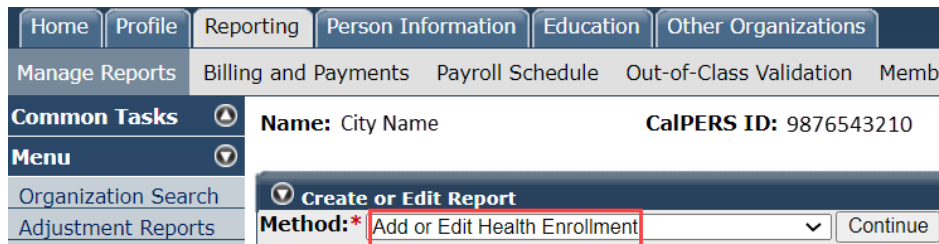
Your former employee's health benefits have been cancelled due to permanent separation, and they have elected to enroll in COBRA to continue their health benefits.

### Step Actions (32 Steps)

#### Add the COBRA Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

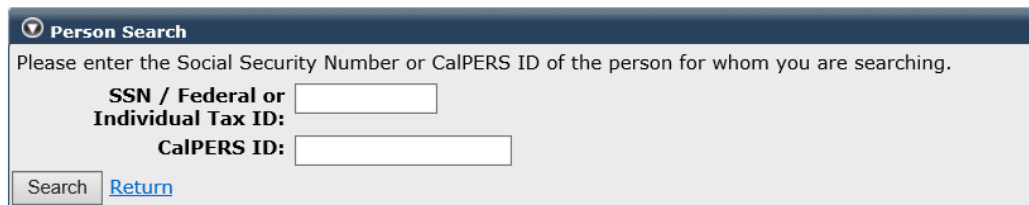


The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Under the Reporting tab, there are sub-tabs for Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Membership. A 'Common Tasks' section is expanded to show a 'Menu' with options for Organization Search and Adjustment Reports. Below this, the 'Create or Edit Report' section is visible, showing a 'Method:' dropdown menu with 'Add or Edit Health Enrollment' selected and highlighted with a red box. Other fields include 'Name: City Name' and 'CalPERS ID: 9876543210'. A 'Continue' button is also present.

Step 3 Select the **Continue** button.

#### Search for the Subscriber

Step 4 Complete the Person Search section with the COBRA enrollee's information.

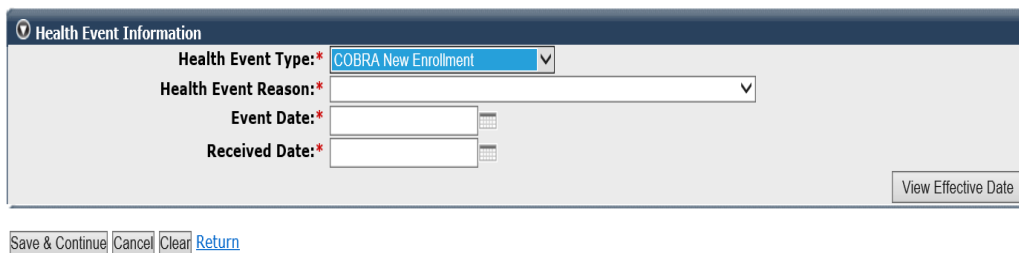


The screenshot shows the 'Person Search' form. It includes a title bar, a description: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.', and three input fields: 'SSN / Federal or Individual Tax ID:', 'CalPERS ID:', and a 'Search' button. A 'Return' link is also present.

Step 5 Select the **Search** button.

#### Input Health Event Information

Step 6 Complete the Health Event Information section.




The screenshot shows the 'Health Event Information' form. It includes a title bar, a 'Health Event Type:' dropdown menu with 'COBRA New Enrollment' selected, a 'Health Event Reason:' dropdown menu, and two date input fields: 'Event Date:' and 'Received Date:'. A 'View Effective Date' button is located at the bottom right. At the bottom of the form, there are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 7 Select the **View Effective Date** button at bottom right, and verify the effective date is the same date their coverage ended.

Step 8 Select the **Save & Continue** button.

## Update Subscriber Details

Step 9 Complete the Maintain Address Details section if you need to update the subscriber's physical address.



**Maintain Address Details**

Address Type:\* Mailing Address

Care Of:

Address:\* 123 A St

Country:\* United States

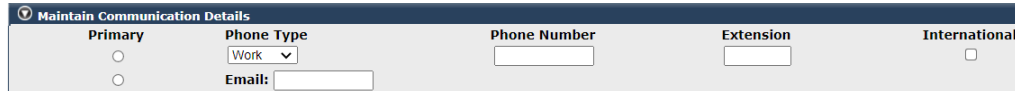
City:\* ANTIOCH

State:\* California

County: Contra Costa

ZIP Code:\* 94531 -

Step 10 **Optional:** If you populate the Maintain Communication Details section, select the **Primary** radio button for the phone number and/or email address.



**Maintain Communication Details**

Primary

Phone Type: Work

Phone Number:

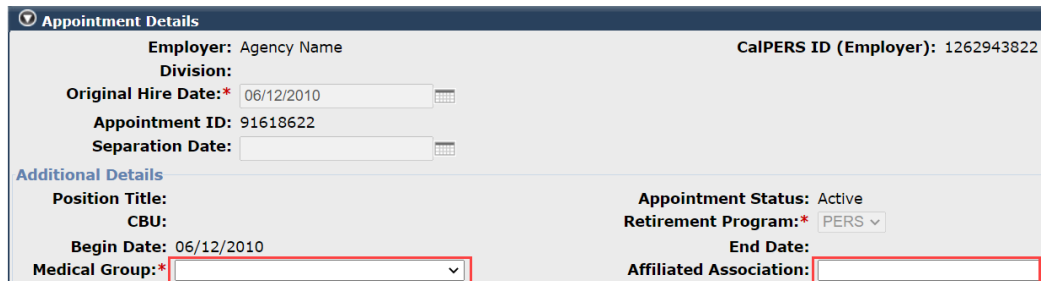
Extension:

International

Email:

Step 11 Complete the Appointment Details section.

- **Medical Group:** Select for a public agency or school employee.
- **Affiliated Association:** Select if the employee is a dues-paying member.



**Appointment Details**

Employer: Agency Name CalPERS ID (Employer): 1262943822

Division:

Original Hire Date:\* 06/12/2010

Appointment ID: 91618622

Separation Date:

**Additional Details**

Position Title:

Appointment Status: Active

CBU:

Retirement Program:\* PERS

Begin Date: 06/12/2010

End Date:

Medical Group:\*

Affiliated Association:

Step 12 Select the **Save & Continue** button.

## Add Dependents

Step 13 Is the subscriber enrolling dependents?

**Yes:** Select the **Add New** button.



**Covered Person List** Add New

Review the covered person list. To enroll a dependent, select the **Add New** button. Otherwise, select the **Save & Continue** button

Name	Date of Birth	Relationship	Medical
JOE JONES	03/02/1984	Self	Basic

Save & Continue Cancel Return

**No:** Skip to step 28.

Step 14 Select the dependent's radio button.

---

Step 15 Select the **Continue** button.

---

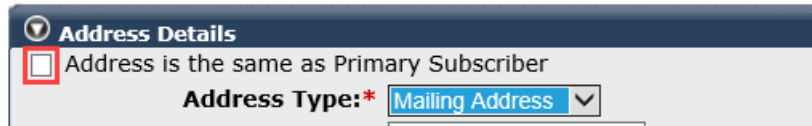
Step 16 Complete or update the Person Details section. You may change the section if the dependent is not an active employee at a PERS-contracting agency.

---

Step 17 Is the dependent's address the same as the subscriber's address?

**Yes:** Skip to step 21.

**No:** Deselect the **Address is the same as Primary Subscriber** check box.



Step 18 Complete the Address Details section.

---

Step 19 Select the **Save & Continue** button.

---

Step 20 Select the **Confirm** button.

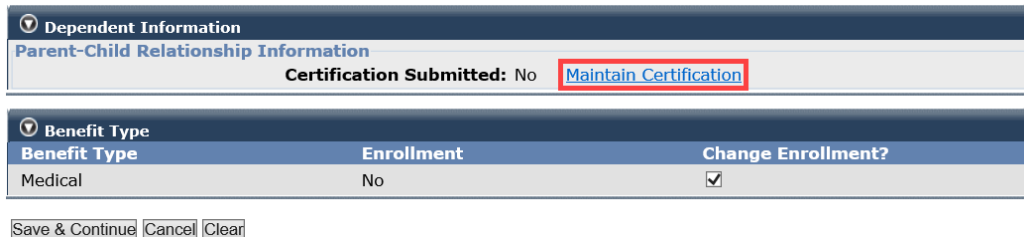
---

Step 21 Select the **Save & Continue** button.

---

Step 22 Is this dependent in a parent-child relationship?

**Yes:** Select the **Maintain Certification** link.



**No:** Skip to step 27.

---

Step 23 Select the **Certify Dependent** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
FIONA PHAM	07/31/2021	<input checked="" type="checkbox"/> Certify Dependent

Step 24 Select the **disclaimer** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
FIONA PHAM	07/31/2021	<input checked="" type="checkbox"/> Certify Dependent

\* I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any c further understand the provision of California Government Code 20085, which states in part:

Step 25 Select the **Save & Continue** button.

---

Step 26 Below the Dependent Information section, select the **Save & Continue** button.

---

Step 27 Is the employee adding more dependents?

**Yes:** Return to step 13.

**No:** Continue to step 28.

---

Step 28 Select the **Save & Continue** button.

---

## Select Health Plan

Step 29 Select the **medical plan** radio button.

Medical Plan Selections				
	Plan Name	Party	Premium	COBRA Premium
<input type="radio"/>	Anthem Blue Cross Select HMO - Region 1	Self/B and 1/B	1737.96	1772.72
<input type="radio"/>	Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68	2417.07
<input type="radio"/>	Health Net SmartCare - Region 1	Self/B and 1/B	2001.04	2041.06
<input type="radio"/>	Kaiser Permanente California - Region 1	Self/B and 1/B	1536.98	1567.72
<input type="radio"/>	PERS Care - Region 1	Self/B and 1/B	2266.28	2311.61
<input type="radio"/>	PERS Choice - Region 1	Self/B and 1/B	1722.36	1756.81
<input type="radio"/>	PERS Select - Region 1	Self/B and 1/B	1040.58	1061.39

Step 30 Complete Medical Provider field(s) if employee provided physician name(s).

---

Step 31 Select the **Save & Continue** button.

---

Step 32 Select one of the four option links in the health transaction confirmation.

**Health Transaction Confirmation**

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

**You have completed this scenario.**

---

## Scenario 2: New COBRA Enrollment for a Former Dependent

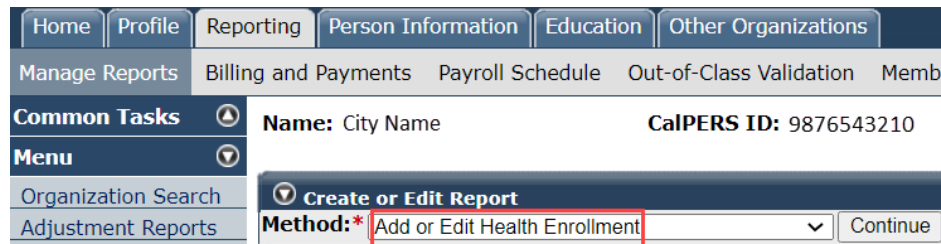
Your employee's ex-spouse and stepchild were deleted from health benefits due to divorce and have elected to enroll in COBRA to continue their health benefits.

### Step Actions (38 Steps)

#### Add the COBRA Health Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

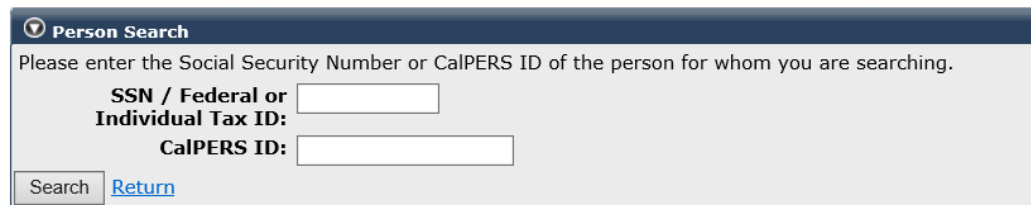


The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Under the Reporting tab, there are sub-tabs for Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Membership. A 'Common Tasks' section is expanded to show a 'Menu' with options for Organization Search and Adjustment Reports. Below the menu, there is a 'Create or Edit Report' section with a 'Name' field containing 'City Name' and a 'CalPERS ID' field containing '9876543210'. The 'Method' dropdown menu is open, showing 'Add or Edit Health Enrollment' selected and highlighted with a red box. A 'Continue' button is visible to the right of the dropdown.

Step 3 Select the **Continue** button.

#### Search for the Subscriber

Step 4 Complete the Person Search section with the COBRA enrollee's information.

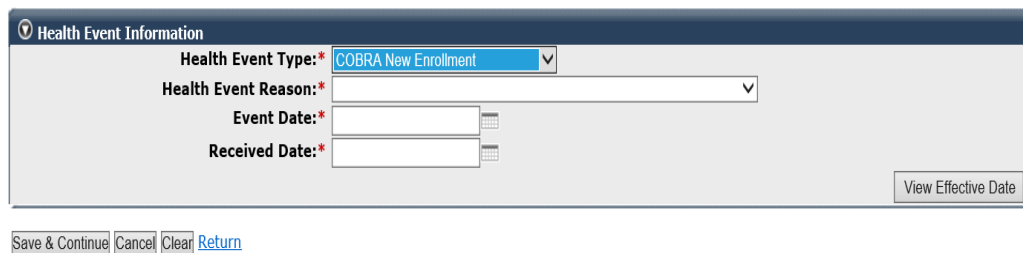


The screenshot shows the 'Person Search' form. It has a title bar with a dropdown arrow and the text 'Person Search'. Below the title bar, there is a prompt: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are three input fields: 'SSN / Federal or Individual Tax ID:', 'CalPERS ID:', and a 'Search' button. A 'Return' link is also present.

Step 5 Select the **Search** button.

#### Input Health Event Information

Step 6 Complete the Health Event Information section.



The screenshot shows the 'Health Event Information' form. It has a title bar with a dropdown arrow and the text 'Health Event Information'. Below the title bar, there are four input fields: 'Health Event Type:\*' (dropdown menu with 'COBRA New Enrollment' selected), 'Health Event Reason:\*' (dropdown menu), 'Event Date:\*' (calendar icon), and 'Received Date:\*' (calendar icon). A 'View Effective Date' button is located at the bottom right. At the bottom of the form, there are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 7 Select the **View Effective Date** button at bottom right to ensure the effective date is the same date their coverage ended.

Step 8 Select the **Save & Continue** button.

## Update Subscriber Details

Step 9 Complete the Maintain Address Details section if you need to update the subscriber's physical address or to choose the employer's ZIP code for eligibility if actively working.

**Maintain Address Details**

Address Type:\* Physical Address ▾

Care Of:

Address:\*

Country:\*

City:\*

Province/Territory:\*

Postal Code:\*

**Note:** If a PO Box is used for the mailing address, the subscriber must have a physical address unless they are using their employer ZIP code for health eligibility.

Select the checkbox if subscriber requested to use their Employer ZIP code for Health Eligibility.  
**NOTE** - Overriding the current Health Eligibility Address will create a Change Eligibility ZIP transaction in conjunction with the enrollment transaction

Use Employer ZIP Code for Health Eligibility :

Step 10 **Optional:** If you populate the Maintain Communication Details section, select the **Primary** radio button for the phone number and/or email address.

**Maintain Communication Details**

Primary  Phone Type  Phone Number  Extension  International

Email:

Step 11 In the Qualifying Information section, choose the **Select** link.

**Qualifying Information**

CalPERS ID: [Select](#)

SSN

First Name:\*  Last Name:\*

Gender:\*  Date Of Birth:\*

Step 12 Complete the Person Search section with the employee's information.

Step 13 Select the **Search** button.

Step 14 After the employee's name displays, choose the **Select** button.

Step 15 For public agencies and schools, in the Appointment Details section, populate the Medical Group field by selecting the employee's medical group.

Medical Group:\*

Step 16 Select the **Save & Continue** button.

## Add Dependents

Step 17 Is the subscriber enrolling dependents?

**Yes:** Select the **Add New** button.

Name	Date of Birth	Relationship	Medical
JOE JONES	03/02/1984	Self	Basic

**No:** Skip to step 34.

Step 18 Is the dependent listed in the Existing Relationships Eligible for Health section?

**Yes:** Select the dependent's radio button

Name	Date of Birth	Relationship	Medical
<input type="radio"/> Jones, Joey	07/30/2015	Child	No
<input type="radio"/> Jones, Jill	11/03/1983	Spouse	No
<input type="radio"/> Jones, Jake	11/17/2017	Child	No

**No:** Skip to step 20.

Step 19 Select the **Continue** button, then skip to step 21.

Step 20 Select **Add New** button.

Step 21 Complete or update the Person Details section. You may update if the dependent is not an active employee at a PERS-contracting agency.

Step 22 Is the dependent's address the same as the subscriber?

**Yes:** Skip to step 27.

**No:** Deselect the **Address is the same as Primary Subscriber** check box.

Step 23 Complete the Address Details section.

Step 24 Select the **Save & Continue** button.

Step 25 Verify the selected address or select the radio button for the correct address.

Step 26 Select the **Confirm** button.

Step 27 Select the **Save & Continue** button.



Step 28 Is this dependent in a parent-child relationship?

**Yes:** Select the **Maintain Certification** link.

Dependent Information		
Parent-Child Relationship Information		
Certification Submitted: No		<a href="#">Maintain Certification</a>

Benefit Type	Enrollment	Change Enrollment?
Medical	No	<input checked="" type="checkbox"/>

[Save & Continue](#) [Cancel](#) [Clear](#)

**No:** Skip to step 33.

Step 29 Select the **Certify Dependent** check box.

Step 30 Select the **disclaimer** check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
FIONA PHAM	07/31/2021	<input checked="" type="checkbox"/> Certify Dependent

\* I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any further understand the provision of California Government Code 20085, which states in part:

Step 31 Select the **Save & Continue** button.

Step 32 Below the Dependent Information section, select the **Save & Continue** button.

Step 33 Is there an additional dependent to add?

**Yes:** Return to step 17.

**No:** Continue to step 34.

Step 34 Select the **Save & Continue** button.

## Select Health Plan

Step 35 Select the **medical plan** radio button.

Medical Plan Selections			
Plan Name	Party	Premium	COBRA Premium
<input checked="" type="radio"/> Anthem Blue Cross Select HMO - Region 1	Self/B and 1/B	2031.62	2072.25
<input type="radio"/> Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2608.00	2660.16

Step 36 Complete the Medical Provider field(s) if employee provided physician name(s).

Step 37 Select the **Save & Continue** button.

Step 38 Select one of the four option links in the health transaction confirmation.

**Health Transaction Confirmation**

The transaction successfully processed.

[Print the health transaction confirmation](#)

[Add another transaction for this subscriber](#)

[Process a new transaction for a different subscriber](#)

[Return to home page](#)

**You have completed this scenario.**

## Unit 4: Non-PERS and CalSTRS Profile and Appointment Changes for Public Agency & School Employees

In this unit, you will learn how to make the following changes for a non-PERS or CalSTRS employee:

- Demographics: SSN, name, gender, and date of birth
- Communication: Phone number, email address, mailing address, and physical address
- Appointment: Begin and end a leave of absence and permanently separate

### System Logic

You need the following access roles:

**Business Partner Retirement Enrollment** or **Business Partner Supplemental Income Plan** to update an employee name, Social Security number, date of birth, or gender.

**Business Partner Appointment Management – Non-Pers and CalSTRS** to update an address and appointment change, e.g., leave of absence, permanent separation, etc.

### Contents

- Scenario 1: Maintain Demographic and Address Information – Page 27
- Scenario 2: Maintain Appointment Information – Page 28

## Scenario 1: Maintain Demographic and Address Information

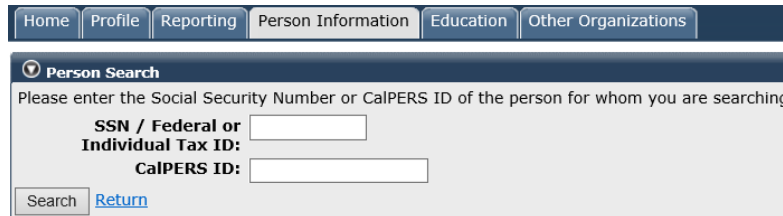
The Health Enrollment unit of the [Public Agency & Schools Health Benefits Guide \(PDF\)](#) provides a list of acceptable verification documents for processing a demographic change.

### Step Actions (10 Steps)

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

---

Step 2 Complete the Person Search section.



Home Profile Reporting Person Information Education Other Organizations

**Person Search**

Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

SSN / Federal or Individual Tax ID:

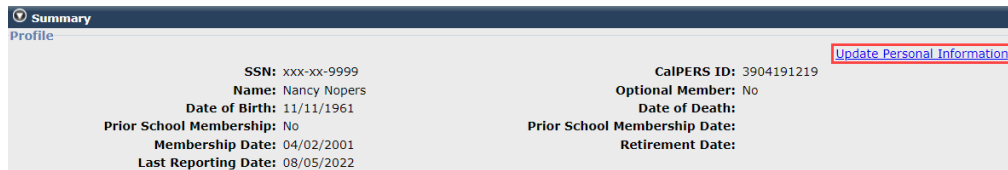
CalPERS ID:

Search [Return](#)

Step 3 Select the **Search** button.

---

Step 4 Do you want to correct the employee's demographic information?  
**Yes:** Within the Summary section, select the **Update Personal Information** link.



**Summary**  
Profile

SSN: xxx-xx-9999  
Name: Nancy Nopers  
Date of Birth: 11/11/1961  
Prior School Membership: No  
Membership Date: 04/02/2001  
Last Reporting Date: 08/05/2022

CalPERS ID: 3904191219  
Optional Member: No  
Date of Death:  
Prior School Membership Date:  
Retirement Date:

[Update Personal Information](#)

**No:** Skip to step 8

---

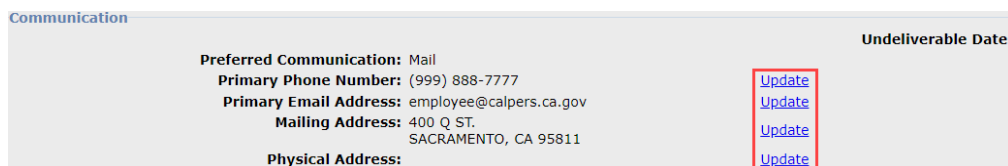
Step 6 Complete the Maintain Personal Information Details section.

---

Step 7 Select the **Save** button.

---

Step 8 Do you want to update their communication information?  
**Yes:** Within the Communication sub-section, select the appropriate **Update** link.



**Communication**

Preferred Communication: Mail  
Primary Phone Number: (999) 888-7777  
Primary Email Address: employee@calpers.ca.gov  
Mailing Address: 400 Q ST.  
SACRAMENTO, CA 95811  
Physical Address:

Undeliverable Date

[Update](#)  
[Update](#)  
[Update](#)

**No:** You have completed this scenario.

---

Step 9 Complete the Maintain Communication Details section.

---

Step 10 Select the **Save** button.

**You have completed this scenario.**

---

## Scenario 2: Maintain Appointment Information

### System Logic

- Leave of absences, except for FMLA or maternity/paternity leaves, will cancel health benefits.
- All permanent separations will cancel health benefits.
- **CalSTRS-Pending Retirement** separation reason is available when permanently separating a CalSTRS employee for retirement.

### Leave of Absence

#### Begin Leave Event

- **Event Date:** At least one day after the last paid date with your agency.
- **Health benefits cancellation date:** Effective the first day of the second month after their last paid date. myCalPERS will use the day prior to the begin leave event date to determine the health cancellation event date.

#### End Leave Event

- **Event Date:** First day back to work.
- Active subscriber premiums will return to your agency's health statement if the employee was on a direct pay. Benefits resume the first of the month following their return to work.
- If health benefits were left cancelled due to a leave, after updating the end leave, re-enroll the subscriber and dependent(s) in the same health plan they had before the leave after the employee submits an HBD-12.

### Permanent Separation

This event should be added when your employee's appointment is permanently separating, e.g., resigns, terminates, retires, etc.

- **Event Date:** Enter at least one day after the last day with your agency.
- **Separation Reason:** If your employee is permanently separating for retirement, select the following in the drop-down list for employees in these retirement systems:
  - Non-PERS: *Retirement*
  - CalSTRS: *CalSTRS – Pending Retirement*
- **Health benefits cancellation date:** Effective the first day of the second month after their last day. myCalPERS will use the day prior to the permanent separation date for the cancel coverage event date.

Example of a permanent separation event date that is the first of the month:

- Permanent Separation Event Date: 04/01/2022
- Health Event Date: 03/31/2022
- Health Cancellation Date: 05/01/2022

## Step Actions (7 Steps)

### Add Appointment Event

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

---

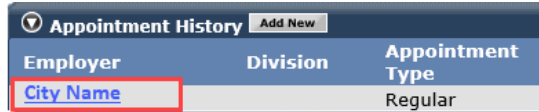
Step 2 Complete the Person Search section.

---

Step 3 Select the **Search** button.

---

Step 4 Within the Appointment History section, select the appropriate **employer** link.



Employer	Division	Appointment Type
<a href="#">City Name</a>		Regular

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



Event Date	Event	Event Details
01/01/2016	New Appointment	<a href="#">View Event Details</a>

Step 6 Complete the Appointment Event Details section. Three examples of different events are listed below.



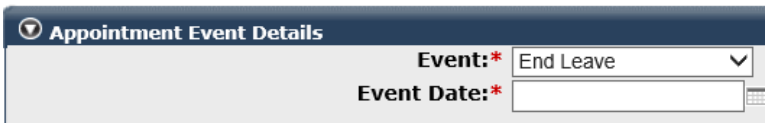
Appointment Event Details

Event:\* Begin Leave

Event Date:\*

Leave Type:\*

Save Clear



Appointment Event Details

Event:\* End Leave

Event Date:\*

Save Clear



Appointment Event Details

Event:\* Permanent Separation

Event Date:\*

Separation Reason:\*

Save Clear

Step 7 Select the **Save** button.

**You have completed this scenario.**

---

## Unit 5: Health Benefits Into Retirement for Public Agency & School Employees

Public agency and school employers will learn the process to enroll a CalSTRS or non-PERS employee, one who never had CalPERS health benefits, in health benefits into retirement. You will also gain knowledge on how to continue non-PERS health benefits into retirement.

### Employee Continuing Health Benefits

- For a **PERS** or **CalSTRS** employee, process a permanent separation. If they are enrolled in health and their last day of employment and retirement date are within 30 days of each other, health will automatically continue into retirement. For CalSTRS employees, refer to Unit 5: Non-PERS and CalSTRS Appointment Changes for step actions to process a permanent separation.
- For a **non-PERS** employee, process a permanent separation then process their health into retirement. Refer to scenario 2 within this unit.

### Eligibility ZIP Code

If using a work ZIP code for health eligibility, upon retirement, the eligibility ZIP code will be changed to the subscriber's physical address (if no physical then mailing address will be used). The retiree will receive a letter noting this change. If their physical address is outside of the health plan service area, they will receive a letter stating they need to change plans.

### Contents

- Scenario 1: CalSTRS or Non-PERS Employee (Never Enrolled) Health Into Retirement – Page 31
- Scenario 2: Non-PERS Employee Continued Health Into Retirement – Page 33

## Scenario 1: CalSTRS or Non-PERS Employee (Never Enrolled) Health Into Retirement

For a CalSTRS or non-PERS employee who never had health benefits with your agency and is electing to enroll in health benefits into retirement, follow this three-part process:

- Part 1: Enter the employee demographics and appointment information in myCalPERS.
  - Your agency must have a retirement contract.
  - You must have the Business Partner Retirement Enrollment access role; otherwise, have the employee submit an HBD-30 to CalPERS instead of these steps.
- Part 2: Permanently separate the employee.
- Part 3: Provide CalPERS with the retirement date, health plan selection, and dependent(s).

### Step Actions (16 Steps)

#### Part I: Add New Appointment

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

Step 2 Within the Create or Edit Report section, select **Add Retirement Enrollment** from the Method drop-down list.

The screenshot shows a navigation menu with tabs: Home, Profile, Reporting, Person Information, Education, Other Organizations. Below these are sections for 'Manage Reports', 'Billing and Payments', 'Payroll Schedule', 'Out-of-Class Validation', and 'Mem'. The 'Common Tasks' section shows 'Name: City Name' and 'CalPERS ID: 9876543210'. The 'Menu' section is expanded to show 'Create or Edit Report'. Under this, the 'Method' dropdown is open, with 'Add Retirement Enrollment' selected and highlighted by a red box. A 'Continue' button is visible to the right of the dropdown.

Step 3 Select the **Continue** button.

#### Search for the Subscriber

Step 4 Complete the Person Search section.

The screenshot shows a 'Person Search' form. It contains the text: 'Please enter the Social Security Number and Date of Birth of the person for whom you are searching.' Below this are two input fields: 'SSN / Federal or Individual Tax ID \*' and 'Date of Birth: \*'. A 'Search' button is located at the bottom left of the form.

Step 5 Select the **Search** button.

Step 6 Did member details display on the Appointment Details page?

**Yes:** Skip to step 11.

**No:** Select the **Add New** button.

The screenshot shows a 'Search Results' section. It features a table with columns: 'CalPERS ID', 'Name', and 'Date of Birth'. The table content is 'No results found.'. An 'Add New' button is highlighted with a red box.

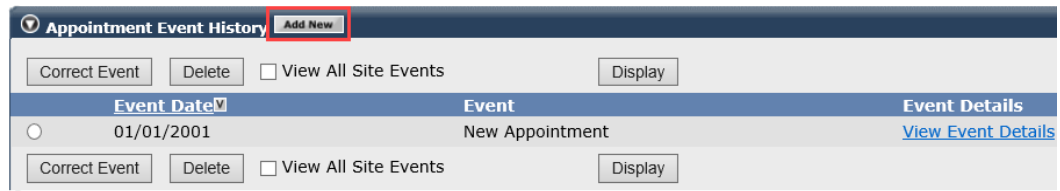
- Step 7 Complete the Person, Address, and Communication Details sections.
- 
- Step 8 Select the radio button for correct **Entered Address** or **U.S. Postal Service Matches**.
- 
- Step 9 Select the **Confirm** button.
- 
- Step 10 Select the **Save & Continue** button.
- 

**Input Appointment Details**

- Step 11 Complete the Appointment Details section:
- Program:** Health
- Enrollment Eligibility Date:** Hire date for this health-eligible position
- Retirement System:** CalSTRS (use Other for non-PERS employees)
- Original Hire Date:** Date employee was originally hired with your agency
- CBU:** Employee’s medical group
- 
- Step 12 Select the **Save** button.
- 

**Part II: Add a Permanent Separation Event**

- Step 13 Next to Appointment Event History, select the **Add New** button.



- 
- Step 14 Complete the Appointment Event Details sections:
- Event:** Permanent Separation
- Event Date:** Separation date is one day after the last day with your agency
- Separation Reason:** CalSTRS-Pending Retirement (use Retirement for non-PERS employees)
- 
- Step 15 Select the **Save** button.
- 
- Step 16 Contact CalPERS to provide the retirement date, health plan selection, and dependent(s) information.
- You have completed this scenario.**
-



## Scenario 2: Non-PERS Employee Continued Health Into Retirement

If the employee is eligible and wants to continue health benefits into retirement, follow this two-part process:

- Part 1: Process a permanent separation (refer to unit 5, scenario 2). myCalPERS will cancel the health benefits the first day of the second month.
- Part 2: Process a new health enrollment unless the employee and/or dependent is eligible for Medicare. Mail the HBD-30 with a copy of their Medicare information to CalPERS.

### Step Actions (32 Steps)

#### Process a New Health Enrollment Into Retirement

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

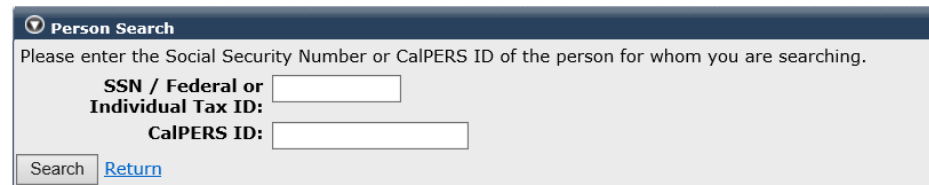


The screenshot shows the 'Reporting' tab selected in the navigation menu. Below the navigation menu, there are several tabs: 'Manage Reports', 'Billing and Payments', 'Payroll Schedule', 'Out-of-Class Validation', and 'Members'. The 'Common Tasks' section is expanded, showing a 'Menu' dropdown. The 'Create or Edit Report' dropdown menu is open, and 'Add or Edit Health Enrollment' is selected. The 'Method' field is labeled with a red asterisk. The 'Continue' button is visible to the right of the dropdown.

Step 3 Select the **Continue** button.

#### Search for the Subscriber

Step 4 Complete the Person Search section.

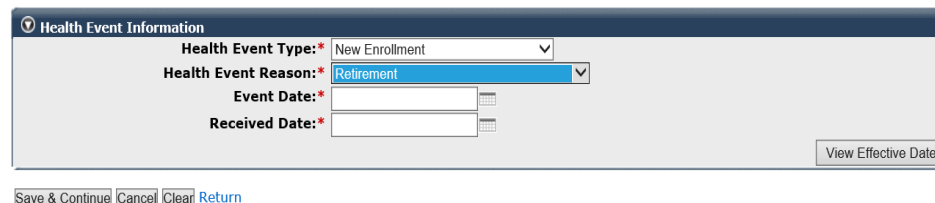


The screenshot shows the 'Person Search' section. It contains a text input field for 'SSN / Federal or Individual Tax ID' and another for 'CalPERS ID'. There is a 'Search' button and a 'Return' link. The text above the input fields reads: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.'

Step 5 Select the **Search** button.

#### Input Health Event Information

Step 6 Complete the Health Event Information section.



The screenshot shows the 'Health Event Information' section. It contains two dropdown menus: 'Health Event Type' (set to 'New Enrollment') and 'Health Event Reason' (set to 'Retirement'). There are two date input fields: 'Event Date' and 'Received Date'. A 'View Effective Date' button is located at the bottom right. At the bottom left, there are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 7 Select the **View Effective Date** button at the bottom right to ensure the effective date is the same as their cancellation date.

Step 8 Select the **Save & Continue** button.

Step 9 Update the Address and Communication Details sections if needed.

Step 10 In the Appointment Details section, select a medical group and if necessary, PORAC from the Affiliated Association drop-down list.

Additional Details

Position Title: CBU: Appointment Status: Perm Sep

Retirement Program: Other

Begin Date: 02/15/2018

End Date:

Medical Group: \*

Affiliated Association: California Association of Highway Patrolmen (CAHP)  
California Correctional Peace Officers Association (CCPOA)  
Peace Officers Research Association of California (PORAC)

Step 11 Select the **Save & Continue** button.

### Add Dependents

Step 12 Is the employee enrolling dependents?

**Yes:** Select the **Add New** button.

Covered Person List Add New

Review the covered person list. To enroll a dependent, select the **Add New** button. Otherwise, select the **Save & Continue** button

Name	Date of Birth	Relationship	Medical
JOE JONES	03/02/1984	Self	Basic

Save & Continue Cancel Return

**No:** Skip to step 28.

Step 13 Is the dependent listed in the Existing Relationships Eligible for Health section?

**Yes:** Select the dependent's radio button.

**No:** Skip to step 16.

Step 14 Select the **Continue** button, then skip to step 16.

Step 15 Select **Add New** button.

Existing Relationships Eligible for Health Add New

Select a dependent below. If a dependent is not listed, select the **Add New** button.

Name	Date of Birth	Relationship	Medical
No results found.			

Continue Cancel Return

Step 16 Complete or update the Person Details section. You may update if the dependent is not an active employee at a PERS-contracting agency.

Step 17 Is the dependent's address the same as the subscriber?

**Yes:** Skip to step 21.

**No:** Deselect the Address is the same as Primary Subscriber check box.

Address Details

Address is the same as Primary Subscriber

Address Type: \* Mailing Address

Step 18 Complete the Address Details section.

Step 19 Select the **Save & Continue** button.

---

Step 20 Select the **Confirm** button.

---

Step 21 Select the **Save & Continue** button.

---

Step 22 Is this dependent in a parent-child relationship?  
**Yes:** Select the **Maintain Certification** link.  
**No:** Skip to step 28.

---

Step 23 Select the **Certify Dependent** check box.

---

Step 24 Select the **disclaimer** check box.

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Lilly Lawson	06/30/2018	03/31/2019	<input checked="" type="checkbox"/> Certify Dependent

\* I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any changes pertaining to this PCR. I further understand the provision of California Government Code 20085, which states in part:

Step 25 Select the **Save & Continue** button.

---

Step 26 Select the **Save & Continue** button.

**Dependent Information**  
Parent-Child Relationship Information

Parent-Child Relationship Certification Expiration Date: 03/31/2020  
Certification Submitted: Yes [Maintain Certification](#)

Step 27 Do you have an additional dependent to add?  
**Yes:** Return to step 12.  
**No:** Continue to step 28.

---

Step 28 Select the **Save & Continue** button.

---

### Select Health Plan

Step 29 Select the **medical plan** radio button chosen by the subscriber.

Medical Plan Selections		
Plan Name	Party	Premium
<input type="radio"/> Anthem Blue Cross Select HMO - Region 1	Self/B and 1/B	1737.96
<input type="radio"/> Anthem Blue Cross Traditional HMO - Region 1	Self/B and 1/B	2369.68
<input type="radio"/> Health Net SmartCare - Region 1	Self/B and 1/B	2001.04
<input type="radio"/> Kaiser Permanente California - Region 1	Self/B and 1/B	1536.98
<input type="radio"/> PERS Care - Region 1	Self/B and 1/B	2266.28
<input type="radio"/> PERS Choice - Region 1	Self/B and 1/B	1722.36
<input type="radio"/> PERS Select - Region 1	Self/B and 1/B	1040.58

Step 30 Complete the Medical Provider field(s) if employee provided physician name(s).

---

Step 31 Select the **Save & Continue** button.

---

Step 32 Select one of the four option links in the health transaction confirmation.  
**You have completed this scenario.**

---

## Unit 6: Dental Benefits Into Retirement for State Employees

State employers will learn how to continue dental benefits for a retiring employee.

After the transaction updates, keep the Dental Plan Enrollment Authorization (STD-692) form on file with your agency. If you are unable to process online, submit the STD-692 to CalPERS.

### System Logic

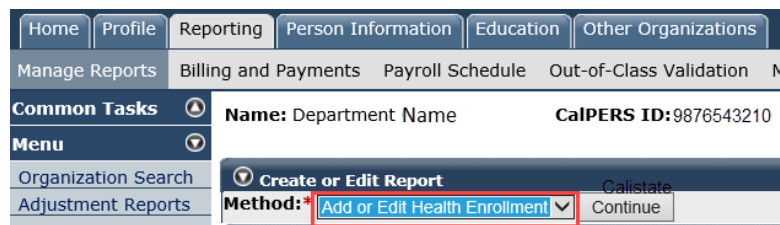
- The state retiree dental enrollment must be processed *prior to the employee permanent separation*.
- A state retired-dental enrollment will display in the Health Enrollment Summary page under the Pending Health Events section until the employee goes on retirement roll.

### Step Actions (31 Steps)

#### Add Dental Enrollment Transaction

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

Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

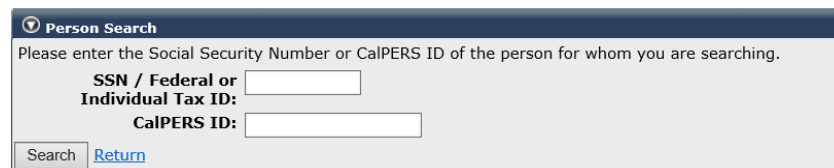


The screenshot shows a navigation menu with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, and Out-of-Class Validation. A 'Common Tasks' section is expanded to show a 'Menu' with options: Organization Search, Adjustment Reports, and 'Create or Edit Report'. The 'Create or Edit Report' section is further expanded to show a 'Method:' dropdown menu with 'Add or Edit Health Enrollment' selected. Other fields include 'Name: Department Name', 'CalPERS ID: 9876543210', and buttons for 'Callstate' and 'Continue'.

Step 3 Select the **Continue** button.

#### Search for the Subscriber

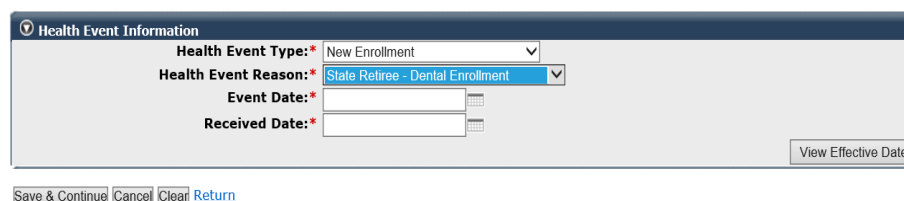
Step 4 Complete the Person Search section.



The screenshot shows a 'Person Search' form with the instruction: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' It contains two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. Below the fields are 'Search' and 'Return' buttons.

Step 5 Select the **Search** button.

Step 6 Complete the Health Event Information section.



The screenshot shows a 'Health Event Information' form with the following fields: 'Health Event Type:\*' (New Enrollment), 'Health Event Reason:\*' (State Retiree - Dental Enrollment), 'Event Date:\*' (calendar icon), and 'Received Date:\*' (calendar icon). A 'View Effective Date' button is located at the bottom right. At the bottom of the form are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

Step 7 Select the **View Effective Date** button at the bottom right.

Step 8 Select the **Save & Continue** button.

---

Step 9 In the Appointment Details section, if the subscriber will continue to be a dues-paying member of an association, select CAHP or CCPOA from the **Affiliated Association** drop-down list.

---

Step 10 Select the **Save & Continue** button.

---

### Add Dependents

Step 11 Is the employee enrolling dependents?

**Yes:** Select the **Add New** button.

Name	Date of Birth	Relationship	Medical	Dental
ED EVANS	05/10/1984	Self	No	Yes

**No:** Skip to step 27.

---

Step 12 Is the dependent listed in the Existing Relationships Eligible for Health section?

**Yes:** Select the dependent's radio button.

**No:** Skip to step 14.

---

Step 13 Select the **Continue** button, then skip to step 15.

---

Step 14 Within the Existing Relationships Eligible for Health section, select the **Add New** button.

Name	Date of Birth	Relationship	Medical	Dental
------	---------------	--------------	---------	--------

Step 15 Complete or update the Person Details section. You may update if the dependent is not an active employee at a PERS-contracting agency.

---

Step 16 Is the dependent's address the same as the employee's address?

**Yes:** Skip to step 20.

**No:** Deselect the Address is the same as Primary Subscriber check box.

Address is the same as Primary Subscriber  
Address Type:\* Mailing Address

Step 17 Complete the Address Details section.

---

Step 18 Select the **Save & Continue** button.

---

Step 19 Select the **Confirm** button.

---

Step 20 Select the **Save & Continue** button.

---

Step 21 Is this dependent in a parent-child relationship?

**Yes:** Select the **Maintain Certification** link.

**No:** Skip to step 26.

---

Step 22 Select the **Certify Dependent** check box.

---

Step 23 Select the **disclaimer** check box.

Name	Acquired Date	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kevin Kooper	06/30/2018	03/31/2019	<input checked="" type="checkbox"/> Certify Dependent

\* I recognize this affidavit is a legally binding document. I accept full responsibility to notify my employer or CalPERS of any changes pertaining to this PCR. I further understand the provision of California Government Code 20085, which states in part:

Step 24 Select the **Save & Continue** button.

---

Step 25 Select the next **Save & Continue** button.

**Dependent Information**

Parent-Child Relationship Information

Parent-Child Relationship Certification Expiration Date: 05/31/2020  
Certification Submitted: Yes [Maintain Certification](#)

Step 26 Do you have additional dependents to add?

**Yes:** Return to step 11.

**No:** Continue to step 27.

---

Step 27 Select the **Save & Continue** button.

---

### Select Dental Plan

Step 28 In the Dental Plan Selections section, select the **dental plan radio** button.

Dental Plan Selections			
Plan Name	Party	Premium	
<input checked="" type="radio"/> Delta PPO Plus Premier	Self and 1	88.75	
<input type="radio"/> Delta Preferred Opt	Self and 1	90.31	
<input type="radio"/> DeltaCare USA	Self and 1	31.90	
<input type="radio"/> MetLife Enhanced	Self and 1	27.18	
<input type="radio"/> Premier Access	Self and 1	22.57	
<input type="radio"/> Western Dental	Self and 1	26.02	

Step 29 Complete the Dental Provider field(s) if employee provided dentist name(s).

Provider Information			
Name	Dependent Type	Medical Provider	Dental Provider
ED EVANS	Self		<input type="text"/>
Kevin Kooper	Parent-Child		<input type="text"/>

Step 30 Select the **Save & Continue** button.

---

Step 31 Select one of the four option links in the health transaction confirmation.

**You have completed this scenario.**

---

## Unit 7: Discontinue Health Benefits Before Retirement

If an enrolled employee does not want their health benefits into retirement, they must request a cancellation.

**CalPERS, CalSTRS, or non-PERS employees:** You must process the cancellation *prior to updating the permanent separation*. This will ensure the health benefits don't automatically continue for CalPERS and CalSTRS retirees. It also clarifies a voluntary cancellation for non-PERS retirees.

**CalSTRS employees:** You do not need to process a health cancellation. When processing a permanent separation with the reason of CalSTRS-Pending Retirement, select the **CalSTRS member wishes to decline continuation of CalPERS health coverage into retirement** check box. Refer to unit 5, scenario 2 for step actions on how to process a permanent separation.

The screenshot shows a web form titled "Appointment Event Details". It contains the following fields:

- Event:** Permanent Separation (dropdown menu)
- Event Date:** ##### (calendar icon)
- Separation Reason:** CalSTRS - Pending Retirement (dropdown menu)

Below these fields is a section titled "STRS Health Into Retirement" with the text: "If STRS member doesn't want health coverage into retirement, then decline his/her retiree health coverage below." There is a checked checkbox with the text: "STRS member wishes to decline continuation of CalPERS health coverage into retirement." A note at the bottom states: "Note: If no selection is made above, the member will automatically continue health into retirement if he/she meets the health eligibility criteria."

### Scenario: Cancel Coverage

Your CalPERS employee does not want their health benefits to continue into retirement. They submitted an HBD-12 to cancel their health benefits, so you will process the cancellation.

### Step Actions (9 Steps)

#### Add Health Enrollment Transaction

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

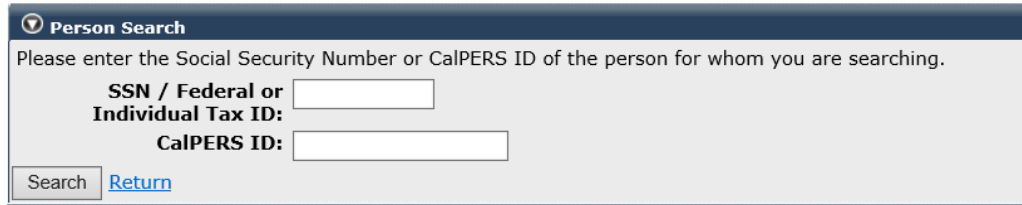
Step 2 Within the Create or Edit Report section, select **Add or Edit Health Enrollment** from the Method drop-down list.

The screenshot shows a navigation menu with tabs: Home, Profile, Reporting, Person Information, Education, Other Organizations. Below these are links: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, Memb. A "Common Tasks" menu is open, showing "Name: City Name" and "CalPERS ID: 9876543210". The "Create or Edit Report" section is highlighted, with a dropdown menu showing "Method:\* Add or Edit Health Enrollment" selected and a "Continue" button next to it.

Step 3 Select the **Continue** button.

## Search for the Subscriber

Step 4 Complete the Person Search section.



**Person Search**

Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.

**SSN / Federal or Individual Tax ID:**

**CalPERS ID:**

[Return](#)

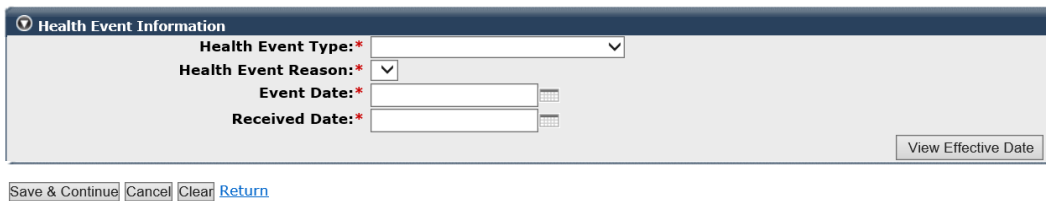
---

Step 5 Select the **Search** button.

---

## Input Health Event Information

Step 6 Complete the Health Event Information section.



**Health Event Information**

**Health Event Type:** \*

**Health Event Reason:** \*

**Event Date:** \*

**Received Date:** \*

[Return](#)

---

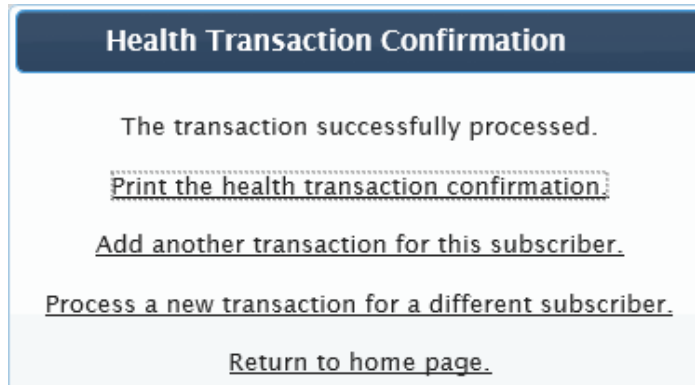
Step 7 Select the **View Effective Date** button at bottom right.

---

Step 8 Select the **Save & Continue** button.

---

Step 9 Select one of the four option links in the health transaction confirmation.



**Health Transaction Confirmation**

The transaction successfully processed.

[Print the health transaction confirmation.](#)

[Add another transaction for this subscriber.](#)

[Process a new transaction for a different subscriber.](#)

[Return to home page.](#)

---

**You have completed this scenario.**

---



## CalPERS Resources

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

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

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

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

- CalPERS Health Subscriber Out of Service Population – Employer
- Chancellor's Office Parent-Child Recertification Report CSU Campuses
- Dental Retirees OE Report – CalHR
- Dental Retirees OE Report – CSU
- Dependent Enrollment Report
- Employer Health Enrollee Report - Ext
- Employer Health Event Notification Report
- Employer Health Event Transaction Report

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

- Health Plan Statement Employer Report
- Health Subscriber PA Billing Report
- Health ZIP Code Yes-No Report - HMO for Public Agency/School
- Health ZIP Code Yes-No Report - PPO for Public Agency/School
- Health ZIP Code Yes-No Report - State/CSU
- Non-PERS Health Eligibility and Appointment Data Submission Report
- Open Enrollment Health Plan Changes Report
- PERS Retiree List Report
- Parent-Child Relationship Dependent with Expiring Certification Report
- State Active Health Enrollment and SCO Health Deduction Discrepancy Report

Reports run via the myCalPERS pages (not the **Reports** left-side link):

For state agencies:

- Dependent Verification End Date Employer Report
- Dependent Verification Health Event Employer Report
- Dependent Verification with Past Due or No End Dates Active Health Report

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

- Monthly Employer Billing Roster Report

**Note:** This report includes subscriber addresses and death dates.

## CalPERS Contacts

### Email

- To contact [employer educators](#) for questions and requests, email **calpers\_employer\_communications@calpers.ca.gov**.
- To contact the [Employer Response Team](#) for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.
- To [request a custom Cognos health report](#), email **hamd\_data\_services@calpers.ca.gov**. It can take 6-10 weeks to fulfill each request. Additional information and approval may be required.

### Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888-225-7377**), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls.)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

### Submit Inquiry

You can send secure messages through myCalPERS. Expand the **Common Tasks** left-side navigation folder, then select the **Submit Inquiry** link to submit a question or request. Refer to the [Introduction to myCalPERS for Business Partners \(PDF\)](#) student guide for details.