

myCalPERS Health Enrollment

Student Guide

December 7, 2024



Introduction

This guide will assist with processing common health enrollment transactions in myCalPERS. You will also learn how to review updated and rescinded transactions and use reports. Refer to the [myCalPERS Health Enrollment Supplement \(PDF\)](#) student guide for additional transactions.

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

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).

What's New Effective August 10, 2024

- You can change a dependent's demographics (refer to unit 4).
- You can change a dependent's relationship type by processing a health transaction.
 - **Health Event Type:** Update Enrollment
 - **Health Event Reason:** Relationship Update
 - **Event Date:** Date of the change in relationship
 - **Received Date:** Date the transaction is keyed
- Six months after adding a dependent without an SSN, subscribers will receive a notification requesting that they provide their employer with the dependent's SSN.

Contents

- Unit 1: Health Benefits Plan Enrollment for Active Employees (HBD-12) – Page 3
- Unit 2: Rescission – Page 21
- Unit 3: Person Search Tool-Health Enrollment Details – Page 23
- Unit 4: Change Dependent Demographics – Page 35
- Unit 5: Health Reports – Page 37
- CalPERS Resources – Page 44
- CalPERS Contacts – Page 46

Unit 1: Health Benefits Plan Enrollment for Active Employees (HBD-12)

In this unit, you will learn how to process the Health Benefits Plan Enrollment for Active Employees (HBD-12) form using myCalPERS. Keep a copy of the HBD-12 in the employee personnel file. Do not mail the form to CalPERS unless it's requested.

System Logic

On the Person Search section, you may use the last four digits of your employee's SSN.

Decline Coverage

If an eligible employee declines to enroll, you do not need to process anything. Your employee must decline and sign the HBD-12 form which you keep on file.

Notifications After a Transaction is Updated

- The next business day, a confirmation is sent to the employee.
- The next business day, a confirmation with the COBRA HBD-85 form and information is sent to cancelled employees and deleted dependents.
- Overnight, health carriers receive health enrollment/changes and demographic/address changes.

Contents

- Scenario 1: New Enrollment-Enroll in Health Benefits – Page 4
- Scenario 2: Add Dependent – Page 12
- Scenario 3: Delete Dependent – Page 15
- Scenario 4: Change Health Plan – Page 17
- Scenario 5: Cancel Coverage – Page 19

Scenario 1: New Enrollment-Enroll in Health Benefits

System Logic

PERS Employees

- The appointment must be updated in myCalPERS prior to processing a health enrollment.
- For central-state agencies, it takes 1-2 days to update myCalPERS from the Personnel Information Management System (PIMS).

Non-PERS and CalSTRS Employees

- If the employee previously had health benefits with your agency then separated (prior appointment is in myCalPERS), before processing a new health enrollment, you will add a new appointment for them by following steps 1-6.
- If the employee has a concurrent active CalPERS appointment with your agency, contact CalPERS to add the non-PERS or CalSTRS appointment prior the health enrollment.
- For employees enrolling due to Affordable Care Act (ACA), the process is like a non-PERS/CalSTRS health enrollment. Refer to step 22 for the retirement program.

New Contracting Health Agency or New Contracting Group

Your PEMHCA resolution must be active in myCalPERS before you can process enrollments.

Social Security Numbers (SSN) for Dependents

- Contact CalPERS if adding a spouse or domestic partner who does not have an SSN.
- You can enroll a dependent child without an SSN by bypassing the warning message. Follow up within 90 days to add their SSN (refer to unit 4).

Disabled Dependent Child

Process the health enrollment without the disabled dependent child who is 26 years or older. Provide the employee with two forms to be completed within 60 days of the newly eligible employee's initial enrollment in the CalPERS health program.

- The employee completes part A of the [Disabled Dependent Member Questionnaire and Medical Report \(HBD-34\) \(PDF\)](#), and then they submit it to the child's physician. The physician completes the rest of the form then submits it to CalPERS.
- The employee submits the [Authorization to Disclose Protected Health Information \(PERS-BSD-35\) \(PDF\)](#) to the child's physician, and the physician retains the form.

After CalPERS reviews the HBD-34, if the overage dependent is eligible, CalPERS will add the disabled dependent to the subscriber's health benefits. A notification will be sent to your agency and the employee after the dependent is added or if they are not approved.

ZIP Code for Eligibility

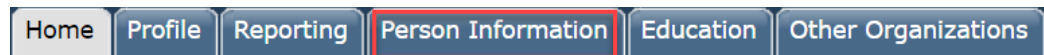
A physical address is required unless the employee is using an employer ZIP code for health eligibility. If the PO Box displays, you may add the physical address at step 17.

Step Actions (48 Steps) **Note:** Most enrollments begin with step 7.

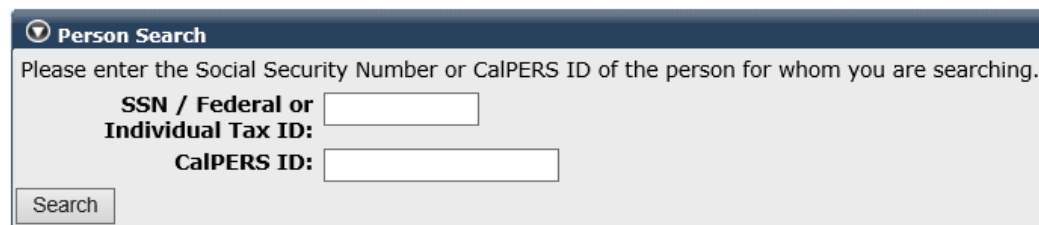
Is This a CalPERS Employee or a New (No Prior Appointment With Your Agency) Non-PERS or CalSTRS Employee?

Step 1 **Yes:** Skip to step 7.

No: For your returning CalSTRS or non-PERS employee (prior appointment in myCalPERS with your agency), add their appointment. From the homepage, select the **Person Information** global navigation tab.



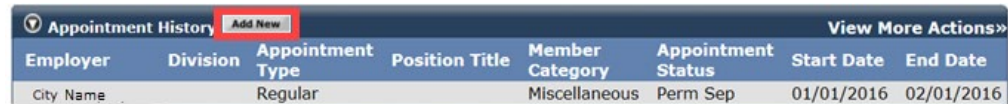
Step 2 Search for the employee using the SSN (or last four digits), tax ID, or CalPERS ID.



A search form titled 'Person Search'. It contains the text: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' Below this are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button is located at the bottom left of the form.

Step 3 Select the **Search** button.

Step 4 Within the Appointment History section, select the **Add New** button to create a new non-PERS or CalSTRS appointment.



A screenshot of the 'Appointment History' section. At the top, there is a dark blue header with 'Appointment History', 'Add New' (highlighted with a red box), and 'View More Actions»'. Below the header is a table with the following columns: Employer, Division, Appointment Type, Position Title, Member Category, Appointment Status, Start Date, and End Date. The first row of data shows: City Name, Regular, Miscellaneous, Perm Sep, 01/01/2016, 02/01/2016.

If the button does not display, contact the person at your agency who adds appointments to assist you before processing the new health enrollment.

Step 5 Change the Program field to *Health*, and then complete the following:

- **Enrollment Eligibility Date:** Hire date for this health-only appointment
- **Retirement System:** Employee's retirement system (do not select CalPERS)
- **Division:** Select if the employee works for an agency under the parent agency
- **Original Hire Date:** Employee's first hire date with your agency
- **CBU:** Collective Bargaining Unit drop-down list displays after selecting the retirement system. Select the employee's medical group.

Step 6 Select the **Save** button.

[Add New Health Enrollment Transaction](#)

Step 7 Select the **Reporting** global navigation tab.

Step 8 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 the menu, there are links for Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Membership. The main content area displays 'Name: City Name' and 'CalPERS ID: 9876543210'. A 'Create or Edit Report' section is active, showing a dropdown menu for 'Method:' with 'Add or Edit Health Enrollment' selected and highlighted with a red box. A 'Continue' button is visible to the right.

Step 9 Select the **Continue** button.

Search for the Subscriber

Step 10 Complete the Person Search section.

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

Step 11 Select the **Search** button.

Step 12 Does the Health Event Information section display?

Yes: Skip to step 14.

No: Select the **Add New** button to continue for the non-PERS or CalSTRS employee.

The screenshot shows a 'Search Results' section with a message: 'No results found. Review the data entered is correct. Click Add New to add a person.' The 'Add New' button is highlighted with a red box.

Step 13 Complete the Demographics Information section.

Input Health Event Information

Step 14 Complete the Health Event Information section.

The screenshot shows a 'Health Event Information' form. It contains the following fields: 'Health Event Type:*' (dropdown), 'Health Event Reason:*' (dropdown), 'Event Date:*' (calendar), and 'Received Date:*' (calendar). 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 15 Select the **View Effective Date** button at bottom right.

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

Update Subscriber Details

Step 17 Complete the Maintain Address Details section if you need to update the employee's address or to choose the employer's ZIP code for health eligibility.

Maintain Address Details

Address Type:* Physical Address ▾

Care Of:

Address:*

Country:*

City:*

Province/Territory:*

Postal Code:*

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 :

If a P.O. Box is used for the mailing address, the employee must have a physical address or use the employer ZIP code for health eligibility.

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 employee's Profile page.

Maintain Communication Details

Primary Secondary

Phone Type: Work ▾ Phone Number: Extension:

Email: International:

Select Appointment

Step 19 Does the employee have more than one active appointment with your agency?

Yes: Choose the **Select Appointment** link.

Appointment Details

Employer: City Name CalPERS ID (Employer): 9876543210

[Select Appointment](#)

No: Skip to step 22.

Step 20 Select the applicable **appointment** radio button.

Appointment History

Delete

Employer	Division	Appointment Type	Position Title	Member Category	Appointment Status	Start Date	End Date
<input checked="" type="radio"/> City Name		Regular		Safety - Police	Active	09/15/2017	
<input type="radio"/> City Name		Regular		Miscellaneous	Active	02/02/1998	

Select Delete

Step 21 Choose the **Select** button.

Step 22 Complete the Appointment Details section:

- **Division:** An agency under a parent agency, e.g., a school district.
- **Original Hire Date:** Non-PERS or CalSTRS employee's first hire date.
- **Retirement Program:** Affordable Care Act/None (For a part-time employee who is eligible due to ACA), Other (non-PERS), or STRS (California State Teachers' Retirement System). Do not select PERS.
- **Affiliated Association:** For a dues-paying member of one of these associations.
- **Medical Group:** For public agencies and schools, choose the employee's medical group based on your agency's health contract.

Appointment Details

Employer: Agency Name CalPERS ID (Employer): 9876543210

Division:

Original Hire Date:*

Appointment ID:

Separation Date:

Additional Details

Position Title:

CBU:

Begin Date:

Medical Group:*

Appointment Status:

Retirement Program:*

End Date:

Affiliated Association:

Save & Continue Cancel Clear Return

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

Step 24 Did you update the address?

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

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: 400 P St., Sacramento, CA 95814

U.S. Postal Service Matches: 400 P ST, SACRAMENTO, CA 95814-5345

No: Skip to step 27.

Step 25 Select the **Confirm** button.

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

Add Dependents

Step 27 Is your 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 44.

Step 28 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 31.

Step 29 Select the **Continue** button.

Step 30 Skip to step 32.

Step 31 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 32 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 33 Does the dependent have the same address as your employee?

Yes: Skip to step 37.

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 34 Complete the Address Details section.

Step 35 Select the **Save & Continue** button.

Step 36 Select the **Confirm** button.

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

Step 38 Is this dependent in a parent-child relationship?

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

Dependent Information

Parent-Child Relationship Information

Certification Submitted: No [Maintain Certification](#)

No: Skip to step 43.

Step 39 Select the Certify Dependent check box.

Parent-Child Relationship Certification

Please complete the following certification/recertification:

The Public Employee's Medical and Hospital Care Act (PEMHCA) and regulations allow for the enrollment of a child (other than natural, adopted, or step-child) in the CalPERS-sponsored health plan when the Employee or Annuitant has a "parent-child relationship" with the child. The child must be under the age of 26 (except for certain disabled dependents).

In order to enroll or continue enrollment in a CalPERS-sponsored health plan, please certify the parent-child relationship by selecting the appropriate certification reason.

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

Step 40 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)].

[Save & Continue](#) [Return](#)

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

Step 42 Below the Dependent Information section, select the **Save & Continue** button.

Step 43 Do they have additional dependents?

Yes: Return to step 27.

No: Continue to step 44.

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

Select Health Plan

Step 45 Select the **medical plan** radio button.

Medical Plan Selections

Plan Name	Party	Premium
<input checked="" type="radio"/> Anthem Blue Cross Select HMO - Region 1	Self/B and 2+/B	2961.04
<input type="radio"/> Anthem Blue Cross Traditional HMO - Region 1	Self/B and 2+/B	3483.22
<input type="radio"/> Blue Shield Access+ - Region 1	Self/B and 2+/B	2799.78

Step 46 Enter a medical provider(s) if the employee indicated a primary care physician.

Provider Information

Name	Dependent Type	Medical Provider
Joe Jones	Self	<input type="text"/>
Jill Jones	Spouse	<input type="text"/>
Kitty Kooper	Parent-Child	<input type="text"/>

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

Ensure all dependents are listed. If you need to make a correction, select the **Return** link at bottom left.

Step 47 Select the **Save & Continue** button.

Step 48

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.](#)

Tip: The print option provides details in a PDF format in a separate browser window. Confirm that the transaction completed accurately. To correct a transaction with a:

- **Future effective date:** Rescind the transaction and re-process the new health enrollment if you forgot a dependent or chose the incorrect plan.
- **Retroactive effective date:** Contact CalPERS.

Health Transaction Confirmation

The following transaction successfully processed on 08/28/2024.

CalPERS ID: 2612367457
Subscriber Name: Joe Jones

Health Event Type: New Enrollment
Health Event Reason: Time Base & Tenure

Effective Date: 09/01/2024
Event Date: 08/28/2024
Received Date: 08/28/2024

Health Plan Name: Anthem Blue Cross Select

Covered Persons:

Covered Person	Relationship
Joe Jones	Self
Kitty Kooper	Niece
Jill Jones	Spouse

You have completed this scenario.

Scenario 2: Add Dependent

System Logic

- Social Security number (SSN) fields are required when adding a spouse or domestic partner. If they do not have an SSN, contact CalPERS to add the dependent.
- You can enroll a dependent child without an SSN by bypassing the warning message. Follow up within 90 days to add their SSN (refer to unit 4).
- When adding multiple dependents within one transaction, the health event reason must be the same. If not, process a separate health transaction for each unique health event reason.

Step Actions (26 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.

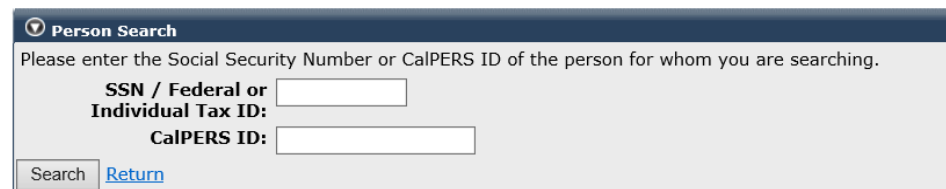


The screenshot shows a navigation menu with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Membership. A 'Common Tasks' section contains a 'Menu' dropdown.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

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.

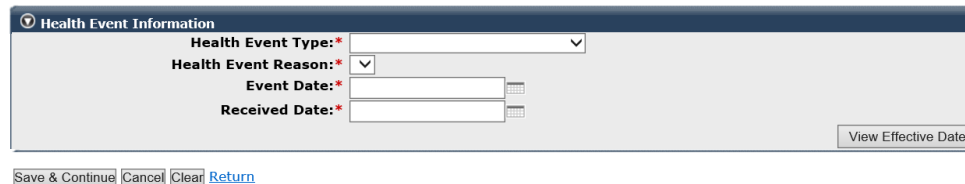


The screenshot shows the 'Person Search' form. It contains the instruction: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are three input fields: 'SSN / Federal or Individual Tax ID:', 'CalPERS ID:', and a 'Search' button. A 'Return' link is also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

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



The screenshot shows the 'Health Event Information' form. It contains the following fields: 'Health Event Type:*' (dropdown), 'Health Event Reason:*' (dropdown), 'Event Date:*' (calendar icon), and 'Received Date:*' (calendar icon). There is a 'View Effective Date' button on the right. At the bottom, there are buttons for 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

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

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

Adding Dependents

Step 9 Is the dependent listed in the Existing Relationships Eligible for Health section?

Yes: Select the dependent's check box.

No: Skip to step 12.

Step 10 Do you need to update the dependent's demographics or address?

Yes: Select the **Update Demographics** link.

Name	Date of Birth	Relationship	Medical	Parent-Child Relationship	Provider
<input checked="" type="checkbox"/> Adams, Annie	05/18/2012	Child	No		Update Demographics

No: Select the **Continue** button, then skip to step 24.

Step 11 Skip to step 13.

Step 12 Within the Existing Relationships Eligible for Health section, 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 13 Complete or update the Person Details section.

Step 14 Is the dependent's address the same as your employee's?

Yes: Skip to step 18.

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 15 Complete the Address Details section.

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

Step 17 Select the **Confirm** button.

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

Step 19 Is the dependent in a parent-child relationship?

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

No: Skip to step 24.

Step 20 Select the Certify Dependent check box.

Name	Parent-Child Relationship Certification Expiration Date	Certify Dependent Checkbox
Kitty Kooper	01/31/2024	<input type="checkbox"/> Certify Dependent

Step 21 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 22 Select the **Save & Continue** button.

Step 23 If the employee provided a physician name for the dependent, enter the physician's name in the Provider field.

Step 24 Do they have additional dependents to add for this health event reason?

Yes: Return to step 9.

No: Continue to step 25.

Step 25 Under the Existing Relationships Eligible for Health section, select the **Continue** 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	Parent-Child Relationship	Provider
<input type="checkbox"/> Liinamo, Pip X	10/02/1986	Child	No		
<input type="checkbox"/> Liinamo, Liber Richelle	12/13/1984	Child	No		
<input checked="" type="checkbox"/> Kooper, Kitty	09/15/2012	Niece	Yes	Update Certification	<input type="text"/>

[Return](#)

Step 26 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 3: Delete Dependent

System Logic

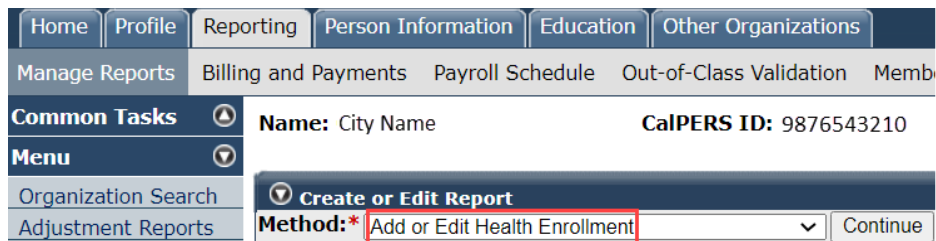
- When deleting multiple dependents within one health transaction, the health event reason must be the same. If not, process a separate health transaction for each health event reason.
- When deleting a former spouse due to divorce or domestic partner due to termination of relationship with the Secretary of State, allow myCalPERS to automatically delete dependents with the relationship of Step Child or Domestic Partner Child.

Step Actions (11 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.

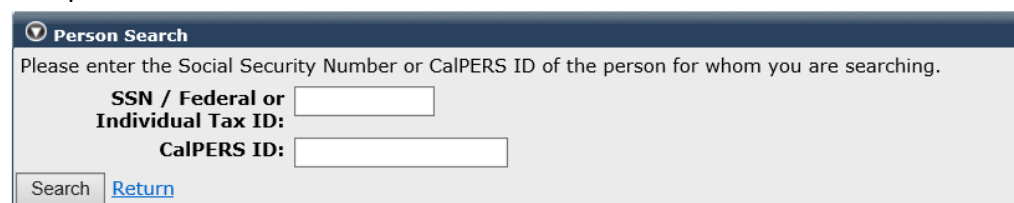


The screenshot shows a navigation menu with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Memb. A 'Common Tasks' menu is open, showing 'Menu' with options: Organization Search and Adjustment Reports. A 'Create or Edit Report' dialog is open, with 'Method:*' set to 'Add or Edit Health Enrollment' (highlighted with a red box) and a 'Continue' button. The background shows 'Name: City Name' and 'CalPERS ID: 9876543210'.

Step 3 Select the **Continue** button.

Search for the Subscriber

Step 4 Complete the Person Search section.

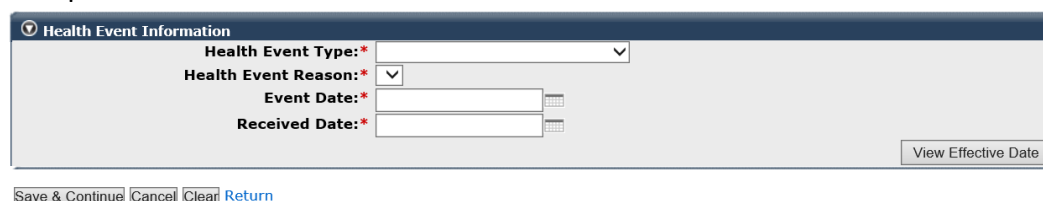


The screenshot shows a 'Person Search' dialog with the instruction: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button and a 'Return' link are at the bottom.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



The screenshot shows a 'Health Event Information' dialog with fields: 'Health Event Type:*' (dropdown), 'Health Event Reason:*' (dropdown), 'Event Date:*' (calendar), and 'Received Date:*' (calendar). A 'View Effective Date' button is at the bottom right. At the bottom of the dialog are buttons: 'Save & Continue', 'Cancel', 'Clear', and 'Return'.

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

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

Delete Dependent(s)

Step 9 Select the check box(es) next to the dependent(s) being deleted.

Existing Relationships Eligible for Health				
	Name	Date of Birth	Relationship	Medical
<input type="checkbox"/>	Wilson, Willy	06/14/2001	Child	Yes
<input type="checkbox"/>	Wilson, Wanda	05/04/1979	Spouse	Yes
<input type="checkbox"/>	Wilson, Wally	03/18/2013	Child	Yes
<input type="checkbox"/>	Smith, Sam	06/02/2004	Step Child	Yes

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

Step 10 Select the **Continue** button.

Step 11 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 4: Change Health Plan

System Logic

Move Health Event Reason

- Prior to processing a plan change, the new address should be reflected in myCalPERS.
- For central-state agencies, an address change in Personnel Information Management System (PIMS) will reflect in myCalPERS in 1-2 business days.

Work ZIP Code

To start or stop using the work ZIP code for health eligibility, process an Update Enrollment health event type prior to the plan change with the following health event reasons:


- *Change Eligibility ZIP* to add the work ZIP code
- *Cancel Eligibility ZIP* to cancel a work ZIP code

Step Actions (14 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.

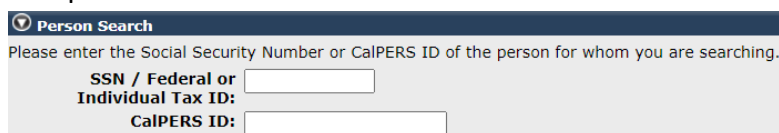


The screenshot shows a navigation menu with tabs for Home, Profile, Reporting, Person Information, Education, and Other Organizations. Under the Reporting tab, there are sub-tabs for Manage Reports, Billing and Payments, Payroll Schedule, and Out-of-Class Validation. A 'Common Tasks' section is expanded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

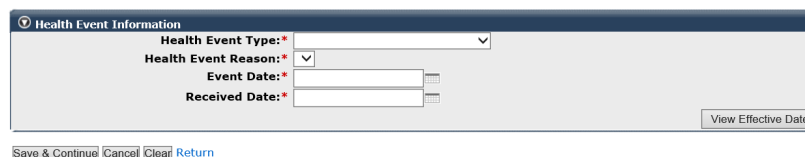


The screenshot shows the 'Person Search' form. It includes a header 'Person Search' and a prompt: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are three input fields: 'SSN / Federal or Individual Tax ID:', 'CalPERS ID:', and a third field for 'CalPERS ID:'.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.



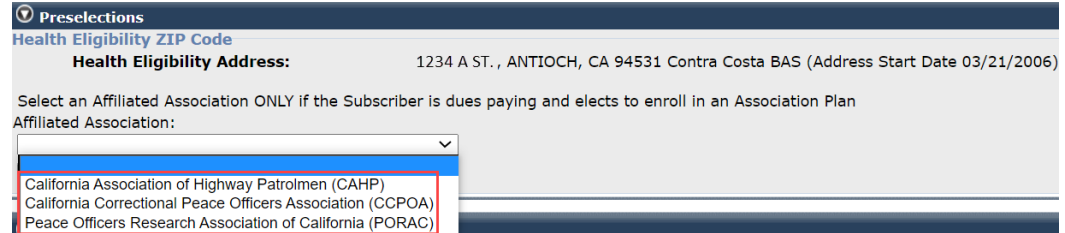
The screenshot shows the 'Health Event Information' form. It includes a header 'Health Event Information' and several required fields: 'Health Event Type:*' (dropdown), 'Health Event Reason:*' (dropdown), 'Event Date:*' (calendar icon), and 'Received Date:*' (calendar icon). There is a 'View Effective Date' button 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.

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

Step 9 Is this a dues-paying member of an affiliated association who is electing to enroll in an association plan?

Yes: Select the member's association from the drop-down list.



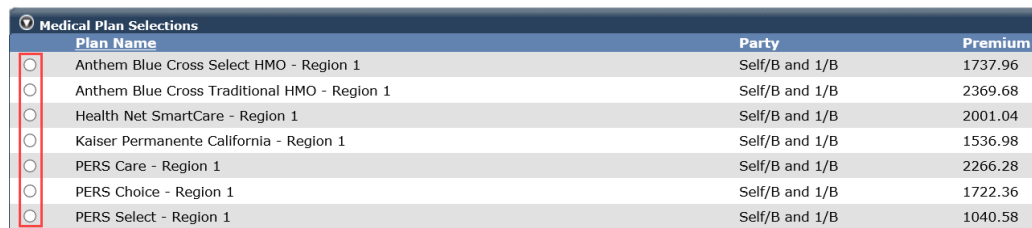
Preselections
Health Eligibility ZIP Code
Health Eligibility Address: 1234 A ST., ANTIOCH, CA 94531 Contra Costa BAS (Address Start Date 03/21/2006)
Select an Affiliated Association ONLY if the Subscriber is dues paying and elects to enroll in an Association Plan
Affiliated Association:
California Association of Highway Patrolmen (CAHP)
California Correctional Peace Officers Association (CCPOA)
Peace Officers Research Association of California (PORAC)

No: Skip to step 11.

Step 10 Select the **Display Plans** button.

Change Health Plan

Step 11 Select the **health plan** radio button chosen by the subscriber.



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

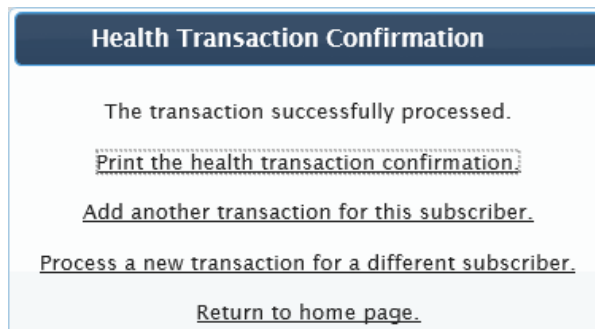


Name	Dependent Type	Medical Provider
Jane Jones	Self	<input type="text"/>
Jill Jones	Natural Born Child	<input type="text"/>

Save & Continue Cancel Clear Return

Step 13 Select the **Save & Continue** button.

Step 14 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 5: Cancel Coverage

System Logic

Leave of Absence (Not Family Medical Leave or Maternity/Paternity Leave)

- After the employee's appointment reflects a leave of absence that is not a family medical leave or maternity/paternity leave, the health benefits will automatically cancel.
- For steps on updating nonPERS and CalSTRS employee appointments, refer to the myCalPERS [Health Enrollment Supplement \(PDF\)](#) student guide.

Permanent Separation

- Do not process a Cancel Coverage transaction for a permanently separating employee. Add the separation event to their appointment, and myCalPERS will cancel the health benefits.
- After the permanent separation is reflected in myCalPERS, verify the health benefits is cancelled to ensure there won't be any billing issues.

Voluntary Cancellation Effective More Than a Month in the Future

If this is requested, you can process the transaction by adjusting the *received date* to the month prior to the effective date.

- **Event Date:** Day of the employee request
- **Received Date:** Month prior to the effective date/01/year

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.

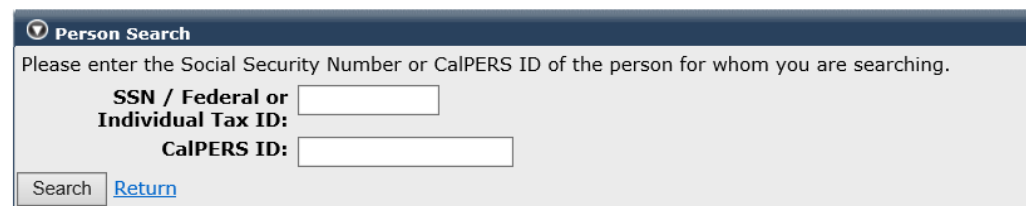


The screenshot shows the myCalPERS navigation menu with 'Reporting' selected. Below the menu, the 'Common Tasks' section is expanded to show the 'Create or Edit Report' option. The 'Method:' dropdown menu is set to 'Add or Edit Health Enrollment', which is highlighted with a red box. The 'Continue' button 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.

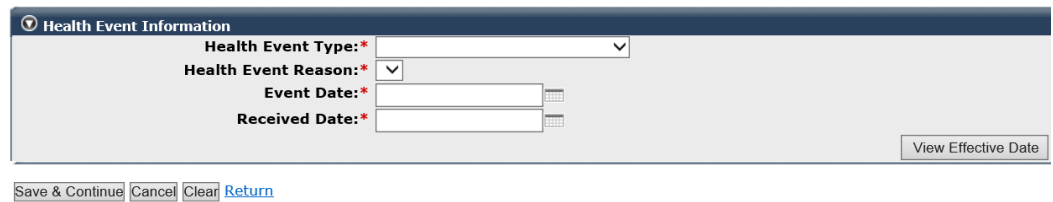


The screenshot shows the 'Person Search' form. It contains the following fields and labels: 'SSN / Federal or Individual Tax ID:' with an input field, and 'CalPERS ID:' with an input field. There are 'Search' and 'Return' buttons at the bottom of the form.

Step 5 Select the **Search** button.

Input Health Event Information

Step 6 Complete the Health Event Information section.

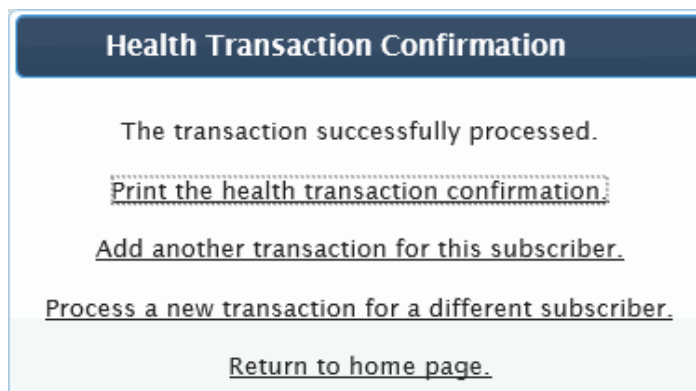


The screenshot shows a form titled "Health Event Information" with a dark blue header. Below the header, there are four fields: "Health Event Type:" with a dropdown menu, "Health Event Reason:" with a dropdown menu, "Event Date:" with a text input and a calendar icon, and "Received Date:" with a text input and a calendar icon. A "View Effective Date" button is located in the bottom right corner of the form. Below the form, there are four buttons: "Save & Continue", "Cancel", "Clear", and "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.



The screenshot shows a confirmation page with a dark blue header that reads "Health Transaction Confirmation". Below the header, the text says "The transaction successfully processed." followed by four underlined links: "Print the health transaction confirmation.", "Add another transaction for this subscriber.", "Process a new transaction for a different subscriber.", and "Return to home page.".

You have completed this scenario.

Unit 2: Rescission

A rescission is reversing a transaction to make a correction or due to a subscriber request. In this unit, you will learn how to rescind a *permissive* transaction with a *future effective date*.

Scenario

You processed a plan change with a future effective date. Today, the employee let you know they changed their mind and wants to remain with their current plan.


System Logic

You may not process a rescission for a mandatory event or if it is after the effective date. To rescind these transactions, contact CalPERS.

Step Actions (12 Steps)

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.

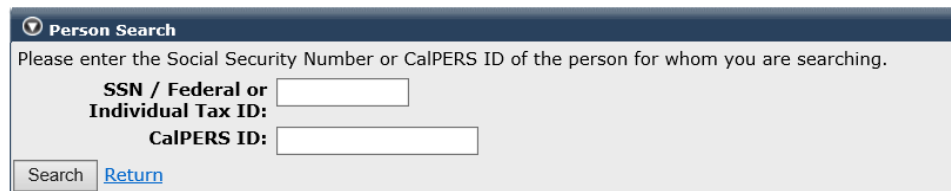


The screenshot shows the CalPERS Reporting interface. At the top, there are navigation tabs: Home, Profile, Reporting (selected), Person Information, Education, and Other Organizations. Below these are sub-tabs: Manage Reports, Billing and Payments, Payroll Schedule, Out-of-Class Validation, and Membership. A 'Common Tasks' section contains a 'Menu' dropdown with options for Organization Search and Adjustment Reports. The main content area shows 'Name: City Name' and 'CalPERS ID: 9876543210'. A 'Create or Edit Report' section has 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 the 'Person Search' form. It includes a title bar 'Person Search' and a prompt: 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are 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.

Rescind the Transaction

Step 6 Within the Demographics Information section, select the **Rescind an Existing Transaction** link.



The screenshot shows the 'Demographics Information' section. It displays the following 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. A blue link labeled 'Rescind an Existing Transaction' is located in the top right corner of the section.

Step 7 Within the Health Enrollment History section, select the radio button associated to the future health event to be rescinded.

Health Enrollment History									
Rescind									
Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status	Appointment ID	Create Date	Change Date	
<input checked="" type="radio"/>	07/01/2024	Change Health Plan	Move	Ellie E Edwards	Medical	Future	495100	06/06/2024 11:36:11 AM	06/06/2024 11:36:11 AM

Step 8 Select the **Rescind** button.

Step 9 Complete the Rescission Confirmation section.

Transaction Details	
Subscriber Name: Ellie E Edwards Subscriber CalPERS ID: 0123456789 Subscriber Date of Birth: 04/17/1977 Subscriber Coverage Type: Basic Health Event Type: Change Health Plan Health Event Reason: 402 - Move Health Benefit Type: Medical Health Plan Name: Anthem Blue Cross Select HMO - Region 1 (5062) Party Type: Self/B and 1/B Effective Date: 07/01/2024 Event Date: 06/06/2024 Received Date: 06/06/2024 Status: Appointment ID: 495100	Created Date: 06/06/2024 11:36:11 AM Change Date: 06/06/2024 11:36:11 AM Created by User: Employer Updated by User: Employer Reason for Rescission: Additional Information:

[View Health Enrollment Summary](#)

Rescission Confirmation	
Reason for Rescission:	Subscriber Request
Additional Information:	On 6/6/24, employee requested to rescind their plan change.
<input type="button" value="Save and Continue"/>	

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

Step 11 From the Health Event Information section, select the **Save & Continue** button.

Step 12 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.](#)

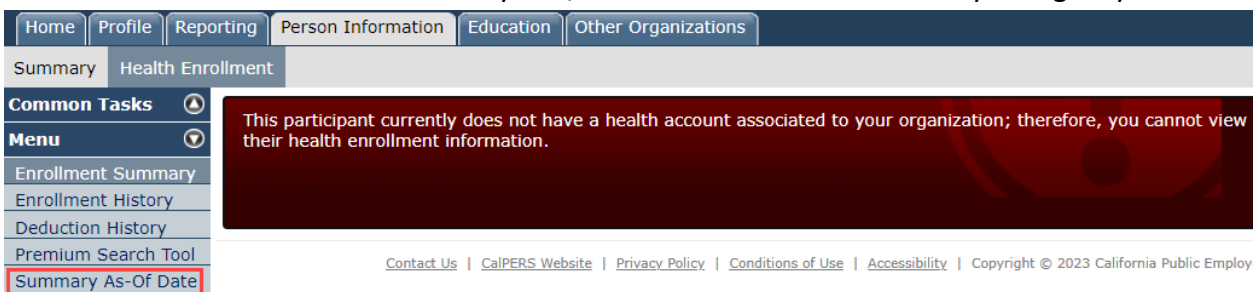
You have completed this scenario.

Unit 3: Person Search Tool-Health Enrollment Details

In this unit, you will learn how to review health enrollment details by using the five left-side links (the five scenarios) for one of your employees enrolled in health benefits.

System Logic

- Use the last four digits or full SSN, employee CalPERS ID, or individual tax ID for a person search.
- You may access health details only for employees and retirees with your agency.
- myCalPERS automatically displays information as of the current date. A warning message displays when you're accessing a future new health enrollment or a retroactive cancelled enrollee. To review their Health Enrollment Summary page, use the **Summary As-Of Date** left-side link and enter a date of when they had/will have health benefits with your agency.



- In most cases, a permanent separation will cancel health benefits; however, verify the cancellation of a separated employee to ensure the correct billing of premiums.
- To clear the previous subscriber's health benefits information, select the myCalPERS logo in the upper left.

Contents

- Scenario 1: Enrollment Summary – Page 24
- Scenario 2: Enrollment History – Page 26
- Scenario 3: Deduction History – Page 28
- Scenario 4: Premium Search Tool – Page 30
- Scenario 5: Summary As-Of Date – Page 33

Scenario 1: Enrollment Summary

You will review subscriber health enrollment information including current and formerly covered dependents, health plan, total premium, and future health events.

System Logic

When the Enrollment Summary page is unavailable due to future-dated enrollments or a former subscriber, use the one of the other four left-side menu links to verify enrollment information and deductions.

Step Actions (12 Steps)

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

Step 2 Complete the Person Search section.

The screenshot shows a navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below the navigation bar is a 'Person Search' section with a dropdown arrow and the text 'Please enter the Social Security Number or CalPERS ID of the person for whom you are searching.' There are two input fields: 'SSN / Federal or Individual Tax ID:' and 'CalPERS ID:'. A 'Search' button is located at the bottom left of the search area.

Step 3 Select the **Search** button.

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

The screenshot shows a local navigation menu with two tabs: 'Summary' and 'Health Enrollment'. The 'Health Enrollment' tab is highlighted with a red box.

Step 5 Select the first link under the Health Account column.

The screenshot shows the 'Health Enrollment' section. On the left is a sidebar with 'Common Tasks', 'Menu', and 'Premium Search Tool'. The main content area has a 'Select Health Account' dropdown menu. Below it is a table with three columns: 'Health Account', 'Qualifying Participant Name', and 'Qualifying CalPERS ID'. The first row is 'CalPERS Employment', 'JOE JONES', and '0123456789'. The 'CalPERS Employment' link is highlighted with a red box. Below the table is a link for 'Health Account Summary'.

Step 6 Review the Health Enrollment Information section.

The screenshot shows the 'Health Enrollment Information' section. It includes a header 'Health Enrollment Information' and a sub-header 'Your health enrollment is based on the following information:'. Below this is a table with two columns: 'Health Eligibility Information' and 'Health Enrollment Summary As Of: 02/01/2023'. The 'Health Eligibility Information' column contains details such as 'Appointment ID: 91618622', 'Employer CalPERS ID: 1262943822', 'Employer: Agency Name', 'Division CalPERS ID: 1262943822', 'Division: Agency Name', 'Agency Type: Public Agency', and 'Qualifying CalPERS ID: 0123456789'. The 'Health Enrollment Summary As Of' column contains details such as 'Medical Group: 001 UNREP UNIT A H M W & X', 'Permanent Separation Date:', 'Retirement Date:', and 'Health Benefit Appointment Yes Same As Health Eligibility:'. Below the table is a section for 'Enrollment Information' with details such as 'Affiliated Retirement System: PERS', 'Financially Responsible CalPERS ID: 0123456789', 'Payroll Office Code: 5', 'Affiliated Association:', and 'Health Account Status: Active Employment'. The 'Health Eligibility Zip Code: 95650', 'Zip Code Override Indicator: Yes', 'Override Zip Code Type: Employer Address', 'Region: RG1', and 'County: Placer' are also listed.

Step 7 Review the Covered Persons Summary section for to review the current and former dependents. Each name is a link to their Covered Persons Health Information page.

Step 8 Is there a **View More Actions** link in the Covered Persons Summary section?
Yes: Select the **View More Actions** link to expand the list of covered and formerly covered dependents.

Covered Persons Summary							View More Actions»
Below are your covered persons for health. Select the name of a covered person to view detailed health information.							
Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision	
TADHIG LIEBAN	05/02/1958	Self	NA	Basic	No	No	
ARUTYUN LIEBAN	10/18/1965	Spouse	NA	Basic	No	No	
STULING LIEBAN	07/01/1994	Natural Born Child	NA	Basic	No	No	
DOMINETTA DUBOSKI	12/06/1995	Natural Born Child	NA	Basic	No	No	

No: Skip to step 10.

Step 9 If you selected the **View More Actions** link, select the **Enrollment Summary** left-side link to return to the previous Health Enrollment Summary page.

Common Tasks	Health Enrollment Information
<ul style="list-style-type: none"> Menu Enrollment Summary Enrollment History Deduction History Premium Search Tool Summary As-Of Date 	Your health enrollment is based on the following information: Health Eligibility Information Appointment ID: 2233440 Employer CalPERS ID: 9876543210 Employer: City Name

Step 10 Review the Health Plan Summary section.

Health Plan Summary				
Below is your plan and premium information.				
Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	Kaiser Permanente California Bay Area (1043)	Self/B and 2+/B	01/01/2016	\$1,906.81

Step 11 Review the Future Health Events section for transactions with future effective dates.

Future Health Events			
Below are your health events that are effective at a future date.			
Future Health Event Type	Future Health Event Reason	Future Effective Date	Health Notification
New Enrollment	Late or Loss of Coverage (Emp)	02/01/2023	
Update Enrollment	Establish Medical Group	02/01/2023	

Step 12 For state agencies, the Pending Health Events section will display if there is a pending dental enrollment into retirement transaction.

Pending Health Events					
Below are requests that require CalPERS review.					
Name	CalPERS ID	Pending Health Event Type	Pending Health Event Reason	Received Date	Status
ZANOTELLI CASTRO-AYALA	0123456789	New Enrollment	State Retiree - Dental Enrollment	01/01/2018	Pending Analyst Review

You have completed this scenario.

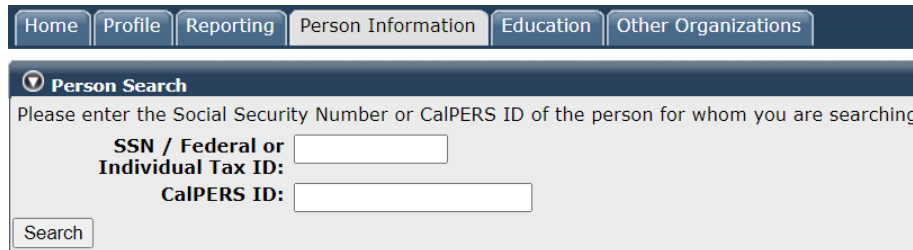
Scenario 2: Enrollment History

You will review all health enrollment transactions in chronological order including rescissions, effective dates, health event types, and future enrollment changes.

Step Actions (11 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.

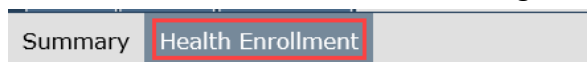
SSN / Federal or Individual Tax ID:

CalPERS ID:

Search

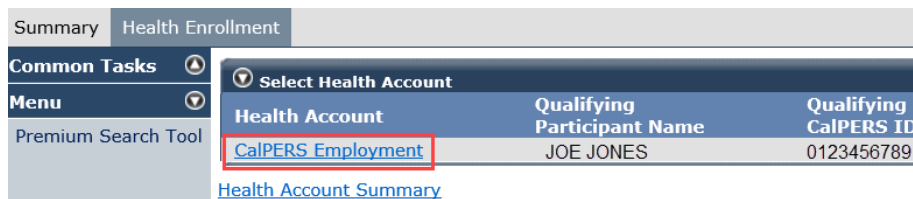
Step 3 Select the **Search** button.

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



Summary **Health Enrollment**

Step 5 Select the top link under the Health Account column.



Summary Health Enrollment

Common Tasks

Menu

Premium Search Tool

Select Health Account

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	JOE JONES	0123456789

[Health Account Summary](#)

Step 6 Select the **Enrollment History** link under the Menu left-side navigation.



Common Tasks

Menu

[Enrollment Summary](#)

Enrollment History

[Deduction History](#)

[Premium Search Tool](#)

[Summary As-Of Date](#)

Health Enrollment Information

Your health enrollment is based on the following information:

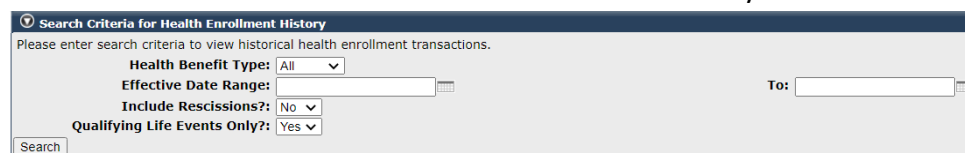
Health Eligibility Information

Appointment ID: 2233440

Employer CalPERS ID: 9876543210

Employer: City Name

Step 7 Do you want to filter your search to review specific transactions like a rescission?
Yes: Use the Search Criteria for Health Enrollment History section.



Search Criteria for Health Enrollment History

Please enter search criteria to view historical health enrollment transactions.

Health Benefit Type: All

Effective Date Range: To:

Include Rescissions?: No

Qualifying Life Events Only?: Yes

Search

No: Skip to step 9.

Step 8 Select the **Search** button.

Step 9

Under the Status column, select the link for transaction details to review the dates used to enter the transaction, if employer or CalPERS processed, and rescission notes.

Health Enrollment History								
Effective Date	Health Event Type	Health Event Reason	Name	Health Benefit Type	Status	Appointment ID	Create Date	Change Date
11/01/2023	Delete Dependent	Delete Dependent- Did not certify for Parent-Child Relationship	Taylor T Thomas	Medical	Rescinded	91776650	10/02/2023 08:02:24 PM	10/13/2023 11:11:46 AM
11/01/2022	Delete Dependent	Delete Dependent- Did not certify for Parent-Child Relationship	Taylor T Thomas	Medical	Rescinded	91776650	10/03/2022 08:00:54 PM	04/21/2023 10:40:28 AM
12/01/2021	Delete Dependent	26 year old delete - Batch	Jenni J Jones	Medical	Confirmed	91776650	11/01/2021 06:58:23 AM	11/01/2021 06:58:23 AM
09/01/2021	Add Dependent	Parent-Child Relationship	Taylor T Thomas	Medical	Confirmed	91776650	08/24/2021 09:48:35 AM	08/24/2021 09:48:35 AM

Step 10

Select the **View Health Enrollment Summary** link for the health enrollment summary as of the effective date of the transaction.

Transaction Details

Subscriber Name: JOE JONES
Subscriber CalPERS ID: 0123456789
Subscriber Date of Birth: 11/11/1972
Subscriber Coverage Type: Basic
Health Event Type: Add Dependent
Health Event Reason: 203 - Parent-Child Relationship
Health Benefit Type: Medical
Health Plan Name: Kaiser Permanente California - Region 1 (5333)
Party Type: Self/B and 2+/B
Effective Date: 09/01/2021
Event Date: 07/01/2021
Received Date: 08/24/2021
Status:
Appointment ID: 91776650

Created Date: 08/24/2021 09:48:35 AM
Change Date: 08/24/2021 09:48:35 AM
Created by User: Employer
Updated by User: Employer
Reason for Rescission:
Additional Information:

Dependent List

Dependent Name	Dependent CalPERS ID	Dependent Date of Birth	Dependent Coverage Type
Taylor T Thomas	1234567890	03/03/2003	Basic

[View Health Enrollment Summary](#)

Step 11

Review the health information based on the effective date of the transaction.

Health Enrollment Information

Your health enrollment is based on the following information:

Health Enrollment Summary As Of: [09/01/2021](#)

Health Eligibility Information

Appointment ID: 91776650
Employer CalPERS ID: 9876543210
Employer: City Name
Division CalPERS ID: 9876543210
Division: City Name
Agency Type: Public Agency
Qualifying CalPERS ID: 0123456789

Medical Group: 004 UPE, LOCAL 790 UNIT B C D
Permanent Separation Date:
Retirement Date:
Health Benefit Appointment Yes Same As Health Eligibility:

Enrollment Information

Affiliated Retirement System: PERS
Financially Responsible CalPERS ID: 0123456789
Payroll Office Code: 5
Affiliated Association:
Health Account Status: Active Employment

Health Eligibility Zip Code: 94601
Zip Code Override Indicator: No
Override Zip Code Type:
Region: RG1
County: Alameda

Covered Persons Summary [View More Actions](#)

Below are your covered persons for health. Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
JOE JONES	11/11/1972	Self	NA	Basic	No	No
Pam Parks	11/12/1964	Spouse	No	Basic	No	No
Paige Parks	05/05/1995	Step Child	No	Basic	No	No
Taylor T Thomas	03/03/2003	Parent-Child	No	Basic	No	No

Health Plan Summary

Below is your plan and premium information.

Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	Kaiser Permanente California - Region 1 (5333)	Self/B and 2+/B	01/01/2020	\$2,115.46

You have completed this scenario.

Scenario 3: Deduction History

You will review your employee’s history of premium payments and credits. The information includes the coverage month, plan name, party type, and participant/employer share.

You also have access to the deduction history for your retirees and former employees.

Step Actions (9 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 top link under the Health Account column.

Step 6 Select the **Deduction History** link under the Menu left-side navigation.

Step 7 Select from the Deduction Source drop-down list in the Search Criteria section.

Deduction Source	Active/Retired and Retirement System Use each deduction source to verify:
Benefit Roll	<i>Retired CalPERS participant</i> deductions only, even though the employer share displays
PA Billing	What has been billed to your agency for your active and retired CalPERS, CalSTRS, and non-PERS participants. Use this to verify your <i>employer share</i> for your retired CalPERS and CalSTRS participants.
SCO	Active central state deductions
Non-Central	Active non-central state deductions

Step 8 Select the **Search** button to review deduction history.

Step 9 Review the Deduction History section.

Deduction History									
Coverage Month	Status	Employer CalPERS ID	Plan Name	Party Type	Plan Code	Participant Share	Employer Share	Medicare Reimbursement	
October 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
September 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
August 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
July 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
June 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
May 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
April 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
March 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
February 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
January 2022	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,228.36	\$0.00	
December 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
November 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
October 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
September 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
August 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
July 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
June 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
May 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
April 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
March 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
February 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
January 2021	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$2,115.46	\$0.00	
December 2020	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$1,998.07	\$0.00	
November 2020	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$1,998.07	\$0.00	
October 2020	Employment	1262943822	Kaiser Permanente California - Region 1	Self/B and 2+/B	5333	\$0.00	\$1,998.07	\$0.00	

Showing records 1 - 25 | First << Previous 1 2 3 4 5 6 7 8 9 Next >> Last | View Max

Public agency and schools: An active employee will have their full premium under the Employer Share column because CalPERS bills your agency for their full premiums. A retiree, unless they're non-PERS, will display their portion and your employer contribution.

State agencies: An active employee and retiree will have their portion and the state contribution displayed. If the employee has consolidated benefits (CoBen), then the full premium will display under the Participant Share column. If a coverage month is not displayed, then premiums have not been paid.

You have completed this scenario.

Scenario 4: Premium Search Tool

You will assist your employee to search for available health plans by eligibility ZIP code and those associated with a specific provider or medical group.

You will also compare benefits and premiums for the available plans.

Step Actions (14 Steps)

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

Step 2 Complete the Person Search section.

The screenshot shows a navigation bar with tabs: Home, Profile, Reporting, Person Information, Education, and Other Organizations. Below the navigation bar is a section titled "Person Search" with the instruction: "Please enter the Social Security Number or CalPERS ID of the person for whom you are searching." There are two input fields: "SSN / Federal or Individual Tax ID:" and "CalPERS ID:". A "Search" button is located at the bottom left of the section.

Step 3 Select the **Search** button.

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

The screenshot shows a local navigation menu with two tabs: "Summary" and "Health Enrollment". The "Health Enrollment" tab is highlighted with a red border.

Step 5 Select the **Premium Search Tool** link under the Menu left-side navigation.

The screenshot shows the "Health Enrollment" section with a left-side navigation menu. The "Premium Search Tool" link is highlighted with a red border. Below the navigation menu is a table titled "Select Health Account" with columns: "Health Account", "Qualifying Participant Name", and "Qualifying CalPERS ID". The table contains one row: "CalPERS Employment", "JOE JONES", and "012345678". Below the table is a link: "Health Account Summary".

Step 6 **Optional:** Use the filter(s) in the Health Premium Search Tool section.

The screenshot shows the "Health Premium Search Tool" section with the instruction: "Please enter the search criteria:". There are several search criteria: "Year:*" (2020), "Health Eligibility ZIP Code:" (Personal selected, Employer unselected), "ZIP Code:*" (92075), "Health Benefit Type:*" (Medical), "Party Type:*" (Self/B and 2+1/B), "Carrier Name:" (All), and "Member Type:*" (Public Agency). There are also "Search", "Clear", and "Advanced Options" buttons. Below the search criteria is the instruction: "Click the Advanced Options button to enable additional search functionality."

Step 7 Do you want to search for plans affiliated with a physician or medical group?

Yes: Continue to step 8.

No: Skip to step 10.

Step 8

Enter a provider’s (primary care or specialist) first or last name or medical group, and the health plans with which they are associated will display. *Subscribers should contact the health plan to verify if the provider is available.*

1. Select the **Advanced Options** button.
2. Select the **Provider Type** radio button.
3. If you want to search for plans associated with a physician medical group, select the **Medical Group** radio button.
4. Change the mile radius from the drop-down list if necessary.
5. Enter a provider’s first and/or last name or medical group name. *Do not press the Enter key.*
6. Select the doctor, specialist, or medical group from the list below.
7. Select the **Search** button at bottom left of the section.
8. Review the *Provider Available?* column to confirm if the provider is affiliated with the health plan.

Advanced Options

Terms of Use: Results are based on the ZIP code, selected mile radius, and coverage type, and include doctors within the United States, and medical groups in California. Provider information is subject to change, before you make any changes verify with the health plan that the selected provider is available.

Enter a Physician or Medical Group name to include in your search.

Provider Type

Basic Physician
 Medicare Physician
 Medical Group

Within 20 Mile radius of 94621

smith

Sam Smith (Specialist)
Family Medicine
2288 Market St
San Francisco, CA 94114

Sam Smith (Primary Care)
Family Medicine
2288 Market St
San Francisco, CA 94114

Search Clear Basic Options

Available Health Plans

The following health plans are available for this service area. Service area is determined by health eligibility ZIP code. To view the Medicare reimbursement amount, use the View Medicare Plans button.

Health Plan Name	Provider Available?	Plan Type	Party Type	Gross Premium	Compare Select All
Kaiser Permanente California - Region 1	No	HMO	Self/B and 2+/B	\$1,998.07	<input checked="" type="checkbox"/>
PERS Care - Region 1	Yes	PPO	Self/B and 2+/B	\$2,946.16	<input type="checkbox"/>

The health plan name is a link their toll-free telephone number.

Step 9

Select at least one health plan check box or the **Select All** link.

Available Health Plans

The following health plans are available for this service area. Service area is determined by health eligibility ZIP code. To view the Medicare reimbursement amount, use the View Medicare Plans button.

Health Plan Name	Plan Type	Party Type	Gross Premium	Compare Select All
Anthem Blue Cross Select HMO - Region 2	HMO	Self/B and 2+/B	\$1,700.50	<input checked="" type="checkbox"/>
Blue Shield Access+ - Region 2	HMO	Self/B and 2+/B	\$2,365.66	<input checked="" type="checkbox"/>
Health Net Salud y Mas - Region 2	HMO	Self/B and 2+/B	\$1,131.36	<input checked="" type="checkbox"/>

Step 10

Within the Provider Directory Alert section, review any alert information.

Provider Directory Alert

Excel Print Show 25 rows Search: _____

Health Plan Name	Provider Name	Alert Message
Western Health Advantage - Region 1		Sample message for WHA plan or a particular provider.

Showing 1 to 1 of 1 entries First Previous Next Last

Step 11

Select the **Compare Health Plans** button at the bottom left of the page.

Step 12

Within the Health Plan Comparison Filters section, select the benefits you want to review or compare.

Health Plan Comparison Filters

Benefit Type:

- Premiums
- Calendar Year Deductible
- Physician Services (including Mental Health and Substance Abuse)
- Infertility Testing/Treatment
- Chiropractic
- Ambulance Services
- Maximum Calendar Year Co-pay or Co-insurance (excluding Pharmacy)
- Diagnostic X-Ray/Lab
- Occupational/Physical/Speech Therapy
- Skilled Nursing Facility
- Hearing Services
- Hospital (including Mental Health and Substance Abuse)
- Prescription Drugs
- Diabetes Services
- Home Health Services
- Vision Care
- Emergency Services
- Durable Medical Equipment
- Acupuncture
- Hospice

Select All Clear All

Plan Type: HMO PPO Association

Step 13

Each plan that you selected in step 9 will be displayed in columns side by side with the selected benefits expanded.

Health Plan Comparison					
					Search:
	Anthem Blue Cross Select	Health Net SmartCare	Kaiser Permanente	PERS Gold	
	■ Hide	■ Hide	■ Hide	■ Hide	
				PPO	Non-PPO
-Premiums					
Gross Premium	\$1,128.83	\$1,174.50	\$913.74	\$825.61	
-Calendar Year Deductible					
Individual	N/A	N/A	N/A	Individual \$1000	
Family	N/A	N/A	N/A	Family \$2000 Incentives available to reduce individual deductible (max. \$500) or family deductible (max. \$1,000) include: getting a biometric screening (\$100 credit); receiving a flu shot (\$100 credit); getting a non-smoking certification (\$100 credit); getting a virtual second opinion (\$100 credit); and getting a condition care certification (\$100 credit)	Family \$2000 Incentives available to reduce individual deductible (max. \$500) or family deductible (max. \$1,000) include: getting a biometric screening (\$100 credit); receiving a flu shot (\$100 credit); getting a non-smoking certification (\$100 credit); getting a virtual second opinion (\$100 credit); and getting a condition care certification (\$100 credit)
+Maximum Calendar Year Co-pay or Co-insurance (excluding Pharmacy)					
+Hospital (including Mental Health and Substance Abuse)					

Step 14

Select the **Back to Health Plan Search Results** button in the top Health Plan Search Criteria section to do another health plan comparison.

Health Plan Search Criteria

Year: 2019

Health Eligibility ZIP Code: Personal Employer

ZIP Code: 94551 Foreign

County: Alameda

Retirement Date:

Vesting Percentage: %

Health Benefit Type: Medical

Party Type: Self/B and 2+/B

Carrier Name: All

Member Type: Public Agency

[Back to Health Plan Search Results](#)

You have completed this scenario.

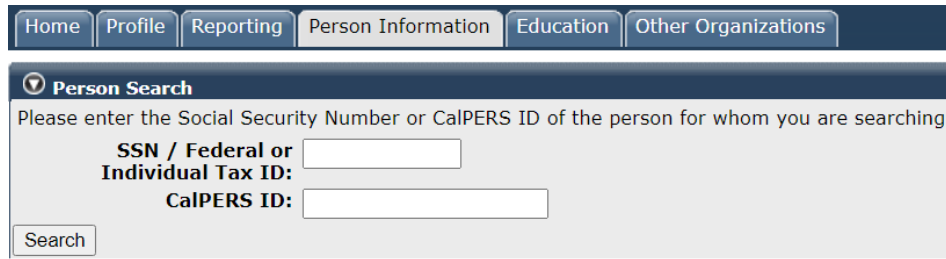
Scenario 5: Summary As-Of Date

You will verify health enrollment details on a new health enrollment with a future effective date. You can also use this to review retroactively cancelled enrollees.

Step Actions (9 Steps)

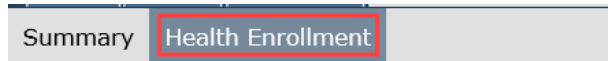
Step 1 From the homepage, select the **Person Information** global navigation tab.

Step 2 Complete the Person Search section.

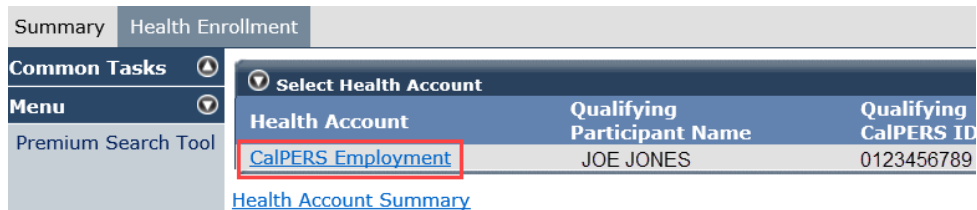


Step 3 Select the **Search** button.

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



Step 5 Select the top link under the Health Account column.

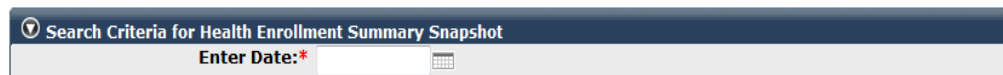


Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	JOE JONES	0123456789

Step 6 Select the **Summary As-Of Date** link under the left-side Menu folder.



Step 7 Enter the date of when the enrollee is covered or the transaction effective date.



Step 8 Select the **Search** button.

Step 9

Review the enrollment summary information based on the as-of date entered. Refer to scenario 1 for details.

Health Account Summary

Health Account: CalPERS Employment Qualifying Participant Name: Roellie Lee Sundotien
 Qualifying CalPERS ID: 0123456789 Health Account Status: Active Employment

Health Enrollment Information

Your health enrollment is based on the following information: Health Enrollment Summary As Of: 01/27/2023

Health Eligibility Information

Appointment ID: 27791120 Medical Group: 004 UPE, LOCAL 790 UNIT B C D
 Employer CalPERS ID: 1262943822 Permanent Separation Date:
 Employer: Agency Name Retirement Date:
 Division CalPERS ID: 1262943822
 Division: Agency Name
 Agency Type: Public Agency
 Qualifying CalPERS ID: 0123456789 Health Benefit Appointment [Yes](#)
 Same As Health Eligibility:

Enrollment Information

Affiliated Retirement System: PERS Health Eligibility Zip Code: 94531
 Financially Responsible CalPERS ID: 0123456789 Zip Code Override Indicator: No
 Payroll Office Code: 5 Override Zip Code Type:
 Affiliated Association: Region: RG1
 Health Account Status: Active Employment County: Contra Costa

Covered Persons Summary [View More Actions](#)

Below are your covered persons for health.
 Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
Roellie Sundotien	11/11/1961	Self	NA	Basic	No	No
Jorge Beuningen	03/06/1961	Spouse	No	Basic	No	No
Elizabeth Llinamo	10/02/2005	Parent-Child	No	Basic	No	No
Liber Llinamo	12/13/1984	Natural Born Child	No	No	No	No

Health Plan Summary

Below is your plan and premium information.

Health Benefit Type	Health Plan Name	Party Type	Health Enrollment Status	Total Premium
Medical	Kaiser Permanente California - Region 1 (5333)	Self/B and 2+/B	01/01/2020	\$2,228.36

Future Health Events

Below are your health events that are effective at a future date.

Future Health Event Type	Future Health Event Reason	Future Effective Date	Health Notification
Add Dependent	Loss of Coverage	02/01/2023	
Dependent Address Change	Address Update	02/01/2023	

Pending Health Events

Below are requests that require CalPERS review.

Name	CalPERS ID	Pending Health Event Type	Pending Health Event Reason	Received Date	Status
No results found.					

You have completed this scenario.

Unit 4: Change Dependent Demographics

In this unit, you will learn how to make dependent demographic changes to a Social Security number, name, gender, and date of birth. You are required to add an SSN to a dependent within 90 days from their enrollment date.

Scenario

You will add a Social Security number to a dependent child who was enrolled without one.

System Logic

You cannot update a dependent's demographics if they work for an agency that contracts with CalPERS for retirement or health benefits. The dependent must contact their employer.

Step Actions (15 Steps)

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

Step 2 Complete the Person Search section.

The screenshot shows the 'Person Search' section of the system. At the top, there is a navigation bar with tabs for 'Home', 'Profile', 'Reporting', 'Person Information', 'Education', and 'Other Organizations'. Below this is a dark blue header for 'Person Search'. The main content area contains the text: '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.

Step 3 Select the **Search** button.

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

Step 5 Select the first link (may display CalPERS or CalPERS Employment) under the Health Account column.

The screenshot shows the 'Health Enrollment' section. At the top, there are tabs for 'Summary' and 'Health Enrollment'. Below this is a 'Common Tasks' menu with a dropdown arrow. The main content area is a table with the following structure:

Health Account	Qualifying Participant Name	Qualifying CalPERS ID
CalPERS Employment	JOE JONES	0123456789

Below the table, there is a link for 'Health Account Summary'.

Step 6 Does the employee's profile page display?

Yes: Skip to step 9.

No: Select the **Summary As-Of Date** left-side link.

The screenshot shows the 'Summary As-Of Date' link in the left-side menu, which is highlighted with a red box. The main content area displays a message: 'This participant currently does not have a health account associated to your organization; therefore, you cannot view their health enrollment information.' The message is displayed in a dark red box with white text. At the bottom of the page, there is a footer with links for 'Contact Us', 'CalPERS Website', 'Privacy Policy', 'Conditions of Use', 'Accessibility', and 'Copyright © 2023 California Public Employ'.

Step 7 Complete the Enter Date field with the date the employee is enrolled.

Step 8 Select the **Search** button.

Step 9 Within the Covered Persons Summary section, is the dependent listed?

Yes: Continue to step 10.

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

Covered Persons Summary [View More Actions»](#)

Below are your covered persons for health.
Select the name of a covered person to view detailed health information.

Name	Date of Birth	Dependent Type	Certified	Medical	Dental	Vision
JOE JONES	05/02/1958	Self	NA	Basic	No	No

Step 10 Select the **name** link for the dependent you want to update.

Step 11 Select the **Edit Demographic** button at bottom left.

Covered Person Information

CalPERS ID: 0123456789
Name: Kitty Kooper
SSN/ITIN:
Date of Birth: 09/15/2012

Gender: Female
Relationship: Other Person
Dependent Type: Parent-Child
Same Address as Primary: Yes

[Edit Demographic](#)

Step 12 From the drop-down list, select Social Security Number.

Maintain Personal Information Details [View Demographic History](#)

CalPERS ID: 1467232966

Social Security Number
Tax Identification Number
Kitty

Middle Name: Last Name: * Kooper

Effective Date of Name Change: Date of Birth: 09/15/2012
Gender: Female
Date of Death:

Verification Document:

Save Clear Return

Step 13 In the next field, enter the dependent's Social Security number.

Step 14 Select the type of proof of documentation you have.

Maintain Personal Information Detail

Social Security Number
Prefix:
First Name: *
Suffix:
Effective Date of Name Change:
Date of Birth:
Verification Document:

Native American Tribal Document
Naturalization
Permanent Resident Card or Alien Registration Receipt Card (Form I-551)
Pre-21 Record
School Records
Social Security Card
Social Security Certification
Survivor Benefits Documentation
U.S. Coast Guard Merchant Mariner Card
U.S. Passport or U.S. Passport Card
Voter's Registration Card

Save Clear Return

Step 15 Select the **Save** button at the bottom left.

You have completed this scenario.

Unit 5: Health Reports

In this unit, you will learn how to run health reports to review new transactions, batch transactions (those that are automatically updated in myCalPERS), and other data.

For a full list of employer reports, refer to the [myCalPERS Employer Reports \(Cognos\) Catalog](#) page.

To learn more about Cognos (IBM software that retrieves data from myCalPERS and creates reports) functionality, refer to the [myCalPERS Employer Reports \(Cognos\) PDF](#) student guide.

Contents

- Scenario 1: Employer Health Event Transaction Report – Page 38
- Scenario 2: Employer Health Enrollee Report – Page 41

Scenario 1: Employer Health Event Transaction Report

You will run the Employer Health Event Transaction Report to review transactions that are effective next month for your agency. It's recommended to run this report monthly.

Some reasons to run this report:

- Identify deleted 26-year-old children. Some state agencies use this information to delete the dependents from the employees' dental and vision benefits.
- Review transactions that were submitted online by your employees.
- Verify the enrollment information that you entered is correct.
- Public agencies and schools review the new transactions for their active and retired employees to reconcile their health statement.

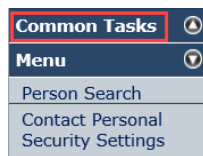
System Logic

Wait to run this report until after the first business day of the current month (26-year-old deletion batch completion time) if retrieving data for the following month.

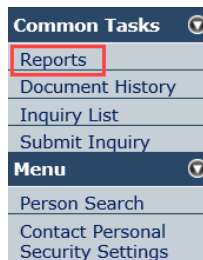
Step Actions (17 Steps)

Run Report

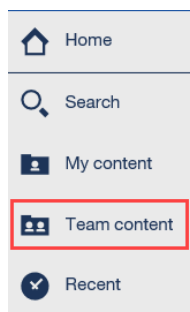
Step 1 From the homepage, select the Common Tasks folder from the upper left side.



Step 2 Select the **Reports** left-side link.



Step 3 From the left-side menu, select the Team content folder.



Step 4 Select the PSR_REPORTS_ENV98 folder.

Step 5 Select the **Employer Health Event Transaction Report** link.

Step 6 To review transactions that will be effective next month, use the Effective Date Range criterion. For example, if the current month is October 2024, enter 11/01/24 for the from and to dates.

Select Effective Date Range _____

The effective date is the date on which the transaction takes effect.

Effective From Date : 

Effective To Date : 

To retrieve other transaction data, you may use these options to run the report:

- For public agency or school billing reconciliation, use the Select Event Create Date Range From Date (day after the previous month's billing cutoff date) and To Date (statement billing cutoff date) fields.
- To display specific transactions by who/what made the updates, choose from the Created by User Type drop-down list:
 - **External Business Partner:** Employer (Employer processed the enrollment or confirmed an employee-submitted myCalPERS transaction)
 - **External Participant:** Employee or retiree
 - **Internal User:** CalPERS team member
 - **Service:** Automatically updated by the system, e.g., 26-year-old delete – Batch, Continued Elig: Retirement – Batch, etc.
 - **Blank:** No user (transaction was due to a data fix)

Step 7 Select the **Finish** button at bottom left.

Change Report Format

Step 8 Select the Run as icon in the top left corner of the page.



Step 9 Select a format. Run Excel data and Run CSV are recommended for filtering.

 Run HTML

 Run PDF

 Run Excel

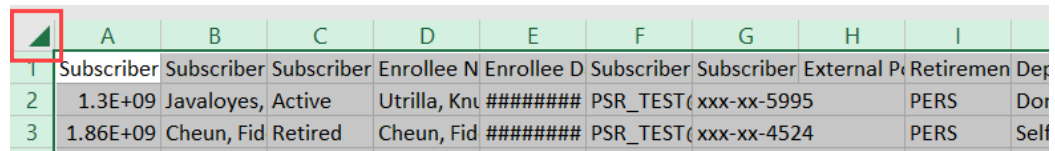
 Run Excel data

 Run CSV

Step 10 Select the spreadsheet to open it.

Filter the Report

Step 11 Select the cell in the top left corner to highlight the entire spreadsheet.



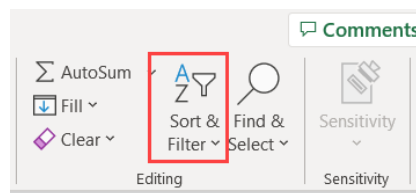
	A	B	C	D	E	F	G	H	I	
1	Subscriber	Subscriber	Subscriber	Enrollee N	Enrollee D	Subscriber	Subscriber	External P	Retiremen	Dep
2	1.3E+09	Javaloyes, Active		Utrilla, Kn	#####	PSR_TEST	(xxx-xx-5995		PERS	Do
3	1.86E+09	Cheun, Fid Retired		Cheun, Fid	#####	PSR_TEST	(xxx-xx-4524		PERS	Self

Step 12 To widen all the cells, double click on the line between any two columns.



	A	B	C
1	Subscriber	Subscriber	Subscriber

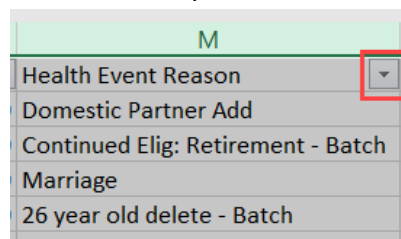
Step 13 From the ribbon, select Sort & Filter.



Step 14 Select the Filter option.

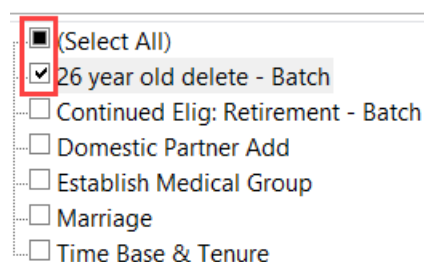


Step 15 Select the drop-down arrow in the Health Event Reason column.



M
Health Event Reason
Domestic Partner Add
Continued Elig: Retirement - Batch
Marriage
26 year old delete - Batch

Step 16 Deselect the Select All check box, and then select the check box(es) for the specific transactions you want displayed like the 26-year-old deleted children.

- 
- (Select All)
 - 26 year old delete - Batch
 - Continued Elig: Retirement - Batch
 - Domestic Partner Add
 - Establish Medical Group
 - Marriage
 - Time Base & Tenure

Step 17 Select the **OK** button.

If you want to save the report with formatting changes, save it with an Excel (not CSV) file extension.

You have completed this scenario.

Scenario 2: Employer Health Enrollee Report

You will run the Employer Health Enrollee Report to display everyone who is enrolled as of a certain date. This includes all dependents and those enrolled on direct pay and COBRA.

Some other benefits to this report:

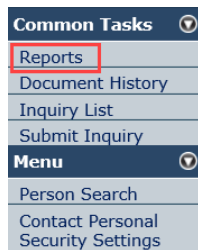
- Review the Age 26 Cancel Date, Medically Disabled Dependent Certification End Date, and Parent-Child Relationship Certification End Date columns to identify the children that will be deleted or who may need to be recertified.
- If the Enrollee SSN column is blank, add the dependent's SSN in myCalPERS (refer to unit 4).
- If the Mailing Undeliverable Address Indicator column has a Y, CalPERS correspondence to the employee got returned. You may need to update an employee's address in myCalPERS.

Step Actions (17 Steps)

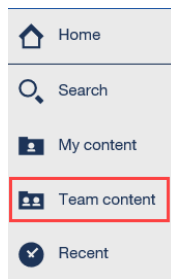
Run Report

Step 1 From the homepage, select the Common Tasks folder from the upper left side.

Step 2 Select the **Reports** left-side link.



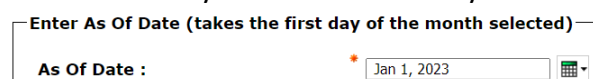
Step 3 From the left-side navigation, select the Team content folder.



Step 4 Select the PSR_REPORTS_ENV98 folder.

Step 5 Select the **Employer Health Enrollee Report-Ext** link.

Step 6 To review everyone who is currently enrolled, don't change the As Of Date field.

A screenshot of a form field labeled 'As Of Date'. Above the field is the text 'Enter As Of Date (takes the first day of the month selected)'. The field contains the text 'Jan 1, 2023' and has a calendar icon to its right.

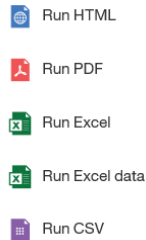
Step 7 Select the **Finish** button.

Change Report Format

Step 8 Select the Run as icon in the top left corner of the page.



Step 9 Select a format. Run Excel data and Run CSV are recommended for filtering.



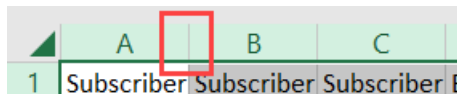
Step 10 Select the spreadsheet to open it.

Filter the Report

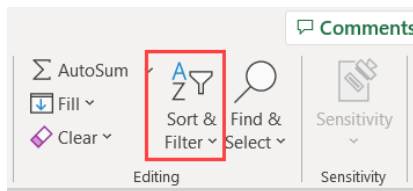
Step 11 Select the cell in the top left corner to highlight the entire spreadsheet.

	A	B	C	D	E	F	G	H	I
1	Subscriber	Subscriber	Subscriber	Subscriber	Retiremen	Subscriber	Enrollee N	Enrollee S	Enrollee C
2	4.45E+09	Al-Kazzaz,	XXX-XX-72	Retired	PERS	#####	Al-Kazzaz,	XXX-XX-72	4.45E+09
3							Lickelli, Xa	XXX-XX-66	7.19E+09
4	7.5E+09	Allshouse,	XXX-XX-04	Employe	PERS		Allshouse,	XXX-XX-04	7.5E+09

Step 12 To widen the cells for the entire sheet, double click on the line in between any two columns.



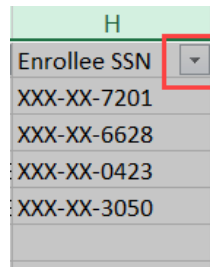
Step 13 From the ribbon, select the Sort & Filter option.



Step 14 Select the Filter option.



Step 15 Select the drop-down arrow in one or more column(s).



The screenshot shows a table with a header row labeled 'H'. The first column is titled 'Enrollee SSN' and contains the following values: 'XXX-XX-7201', 'XXX-XX-6628', 'XXX-XX-0423', and 'XXX-XX-3050'. A red box highlights the drop-down arrow in the 'Enrollee SSN' column header.

H
Enrollee SSN
XXX-XX-7201
XXX-XX-6628
XXX-XX-0423
XXX-XX-3050

Step 16 Deselect the Select All check box, and then select the check box if you only want to certain information like all dependents with missing SSNs.

Text Filters

Search

- XXX-XX-9592
- XXX-XX-9669
- XXX-XX-9819
- XXX-XX-9835
- XXX-XX-9846
- XXX-XX-9934
- XXX-XX-9959
- XXX-XX-9995
- (Blanks)

Step 17 Select the **OK** button.

If you want to save the report with formatting changes, save it with an Excel (not CSV) file extension.

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.

- [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)
- [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
 - Parent-Child Relationship Dependent with Expiring Certification Report
 - PERS Retiree List 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 (includes subscriber addresses and death dates)
- [Self-Paced Online Classes](#) (log in to myCalPERS, select the **Education** global navigation tab)
 - Business Rules
 - Health Eligibility Requirements
 - Health Enrollment
 - myCalPERS
 - New Enrollment, Non-PERS and CalSTRS New Enrollment
 - Change Plan, Cancellation
 - Add a Dependent, Delete Dependent
 - Rescission

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.