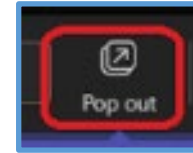




# FAQs- Tech Help

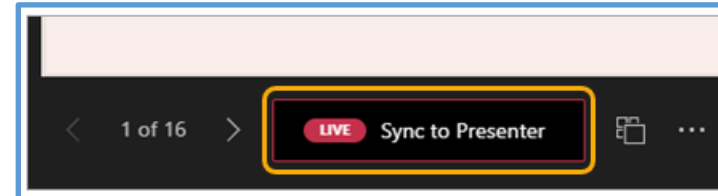
**Question:** I am unable to legibly view the PowerPoint slides due to the text being too small, what can I do to resolve the issue?

**Answer:** Use the **Pop out icon** (top left-hand side) on the meeting toolbar to give the content more space on your screen(s) for a better visual.



**Question:** What do I do if I do not see the current slide being presented on my screen?

**Answer:** You can use the navigation arrows (lower left-hand side) to move around to different slides. To get back to where the current presenter is, click **Sync to Presenter**.



**Question:** I am unable to view all slides and/or I cannot hear anyone present, what can I do to resolve the issues?

**Answer:** Please check on the status of your internet connection and Wi-Fi, the signal may not be strong enough to attend the forum. Also, double check on your device settings by selecting **More > Settings > Device Settings** from the dropdown on the meeting toolbar to ensure that your Speaker and Microphone are on the appropriate settings. If you continue to have issues, please sign out and sign back into the forum.

# FAQs- Tech Help



**Question:** The screen where the PowerPoint slides were displayed is now white or black. I cannot see the slides. What can I do to resolve this issue?

**Answer:** Your computer's bandwidth may not be able to process the capacity of the meeting's data. To optimize performance, you can clear your Teams cache on Chrome or Microsoft Edge. Follow the instructions below to clear your cache:

## Chrome:

1. Launch your Chrome browser.
2. Click on the 3 vertical dots on your browser toolbar and go to Settings.
3. On the left pane, select Privacy and Security.
4. In the privacy and security area, click on Clear browsing data.
5. In the Clear browsing data box, change the Time range dropdown to All time.

## Microsoft Edge:

Go to Settings > Privacy > Clear browsing data and select Ctrl+Shift+Del.

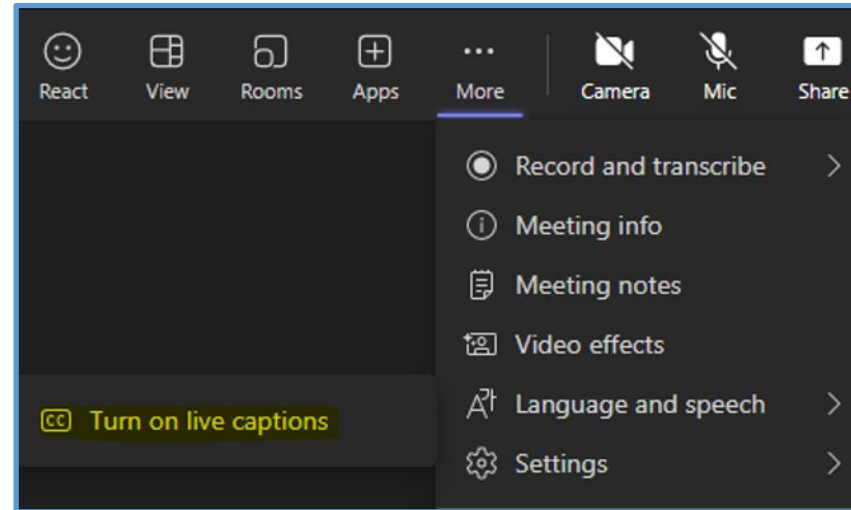
You can also type "edge://settings/clearbrowserdata" in your address bar to access this function.



# FAQs- Tech Help

**Question:** How do I turn on live captions on my device?

**Answer:** Go to your meeting toolbar at the top of the screen, select More, and scroll down to Language and Speech to turn on live captions.



**Question:** I am having trouble accessing the forum as the meeting link is not working for me, how can I attend the forum?

**Answer:** Please email [TSEF@sco.ca.gov](mailto:TSEF@sco.ca.gov) to receive a fresh link.

**For any other tech related questions, please drop them in the meeting's chat**



# Good Morning! Welcome to the Transaction Specialists' Educational Forum

AGENDA: Transaction Specialists' Educational Forum - JUNE 4, 2026		
TOPIC	AGENCY	PRESENTER
Welcome	SCO	Nastassja Johnson
<b>STATEWIDE BENEFITS ADMINISTRATION</b>		
Open Enrollment: Events, Dental, Benefits Summit	CalHR	Bobby Saetern
Employee Assistance Program	CalHR	Shannon Macgregor
Dental, Vision, FlexElect Appeal Reminder	CalHR	Susan Garrett
LTD/Life/Group Legal Reminders	CalHR	Ngoc Le
<b>STATEWIDE PROGRAM UPDATES</b>		
SEIU Open Enrollment	CLAS	Megan Vinson
myCalPERS Reports	CalPERS	Angelika George / Brionna Thompson
PPSD General Reminders and SCO Resources	SCO	Nastassja Johnson
Closing	Communications	Nastassja Johnson

**We will get started at 9:02 A.M. to let others join.**

**Thank you!**

**Please make sure your microphone is on mute.**





# Transaction Specialists' Educational Forum

Presented By: Nastassja Johnson

Contact: [TSEF@sco.ca.gov](mailto:TSEF@sco.ca.gov)

Office of State Controller Malia M. Cohen

June 4, 2026



# STATEWIDE BENEFITS ADMINISTRATION

# CalHR Transaction Specialists' Educational Forum Update

CalHR Benefits Division

June 4, 2026





# Statewide Benefits Program

Presenter: Marisa Garcia

Contact: [ppsdcsbenefits@sco.ca.gov](mailto:ppsdcsbenefits@sco.ca.gov)

## Updates

- New Benefits manager
  - Introduction
- Preparation for Open Enrollment
  - Working with CalHR
  - Updating toolkits and the SCO website
- Duplicate Accounts Receivable
  - December's pay period is complete
- Dependent Care Reimbursement enrollment
  - New permitting events for Return to Office mandate



JUNE 4, 2026

# CalHR Benefits Division Updates

*Benefits for a  
Life Well Lived.*

# About the Benefits Division

## OUR MISSION

We administer benefits through stakeholder collaboration that empowers strategic partners to attract, retain and enhance the wellbeing of the State of California workforce.

## OUR VISION

A thriving State of California workforce that is empowered by high-quality, comprehensive and competitive benefit options to lead healthy, secure and prosperous lives.





# Open Enrollment 2026 Updates

Presenter: Bobby Saetern

# Open Enrollment 2026

Presenter: Bobby Saetern

Email: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

## Open Enrollment (OE) Updates

- The 2026 OE period will take place September 14 – October 9, 2026
  - Eligible state employees and retirees will have the option to enroll, change or remove benefit options for health, dental, vision, FlexElect, COBRA, long-term disability and legal insurance.
  - All changes made during the 2026 OE period will be effective January 1, 2027.

# Open Enrollment 2026

Presenter: Bobby Saetern

Email: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

## Coming this Season

Find ways to expand your benefits knowledge through these resources:

- [Benefits Summits for HR Professionals](#)
- CalHR hosted in-person Benefits Fair
- Virtual OE events
- [OE Fair toolkit for HR Professionals](#)
- Benefits Fair request system through the CalHR Request Tracking System (RTS)
- Find general OE information [on the OE webpage.](#)
- Find general information tailored for HR Professionals [on the HR Professionals webpage.](#)
- Find general information on upcoming OE events [on the Benefits Fairs webpage.](#)

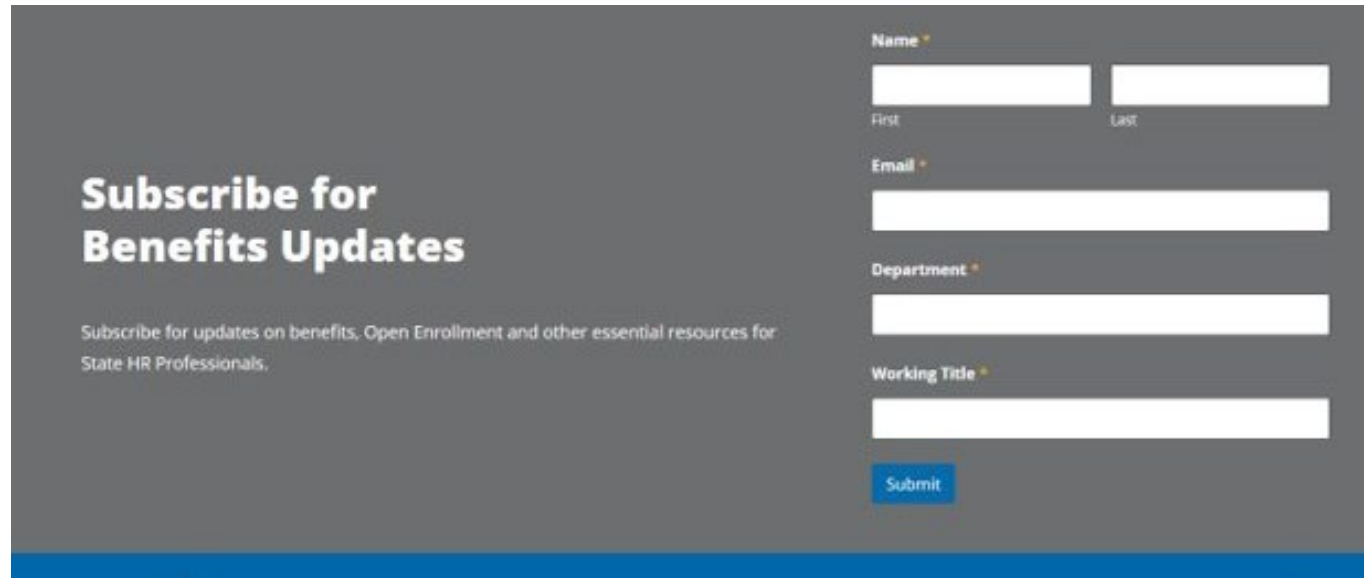
# Open Enrollment 2026

Presenter: Bobby Saetern

Email: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

## Reminder:

- To receive future updates, please subscribe to the Personnel Officers Subscription list by visiting the [HR Professionals webpage](#), scrolling down to the bottom, and submitting your information.



**Subscribe for Benefits Updates**

Subscribe for updates on benefits, Open Enrollment and other essential resources for State HR Professionals.

Name \*

First Last

Email \*

Department \*

Working Title \*

Submit

# Open Enrollment 2026

Presenter: Amber Neves

Email: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

## Benefits Summit

- CalHR Benefits Division is hosting a Benefits Summit for State HR Professionals. Summit participants will hear directly from Benefit Carriers including VSP, Metlife, ARAG, Standard, and Delta Dental on the fundamentals of administering state employee benefits.
- Registration is now open! [Benefits Summit webpage](#).

**Benefits Summit - Sacramento, CA - June 2, 2026 - Registration Closed**

**Benefits Summit - Sacramento, CA - July 23, 2026**

**Benefits Summit - Los Angeles, CA - August 17, 2026**

- For questions regarding Benefits Summit, please email [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)



# FlexElect - Dependent Care Reimbursement Account

Presenter: Bobby Saetern

# FlexElect – Dependent Care Reimbursement Account

Presenter: Bobby Saetern

Email: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

## Two New Permitting Events

- Governor Newsom released Executive Order [N-22-25](#), which will go into effect July 1, 2026.
- To support employees during this transition, the California Department of Human Resources (CalHR) and the State Controller's Office (SCO) created two new permitting events for the FlexElect Dependent Care Reimbursement Account (DCRA) Program.
- The new permitting events will let eligible state employees enroll in the DCRA or increase their current monthly DCRA contribution (if they are not already at the maximum). They can make these changes within 60 days of returning to a more frequent in-office schedule.
- **Important limitation:** Employees currently enrolled in the program may not cancel their enrollment or decrease their current contributions with the new permitting events unless they have another qualifying permitting event.

# FlexElect – Dependent Care Reimbursement Account

Presenter: Bobby Saetern

Email: [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)

## Two New Permitting Events

Permitting Event	Action Allowed	Permitting Event Code	Permitting Event Date	Effective Date of Action	Time Limit to File Document
Returning to an In-Office setting more frequently	May newly enroll in DCRA	03A	Date of event	Mandatory	60 days after date of event

Permitting Event	Action Allowed	Permitting Event Code	Permitting Event Date	Effective Date of Action	Time Limit to File Document
Returning to an In-Office setting more frequently	Increase DCRA contribution	28B	Date of event	Mandatory	60 days after date of event

More information can be found under the “Enrollment” and “Changes to Coverage” in the [FlexElect section of the Benefits Administration Manual](#)



# Employee Assistance Program

Presenter: Shannon MacGregor

# Employee Assistance Program: Spring Health

Presenter: Shannon MacGregor

Email: [EAP@calhr.ca.gov](mailto:EAP@calhr.ca.gov)

## **A New Chapter for the Statewide Employee Assistance Program Whole You, Your Employee Assistance Program Powered by Spring Health**

- Transition to Spring Health | July 1, 2026
  - What's Coming
    - Enhanced Access to Care
    - Holistic Wellbeing Support
    - Specialized Support for High-Impact Roles
    - Improved Digital Experience
    - Stronger Program Integration
  - What to Expect Next
  - For any questions, please email [EAP@calhr.ca.gov](mailto:EAP@calhr.ca.gov).





# Dental, Vision & FlexElect

Presenter: Susan Garrett

# Dental, Vision and FlexElect Appeal Reminders

Presenter: Susan Garrett

- Appeals requiring CalHR approval must be submitted through the Request Tracking System (RTS) as Customer Service and Support Appeals Requests.
  - Departmental personnel offices may reach out to the appropriate email inbox to request resources, including a recorded system demo, FAQs and a User Manual.
  - We no longer accept appeals sent to the program inboxes.
  - Do not submit duplicate appeals to the program inboxes.
  - Once an appeal is denied or closed due to non-response, please submit the corrected forms as a new appeal instead of responding to a closed inquiry.
- Appeal forms should be reviewed by the submitting department prior to uploading to RTS.
  - If handwritten, ensure the enrollment form is legible, complete and error free.
  - Encourage employees to utilize the Benefits Calculator to generate a digital Std.692 enrollment form.
  - The requested effective date on the appeal memo must be consistent with information on the form.

# Continued

Presenter: Susan Garrett

- Justification memos must include the reason an appeal is necessary, not just a cover memo stating, 'Please see attached appeal.'
- Incomplete/incorrect forms will be rejected and sent back to the department.
- An enrollment submitted outside of open enrollment or current-basis require a valid permitting event code.
- Once an appeal is approved, we cannot retract or cancel the appeal request.
- Mandatory deletions occur the first day of the month following the event.
  - Multiple dependent deletions
    - Each deletion must be submitted on a separate form with the correct effective date and permitting event code.
- [Link to RTS](#)



# Long-Term Disability Insurance

Presenter: Ngoc Le

# Long-Term Disability Insurance Reminders

Presenter: Ngoc Le

Email: [LTD@calhr.ca.gov](mailto:LTD@calhr.ca.gov)

## **Effective January 1, 2026:**

- Excluded employees can enroll and make changes to their account at any time of the year.
- Employees can enroll their spouse or domestic partner into Accident Insurance (AI) or Critical Insurance (CI) as a voluntary deduction.
- Children are automatically covered under CI.
  - Note: Employees enrolled prior to January 2025 who want to cover their children must log on to [Standard](#) and select “ Enroll Online” to enroll their child(ren).
- Health Maintenance Benefits have increased from \$50 to \$100 per enrollee in AI and CI.

Personnel Specialists can find forms and more information by visiting [The Standard State of California Personnel Officers](#) website.



# Group Legal Insurance

Presenter: Ngoc Le

# Group Legal Insurance Reminders

Presenter: Ngoc Le

Email: [GroupLegal@calhr.ca.gov](mailto:GroupLegal@calhr.ca.gov)

## **Effective January 1, 2026, rates increased:**

- Individual Plan:  
\$10.27 to \$10.61
  
- Family Plan:  
\$17.87 to \$18.47

The next Open Enrollment is **September 14 – October 9, 2026**. During this period, employees can enroll in ARAG online, [Learn More About ARAG Legal](#)

**Personnel Specialists can find forms and more information by visiting the [ARAG State of California Personnel Offices Only](#) website.**



# Basic Life and Supplemental Life Insurance

Presenter: Ngoc Le

# Basic Life and Supplemental Life Insurance Reminder:

Presenter: Ngoc Le

Email: [LifeInsurance@calhr.ca.gov](mailto:LifeInsurance@calhr.ca.gov)

- When an employee reaches age 70, their employer-paid Basic Life insurance premium and benefit amount is reduced by 50 percent.
- The reduction is effective January 1, after the year in which the employee reaches age 70 and is reflected in the employee's December pay period.
  - \$25,000 coverage is reduced to \$12,500 and the employer paid monthly premium is \$2.81.
  - \$50,000 coverage is reduced to \$25,000 and the employer paid monthly premium is \$5.13.

For any questions, Personnel Specialists can email [LifeInsurance@calhr.ca.gov](mailto:LifeInsurance@calhr.ca.gov).



CalHR Benefits Division Updates

# Thank you!

*Benefits for a  
Life Well Lived.*

# Resources – CalHR Benefits Webpages

- [Benefits Website](#)
- [State HR Professionals](#)
- [State HR Professionals Benefits Toolkit](#)
- [State HR Professionals OE Resources](#)
- [HR Manual](#)
- [Open Enrollment](#)
- [CalPERS Open Enrollment for Active Members](#)
- [Virtual Library](#)
- [Benefits Calculator](#)
- [State Employees](#)
- [Health](#)
- [Dental](#)
- [Vision](#)
- [Insurance Benefits](#)
- [Consolidated Benefits \(CoBen\)](#)
- [FlexElect Reimbursement Account](#)
- [Life Insurance for Excluded Employees](#)
- [Group Legal Services](#)
- [Group Long-Term Disability Insurance \(LTD\) – Excluded Employees Only](#)
- [Work Resources](#)
- [Engagement Resources](#)

## Resources – CalHR Benefits Contacts

- ACA Program [ACA.Policy@calhr.ca.gov](mailto:ACA.Policy@calhr.ca.gov)
- BAM Training [BenefitsInquiries@calhr.ca.gov](mailto:BenefitsInquiries@calhr.ca.gov)
- COBRA [COBRA@calhr.ca.gov](mailto:COBRA@calhr.ca.gov)
- Dental Program [dental@calhr.ca.gov](mailto:dental@calhr.ca.gov)
- Dependent Re-verification (DRV) Program [DRV@calhr.ca.gov](mailto:DRV@calhr.ca.gov)
- FlexElect Program [FlexElect@calhr.ca.gov](mailto:FlexElect@calhr.ca.gov)
- CoBen Program [CoBen@calhr.ca.gov](mailto:CoBen@calhr.ca.gov)
- Group Legal [Grouplegal@calhr.ca.gov](mailto:Grouplegal@calhr.ca.gov)
- Life Insurance [LifeInsurance@calhr.ca.gov](mailto:LifeInsurance@calhr.ca.gov)
- Long-Term Disability [LTD@calhr.ca.gov](mailto:LTD@calhr.ca.gov)
- Third Party Pre-Tax Parking Reimbursement Account [Pre-TaxParking@calhr.ca.gov](mailto:Pre-TaxParking@calhr.ca.gov)
- Vision/Dental Authorization Portal [VisionDental.Authorization@calhr.ca.gov](mailto:VisionDental.Authorization@calhr.ca.gov)
- Vision Program [vision@calhr.ca.gov](mailto:vision@calhr.ca.gov)
- Open Enrollment [OpenEnrollment@calhr.ca.gov](mailto:OpenEnrollment@calhr.ca.gov)
- General Questions [BenefitsInquiries@calhr.ca.gov](mailto:BenefitsInquiries@calhr.ca.gov)



# STATEWIDE PROGRAM UPDATES

# California Leave Accounting System (CLAS)

Presenter: Megan Vinson  
Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## CLAS Leave Benefit Election Changes

- What is it?
  - When an employee chooses to change from vacation and sick leave to annual leave or from annual leave to vacation and sick leave



# California Leave Accounting System (CLAS)

Presenter: Megan Vinson  
Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## Leave Benefit Election Changes: The Process

- Form CalHR 875 – Annual Leave-Sick/Vacation Leave Election Form



**CALHR** CALIFORNIA DEPARTMENT OF HUMAN RESOURCES  
**Annual Leave-Sick/Vacation Leave Election Form**  
California Department of Human Resources  
State of California

[Print Form](#) [Reset Form](#)

**1. EMPLOYEE INFORMATION**

Name \_\_\_\_\_ Unit Number \_\_\_\_\_ Work Phone Number \_\_\_\_\_  
Department/Location \_\_\_\_\_

**2. EMPLOYEES NOT COVERED BY SEIU BARGAINING UNITS**

I elect to participate in the following leave program effective the first day of the pay period this election is received by my personnel office.

Annual Leave  
 Sick Leave/Vacation

I understand I may change from Annual Leave to Sick Leave/Vacation or vice versa no more than once every 24 months.

**3. EMPLOYEES IN SEIU BARGAINING UNITS**

Annual Leave  
 Sick Leave/Vacation

I understand I may change from Annual Leave to Sick Leave/Vacation or vice versa annually during an open enrollment period during the month of April. The effective date of the election shall be the first day of the June pay period.

**4. APPROVAL**

I understand the accrual rate and usage provisions differ in the Annual Leave and Sick Leave/Vacation Programs. Further, if I am a current employee, I understand when I change from one program to another, all provisions of the program I enter apply upon the effective date. However, the annual leave, sick leave, or vacation (converted to annual leave) balances I have on the effective date of the new program will continue to be available to me to use. If I have a sick leave balance upon retirement, I may convert it to PERS service credit according to Government Code section 20963.

I make this election freely and voluntarily.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Note: New Employees: If this election form is not returned to the Personnel Office, it will be deemed an election for the sick leave/vacation program.

**5. FOR PERSONNEL OFFICE USE ONLY**

After processing election, place in employee's personnel file.

SSN: \_\_\_\_\_  
Date Election Received: \_\_\_\_\_ Received By: \_\_\_\_\_  
Effective Date: \_\_\_\_\_ Date Eligible to Change: \_\_\_\_\_

CalHR 875 Page 1 of 1 (rev 09/2021)

# California Leave Accounting System (CLAS)

Presenter: Megan Vinson  
Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## Leave Benefit Election Changes: The Process

- Timing of elections and effective dates
  - SEIU-Represented Employees
    - Must submit the form in April
    - Effective June 1st
  - Non-SEIU Represented Employees
    - Can submit the form at any time during the year, if they have been in their current election for at least 24 months
    - Effective the month the form is submitted



# California Leave Accounting System (CLAS)

Presenter: Megan Vinson  
Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## Leave Benefit Election Changes: The Process

- Timing of keying the change
  - Never key the change until after the monthly accruals are processed
    - Monthly Leave Processing occurs around the 8th business day of the month
    - For SEIU changes this month: Can key beginning June 11th
  - Key the change before the close of the effective month to avoid retroactivity
    - Use the CLAS Workbook to make retroactive corrections



# California Leave Accounting System (CLAS)

Presenter: Megan Vinson  
Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## CLAS Leave Benefit Election Changes

```
LASF039  TRNG          P18 - EMPLOYEE POSITION HISTORY INQUIRY
SSN: 000-03-6040          NAME: 00 SERVICE
```

PSN SEQ	POSITION NUMBER	BEGIN DATE	END DATE	CBID	TIME BASE
01	ZZZ-001-1379-075	10/01/16	99/99/99	R04	003/008

```
DC982411 ONLY PAGE
ACTN: B10  SSN: _____ LB: ___ LV PRD: ___ ___
PF4=REFRESH PF7=PREVIOUS PF8=NEXT PF12=PRINT CLEAR=MENU
```



# California Leave Accounting System (CLAS)

Presenter: Megan Vinson  
Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## CLAS Leave Benefit Election Changes

```
LASF001 TRNG          B10 - LEAVE BENEFIT INQUIRY

SSN: 000-03-6108          NAME: Y  SOUPE

SEL LEAVE BENEFIT          BALANCE          YTD          PSN
                           TOTAL          SEQ EMPLOYER

_ ANNUAL LEAVE             43.00
_ SICK LEAVE                32.00
_ PERSONAL HOLIDAY         0.00

DC982411 ONLY PAGE
ACTN: B20  SSN: _____ LB: ____ LV PRD: ____
PF4=REFRESH PF7=PREVIOUS PF8=NEXT PF12=PRINT CLEAR=MENU
```

# California Leave Accounting System (CLAS)

Presenter: Megan Vinson  
Contact: [CLAS@sco.ca.gov](mailto:CLAS@sco.ca.gov)

## CLAS Leave Benefit Election Changes - Resources

- **CLAS Workbook**, “Conditions Section”: [CLAS References](#)
  - Annual Leave to Vacation/Sick Leave
  - Vacation/Sick Leave to Annual Leave
  - Retroactive Corrections After Changing from VA to AL or AL to VA
- Leave Benefit Election Change eLearning: [Leave Benefit Election Change 3-25](#)
- Leave Letter 26-003: [Leave Accounting Letters 2026](#)



# myCalPERS Technical Support

Employer Account Management Division (EAMD)

Brionna Thompson

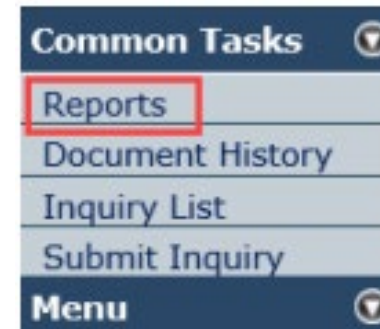
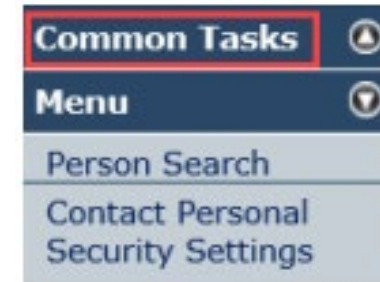
# System Enhancements

- ❑ **Highlighted Enhancement:**
  - myCalPERS Reports



# myCalPERS Reports

- ❑ **Cognos to myCalPERS:**
  - Reports have now transitioned from Cognos to myCalPERS Reports.
  
- ❑ **Benefits:**
  - Improved performance
  - Accessibility
  - Navigation ease



# myCalPERS Reports

## □ Home Tab:

- **Frequent Reports**
  - Displays the last 5 reports ran most often.
- **Recent Activity**
  - Displays the last 10 reports run by the user.

The screenshot shows the myCalPERS Reports Home Tab interface. At the top, there is a dark blue header with the myCalPERS logo and the word "Reports". To the right of the header, it says "Welcome" followed by a greyed-out user name. Below the header is a navigation bar with three tabs: "Home" (which is active), "Run Report", and "Generated Reports".

The main content area is divided into two sections:

- Recent Activity**: A table with columns for Title, Format, Status, and Submit Date. It lists three reports: "Business Partner myCalPERS User Access Report" (Download (.xls), Running, May 26, 2026 11:42 AM), "Retirement Appointment Reconciliation Report" (Online, Submitted, May 26, 2026 11:41 AM), and "Business Partner Info Report" (Download (.xls), Generated, May 26, 2026 11:39 AM). A "Refresh" button is located below the table.
- Frequent Reports**: A list of reports with a "Title" column. The reports listed are "Retirement Appointment Reconciliation Report", "Business Partner myCalPERS User Access Report", "Business Partner Info Report", and "Participant Appointment Details Report".

# myCalPERS Reports

- ❑ **Format:** Run option selected upon initial generated report.
- ❑ **Status:** Availability of generated report.

The screenshot shows the myCalPERS Reports interface. At the top, there is a navigation bar with 'Home', 'Run Report', and 'Generated Reports'. Below this is a 'Recent Activity' section with a table. The table has four columns: 'Title', 'Format', 'Status', and 'Submit Date'. The 'Format' and 'Status' columns are highlighted with red boxes. Below the table, there are three rows of activity:

Title	Format	Status	Submit Date
	Download (.xls)	Running	
	Save Online (.html)	Generated	
	Download (.csv)	Completed	

- **Run Options:**

- Offers options to run your report.

Run Option:  Download (.xls)  Download (.csv)  Online (.html)  Save Online (.html)

Save Notes:

# myCalPERS Reports

## ❑ Information & Disclosures

- Select the 'i' icon to view descriptions and disclosures.

The screenshot shows the myCalPERS Reports interface. At the top, there is a dark blue header with the myCalPERS logo, the word "Reports", and a "Welcome" message followed by a greyed-out user name. Below the header is a navigation bar with three tabs: "Home", "Run Report", and "Generated Reports". The "Home" tab is currently selected. The main content area is divided into two sections. On the left, there is a section titled "Recent Activity" with a red square highlighting an information icon (i) next to the title. Below this title is a table with four columns: "Title", "Format", "Status", and "Submit Date". The "Format" column also has a small information icon (i) below the header. On the right, there is a dark blue box titled "Recent Activity" with the text "Displays the last 10 reports run by the user."

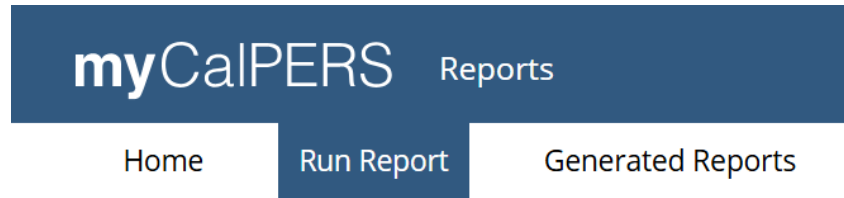
Title	Format	Status	Submit Date
-------	--------	--------	-------------

# myCalPERS Reports

## ☐ Run Report:

- **Search by Report name**

- Either type or scroll for your identified report and run report.



Search by Report Name:

Participant Retirement Planning Report

## Participant Retirement Planning Report ⓘ

The purpose of the report is to provide employers with retirement planning information based on members' age group and member category.

MCP Release: 12.7.1  
Report Version: 12.3.6  
SPS Number: SPS2763

### Business Partner CalPERS ID \*

<input checked="" type="checkbox"/> Agency Name - 1262943822
<input type="checkbox"/> Division Name - 1262943822

[Select All](#) [Deselect All](#)

Next

# myCalPERS Reports

## Generated Reports:

- Reports generated by user, system, or all can be found in this tab.
  - **User:** View reports that were generated with the "Save" or "Download" run option.
  - **System:** Based on a scheduled background process that is associated with your business functions.
  - **All:** View both user and system reports

myCalPERS Reports Welcome [User Name]

Home Run Report **Generated Reports**

Generated by: User (dropdown menu with options: User, System, All) Search: [input field]

Title	Format	Status	Last Submit Date	Run History
Reported Member-Detail Report	Download (.xls)	<a href="#">Generated</a>	May 20, 2026 11:40 AM	<a href="#">View History</a>
Contributions Error Summary Report	Download (.csv)	<a href="#">Generated</a>	May 20, 2026 11:39 AM	<a href="#">View History</a>
Contribution Summary for a Fiscal Year Report	Save Online (.html)	<a href="#">Generated</a>	May 20, 2026 11:39 AM	<a href="#">View History</a>

Showing 1 to 3 of 3 entries

# myCalPERS Reports

## ☐ myCalPERS Reports Resources:

- [myCalPERS Reports Student Guide](#)
- [myCalPERS Reports Catalog](#)
- [myCalPERS Reports Class](#)

## ☐ Additional Resources:

- [myCalPERS System Privileges for Business Partner Roles](#)
- [myCalPERS Primary Contact Types & Documents](#)
- [myCalPERS System Access Administration](#)
- [Employer Technical Toolkit](#)
- [System Enhancements](#)

## myCalPERS Student Guides & Resources

These resources will help you navigate and process transactions through myCalPERS. The student guides below will assist you with system functionality related to your reporting responsibilities. Check back often for the current student guide versions.

We recommend taking [Business Rules](#) before myCalPERS classes to build a strong foundation for a comprehensive learning experience. Attend myCalPERS instructor-led in-person or virtual classes for hands-on learning, where you can complete transactions in a training environment and walk through student guide scenarios. Log in to your [myCalPERS](#) [business partner](#) account and select **Education** to register.

If you don't have myCalPERS access, contact your agency's [system access administrator](#).

Our educators can visit your agency to provide tailored education and training at no cost. Email your training request to our Employer Education team at [CalPERS\\_Employer\\_Communications@calpers.ca.gov](mailto:CalPERS_Employer_Communications@calpers.ca.gov).

+ New Users

+ Retirement

+ Financials

+ Health

+ Payroll

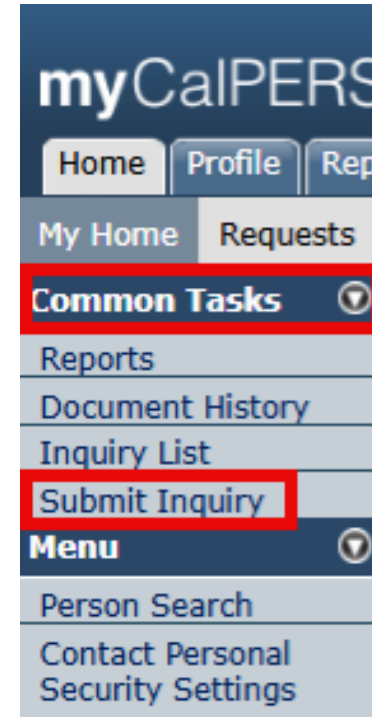
- Reports

Name	Audience	Description
myCalPERS Reports (PDF)	<ul style="list-style-type: none"><li>• Non-Central State Agency</li><li>• Public Agency</li><li>• School</li><li>• State/CSU</li></ul>	Run reports in myCalPERS.

# myCalPERS Technical Support

## ☐ Contact Us:

- **Submit an inquiry** in myCalPERS
  - Select 'Submit Inquiry' in the Common Tasks left-side navigation menu
- **Email:** [Employer\\_Technical\\_Support@calpers.ca.gov](mailto:Employer_Technical_Support@calpers.ca.gov)
- **Phone: 888 CalPERS** (or 888-225-7377)
  - Monday - Friday, 8:00 a.m. to 5:00 p.m.





# PPSD General Reminders

When you reconcile payroll, check that these *details* are correct:

- Withholdings and deductions
- Employer taxes
- Hours worked, including overtime, vacation time, sick days, etc.
- Wages and salaries

Make sure the numbers recorded are reasonable. Look at past payrolls to see if current pay period is similar. If there is a large difference, learn the cause. Then, make sure each transaction you entered is correct.

Resource: Payroll Procedures Manual (PPM) [Section M](#)



# PPSD General Reminders

- Utilize ConnectHR to submit documents or upload data
- Please **do not** email forms that include employees' social security number (SSN) to the ConnectHR Team. All attachments containing SSNs are automatically deleted.
- Check [Weekly Processing Dates](#) before utilizing the [Escalation Email](#) process
- Update [California Personnel Office Directory \(CPOD\)](#)
- All HR Offices must promptly address all email messages that come through their Departmental Universal Email established with SCO (e.g., Ding Notices, ConnectHR Direct Deposit Feature – Approval Required, etc.)
- The [PPSD Register](#) – PPSD's Bi-Monthly Newsletter
- Check out our recommended Human Resources [subscriptions](#)
- HR offices calling the [Statewide Customer Contact Center](#) (916) 372-7200 must listen to the prompts carefully and patiently to select the appropriate program area who may best assist with their inquiry.
- Share this information with your Human Resources Team!

# Helpful Resources



## State Controller's Office:

- [SCO Website](#)
- [Library and Resources](#) - Communication. Manuals/Guides/Toolkits. Forms. FAQs.
- [Personnel Action Manual \(PAM\)](#)
- [Payroll Procedures Manual \(PPM\)](#)
- [Statewide Customer Contact Center \(SCCC\)](#)

## CalHR:

- [CalHR Website](#)
- [Contact CalHR](#)
- [Human Resources Professionals](#)
- [Benefits Website](#)

## CalPERS:

- [CalPERS Website](#)
- [Circular Letters](#)
- [my|CalPERS](#)
- [State Reference Guide \(PDF\)](#)
- [CalPERS Email Subscriptions](#)

► ***When in doubt, ask your Supervisor or Manager for guidance!***

# SCO Contacts



## Web Resources:

- HR Personnel | [Webpage](#)
- State Employees | [Webpage](#)

## Contacts:

- Affordable Care Act (ACA) | [Contact Email](#)
- Cal Employee Connect (CEC) | [Help and Feedback](#)
- ConnectHR | [Help and Feedback](#)
- California Leave Accounting System (CLAS) | [Contact Email](#)
- Civil Service Escalation Email (HR Supervisors and Managers) | [Contact Email](#)
- Decentralized Security Administration & ViewDirect Access | [Contact Email](#)
- PPSD HR suggestions (All HR Staff) | [Contact Email](#)
- Management Information Retrieval System (MIRS) | [Contact Email](#)



# Transaction Specialists' Educational Forum

Presented By: Nastassja Johnson

Contact: [TSEF@sco.ca.gov](mailto:TSEF@sco.ca.gov)

Office of State Controller Malia M. Cohen

June 4, 2026