Date: September 13, 2011

To: Human Resources Officers
   Benefits Officers

From: Evelyn Nazario
   Assistant Vice Chancellor
   Human Resources Management

Subject: CalPERS Pension System Resumption (PSR) Implementation Update regarding Final Campus Acceptance Testing and Activities for the September 19, 2011, Go-Live

Overview

Audience: Human Resources Officers, Benefits Officers, and/or campus designee(s) responsible for benefits administration.

Action Item: Required Campus Acceptance Testing (CAT) activities and completion of data clean-up for the September 19, 2011, implementation of the CalPERS Pension System Resumption (PSR), formerly CalPERS Automated Communication Exchange System (ACES).

Affected Employees: N/A

Summary

This technical letter provides updated information regarding Campus Acceptance Testing (CAT) activities, data clean-up requirements and the mandated freeze of benefits processing in Oracle/PeopleSoft in preparation for the PSR system go-live on September 19, 2011. Campus designees responsible for health benefits administration and/or the testing of Oracle/PeopleSoft CSU PSR Interface processes should read the remainder of this technical letter.

Update: Implementation Dates and Campus Acceptance Testing (CAT) Activities

As previously communicated, the new CalPERS myCalPERS/PSR system will launch on September 19, 2011. To ensure a successful transition for CalPERS and the CSU, the PSR Project Team (comprised of Common Management Systems (CMS) and Human Resources Management (HRM)) continues to work closely with the CalPERS Public Employees Readiness Team (PERT) to prepare campuses for the September 19, 2011, go-live.

At present, all campuses, including the Chancellor’s Office, have completed the initial CAT phase which has allowed them to test the connection points between their campus and CalPERS, and familiarize themselves with the CSU PSR processes.

A second phase of testing with CalPERS has been arranged, and is referred to as “CAT Phase II.” While this phase of CAT is not required, the CSU PSR Project Team strongly encourages all campuses to participate as it will present the opportunity for campuses to test with CalPERS with a broader data set and become more comfortable with the Oracle/PeopleSoft (PS) PSR Interface processes before go-live.
CAT Phase II was initiated on August 29, 2011, and will continue through the PSR go-live date of September 19, 2011. Campus Benefits Officers and Human Resources Officers received preliminary information regarding CAT Phase II activities in an electronic communication released by the CSU PSR Project Team on August 24, 2011. Additional information regarding CAT Phase II activities is discussed in the following section.

**Seed Data Load Testing, CAT Phase II Activities and CAT Teleconferences**

Campuses were provided with the PSR Project information on August 24, 2011, and campus-specific activities are as follows:

1) Preparation for Seed Data Load testing;
2) Seed Data Load testing /CAT Phase II;
3) Freeze of Benefits data entry in campus Production Environment;
4) Loading of production Seed Data file; and
5) Distribution of FTP production account information to campus Technical Contacts.

Due to secure measures in place at the CSU, the CalPERS CAT Phase II testing must occur in the original test environment provided to the CSU PSR Project Team at the onset of testing.

To support CAT Phase II, in addition to the regularly scheduled bi-monthly HUG Benefits Subcommittee teleconferences (held the first and third Wednesdays of each month from 2 p.m. to 3 p.m., through December 2011), the CSU PSR Project Team began hosting CAT teleconference calls beginning on Thursday, August 25, 2011, and these calls will be held on each subsequent Tuesday and Thursday through the PSR go-live week. The intent of these calls is to review campus activities, the PSR schedule and provide a forum to address campus questions related to the PSR Implementation including CAT Phase II.

The CAT Phase II teleconferences will be held at 9:30 a.m. – 10:00 a.m., on the following days:

<table>
<thead>
<tr>
<th>Tuesdays</th>
<th>08/30/11</th>
<th>09/06/11</th>
<th>09/13/11</th>
<th>09/20/11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursdays</td>
<td>09/01/11</td>
<td>09/08/11</td>
<td>09/15/11</td>
<td>09/22/11</td>
</tr>
<tr>
<td>PSR Go-Live</td>
<td>09/19/11</td>
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</tbody>
</table>

The dial-in information is as follows:

Teleconference Number: 866-285-7780, Access Code: 6948903

Should CSU be apprised of any changes from CalPERS that significantly impact the CSU PSR Interface processes, campus activities and/or PSR schedule as noted above, CSU stakeholders will be advised immediately. It is imperative that campuses follow the assigned schedule outlined above. Failure to do so may result in adverse impact to the campus.

If campuses experience issues or delays associated with CAT Phase II or any aspect of the CSU PSR Interface processes, they should contact Tammy Hines at tammy.hines@calstate.edu.

**Data Clean-Up Activities by August 30, 2011 Deadline**

A list of required fields for PSR was supplied to campuses during the HUG Benefits Subcommittee teleconferences. Oracle/PeopleSoft must be updated with the following data elements, as applicable to the employee(s):

- Dependent Social Security Number
- Dependent Address, if different from employee
- Marital Status Date(s)
- Domestic Partnership Date(s)

*Data clean-up of required data elements should now be completed in anticipation of the PSR go-live.*
As a reminder, required employee data not contained in the CalPERS file or Oracle/PeopleSoft must be solicited from the employee(s). For those employees who are unwilling to provide this information, the campus must terminate benefits for affected dependents.

Some campuses have reported circumstances where employees’ dependents are ineligible to obtain a Social Security Number (SSN). In these cases, according to CalPERS, the campus should treat such enrollments as exceptions and notify CalPERS at (888) 225-7377. CalPERS’ internal staff will have the capacity to enroll a spouse, or domestic partner and/or underage children that have no Social Security Number or federal tax identification (ID) number.

Campuses that experience issues with the collection of these required data elements should contact HRM.

The Decommission of ACES and the impact to CSU
As previously announced, ACES was decommissioned on August 30, 2011, in preparation for the PSR go-live. Current ACES users will have “view only” access until October 31, 2011, and ACES will be completely deactivated after October 31, 2011.

For the CSU, this means that as of September 19, 2011, all campuses, including the Chancellor’s Office, will only have the capability to transmit health enrollments to CalPERS via the CSU PSR Interface or in the cases of exceptions, manually via phone. As a result, health enrollments can no longer be entered in ACES online or transmitted to CalPERS via the CSU ACES interface. Oracle/PeopleSoft is the system of record for CSU benefits. Therefore; when PSR is implemented, campuses will not have the capability to manually enter such health enrollments online via my|CalPERS (PSR Online). Benefits data must be captured in Oracle/PeopleSoft to ensure the integrity of the data between Oracle/PeopleSoft and the new CalPERS PSR system.

Campuses will be granted online access to my|CalPERS upon go-live, but only in a “view-only” capacity. Additional information regarding this access can be found in a later section of this technical letter.

Oracle/PeopleSoft Benefits Processing Freeze During Conversion to PSR
CalPERS released Circular Letter 600-053-11 on August 24, 2011, that outlined readiness activities occurring at CalPERS in preparation for this new PSR system go-live, including the system conversion period of September 2, 2011, through September 18, 2011. In order to obtain the maximum benefit possible of the PSR Implementation for the CSU, ensure data integrity, position CSU to address any changes advised by CalPERS due to system defects identified during campus testing, and to reduce the level of risk associated with potential data conversion issues, the CSU placed a freeze on benefits processing in Oracle/PeopleSoft. All campuses, including the Chancellor’s Office, were instructed to freeze the processing of medical benefits transactions from August 31, 2011, through September 18, 2011. Note: Failure to comply with the Oracle/PeopleSoft medical benefits processing freeze may result in negative impacts to the campus and the entire CSU.

PSR Go-Live Test on September 19, 2011
On September 19, 2011, each campus, including the Chancellor’s Office, has been instructed to:

- **Key one benefits transaction into Oracle/PeopleSoft and send to CalPERS via PSR.**

  If results are **good**, the campus can continue processing medical benefits using the CSU PSR Interface. However, if there are **issues**, the campus must contact the CSU PSR Project Team for further instruction.

Updated PSR Implementation Timeline
Please note the following implementation activities as of August 25, through the September 19, 2011, (information and timelines are tentative and are subject to change):
### Dates: August 2011

<table>
<thead>
<tr>
<th>Assigned To</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus</td>
<td>08/24 - 8/26/11: Preparation for Seed Data Load Testing; CAT Phase II</td>
</tr>
<tr>
<td>Campus</td>
<td>08/22 – 8/30/11: Benefits processing continues as usual</td>
</tr>
<tr>
<td>Campus/PSR Project Team</td>
<td>08/29/11 – 09/18/11: Seed Data Load Testing/CAT Phase II occurs</td>
</tr>
<tr>
<td>Campus</td>
<td>8/30/11: Data clean-up activities are completed for PSR go-live</td>
</tr>
<tr>
<td>Information Only</td>
<td>08/30/11: ACES IS FROZEN</td>
</tr>
<tr>
<td>Campus</td>
<td>08/30/11 – 09/18/11: Medical benefits are frozen (Oracle/PeopleSoft)</td>
</tr>
</tbody>
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### Dates: September 2011

<table>
<thead>
<tr>
<th>Assigned To</th>
<th>Activities</th>
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</thead>
<tbody>
<tr>
<td>Campus</td>
<td>CAT Phase II continues through Go-Live</td>
</tr>
<tr>
<td>Campus</td>
<td>Medical benefits are frozen (Oracle/PeopleSoft)</td>
</tr>
<tr>
<td>Campus</td>
<td>Production Seed Data file is loaded</td>
</tr>
<tr>
<td>PSR Project Team</td>
<td>FTP Production account information is distributed to campus Technical Contacts</td>
</tr>
<tr>
<td>Campus/PSR Project Team</td>
<td>CAT Phase II continues through Go-Live</td>
</tr>
<tr>
<td>Information Only</td>
<td>09/19/11: PSR Go-Live</td>
</tr>
<tr>
<td>Campus</td>
<td>09/19/11: One benefits transaction is keyed into PS and sent via PSR</td>
</tr>
<tr>
<td>Campus</td>
<td>09/19/11: If the single benefits transaction is successful, campus resumes benefits processing in Oracle/PeopleSoft</td>
</tr>
</tbody>
</table>

### Dates: October 2011

<table>
<thead>
<tr>
<th>Assigned To</th>
<th>Activities</th>
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</thead>
<tbody>
<tr>
<td>Campus</td>
<td>10/10/11: Open Enrollment Period begins</td>
</tr>
<tr>
<td></td>
<td>PSR Teleconferences continue</td>
</tr>
</tbody>
</table>

### Authorized Online Access in myCalPERS (PSR)

In **HR/Benefits 2011-05, Supplement #1**, it was clarified that the campus System Access Administrator (SAA) and designated Business Contact(s) would be limited to “view only” access for certain components (Health Enrollment and Retireement Enrollment).

Each designated SAA is scheduled to receive his/her CalPERS-assigned User ID and password prior to September 19, 2011, for the purposes of logging on and registering Business Contacts on the myCalPERS website. In summary, **the SAA is authorized to grant the following accesses only**:

- **Health Enrollment (View Only)**
- **Retirement Enrollment (View Only)**

### MyCalPERS Training

The training CalPERS is providing is for those public agencies that report health benefit transactions, payroll, retirement, and service credit directly to CalPERS. In dialog with CalPERS, it has been determined that training on the myCalPERS system components is not needed for CSU as the CSU PSR interface will process health benefits transactions and the State Controller’s Office will report all payroll, retirement, and service credit to CalPERS on behalf of CSU, as is the case today. As background information on the myCalPERS system, HRM recommends that each SAA take the CalPERS computer-based training modules myCalPERS Overview and Demographics for Employers (CBT-1) and Profile Maintenance for Employers (CBT-02), available by registering on the CalPERS website:

As stated earlier, the only components applicable to CSU are:

- Health Enrollment (View Only)
- Retirement enrollment (View Only)

**Deferral of Retiree Dental**

CalPERS initially communicated that CSU could begin transmitting the initial Retiree Dental enrollments via PSR at go-live. Please be advised that CalPERS has decided to delay this component until further notice. Therefore, campuses should continue to submit Retiree Dental initial enrollments to CalPERS via the Retiree Dental Enrollment form (STD. 692), utilizing the process that is currently in place.

**Common Management Systems (CMS) Processing Instructions**

This technical letter has impact to CMS Baseline. The new CSU PSR Interface processes for: CalPERS health benefits and the initial COBRA enrollment(s) for employees and their dependents were delivered in CMS Baseline on August 18, 2011, (v8.9) and August 19, 2011, (v9.0). The PSR project will be made available in all campus’ production environments, including the Chancellor’s Office, in early September.

**General Information**

Questions regarding this technical letter may be directed to Human Resources Management at (562) 951-4411. This document is also available on the Human Resources Management Web site at: [http://www.calstate.edu/HRAdm/memos.shtml](http://www.calstate.edu/HRAdm/memos.shtml).

EN/mh/th