CALSTRS®

EMPLOYER TRAINING SERVICES

Employer Success Criteria Checklist

During Soft Launch, Report Sources are required to complete a series of Success Criteria in the dedicated testing environment to demonstrate readiness for the new Secure Employer Website. Success Criteria checklists, one for mandatory and one for strongly recommended success criteria, are included below for Report Sources to track and complete the necessary readiness activities. Report Sources will contact their Employer Services Representative and provide the data indicated in the checklist so CalSTRS can validate each Report Sources' readiness progress .

Mandatory Success Criteria Checklist

✔	Success Criteria	Readiness Activity	Data to Provide CalSTRS
☐	1. Register System Administrator	Register at least one user with the Administrator Contact role.	• Organization Code • Administrator Contact first and last name
☐	2. Register Payroll User	Register at least one user with the Payroll Contact role.	• Organization Code • Payroll Contact first and last name
☐	3. Submit Enrollments	Submit at least ten 'Enrollment' transactions using file submission or online entry.	• Organization Code • CID or Person Name who was on the enrollment transaction
☐	4. Upload DB Contribution File	Upload and transmit a Defined Benefit Contribution File that represents a normal monthly volume of transactions that must contain transaction types 'Regular' and 'Adjustment.'	• Organization Code • Payroll Summary ID
☐	5. Upload CB Contribution File	If Applicable: Upload and transmit a Cash Balance Contribution File that represents a normal monthly volume of transactions and must contain transaction types 'Regular' and 'Adjustment.'	• Organization Code • Payroll Summary ID

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Strongly Recommended Success Criteria Checklist

✔	Success Criteria	Readiness Activity	Data to Provide CalSTRS
☐	**6. Merge Payroll Summaries**	Merge two Payroll Summaries in the system.	• Organization Code • At least two Payroll Summary IDs
☐	**7. Submit A/R transactions**	Submit Account Receivable transactions using either the Contribution File - AR or online entry.	• Organization Code • Payroll Summary ID
☐	**8. Upload Employment File**	Upload and transmit an Employment File and download the Employment Response File.	• Organization Code • Employment Summary ID
☐	**9. Submit Match File**	Submit an Employee Match File and retrieve the Match Response File as a secure message.	• Organization Code • File Header (optional)
☐	**10. Send Secure Message ****	Use the self-service functionality to send a Secure Message to your Employer Services Representative.	• Organization Code • Name of message recipient
☐	**11. Upload Document ****	Use the self-service Functionality to upload a document.	• Organization Code • Name of uploaded document

** This Success Criterion can only be completed after Maintenance Release 2 – April 2020.

See the *Employer Readiness Environment Testing Guide* in the Employer Toolkit for more information regarding completing the Success Criteria, submitting data to CalSTRS, and validating readiness for the new Secure Employer Website.