

Employer-Related Form Crosswalk

This job aid provides an overview of information employers currently submit to CalSTRS on a form and how employers will submit that information to CalSTRS in the new Secure Employer Website (SEW). Additionally, this job aid provides references to applicable computer-based trainings (CBT) in the Employer Learning Center (ELC) as well as relevant job aids available on the Employer Support Portal (ESP).

Questions? Contact PSEmployerreadiness@calstrs.com.

Revised: 01/06/2025

Form Crosswalk

Form	Current Process	Process in the new system
<i>Application for CalSTRS Activation (ES1796)</i>	Form is submitted via mail, fax or secure message.	Form can be uploaded to the organization’s ECM or submitted via mail, fax or secure message. See the Electronic Content Management CBT in ELC for detailed instructions on how to upload the document.
<i>Cash Balance Benefit Program (CB1584)</i>	Form is submitted via mail, fax or secure message.	Form can be uploaded to the member’s ECM or submitted via mail, fax or secure message. See the Electronic Content Management CBT in ELC for detailed instructions on how to upload the document.
<i>Cash Balance Benefit Program Election (CB533)</i>	Form is submitted via mail, fax or secure message.	Form can be uploaded to the member’s ECM or submitted via mail, fax or secure message. See the Electronic Content Management CBT in ELC for detailed instructions on how to upload the document.

Form	Current Process	Process in the new system
<i>Cash Balance Contribution Rates Notice (CB589)</i>	Form is submitted via mail, fax or secure message.	<p>Form will be retired at go live. Employers establish their contribution rates on the CB Contribution Rate Maintenance screen. CalSTRS will transfer established contribution rates into the new system. Contribution rates are effective until updated by the employer.</p> <p>See the Cash Balance Employer Organization Tasks CBT in the ELC as well as the Cash Balance Contribution Rates job aid at employersupport.calstrs.com</p>
<i>Certification by Principal (DS0056)</i>	Form is submitted via mail, fax or secure message.	<p>Form will be retired at go live. Disability certification will be submitted through the new SEW.</p> <p>See the Employee Change Request- Employer Certification for Disability and Processing Pending Work Items CBTs in ELC and the Processing Pending Work Items and Employee Change Request- Certification for Disability job aid at employersupport.calstrs.com for more information about how to submit termination and sick leave data.</p>
<i>Employer Org Change/Merge Notification (ES1795)</i>	Form is submitted via mail, fax or secure message.	<p>Form can be uploaded to the organization's ECM or submitted via mail, fax or secure message.</p> <p>See the Electronic Content Management CBT in ELC for detailed instructions on how to upload the document.</p>
<i>Employment and Benefits Information (DS0318)</i>	Form is submitted via mail, fax or secure message.	<p>Form will be retired at go live. Employment and benefit information for disability certification will be submitted through the new SEW.</p> <p>See the Employee Change Request- Employer Certification for Disability and Processing Pending Work Items CBTs in ELC and the Processing Pending Work Items and Employee Change Request- Certification for Disability job aid at employersupport.calstrs.com for more information about how to submit termination and sick leave data.</p>

Form	Current Process	Process in the new system
<p><i>Employment Termination and Sick Leave Correction (SR0559)</i></p>	<p>Form is submitted via mail or fax.</p>	<p>Form will be retired at go live. Termination and unused sick leave data will be submitted through the new SEW. Additionally, one-year final compensation requests will be submitted through the employee change request process in SEW.</p> <p>See the Submitting Termination and Unused Sick Leave Data and Processing Pending Work Items CBTs in ELC and the Processing Pending Work Items job aid at employersupport.calstrs.com for more information about how to submit termination and sick leave data.</p> <p>See the Employee Change Request- One-Year Final Compensation CBT in ELC as well as the Employee Change Request- One Year Final Compensation job aid at employersupport.calstrs.com for more information about requesting one-year final compensation on behalf of a member.</p>
<p><i>Express Benefit Report (SR0544E)</i></p>	<p>Form is submitted via mail or fax.</p>	<p>Form will be retired at go live. Termination and unused sick leave data will be submitted through the new SEW. Additionally, one-year final compensation requests will be submitted through the employee change request process in SEW.</p> <p>See the Submitting Termination and Unused Sick Leave Data and Processing Pending Work Items CBTs in ELC and the Processing Pending Work Items job aid at employersupport.calstrs.com for more information about how to submit termination and sick leave data.</p> <p>See the Employee Change Request- One-Year Final Compensation CBT in ELC as well as the Employee Change Request- One Year Final Compensation job aid at employersupport.calstrs.com for more information about requesting one-year final compensation on behalf of a member.</p>

Form	Current Process	Process in the new system
<i>Permissive Election & Acknowledgement Form</i> (ES0350)	Form is submitted via mail, fax or secure message.	Form can be uploaded to the member's ECM or submitted via mail, fax or secure message. See the Electronic Content Management CBT in ELC for detailed instructions on how to upload the document.
<i>Reduced Workload Program</i> (ES1161)	Form is submitted via mail, fax or secure message.	Form will be retired at go live. Reduced Workload Program enrollment requests will be completed by submitting an employee change request in SEW. See the Employee Change Request- Reduced Workload Program CBT in ELC as well as the Employee Change Request- Reduced Workload Program job aid at employersupport.calstrs.com for more information about this process.
<i>Retirement Incentive Program- Employer Certification of Member Eligibility</i> (MS187)	Form is submitted via mail, fax or secure message.	Forms will be submitted through the program enrollment request process in SEW. See the Program Enrollment Requests Overview and Submission CBT in ELC as well as the Program Enrollment Requests job aid at employersupport.calstrs.com for more information about this process.
<i>Retirement Incentive Program- Certification of Employer Participation</i> (MS1169-1)	Form is submitted via mail, fax or secure message.	Forms will be submitted through the program enrollment request process in SEW. See the Program Enrollment Requests Overview and Submission CBT in ELC as well as the Program Enrollment Requests job aid at employersupport.calstrs.com for more information about this process.
<i>Retirement System Election</i> (ES0372)	Form is submitted via mail, fax or secure message.	Form can be uploaded to the member's ECM or submitted via mail, fax or secure message. See the Electronic Content Management CBT in ELC for detailed instructions on how to upload the document.

Form	Current Process	Process in the new system
<p><i>Separation from Service Requirement Exemption (SR1897)</i></p>	<p>Form is submitted via mail, fax or secure message.</p>	<p>Form will be retired at go live. Separation from Service Requirement Exemption requests will be submitted through the employee change request process in SEW.</p> <p>See the Employee Change Request- SR Earnings Limit Exemption CBT in ELC as well as the Employee Change Request- SR Earnings Limit Exemption job aid at employersupport.calstrs.com for more information about this process.</p>