

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). Forms that will be submitted electronically will be uploaded to the applicable Electronic Content Management (ECM) file in the new SEW. Additionally, this job aid provides references to applicable computer-based trainings (CBT) in the Employer Learning Center (ELC) at training.calstrs.com as well as relevant job aids available on the Employer Support Portal (ESP) at employersupport.calstrs.com.

Questions? Contact Employerhelp@CalSTRS.com.

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Form Crosswalk

Form	Current Process	Process in the new system
Application for CalSTRS Activation (ES1796)	Form is submitted via mail, fax or secure	Form can be uploaded to the organization's ECM file.
Activation (EST190)	message.	Applicable training materials:
		Electronic Content Management CBT
Cash Balance Benefit Program	Form is submitted via	Form can be uploaded to the member's ECM file or submitted via mail,
(CB1584)	mail, fax or secure	fax or secure message.
	message.	
		Applicable training materials:
		Electronic Content Management CBT
Cash Balance Benefit Program	Form is submitted via	Form can be uploaded to the member's ECM file or submitted via mail,
Election (CB533)	mail, fax or secure	fax or secure message.
	message.	
		Applicable training materials:
		Electronic Content Management CBT

Form	Current Process	Process in the new system
Cash Balance Contribution Rates Notice (CB589)	Form is submitted via mail, fax or secure message.	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.
		Applicable training materials:
		 Cash Balance Employer Organization Tasks CBT <u>Cash Balance Contribution Rates</u> job aid
Survivor Benefits Employment Termination & Sick Leave Report (SB0554)	Form is submitted via mail, fax or secure message.	Form will be retired at go live. Employer certification for death before retirement will be submitted through the new SEW.
		Applicable training materials:
		Employee Change Request – Employer Certification for Death Before Retirement CBT
		Employee Change Request – Certification for Death Before Retirement job aid
		Processing Pending Work Items CBT
		Processing Pending Work Items job aid
Certification by Principal (DS0056)	Form is submitted via mail, fax or secure message.	Form will be retired at go live. Disability certification will be submitted through the new SEW.
		Applicable training materials:
		Employee Change Request- Employer Certification for Disability CBT
		Employee Change Request - Certification for Disability job aid
		Processing Pending Work Items CBT
		Processing Pending Work Items job aid

Form	Current Process	Process in the new system
Employer Org Change/Merge	Form is submitted via	Form can be uploaded to the organization's ECM file.
Notification (ES1795)	mail, fax or secure	
	message.	Applicable training materials:
		Electronic Content Management CBT
Employment and Benefits	Form is submitted via	Form will be retired at go live. Employment and benefit information for
Information (DS0318)	mail, fax or secure message.	disability certification will be submitted through the new SEW.
		Applicable training materials:
		Employee Change Request- Employer Certification for Disability CBT
		Employee Change Request- Certification for Disability job aid
		Processing Pending Work Items CBT
		Processing Pending Work Items job aid
Employment Termination and Sick Leave Correction (SR0559)	Form is submitted via mail or fax.	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. Reduction in school funds transactions will be submitted through an online transaction.
		Applicable training materials:
		Submitting Termination and Unused Sick Leave Data CBT
		Submitting Termination and Sick Leave Data job aid
		Employee Change Request-One-Year Final Compensation CBT
		Employee Change Request- One Year Final Compensation job aid
		Reduction in School Funds job aid
		Processing Pending Work Items CBT
		Processing Pending Work Items job aid

Form	Current Process	Process in the new system
DB and CB Request for Adjustments (ES 756)	Form is sent to employers to request corrections. Employers notify CalSTRS when the corrections have been made.	Form is being retired at Go Live. Employer Reporting Requests will be received and processed by employers in the new SEW. Applicable training materials: Employer Reporting Requests CBT Employer Reporting Requests job aid Processing Pending Work Items CBT Processing Pending Work Items job aid
Express Benefit Report (SR0544E)	Form is submitted via mail or fax.	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. Reduction in school funds transactions will be submitted through an online transaction. Applicable training materials: Submitting Termination and Unused Sick Leave Data CBT Submitting Termination and Sick Leave Data job aid Employee Change Request-One-Year Final Compensation CBT Employee Change Request- One Year Final Compensation job aid Reduction in School Funds job aid Processing Pending Work Items CBT Processing Pending Work Items job aid
Permissive Election & Acknowledgement Form (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. Applicable training materials: • Electronic Content Management CBT

Form	Current Process	Process in the new system
Reduced Workload Program (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.
		Applicable training materials:
		 Employee Change Request- Reduced Workload Program CBT Employee Change Request- Reduced Workload Program job aid
Retirement Incentive Program- Employer Certification of Member Eligibility (MS187)	Form is submitted via mail, fax or secure message.	Forms will be submitted through the program enrollment request process in SEW.
	J	 Applicable training materials: Program Enrollment Requests Overview and Submission CBT Program Enrollment Requests job aid
Retirement Incentive Program- Certification of Employer Participation (MS1169-	Form is submitted via mail, fax or secure message.	Forms will be submitted through the program enrollment request process in SEW.
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Retirement System Election (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.
		Applicable training materials:Electronic Content Management CBT

Current Process	Process in the new system
Form is submitted via	Form will be retired at go live. Separation from Service Requirement
mail, fax or secure	Exemption requests will be submitted through the employee change
message.	request process in SEW.
	Applicable training materials:
	Employee Change Request- SR Earnings Limit Exemption CBT
	Employee Change Request- SR Earnings Limit Exemption job aid
	Form is submitted via mail, fax or secure