

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.

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Mandatory Success Criteria

Success Criteria 1:

Register at least one user with the Administrator Contact role.

Data to provide CalSTRS:

- Organization Code
- Administrator Contact first and last name

Success Criteria 2:

Register at least one user with the Payroll Contact role.

Data to provide CalSTRS:

- Organization Code
- Payroll Contact first and last name

Success Criteria 3:

Submit at least ten 'Enrollment' transactions using file submission or online entry.

Data to provide CalSTRS:

- Organization Code
- CID or Person Name who was on the enrollment transaction

Success Criteria 4:

Upload and transmit a Defined Benefit Contribution File that represents a normal monthly volume of transactions that must contain transaction types 'Regular' and 'Adjustment.'

Data to provide CalSTRS:

- Organization Code
- Payroll Summary ID

Success Criteria 5:

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.'

Strongly Recommended Success Criteria

Success Criteria 6:

Merge two Payroll Summaries in the system

Data to provide CalSTRS:

- Organization Code
- At least two Payroll Summary IDs

Success Criteria 7:

Submit Account Receivable transactions using either the Contribution File – AR or online entry.

Data to provide CalSTRS:

- Organization Code
- Payroll Summary ID

Success Criteria 8:

Upload and transmit and Employment File and download the Employment Response File.

Data to provide CalSTRS:

- Organization Code
- Employment Summary ID

Success Criteria 9:

Submit an Employee Match File and retrieve the Match Response File as a secure message.

Data to provide CalSTRS:

- Organization Code
- File Header (optional)

Success Criteria 10:

Use the self-service functionality to send a Secure message to your Employer Services Representative.

Data to provide CalSTRS:

- Organization Code
- Name of message recipient

Success Criteria 11:

Use the self-service functionality to upload a document.

Data to provide CalSTRS:

- Organization Code
- Name of uploaded document