

# Employer Reporting Requests

This job aid provides the step-by-step process for employers to view and process Employer Reporting Requests including verifying suppressed warnings, providing supporting documentation, and processing payroll detail adjustments.

Revised: 01/22/2021

## Verify Suppressed Warnings

### Step 1:

From the **Dashboard**, scroll down to the **Pending Work Items** panel. Select the **New Request** link for **Employer Reporting Requests**.

The screenshot shows the CALSTRS Dashboard interface. At the top, there is a header with the CALSTRS logo, the text 'Dashboard', and user information for '62555 COMMUNITY COLLEGE DISTRICT 555 TRN1 - 2.0.561.1 - Green Region'. Below the header, there are several navigation tiles: 'Upload Files', 'Online Reports', and 'Contribution Account Portal (CAP)'. A 'New Announcements' section follows, containing a 'System Outage' notice and 'New Publications'. The 'Pending Work Items' section is a table with the following data:

Request Type	New Request	Progress Request	Total Outstanding Request
Employer Certification for Disability		1	1
Employer Certification for Death Before Retirement	66	1	67
Service Purchase Requests		2	2
Employer Reporting Requests	3		3
Termination Requests for CB SR			13
Termination Requests for DB SR	14		14
Unused Sick Leave Requests for SR	10		10

The number '3' in the 'New Request' column for 'Employer Reporting Requests' is circled in red. The bottom right corner of the dashboard shows 'Font Size: 12 14 16'.

### Step 2:

The **Employer Reporting Request Search** screen displays. The **Employer Reporting Requests** automatically display in the **Search Results** panel. Locate the **Verify Suppressed Warnings Employer Reporting Request** to work and select the associated **Employer Reporting Request ID** link.

ESS Employer Reporting Request Search

62555 COMMUNITY COLLEGE DISTRICT 555  
TRN1 - 2.0.561.1 - Green Region

Powered by Neospin®  
Welcome Contact, Teresa

[ 2 Records met the search criteria. ]

**Criteria**

Client ID:  Reporting Source:  Include Associated Organization:

Status: All Action Required: All Program Area:

Submitted Date (From):  Submitted Date (To):

Search Reset Store Search

**Search Results**

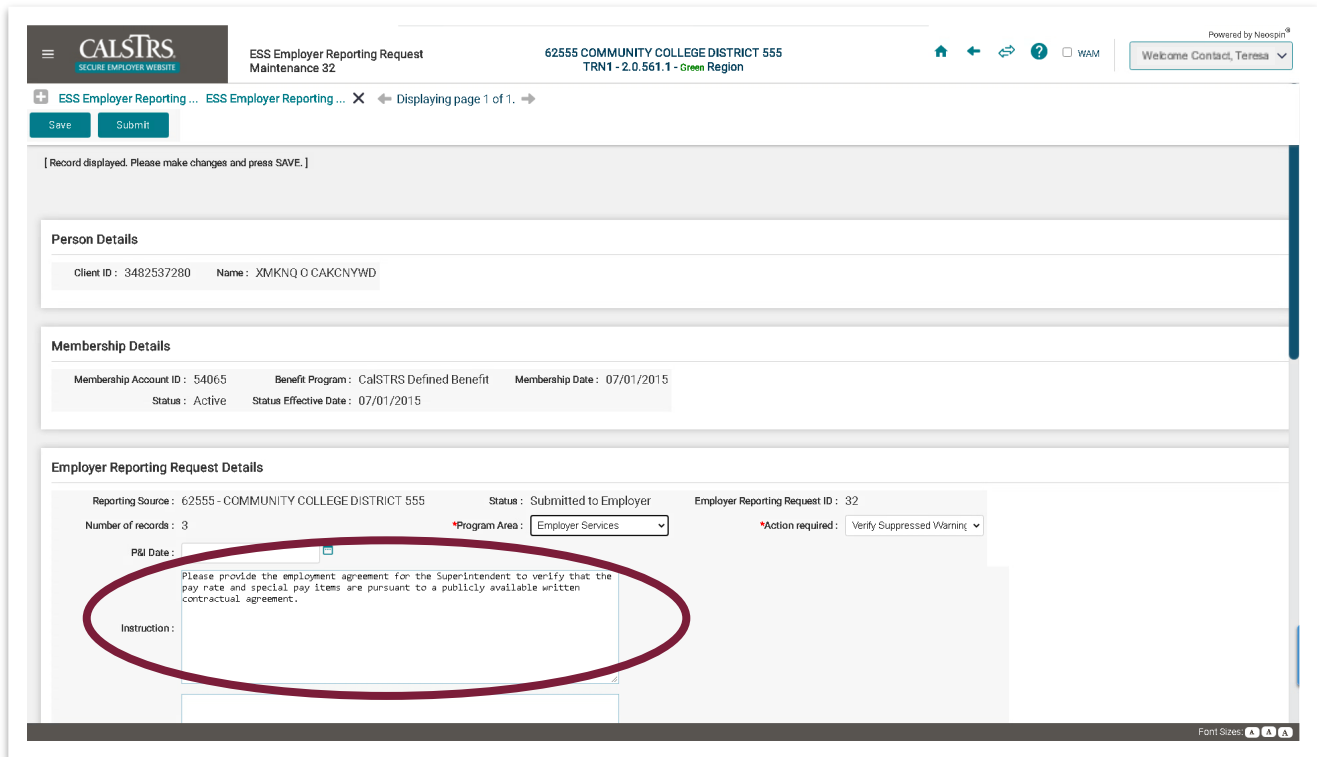
Open Export To Excel

<input type="checkbox"/>	Employer Reporting Request ID	Client ID	Number of Reported Lines	Reporting Source	Status	Action Required	Program Area	Instructions	Aging
<input type="checkbox"/>	<a href="#">25 1540192915</a>		3	62555 - COMMUNITY COLLEGE DISTRICT 555	Submitted to CalSTRS	Create Adjustment	Employer Services	Please provide employment agreement f...	25
<input type="checkbox"/>	<a href="#">22 348 37280</a>		3	62555 - COMMUNITY COLLEGE DISTRICT 555	Submitted to Employer	Verify Suppressed Warnings	Employer Services	Please provide the employment agreeme...	26

Font Sizes:

### Step 3:

The **Employer Reporting Request Maintenance** screen displays. In the **Employer Reporting Request Details** panel, review the **Instruction** field for detailed notes about information to provide or explain.



The screenshot shows the CalSTRS Employer Reporting Request Maintenance interface. The top navigation bar includes the CalSTRS logo, the page title "ESS Employer Reporting Request Maintenance 32", the client information "62555 COMMUNITY COLLEGE DISTRICT 555 TRN1 - 2.0.561.1 - Green Region", and a user profile "Welcome Contact, Teresa". Below the navigation bar, there are tabs for "ESS Employer Reporting ..." and "ESS Employer Reporting ...". The main content area is divided into three sections: "Person Details", "Membership Details", and "Employer Reporting Request Details". The "Employer Reporting Request Details" section is highlighted with a red oval and contains the following information:

- Reporting Source: 62555 - COMMUNITY COLLEGE DISTRICT 555
- Status: Submitted to Employer
- Employer Reporting Request ID: 32
- Number of records: 3
- Program Area: Employer Services
- Action required: Verify Suppressed Warning
- PII Date: [Redacted]
- Instruction: Please provide the employment agreement for the Superintendent to verify that the pay rate and special pay items are pursuant to a publicly available written contractual agreement.

### Step 4:

Scroll down to the **Transactions** panel to review the contribution transactions associated to the **Employer Reporting Request**. Click the **Subsystem Reference ID** link.

The screenshot displays the 'Transactions' section of the 'ESS Employer Reporting Request' interface. The page header includes the CALSTRS logo, the user's name 'Welcome Contact, Teresa', and the system title '62555 COMMUNITY COLLEGE DISTRICT 555 TRN1 - 2.0.561.1 - Green Region'. Below the header, there are 'Save' and 'Submit' buttons. The main content area is titled 'Transactions' and contains a table with the following columns: Organization, Transaction Date, Effective Date, Member Code, Assignment Code, Pay Code, Pay Rate, Pay Period Begin Date, Pay Period End Date, Transaction Type, Earnings, Pre-Tax EE Contribution, Post-Tax EE Contribution, Interest, Service Credit, Subsystem, Subsystem Reference ID, Time Base, Base Hours, and Earnings Type. Three transactions are listed, with the first one having a 'Subsystem Reference ID' of 1605 circled in red. Below the table is an 'Attachments' section with a 'Select File' button, a 'Clear' button, and an 'Upload' button.

Organization	Transaction Date	Effective Date	Member Code	Assignment Code	Pay Code	Pay Rate	Pay Period Begin Date	Pay Period End Date	Transaction Type	Earnings	Pre-Tax EE Contribution	Post-Tax EE Contribution	Interest	Service Credit	Subsystem	Subsystem Reference ID	Time Base	Base Hours	Earnings Type
62555- COMMUNITY COLLEGE DISTRICT 555	<a href="#">12/03/2020</a>	01/08/2020	Member	Contract		0	12/01/2019	12/31/2019	Regular	0	1020.5	0	0	0	Employer Reporting	1605	CCD (Non-Temporary/Non-Adjunct)	0	Certificate/Li
62555- COMMUNITY COLLEGE DISTRICT 555	<a href="#">12/03/2020</a>	01/08/2020	Member	Contract		0	12/01/2019	12/31/2019	Regular	0	1020.5	0	0	0	Employer Reporting	1604	CCD (Non-Temporary/Non-Adjunct)	0	Longevity
62555- COMMUNITY COLLEGE DISTRICT 555	<a href="#">12/03/2020</a>	01/08/2020	Member	Contract		0	12/01/2019	12/31/2019	Regular	0	510.25	0	0	0	Employer Reporting	1606	CCD (Non-Temporary/Non-Adjunct)	0	Certificate/Li

### Step 5:

The **Employer Payroll Detail Maintenance** screen displays. Scroll down to the **Validation Information** panel. From here, review the **Warning(s)** that were suppressed when the contribution transaction was submitted to CalSTRS. If needed, refer to your internal employer payroll reporting system to research the contribution data that was reported. In addition, you may need to provide documentation or provide a response to CalSTRS.

The screenshot shows the 'Employer Payroll Detail Maintenance' interface for '62555 COMMUNITY COLLEGE DISTRICT 555'. The page includes a 'Contributions' table, a table of 'Other Payroll Details With Same SSN', and a 'Validation Information' section. The 'Validation Information' section is circled in red and contains the following data:

Message ID	Display Message	Severity	Instructions
30301313	Special Pay appears excessive for fiscal year.	Warning	View

### Step 6:

Once information is gathered, respond to the **Employer Reporting Request**. Click the **Employer Reporting Request Maintenance** link in the **Breadcrumb Navigation** bar.

**Contributions**

Contribution Type	Contribution Rate	Reported Amount	Calculated Amount
Pre Tax EE Contribution :	10.205000%	\$510.25	\$510.25
Post Tax EE Contribution :	0.000000%	\$0.00	\$0.00
Employer Contribution :	17.100000%	\$855.00	\$855.00
<b>Total :</b>		<b>\$1,365.25</b>	<b>\$1,365.25</b>

**Other Payroll Details With Same SSN**

Open

<input type="checkbox"/>	Reporting Unit	Status	Transaction Type	Pay Period Start Date	Pay Period End Date	Earnings	EE Pre Tax	EE Post Tax	ER Contributions
<input type="checkbox"/>	62555	Processed	<a href="#">Regular</a>	12/01/2019	12/31/2019	\$10,000.00	\$1,020.50	\$0.00	\$1,710.00
<input type="checkbox"/>	62555	Processed	<a href="#">Regular</a>	12/01/2019	12/31/2019	\$10,000.00	\$1,020.50	\$0.00	\$1,710.00
<input type="checkbox"/>	62555	Processed	<a href="#">Regular</a>	12/01/2019	12/31/2019	\$20,239.65	\$2,065.46	\$0.00	\$3,460.98

**Validation Information**

<input type="checkbox"/>	Message ID	Display Message	Severity	Instructions
<input type="checkbox"/>	30301313	Special Pay appears excessive for fiscal year.	Warning	<a href="#">View</a>

**Audit Information**

Created : Ching, Barbara 12/03/2020 04:20 PM Modified : [BATCH\_16\_61835] 12/03/2020 04:29 PM

### Step 7:

The **Employer Reporting Request Maintenance** screen displays. Enter a response in the **Response** field.

Number of records: 3    \*Program Area: Employer Services    \*Action required: Verify Suppressed Warning

P&I Date:

Instruction:  
Please provide the employment agreement for the Superintendent to verify that the pay rate and special pay items are pursuant to a publicly available written contractual agreement.

Response:  
Superintendent's pay rate and special pay amounts are contained within the attached employment agreement.

Submitted Date/Time: 12/03/2020 04:31 PM    Submitted by: bchiing

Transactions

Create Summary

Organization	Transaction Date	Effective Date	Member Code	Assignment Code	Pay Code	Pay Rate	Pay Period Begin Date	Pay Period End Date	Transaction Type	Earnings	Pre-Tax EE Contribution	Post-Tax EE Contribution	Interest	Service Credit	Subsystem	Subsystem Reference ID	Time Base	Base Hours	Earnings Type
62555-COMMUNITY COLLEGE DISTRICT 555	12/03/2020	01/08/2020	Member	Contract		0	12/01/2019	12/31/2019	Regular	0	1020.5	0	0	0	Employer Reporting	1604	CCD (Non-Temporary/Non-Adjunct)	0	Certificate/Lic

Font Sizes:

### Step 8:

Scroll down to the **Attachments** panel to upload the employment agreement. Click the **Select File** button.

The screenshot displays the CALSTRS ESS Employer Reporting Request interface. At the top, the header includes the CALSTRS logo, the text "ESS Employer Reporting Request Maintenance 32", and the organization name "62555 COMMUNITY COLLEGE DISTRICT 555 TRN1 - 2.0.561.1 - Green Region". A user login bar on the right shows "Welcome Contact, Teresa".

Below the header, there are navigation tabs for "ESS Employer Reporting ..." and "ESS Employer Reporting ...". A "Save" button and a "Submit" button are visible. The main content area contains a table with three rows of employee data:

<input type="checkbox"/>	62555- COMMUNITY COLLEGE DISTRICT 555	12/03/2020	01/08/2020	Member	Contract	0	12/01/2019	12/31/2019	Regular	0	1020.5	0	0	0	Employer Reporting	1604	CCD (Non- Temporary/Non- Adjunct)	0	Certificate/Lic
<input type="checkbox"/>	62555- COMMUNITY COLLEGE DISTRICT 555	12/03/2020	01/08/2020	Member	Contract	0	12/01/2019	12/31/2019	Regular	0	1020.5	0	0	0	Employer Reporting	1606	CCD (Non- Temporary/Non- Adjunct)	0	Longevity
<input type="checkbox"/>	62555- COMMUNITY COLLEGE DISTRICT 555	12/03/2020	01/08/2020	Member	Contract	0	12/01/2019	12/31/2019	Regular	0	510.25	0	0	0	Employer Reporting	1605	CCD (Non- Temporary/Non- Adjunct)	0	Certificate/Lic

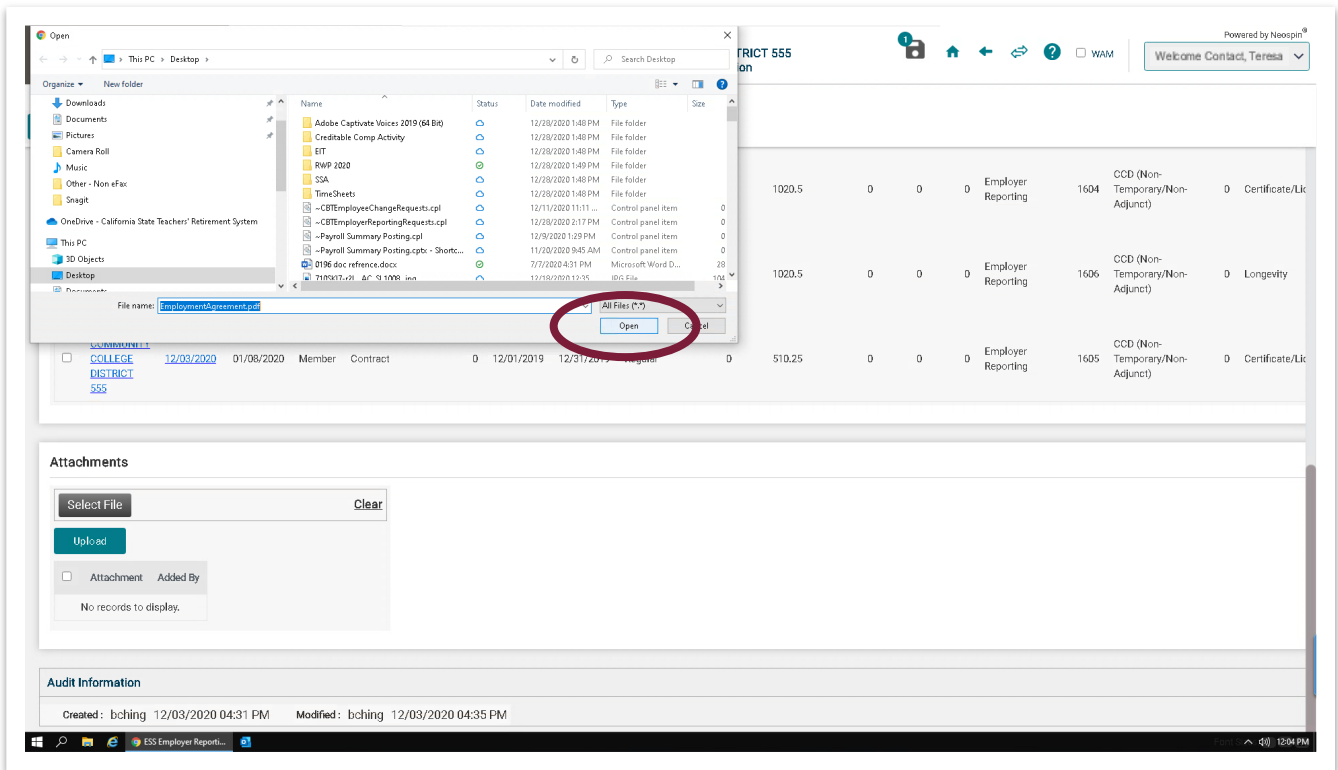
Below the table is the "Attachments" section, which includes a "Select File" button (circled in red) and a "Clear" button. Below these buttons is a table with columns for "Attachment" and "Added By", which currently shows "No records to display".

At the bottom of the page, there is an "Audit Information" section showing "Created: bching 12/03/2020 04:31 PM" and "Modified: bching 12/03/2020 04:35 PM".



**Step 9:**

The **Choose File to Upload** window displays. Select the file to upload and click the **Open** button.



### Step 10:

The selected file displays with a green checkmark. Click the **Upload** button.

The screenshot displays the CALSTRS ESS Employer Reporting Request interface. The page title is "ESS Employer Reporting Request Maintenance 32" for "62555 COMMUNITY COLLEGE DISTRICT 555 TRN1 - 2.0.561.1 - Green Region". The user is logged in as "Welcome Contact, Teresa".

The main content area shows a table of employee records. The table has columns for selection, employee ID, date, status, contract type, and various numerical fields. Three records are visible, all with a green checkmark in the selection column.

The Attachments section is located below the table. It features a "Select File" button and a "Clear" button. A file named "EmploymentAgreement.pdf" (198508 bytes) is listed with a green checkmark. The "Upload" button is circled in red.

<input type="checkbox"/>	62555- COMMUNITY COLLEGE DISTRICT 555	12/03/2020	01/08/2020	Member	Contract	0	12/01/2019	12/31/2019	Regular	0	1020.5	0	0	0	Employer Reporting	1604	CCD (Non-Temporary/Non-Adjunct)	0	Certificate/Lic
<input type="checkbox"/>	62555- COMMUNITY COLLEGE DISTRICT 555	12/03/2020	01/08/2020	Member	Contract	0	12/01/2019	12/31/2019	Regular	0	1020.5	0	0	0	Employer Reporting	1606	CCD (Non-Temporary/Non-Adjunct)	0	Longevity
<input type="checkbox"/>	62555- COMMUNITY COLLEGE DISTRICT 555	12/03/2020	01/08/2020	Member	Contract	0	12/01/2019	12/31/2019	Regular	0	510.25	0	0	0	Employer Reporting	1605	CCD (Non-Temporary/Non-Adjunct)	0	Certificate/Lic

### Step 11:

The uploaded file displays in the grid in the **Attachments** panel. Once the response is entered and the file is uploaded, scroll to the top of the **Employer Reporting Request Maintenance** screen and click the **Save** button.

The screenshot shows the 'ESS Employer Reporting Request Maintenance 32' interface. At the top, there's a header with 'CALSTRS SECURE EMPLOYER WEBSITE', '62555 COMMUNITY COLLEGE DISTRICT 555 TRN1 - 2.0.561.1 - Green Region', and a user profile 'Welcome Contact, Teresa'. Below the header, there are tabs for 'Employer Reporting ...' and 'ESS Employer Reporting ...'. A 'Save' button is circled in red. The main area contains a table with columns for various fields like 'EMPLOYEE ID', 'HIRE DATE', 'EMPLOYEE STATUS', 'EMPLOYEE TYPE', 'REGULAR', 'HOURS', 'SALARY', 'EMPLOYER REPORTING', 'EMPLOYEE CLASSIFICATION', and 'CERTIFICATE/LIC'. Below the table is an 'Attachments' section with a 'Select File' button and a 'Clear' button. A file 'EmploymentAgreement.pdf (198508 bytes)' is shown with a PDF icon and a green checkmark. An 'Upload' button is below the file. At the bottom, there's a table with columns 'Attachment' and 'Added By', showing the file 'EmploymentAgreement.pdf' added by 'serickson@calstrs.com'. The footer includes 'Font Sizes: A A A'.

### Step 12:

The **Employer Reporting Request** is successfully saved. A message displays at the top of the screen stating: “[All changes successfully saved.]” Then, click the **Submit** button. The **Employer Reporting Request** is submitted to CalSTRS for review and processing. The **Status** field is updated to **Submitted to CalSTRS**.

The screenshot displays the CalSTRS web interface for an Employer Reporting Request. At the top, the CalSTRS logo and navigation icons are visible. The page title is "ESS Employer Reporting Request Maintenance 32" for "62555 COMMUNITY COLLEGE DISTRICT 555 TRN1 - 2.0.561.1 - Green Region". A message at the top states "[All changes successfully saved.]". The "Submit" button is highlighted with a red circle. Below the message, the form is divided into sections: "Person Details" (Client ID: 3482537280, Name: XMKNQ O CAKCNYWD), "Membership Details" (Membership Account ID: 54065, Benefit Program: CalSTRS Defined Benefit, Membership Date: 07/01/2015, Status: Active, Status Effective Date: 07/01/2015), and "Employer Reporting Request Details". In the "Employer Reporting Request Details" section, the "Status" field is highlighted with a red circle and contains the text "Submitted to CalSTRS". Other fields include "Reporting Source: 62555 - COMMUNITY COLLEGE DISTRICT 555", "Number of records: 3", "Program Area: Employer Services", and "Action required: Verify Suppressed Warning". An instruction box contains the text: "Please provide the employment agreement for the Superintendent to verify that the pay rate and special pay items are pursuant to a publicly available written contractual agreement." The footer shows "Font Sizes: A A A".

### Provide Supporting Documentation

#### Step 1:

From the **Dashboard** scroll down to the **Pending Work Items** panel. Select the **New Request** link for **Employer Reporting Requests**.

The screenshot shows the CALSTRS Secure Employer Website dashboard. At the top, there is a navigation bar with the CALSTRS logo, the text "Dashboard", and user information for "57004 SCHOOL DISTRICT 004 TRN1 - 2.0.561.1 - Green Region". A welcome message for "Teresa" is visible in the top right.

The main content area is titled "Secure Employer Website" and includes several navigation tiles: "Employment", "Employee Profile", "Employer Profile", "Upload Files", "Online Reports", and "Contribution Account Portal (CAP)".

Below these tiles is a "New Announcements" section with information about system outages and publications.

The "Pending Work Items" section contains a table with the following data:

Request Type	New Request	Progress Request	Total Outstanding Request
Employer Reporting Requests	1		1

The number "1" in the "New Request" column for "Employer Reporting Requests" is circled in red in the original image.

### Step 2:

The **Employer Reporting Request Search** screen displays. The **Employer Reporting Requests** automatically display in the **Search Results** panel. Locate the **Provide Supporting Documentation Employer Reporting Request** to work and select the associated **Employer Reporting Request ID** link.

The screenshot shows the 'ESS Employer Reporting Request Search' interface. At the top, there is a header with the CALSTRS logo and navigation icons. The main content area is divided into two sections: 'Criteria' and 'Search Results'.

**Criteria Section:**

- Client ID: [Text Input]
- Reporting Source: [Text Input]
- Include Associated Organization:
- Status: All (Dropdown)
- Action Required: All (Dropdown)
- Program Area: [Dropdown]
- Submitted Date (From): [Text Input]
- Submitted Date (To): [Text Input]
- Buttons: Search, Reset, Store Search

**Search Results Section:**

Buttons: Open, Export To Excel

Employer Reporting Request ID	Client ID	Number of Reported Lines	Reporting Source	Status	Action Required	Program Area	Instructions	Aging
<a href="#">26</a>	13260110	1	57004 - SCHOOL DISTRICT 004	Submitted to Employer	Provide Supporting Documentation	Employer Services	Please provide the employment agreeme...	26

Font Size: [Icons]

### Step 3:

The **Employer Reporting Request Maintenance** screen displays. In the **Employer Reporting Request Details** panel, review the **Instruction** field for detailed notes from CalSTRS requesting documentation to be provided.

The screenshot shows the CalSTRS Employer Reporting Request Maintenance interface. The top navigation bar includes the CalSTRS logo, the page title 'ESS Employer Reporting Request Maintenance 36', the user's location '57004 SCHOOL DISTRICT 004 TRN1 - 2.0.561.1 - Green Region', and a user profile 'Welcome Contact, Teresa'. Below the navigation bar, there are tabs for 'ESS Employer Reporting ...' and 'ESS Employer Reporting ...', and a status indicator 'Displaying page 1 of 1'. The main content area is divided into several sections: 'Person Details' (Client ID: 1526673410, Name: CAXYN CLONE CBXQ), 'Membership Details' (Membership Account ID: 181019, Benefit Program: CalSTRS Defined Benefit, Membership Date: 09/06/1984, Status: Active, Status Effective Date: 01/04/1982), and 'Employer Reporting Request Details'. The 'Employer Reporting Request Details' section is highlighted with a red oval and contains the following information: Reporting Source: 57004-SCHOOL DISTRICT 004, Status: Submitted to Employer, Employer Reporting Request ID: 36, Number of records: 1, Program Area: Employer Services, Action required: Provide Supporting Docum. The 'Instruction' field is highlighted with a red oval and contains the text: 'Please provide the employment agreements for the Superintendent to verify that the pay rate increase is pursuant to a publicly available written contractual agreement.'

### Step 4:

Scroll down to the **Transactions** panel to review the contribution transactions associated to the Employer Reporting Request.

Submitted Date/Time: 12/04/2020 01:38 PM      Submitted by: bching

**Transactions**

Create Summary

Organization	Transaction Date	Effective Date	Member Code	Assignment Code	Pay Code	Pay Rate	Pay Period Begin Date	Pay Period End Date	Transaction Type	Earnings	Pre-Tax EE Contribution	Post-Tax EE Contribution	Interest	Service Credit	Subsystem	Subsystem Reference ID	Time Base	Base Hours	Earnings Type	Service Type
SCHOOL DISTRICT 004	12/04/2020	02/07/2020	Member	Contract	12 Monthly Payments	260000	01/01/2020	01/31/2020	Regular	0	2220.83	0	0	0.006944	Employer Reporting	1617	0	0	Salary	

Font Size: [A] [A] [A]



### Step 5:

Enter a response in the **Response** field.

The screenshot displays the 'ESS Employer Reporting Request' interface. At the top, the CALSTRS logo and 'EMPLOYER TRAINING SERVICES' are visible. The page title is 'ESS Employer Reporting Request Maintenance 36'. The user is logged in as 'Contact, Teresa'. The request details include: Reporting Source: 57004 - SCHOOL DISTRICT 004, Status: Submitted to Employer, and Employer Reporting Request ID: 36. The 'Response' field is highlighted with a red oval and contains the text: 'Superintendent's pay rate increase is contained within the attached employment agreement'. Below the response field, there is a 'Submitted Date/Time' of 12/04/2020 01:38 PM. At the bottom of the page, there is a 'Transactions' section with a 'Create Summary' button.

### Step 6:

Scroll down to the **Attachments** panel to upload the employment agreements. Click the **Select File** button.

The screenshot displays the CALSTRS ESS Employer Reporting Request Maintenance 36 interface. At the top, the header includes the CALSTRS logo, the title 'ESS Employer Reporting Request Maintenance 36', and the school district information '57004 SCHOOL DISTRICT 004 TRN1 - 2.0.561.1 - Green Region'. A user profile for 'Welcome Contact, Teresa' is visible in the top right corner. Below the header, there are 'Save' and 'Submit' buttons. A 'Response' field contains the text: 'Superintendent's pay rate increase is contained within the attached employment agreement.' Below this, it shows 'Submitted Date/Time: 12/04/2020 01:38 PM' and 'Submitted by: bching'. The 'Transactions' section features a 'Create Summary' button and a table with the following data:

Organization	Transaction Date	Effective Date	Member Code	Assignment Code	Pay Code	Pay Rate	Pay Period Begin Date	Pay Period End Date	Transaction Type	Earnings	Pre-Tax EE Contribution	Post-Tax EE Contribution	Interest	Service Credit	Subsystem	Subsystem Reference ID	Time Base	Base Hours	Earnings Type	Serv Type
57004 - SCHOOL DISTRICT 004	12/04/2020	02/07/2020	Member	Contract	12 Monthly Payments	260000	01/01/2020	01/31/2020	Regular	0	2220.83	0	0	0.006944	Employer Reporting	1617	0	0	Salary	

The 'Attachments' section at the bottom includes a 'Select File' button (circled in red), a 'Clear' button, and an 'Upload' button. The footer of the page indicates 'Font Sizes: 12 14 16'.

## Step 7:

The **Choose File to Upload** window displays. Select the file to upload and click the **Open** button.

The screenshot shows a web application interface with a file upload dialog box open. The dialog box is titled "Open" and shows the contents of the Desktop folder. The file "EmploymentAgreement.pdf" is selected, and the "Open" button is circled in red. Below the dialog box, the "Transactions" section is visible, containing a table with columns for Organization, Transaction Date, Effective Date, Member Code, Assignment Code, Pay Code, Pay Rate, Pay Period Begin Date, Pay Period End Date, Transaction Type, Earnings, Pre-Tax EE Contribution, Post-Tax EE Contribution, Interest, Service Credit, Subsystem, Subsystem Reference ID, Time Base, Base Hours, Earnings Type, and Service Type. The table contains one row of data for SCHCCL DISTRICT 004. Below the table, the "Attachments" section is visible, containing a "Select File" button, a "Clear" button, and an "Upload" button.

Organization	Transaction Date	Effective Date	Member Code	Assignment Code	Pay Code	Pay Rate	Pay Period Begin Date	Pay Period End Date	Transaction Type	Earnings	Pre-Tax EE Contribution	Post-Tax EE Contribution	Interest	Service Credit	Subsystem	Subsystem Reference ID	Time Base	Base Hours	Earnings Type	Service Type
57004 - SCHCCL DISTRICT 004	12/04/2020	02/07/2020	Member	Contract	12 Monthly Payments	260000	01/01/2020	01/31/2020	Regular	0	2220.83	0	0	0.006944	Employer Reporting	1617	0	Salary		

### Step 8:

The selected file displays with the green checkmark. Click the **Upload** button. Repeat this process for each employment agreement that needs to be uploaded and submitted to CalSTRS. Once uploaded the file displays in the **Attachments** panel.

The screenshot displays the CalSTRS ESS Employer Reporting Request Maintenance 36 interface. The page title is "57004 SCHOOL DISTRICT 004 TRN1 - 2.0.561.1 - Green Region". The page shows a table of transactions and an attachments panel. The "Upload" button in the attachments panel is circled in red.

Organization	Transaction Date	Effective Date	Member Code	Assignment Code	Pay Code	Pay Rate	Pay Period Begin Date	Pay Period End Date	Transaction Type	Earnings	Pre-Tax EE Contribution	Post-Tax EE Contribution	Interest	Service Credit	Subsystem	Subsystem Reference ID	Time Base	Base Hours	Earnings Type	Servi Type
57004 SCHOOL DISTRICT 004	12/04/2020	02/07/2020	Member	Contract	12 Monthly Payments	260000	01/01/2020	01/31/2020	Regular	0	2220.83	0	0	0.006944	Employer Reporting	1617	0	0	Salay	

The Attachments panel shows a file named "EmploymentAgreement.pdf" (198508 bytes) with a green checkmark. The "Upload" button is circled in red.

### Step 9:

Scroll to the top of the **Employer Reporting Request Maintenance** screen and click the **Save** button.

The screenshot shows the CALSTRS Employer Reporting Request Maintenance interface. At the top, the CALSTRS logo and navigation menu are visible. The main header displays "ESS Employer Reporting Request Maintenance 36" and "57004 SCHOOL DISTRICT 004 TRN1 - 2.0.561.1 - Green Region". A user greeting "Welcome Contact, Teresa" is shown in the top right. Below the header, there are two buttons: "Save" and "Submit". The "Save" button is circled in red. The main content area is divided into three sections: "Person Details", "Membership Details", and "Employer Reporting Request Details".

**Person Details**

Client ID : 1526673410    Name : CAXYN CLONE CBXQ

**Membership Details**

Membership Account ID : 181019    Benefit Program : CalSTRS Defined Benefit    Membership Date : 09/06/1984  
Status : Active    Status Effective Date : 01/04/1982

**Employer Reporting Request Details**

Reporting Source : 57004 - SCHOOL DISTRICT 004    Status : Submitted to Employer    Employer Reporting Request ID : 36  
Number of records : 1    \*Program Area : Employer Services    \*Action required : Provide Supporting Documt  
PRR Date :  
Instruction :  
Please provide the employment agreements for the Superintendent to verify that the pay rate increase is pursuant to a publicly available written contractual agreement.  
Superintendent's pay rate increase is contained within the attached employment agreement.

### Step 10:

The **Employer Reporting Request** is successfully saved. A message displays at the top of the screen stating: “[All changes successfully saved.]” Then, click the **Submit** button. The **Employer Reporting Request** is submitted to CalSTRS for review and processing. The Status field is updated to **Submitted to CalSTRS**.

The screenshot shows the CalSTRS web interface for an Employer Reporting Request. At the top, the CalSTRS logo and navigation menu are visible. The page title is "ESS Employer Reporting Request Maintenance 36". The user is logged in as "WAM" and the page is powered by Naepkin. A message at the top states "[All changes successfully saved.]". The "Submit" button is circled in red. Below the message, the form is divided into sections: "Person Details" (Client ID: 1526673410, Name: CAXYN CLONE CBXQ), "Membership Details" (Membership Account ID: 181019, Benefit Program: CalSTRS Defined Benefit, Membership Date: 09/06/1984, Status: Active, Status Effective Date: 01/04/1982), and "Employer Reporting Request Details" (Reporting Source: 57004 - SCHOOL DISTRICT 004, Status: Submitted to CalSTRS, Employer Reporting Request ID: 36, Number of records: 1, Program: [dropdown], Action required: Provide Supporting Docum [dropdown], P&I Date: [input], Instruction: [text area]). The "Status" field is circled in red. The instruction text reads: "Please provide the employment agreements for the Superintendent to verify that the pay rate increase is pursuant to a publicly available written contractual agreement." and "Superintendent's pay rate increase is contained within the attached employment agreement."

### Process Payroll Detail Adjustment

#### Step 1:

From the **Dashboard**, scroll down to the **Pending Work Items** panel. Select the **New Request** link for **Employer Reporting Requests**.

The screenshot shows the CALSTRS Secure Employer Website dashboard for user Teresa. The page includes navigation links for Employment, Employee Profile, Employer Profile, Upload Files, Online Reports, and Contribution Account Portal (CAP). Below these are announcements regarding system maintenance and a 'Pending Work Items' table.

Request Type	New Request	Progress Request	Total Outstanding Request
Employer Certification for Death Before Retirement	7		7
Employer Reporting Requests	1		1
Unused Sick Leave Requests for SR	1		1

### Step 2:

The **Employer Reporting Request Search** screen displays. The **Employer Reporting Requests** automatically display in the **Search Results** panel. Locate the **Create Adjustment Employer Reporting Request** to work and select the associated **Employer Reporting Request ID** link.

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ESS Employer Reporting Request Search

01016 UNIFIED SCHOOL DISTRICT 016  
TRN1 - 2.0.561.1 - Green Region

Welcome Contact, Teresa

[ 3 Records met the search criteria. ]

**Criteria**

Client ID:  Reporting Source:  Include Associated Organization:

Status: All Action Required: All Program Area:

Submitted Date (From):  Submitted Date (To):

Search Reset Store Search

**Search Results**

Open Export To Excel

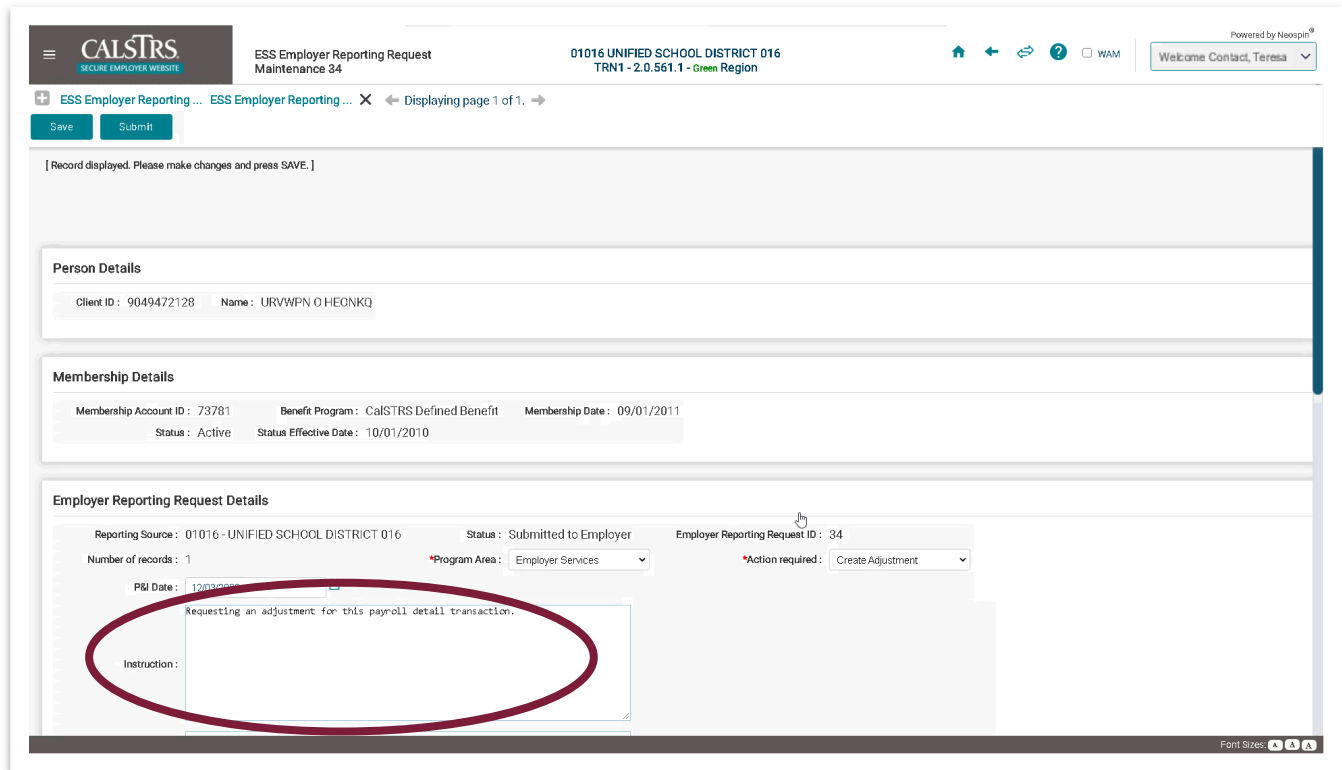
<input type="checkbox"/>	Employer Reporting Request ID	Client ID	Number of Reported Lines	Reporting Source	Status	Action Required	Program Area	Instructions	Aging
<input type="checkbox"/>	<a href="#">37</a>	<a href="#">1540198659</a>	1	01016 - UNIFIED SCHOOL DISTRICT 016	Submitted to Employer	Create Adjustment	Employer Services	Please review and submit an adjustmen...	26
<input type="checkbox"/>	<a href="#">34</a>	<a href="#">904933028</a>	1	01016 - UNIFIED SCHOOL DISTRICT 016	Submitted to Employer	Create Adjustment	Employer Services	Requesting an adjustment for this pay...	27
<input type="checkbox"/>	<a href="#">38</a>	<a href="#">1544144415</a>	1	01016 - UNIFIED SCHOOL DISTRICT 016	Submitted to Employer	Provide Supporting Documentation	Employer Services	Supporting documentation is requested...	27

Font Sizes A A A



### Step 3:

The **Employer Reporting Request Maintenance** screen displays. In the **Employer Reporting Request Details** panel, review the **Instruction** field for detailed notes from CalSTRS requesting an adjustment of the contribution transaction.



The screenshot shows the CalSTRS Employer Reporting Request Maintenance interface. The top navigation bar includes the CalSTRS logo, the text "SECURE EMPLOYER WEBSITE", and the user's name "Welcome Contact, Teresa". The main header displays "ESS Employer Reporting Request Maintenance 34" and "01016 UNIFIED SCHOOL DISTRICT 016 TRN1 - 2.0.561.1 - Green Region".

The interface is divided into several sections:

- Person Details:** Client ID: 9049472128, Name: URVWPN O HEONKQ
- Membership Details:** Membership Account ID: 73781, Benefit Program: CalSTRS Defined Benefit, Membership Date: 09/01/2011, Status: Active, Status Effective Date: 10/01/2010
- Employer Reporting Request Details:** Reporting Source: 01016 - UNIFIED SCHOOL DISTRICT 016, Status: Submitted to Employer, Employer Reporting Request ID: 34, Number of records: 1, Program Area: Employer Services, Action required: Create Adjustment.

The **Instruction** field is circled in red and contains the text: "Requesting an adjustment for this payroll detail transaction."

### Step 4:

Scroll down to the **Transactions** panel to review the transactions associated to the Employer Reporting Request. Click the **Subsystem Reference ID** link.

ESS Employer Reporting Request  
Maintenance 34

01016 UNIFIED SCHOOL DISTRICT 016  
TRN1 - 2.0.561.1 - Green Region

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Welcome Contact, Teresa

ESS Employer Reporting ... ESS Employer Reporting ... X ← Displaying page 1 of 1. →

Save Submit

Response :

Submitted Date/Time : 12/03/2020 06:27 PM Submitted by : bchng

#### Transactions

Create Summary

Organization	Transaction Date	Effective Date	Member Code	Assignment Code	Pay Code	Pay Rate	Pay Period Begin Date	Pay Period End Date	Transaction Type	Earnings	Pre-Tax EE Contribution	Post-Tax EE Contribution	Interest	Service Credit	Subsystem	Subsystem Reference ID	Time Base	Base Hours	Earnings Type	Se Ty
01016-UNIFIED SCHOOL DISTRICT 016	12/03/2020	01/06/2020	Member	Contract	12 Monthly Payments	12273.66	12/01/2019	12/31/2019	Regular	0	1045.3	0	0	0.069241	Employer Reporting	1609		0	Salary	

#### Attachments

Select File Clear

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### Step 5:

The **Employer Payroll Detail Maintenance** screen displays. If needed, refer to your internal employer payroll reporting system to research the contribution data that was reported. In addition, you may need to provide documentation and/or provide a response to CalSTRS.

Record displayed.

Read Only: Employer Payroll Detail has been processed.

#### Employer Payroll Summary

Reporting Source: <a href="#">01001-COUNTY OFFICE OF EDUCATION</a>	Payroll Summary ID: <a href="#">1362</a>	Payroll Summary Status: Processed
Reporting Period: <a href="#">09/01/2020-09/30/2020</a>	File Type: F496 File	Benefit Program: CalSTRS Defined Benefit

#### Employer Payroll Header

Organization: <a href="#">01016-UNIFIED SCHOOL DISTRICT 016</a>	Payroll Header ID: <a href="#">1274</a>	Payroll Header Status: Processed
Benefit Program: CalSTRS Defined Benefit	Benefit Structure: DB 2% at 60	
Submitted to Source By: <a href="mailto:bching@calstrs.com">bching@calstrs.com</a>	Submitted to Source Date: 12/03/2020 06:16:15 PM	Submitted to Source: Yes

#### Employer Payroll Detail

Payroll Detail ID: 1609	Payroll Detail Status: Processed	Suppress Warnings: <input type="checkbox"/>
*SSN: 406-43-9551	Client ID: <a href="#">9049472128</a>	
*First Name: URVWPN	Middle Name: 0	*Last Name: HEONKQ
*Member Code: Member	*Transaction Type: Regular	Earnings: \$10,198.05
*Pay Period Begin Date: 12/01/2019	*Pay Period End Date: 12/31/2019	
*Assignment Code: 57 - Contract	Pay Rate: \$12,273.660	Pay Code: 12 Monthly Payments
Contribution Code: Current Member Contributions	Classification Code:	Base Hours: 0.00
Comments:		

Font Sizes:

### Step 6:

Once information is gathered, respond to the **Employer Reporting Request**. Click the **Employer Reporting Request Maintenance** link in the **Breadcrumb Navigation** bar.

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Welcome Contact, Teresa

Employer Payroll Detail Maintenance  
1609

01016 UNIFIED SCHOOL DISTRICT 016  
TRN1 - 2.0.561.1 - Green Region

ESS Employer Reporting... Employer Payroll Detail... X ← Displaying page 1 of 1. →

Refresh

Record displayed.

Read Only: Employer Payroll Detail has been processed.

#### Employer Payroll Summary

Reporting Source: [01001-COUNTY OFFICE OF EDUCATION](#) Payroll Summary ID: [1362](#) Payroll Summary Status: Processed  
Reporting Period: [09/01/2020-09/30/2020](#) File Type: F496 File Benefit Program: CalSTRS Defined Benefit

#### Employer Payroll Header

Organization: [01016-UNIFIED SCHOOL DISTRICT 016](#) Payroll Header ID: [1274](#) Payroll Header Status: Processed  
Benefit Program: CalSTRS Defined Benefit Benefit Structure: DB 2% at 60  
Submitted to Source By: bchling@calstrs.com Submitted to Source Date: 12/03/2020 06:16:15 PM Submitted to Source: Yes

#### Employer Payroll Detail

Payroll Detail ID: 1609 Payroll Detail Status: Processed Suppress Warnings:

*SSN: 406-43-9551	Client ID: <a href="#">9049472128</a>	
*First Name: URVWPN	Middle Name: O	*Last Name: HEONKQ
*Member Code: Member	*Transaction Type: Regular	Earnings: \$10,198.05
*Pay Period Begin Date: 12/01/2019	*Pay Period End Date: 12/31/2019	
*Assignment Code: 57 - Contract	Pay Rate: \$12,273.660	Pay Code: 12 Monthly Payments
Contribution Code: Current Member Contributions	Classification Code:	Base Hours: 0.00
Comments:		

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### Step 7:

The **Employer Reporting Request Maintenance** screen displays. In the **Transactions** panel, select the checkbox next to the transaction that needs to be adjusted. Click the **Create Summary** button to create a new Summary, Header and Payroll Detail from the screen or submit the adjustment through a Contribution File.

01016 UNIFIED SCHOOL DISTRICT 016  
TRN1 - 2.0.604.1 - Green Region

ESS Employer Reporting Request Maintenance 37

ESS Employer Reporting ... ESS Employer Reporting ... X ← Displaying page 1 of 1. →

Save Submit

Response:

Submitted Date/Time: 12/04/2020 01:46 PM Submitted by: lchling

**Transactions**

Create Summary

<input type="checkbox"/>	Organization	Transaction Date	Effective Date	Member Code	Assignment Code	Pay Code	Pay Rate	Pay Period Begin Date	Pay Period End Date	Transaction Type	Earnings	Pre-Tax EE Contribution	Post-Tax EE Contribution	Interest	Service Credit	Subsystem	Subsystem Reference ID	Time Base	Base Hours	Earnings Type	Service Type	Expected Pay Periods
<input type="checkbox"/>	01016-UNIFIED SCHOOL DISTRICT 016	12/03/2020	01/08/2020	Member	Contract	12 Monthly Payments	12273.66	12/01/2019	12/31/2019	Regular	0	1045.3	0	0	0.069241	Employer Reporting	1609	0	0	Salary		

**Attachments**

Select File Clear

Upload

Attachment Added By

No records to display.

**Audit Information**

### Step 8:

Enter a response in the **Response** field and click the **Save** button.

The screenshot shows the 'ESS Employer Reporting Request' interface for '01016 UNIFIED SCHOOL DISTRICT 016'. The page title is 'ESS Employer Reporting Request Maintenance 37'. The user is logged in as 'Teresa'.

**Membership Details:**

- Membership Account ID: 206026
- Benefit Program: CalSTRS Defined Benefit
- Membership Date: 09/01/2011
- Status: Active
- Status Effective Date: 10/01/2010

**Employer Reporting Request Details:**

- Reporting Source: 01016 - UNIFIED SCHOOL DISTRICT 016
- Status: Submitted to Employer
- Employer Reporting Request ID: 37
- Number of records: 1
- PKI Date: 12/04/2020
- Program Area: Employer Services
- Action required: Create Adjustment

**Instruction:**

Please review and submit an adjustment for the payroll detail transaction.

**Response:**

Agree adjustment is needed. Created a new payroll detail transaction for the requested adjustment.

Submitted Date/Time: 12/04/2020 01:40 PM

**Transactions:**

- Create Summary

### Step 9:

The **Employer Reporting Request** is successfully saved. A message displays at the top of the screen stating: “[**All changes successfully saved.**]” Then, click the **Submit** button. The **Employer Reporting Request** is submitted to CalSTRS for review and processing. The Status field is updated to **Submitted to CalSTRS**.

The screenshot shows the CalSTRS web interface for an Employer Reporting Request. At the top, the header includes the CalSTRS logo, the title "ESS Employer Reporting Request Maintenance 37", and the reporting source "01016 UNIFIED SCHOOL DISTRICT 016". A message at the top of the page states "[All changes successfully saved.]". Below this, there are sections for "Person Details" (Client ID: 1540198659, Name: URVWPN CLONE HEONKG), "Membership Details" (Membership Account ID: 206026, Status: Active), and "Employer Reporting Request Details". In the "Employer Reporting Request Details" section, the "Status" field is highlighted with a red circle and contains the text "Submitted to CalSTRS". Other fields include "Reporting Source", "Number of records", "PKI Date", "Program", "Action required", "Instruction", and "Response".