Service Credit Purchase Requests

This document provides a description of the Account Receivable type, a list of the leave types that require employer approval, common reasons a Service Credit Purchase Request would be rejected and the step-by-step processes for an employer to approve Service Credit Purchase Requests.

Questions? Contact EmployerHelp@CalSTRS.com or send a secure message in the Secure Employer Website. Please include supporting documentation for review.

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Account Receivable Contact Type

The Account Receivable contact type is responsible for reviewing, rejecting and approving service credit purchase requests. This contact type is also able to create Purchasable Service Credit records.

Leave types that require employer approval

The following types of leave require employer approval:

- FMLA or CFRA Family Medical Leave
- Fulbright Leave
- Maternity or Paternity Leave
- Sabbatical Leave

Common reasons for rejecting requests

The following are common reasons a Service Credit Purchase Request is rejected:

- Incorrect leave type was selected by the member
- The leave does not exist for the member

Step-by-step process to approve a Service Credit Purchase Request

Step 1:

From the **Dashboard**, scroll down to the **Pending Work Items** panel.

Step 2:

From the **Pending Work Items** panel, click the **New Request** link for Service Purchase Requests.

Request Type	New Request	Progress Request	Total Outstanding Request
Employer Certification for Death Before Retirement	17	1	18
Service Purchase Requests	1	4	5
Termination Requests for DB SR	1		1
Unused Sick Leave Requests for SR	1		1

Step 3:

The **Service Purchase Request Search** screen displays. The new Service Purchase Requests automatically display in the **Search Results** panel. From the **Search Results** panel, click the **Service Purchase Request ID** link.

Step 4:

Click the **Add** button in the **Purchasable Service** panel to add a line.

Step 5:

Once the Add button is clicked, additional fields display. Enter the following required fields: **Assignment Code**, **Annualized Pay Rate**, **Pay Period Start Date**, **Pay Period End Date**, **Earning Type**, and **Earnings**.

The **Pay Period Start Date** and **Pay Period End Date** fields can be edited if the data is not accurate. If the service spans fiscal years, separate lines need to be added.

Step 6:

Review the **Service Credit Purchase Type** and **Organization-Employment** fields to ensure the information is accurate. If the information is inaccurate, those fields are unable to be edited and the request will need to be rejected by clicking the reject button found at the top of the screen.

If a service credit purchase request is rejected due to inaccurate service credit purchase type, you may create a purchasable service credit record. See the Purchasable Service Credit Records job aid at employersupport.calstrs.com for more information.

Step 7:

Click the **Save** button.

Step 8:

Ensure the changes have been made successfully. A message will display at the top of the **Purchasable Service Maintenance** screen that reads, "All changes successfully saved."

If errors trigger, hard errors will display at the top of the screen in red and soft errors will display in the Validation Information panel. Only Service Credit Purchase Requests in a valid status can be approved.

Step 9:

Click the **Approve** button.

Step 10:

Scroll to the **Purchasable Service** panel on the **Purchasable Service Maintenance** screen. The Action Status will now be **Approved**.