CalSTRS Training Tips Forum – Enrollment Quarter 2 Webinar: Q&A Report for November 12, 2025

This document provides the Q&A report from the Training Tips Forum – Enrollment Quarter 2 Webinar which was held on November 12, 2025.

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

Revised: 11/25/2025

Contents

Questions and Answers

Enrollment

Question	Answer
So, if they are currently members and we hire them, do we have to re-enroll them under our District?	Correct, if they are new to your district they must have an enrollment record for your district. Submit an enrollment record online or by using the MR87 Enrollment File.
Does this mean at the beginning of each year when we do mass hiring that we need to input each new CalSTRS eligible person? This could be over 100 people for some of the years.	Yes, to enroll employees (EE) in bulk you can do that with the MR87 Enrollment File. For more information, please see the Uploading an MR97 Enrollment File job aid available at employersupport.calstrs.com.
What transaction code is used to set up a CalSTRS nonmember?	Transaction Code 02 is for Defined Benefit nonmembers. For more information on enrollment codes please see the MR87 File Specification and Submitting an Online Employment Transaction job aid available at employersupport.calstrs.com.
Where is the Employee Search screen? Will we get to see how to enroll someone by viewing the steps in SEW?	The **Employee Profile** quick link on the **Dashboard** will take you to the screen to search for a member. You can also navigate to the **Employee Search Lookup** screen by clicking the **Global Navigation Menu**, selecting **Employee**, and **Employee** again. For more information on enrolling an employee, please see the Submitting an Online Enrollment Transaction job aid available at employersupport.calstrs.com
When enrolling, is the “employment start date” the date they were hired or when they qualified for membership?	The enrollment dates are tied to individual employment records so they may be different than the membership dates. For example, an employee became a member effective 11/1 with ABC Unified and then went to work for DEF Unified effective 11/15, you would see a membership date of 11/1 and an employment start date with DEF Unified effective 11/15.
What happens to the employee information if you hit the Save button but do not hit the Submit button and you close out of the window?	Clicking the **Save** button will save the transaction details but it is not considered submitted/processed. You can return to that screen to search, open, and submit the saved record.

Question	Answer
What do we do when we are getting a message that says Social Security number (SSN) is not matching during the enrollment? I have verified that both SSN and Confirm SSN match.	This is a known issue. In most cases, employers are able to submit the transaction after waiting a few minutes and trying again. If you continue to encounter that issue, please reach out to EmployerHelp@CalSTRS.com so we can escalate it to our technical staff.
What needs to be done if after saving the transaction with a "temporary" name to bypass the "Error - two or more employees have same SSN etc."? The system doesn't let you save the correct name and gives the same error again.	Please reach out to EmployerHelp@CalSTRS.com if the workaround for Message ID: 3030094 – More than one person exists with the same name and birth date under different tax ID… does not work. The current work around is to enter a placeholder last name to process the enrollment and then change the name to the correct last name once the enrollment is processed. For example, if the member's name is Jane Smith, enter the last name as Smith-Duplicate, then change the name to Smith.
In the legacy system, it would show previous names listed. If we use this work around with a name change, does the new system retain the previous list of name changes? Can the member (employee) see this information when they access their account?	No, there is no name change history saved to the system. Members/employees and employers only see one active name on the account.
Once an enrollment is created do we have the option to delete the enrollment if an employee was not supposed to be enrolled or do we have to void the enrollment?	You cannot delete or void the enrollment that is in Processed status. Contact EmployerHelp@CalSTRS.com for further support to remove the enrollment.
What would happen if we accidentally added the same person twice? Should we call you to merge them or can we delete one after the fact?	Yes, call or send an email to EmployerHelp@CalSTRS.com for assistance.
Why can't employers correct enrollment issues themselves? Is that something that can be changed in the future?	To ensure data integrity and prevent actions that would have more serious impacts on member accounts, many enrollment errors must be corrected by CalSTRS. When we transition to New File Format (NFF) in 2027, employers will be able to submit transactions to close an enrollment opened in error.

Question	Answer
How do we know the employee we are hiring is a retiree?	When you search for an employee and they are retired, this will show under that **Status** column of their membership account. You can view membership account statuses in the **Membership Account** panel on the **Employee Maintenance** screen or the panels on the **Employee Membership Account Maintenance** screen. For more information on SEW Navigation, please see the Secure Employer Website Navigation computer-based training (CBT) within the Introduction to the New Secure Employer Website course for the New SEW Training course category.
How do we set up a retiree in new SEW? How do we report their earnings for retired activities? Is it with Assignment Code 61?	No set up/enrollment is required. That is correct. Submitting reporting/transactions with assignment code 61 and member code 2 (nonmember) will automatically create the post-retirement service enrollment.
If we are not supposed to create an enrollment for AC61 coded work, how do we resolve the enrollment errors on AC61 retro pay?	If you are experiencing errors that you do not understand or cannot resolve them by using the F496 Files Specification available at employersupport.calstrs.com, please contact EmployerHelp@CalSTRS.com with supporting documentation such as screenshots to examine and research.
Is there an easy way for employers to tell the difference between a member, nonmember, and retiree without going through layers in the employee area in the Secure Employer Website (SEW)?	If the membership date is blank, this indicates a person is a DB nonmember. Retirees should show the status of “Retirement” next to their membership account. For more information on statuses and their definitions, please see the Employee Maintenance for Employer job aid available at employersupport.calstrs.com
Is there a status for retirees working after retirement? Their member appointment with their last organization is still active.	Yes, if an employee is working after retirement, they will appear as "active.” We are working on a potential enhancement request to add additional statuses to make the distinction between active employment and working after retirement clear.
For retirees, I am unable to submit a Termination transaction. It is giving me an error that says it can affect their benefit. Could you please assist?	Please send a request to EmployerHelp@CalSTRS.com with supporting documentation such as screenshots of the error and they will look into this.
How long does it take for the enrollments to be active?	Enrollments completed in the new system are active immediately.

Question	Answer
When attempting to update membership for a nonmember to a member, we are facing issues with entering their address. For example, the Address field becomes blank when we try to update the transaction type or when we click the Enroll member button and update the transaction type from “2” to “81”. Additionally, clicking the Get suggestion button changed the transaction 81 back to 2. Why is this happening and what is the solution?	Please send the details of this issue including screenshots to EmployerHelp@CalSTRS.com so they can investigate. This may be a defect.
How can we tell if an EE is Reduced Workload Program (RWP) status?	If you click on a person’s hyperlinked membership account within the **Employment Maintenance** screen, the **Membership Account** panel will display a **Member Provision** tab. The RWP information will be listed within this tab.
Is the *Permissive Membership* (ES 350) form required to be uploaded or is it recommended?	It is required for the ES 350 to be uploaded.
Can we mail the ES 350 forms instead of uploading them or is there a way to upload 50 forms at one time?	You may attach as many documents to a single secure message as needed and submit. Please ensure each form is uploaded as an individual file rather than grouping all member forms and documents in one file.
Would it be possible to upload the ES 350 directly during enrollment and on the Employment screen instead uploading the form on the ECM screen or sending it through Secure Message? Do you plan to add this feature in the future?	No, there is no option to upload a document on the Enrollment screen. At this time there are no plans to add this option, but we can take this back and discuss a possible future enhancement.

Question	Answer
During our last webinar, it was mentioned that documents such as ES 350 and ES 372 should be uploaded under Secure Messages. When we attempted to do this, it appears that we first have to compose and send an email, then return to the message in order to attach the document. Could you please confirm if it's possible to attach the document directly from the initial secure message?	A Secure Message must be saved before you can add attachments. Once you fill in the required fields, click the **Save** button and scroll to the **Attachments** panel to add your attachments.
If I enrolled someone as a permissively elected member with one district and it turns out that they had elected membership in a different district earlier, can I backdate the membership myself or do I need to contact Employer Help?	If the membership date needs to be adjusted, contact EmployerHelp@CalSTRS.com for further support.
What's the turn-around time for these "Internal adjustments" (Membership Account Information Adjustment)?	The service level to answer a request submitted to EmployerHelp@CalSTRS.com is 10 business days. Depending on the complexity of the actions needed to adjust the membership account, additional time may be needed. Certain system tasks can take up to two weeks to be processed.
If a substitute teacher works across different districts and elects membership should the status effective date, hire date, and membership date all match the earliest hire date in the Membership Detail screen?	No, not necessarily. The hire date will reflect the original hire date. For example, if they were hired as a nonmember and elected membership at a later date, the status effective date would not match the hire date. The status effective date should reflect the date of when the current member status took effect.
If an employee refunds, do we have to re-enroll them as a nonmember once they return to work for the district?	Yes, a new enrollment will be required.

Question	Answer
Since I began in my position, I have enrolled substitutes as the packets came to my desk whether or not they were actively working yet (they are hired, but no time sheets have been submitted). However, my County Office of Education (COE) is stating I should not enroll anyone until I have an actual time sheet for them. What is CalSTRS recommendation on enrolling substitutes?	If substitutes are eligible to work, then enrollments can be submitted to CalSTRS. If substitutes are considered employed by the district, then enrollments should be submitted to CalSTRS. You would not submit contribution reporting until they perform creditable service and earn creditable compensation.
How do we get notified if a certificated substitute became a member from another school district? Is there something Human Resources (HR) staff can do before Payroll processes the reporting items.	There is no proactive notification; however, there is an Online Report titled Employee Status Change Report that will list any of your employees impacted by a membership change. You can navigate to the **Online Reports** screen by clicking the **Online Reports** quick link on the **Dashboard** or clicking the **Global Navigation Menu** and select **Online Reports**.
Can this Online Report titled “Employee Status Change Report" be run at the county level?	Yes, the county offices of education can view Employee Status Change Reports.
Do you have a training guide for Online Report titled “Employee Status Change Report”?	We do not currently have a job aid specifically for this report, but we will note your question and work on possibly developing one.
The Employee Status Change Report displays changes for other districts and does not have a way to easily filter to by district. Is there a way to only see the ones for our district?	There is no way to filter by district. The status change impacts employees that have an enrollment at your district even if it was made at another CalSTRS employer. The idea of the report is for districts to have visibility to status changes that would impact members at your districts.

Question	Answer
The search function does not always work. When looking someone up, they do not show up with the Social Security Number (SSN) or first/last name search, but when we go to enroll their client ID pops up with information indicating they are already a member. Is this a defect?	This is a known issue. You can send a request to PSEmployerReadiness@CalSTRS.com to obtain a list of employees affected by this issue.
The employee is already a CalSTRS member with a retirement formula of 2% at 60; however, when we create an appointment for our district, it defaults to 2% at 62. We are unable to report the earnings due to a concern with the contribution calculation. How do we fix this?	There is a current defect that is causing this issue. Until it is resolved please reach out to EmployerHelp@CalSTRS.com to correct it to the appropriate benefit structure.
I noticed that at times when a birth date is mistakenly entered on the enrollment date, it creates a 2% at 60 status even though the employee is PEPRA (2% at 62). Is there a workaround this error?	There is a current defect that is causing this issue. Until it is resolved please reach out to EmployerHelp@CalSTRS.com to correct it to the appropriate benefit structure.
Districts in our county have made a considerable amount of enrollment errors that require CalSTRS Internal Adjustments. Is there an anticipated date for resolving the issue of allowing nonmember enrollments for members? Also, the default status of "02 – nonmember" on the drop-down isn't doing us any favors. Is this on the docket for a fix?	This defect is a high priority and currently scheduled for an early December fix. Regarding the default "02" in the dropdown we have an enhancement opened for that but there is no target fix date for that one quite yet.

Question	Answer
We have discovered at least one member who is showing up as classic member in some districts and PEPRA in others, how does this happen?	This may be due to the existence of a non-contributing membership account for the member. If you are seeing this in a membership account that does not have a Non-contributing status, please send a request to EmployerHelp@CalSTRS.com to have this looked into.
Is it required to end an enrollment? What happens if the previous employer forgot to end the enrollment for a new employee who is working for us?	No, it is not required to end date the enrollment. If the prior employer didn't end date their enrollment, you can still submit your enrollment.
How do we enter an end date on the appointment when an employee is no longer employed?	You would need to submit a Termination transaction to end date an enrollment. For more information, please see the Submitting Termination Data job aid available at employersupport.calstrs.com
We have Part-Time Faculty come and go from our District. If they are no longer employed, do we submit a Termination transaction? Then if they return, would we re-enroll them?	A Termination transaction is optional in this instance (not required but can be submitted if you choose to do so). If you do terminate them, a new enrollment would be required if they return to work.
How about employees terminated before New SEW system? Do we need to enter end date?	You do not need to submit a Termination transaction unless you receive a pending work item to do so.
Can we use the "suppress warnings flag" box?	Yes, you can use the **Suppress Warnings flag** box. To suppress a warning, a comment is required. The **Comments** field will populate once you select the **Suppress Warnings flag** box.

Miscellaneous

Question	Answer
Is there a way to report the death of a retiree in the system to assist the family?	You or the family member of the late retiree may submit a Notification of Death by using the Online form found at CalSTRS.com.
Where can we find the member's service credit?	To view the member's service credit please see the Viewing Service Credit Totals job aid available at employersupport.calstrs.com.

Question	Answer
Is there any chance Service Credit by Fiscal Year will be viewable on the screen in the new SEW and in the future rather than having to download and calculate the service credit?	We have an enhancement request in place for this. We expect it will be implemented mid-2026.
Will the DBS adjustments stay in the future?	We have an enhancement to remove the DBS transfer, excess, and interest records you are seeing on the Transactions screen.
What lines from the DBS accounts do we remove?	Please contact EmployerHelp@CalSTRS.com with documentation for further support.
Can we get a list of system defaults/internal problems that the new SEW is having ?	This document is currently in the works. Once it is available we will send out a SEW announcement to notify employers.
Do we still need to request a new RUID in the new SEW?	Are you referring to a Report Unit ID or organization ID for a district? If so, send a request to EmployerHelp@CalSTRS.com for this.
When will employers be able to send member documents via the ECM Upload screen?	We have resolved the issues with ECM and employers are now able to send member documents in SEW via ECM.
When a substitute teacher is hired, is the membership date the first day of employment or first day of pay period in which the election is made?	Pursuant to EDC 22515 and 22455.5, employees employed to perform creditable service in positions that do not require membership can elect membership at any time while employed to perform creditable service. They have the option to elect a membership date no earlier than the first day of employment (date of hire) or the first day of the pay period in which the election is made, whichever is later. If they declined membership on the ES 350 but reached the 100-day threshold for their substitute teacher position, they will mandate into membership the first day of the following pay period. For more information, please see EDC 22503, EDC 22602 and the Defined Benefit Program Membership job aid available at CalSTRS.com. If you are enrolling a substitute teacher, please use 02 – Establish Non-Member Account if they are a non-member, 81 – Establish Permissive Elect Member Account, if they elected for the Defined Benefit Program on the ES 350, or 11 – Establish Mandatory Qualifying Account if they are already a member.

Question	Answer
Just to clarify, are we required to submit declined ES 350 forms to CalSTRS or is it only when they elect CalSTRS?	If the employee declines membership, you are not required to send a copy to STRS, but you are required to keep a copy on record.
When an employee's last day of work is 10/31/25 and their last paycheck will be processed in November. Which period should the paylines be reported for.	The pay period start and end for the contribution line/payroll detail record must be for the period in which it was earned. If it considered earned in October but paid out in November, please use the October pay period.
Can we leave the dates on the Termination transaction blank?	No, when submitting a Termination transaction, you cannot leave the termination fields blank.
For name changes, does CalSTRS still want a copy of the employee's SSN card, ID or passport showing their new name?	Yes, for more information on what documentation to provide for account information updates please see the Supporting Documentation for Common Employer Reporting Requests Types job aid available at CalSTRS.com. Employers can make this change in the Secure Employer Website without providing supporting documentation.
The Account Summary information is pretty useful. Is there any way to get that same type of screen for employers?	Thank you for your feedback, we will provide this to our system team.
I'm working on corrections and pending work items but when I get to the Existing Employment Records drop-down menu, selections do not come up. How can I move forward?	If you are working on a Unused Sick Leave Information transaction and the Existing Employment Record is not appearing, it is likely that you need to submit the Termination transaction for that member first.
If an employee has an address change who is responsible for updating that in SEW?	If an employee has previously updated/changed their address through MyCalSTRS.com then employers are unable to make subsequent address changes. The member must submit these through MyCalSTRS.com. If the employee has not previously updated/changed their address through MyCalSTRS.com then the employer can submit address changes on their behalf.

Question	Answer
For the refund applications, will the termination need to be submitted by the district or the COE, or will it show up under the Pending Work Items panel?	The pending work item will display for the district only; however, the COE or district can search for transactions on the **Employment Detail Lookup** screen and submit the termination transactions on the **Employment Detail Maintenance** screen.
After processing the refund, is the employer allowed to adjust the employee's contributions due to the current month's payrolls? Will making these adjustments cause error messages when modifying prior payrolls or should the employer wait to terminate the employee until the current month's report is posted?	Assuming the reporting is prior to the member's termination date, you should not encounter any difficulty in reporting contributions after submitting the termination transaction. If you have any issues, please contact EmployerHelp@CalSTRS.com with supporting documentation.
Can the pending work item display be available for county as well? I do not want districts to do refund terminations without my knowledge.	We submitted a request to make pending work items visible for both the COE and district. We do not have a timeline for when this will be changed but hopefully the first half of 2026.