Employer Onboarding Resources Checklist

This checklist provides information to help employer reporting partners gain an understanding of the services and benefits CalSTRS provides to our members and critical information to help successfully submit reporting to us. Our partnership with you is essential to providing California educators with accurate benefits they can rely on after their careers end. The contribution data you submit is the foundation of those benefits, and it's our goal to provide education and tools to help you. We will support you with the additional training and service necessary to ensure timely and accurate reporting.

The resources listed here can be found on the Pension Administration Learning Management System (PALMS) in the Employer Onboarding Resources folder. If you have questions, contact EmployerHelp@CalSTRS.com or send a secure message in the Secure Employer Website.

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CalSTRS Overview

This section outlines CalSTRS member specific information as well as a general overview of CalSTRS and our plan design and functions.

Watch Member Videos/Read Member Publications

- ☐ CalSTRS Pension 2 Plan Overview
- ☐ DBS Part 1: What it is and How it's Funded
- ☐ Understanding the Formula – 2% at 60
- ☐ Understanding the Formula – 2% at 62
- ☐ Welcome to CalSTRS
- ☐ Join CalSTRS? Join CalPERS?
- ☐ Social Security, CalSTRS and You
- ☐ Understanding the Formula Publication

Read Secure Employer Website Resources

- ☐ Pension Solution Fact Sheet for Report Sources

Creditable Service

This section covers the various sections of the law that outline what entities are considered employers, which types of service are eligible for CalSTRS coverage, and how service may be grandfathered as creditable service.

Read the Teachers' Retirement Law

☐ Education Code 22131

☐ Education Code 22119.5

☐ Education Code 22119.6

Read Employer Circulars and Directives

☐ Employer Directive 2016-01

☐ Employer Directive 2016-04

Review Other Online Resources

☐ California Commission on Teacher Credentialing (CTC) Website

☐ Community College Board of Governors' Minimum Qualifications Handbook

Watch Computer Based Trainings on PALMS

☐ Creditable Service

Defined Benefit Membership

This section outlines the eligibility factors for employees who mandate CalSTRS Defined Benefit Program coverage and for employees who permissively elect membership. This also includes the eligibility requirements of a retirement system election.

Read the Teachers' Retirement Law

- ☐ Education Code Part 13 Chapter 10
- ☐ Education Code Part 13 Chapter 11
- ☐ Education Code 22455.5

Read Employer Circulars and Directives

- ☐ Employer Circular Volume 23-13 (2007)
- ☐ Employer Circular Volume 29-03 (2013)
- ☐ Employer Directive 2020-03

Review Forms

- ☐ *Permissive Membership* (ES 0350)
- ☐ *Retirement System Election* (ES 0372)

Watch Computer Based Trainings on PALMS

- ☐ Defined Benefit Membership

Creditable Compensation

This section describes what earnings should be reported to CalSTRS based on the employee's benefit structure. This includes differences between CalSTRS 2% at 60 members and CalSTRS 2% at 62 members as well as the differences between salary and remuneration in addition to salary, also known as special pay.

Read the Teachers' Retirement Law

- ☐ Education Code 22112.5
- ☐ Education Code 22119.2
- ☐ Education Code 22119.3
- ☐ Education Code 22144.3
- ☐ California Code of Regulations Title 5 Division 3 27300-27602

Read Employer Circulars and Directives

- ☐ Employer Circular Volume 25-05 (2009)
- ☐ Employer Circular Volume 27-02 (2011)
- ☐ Employer Directive 2012-07
- ☐ Employer Directive 2014-05
- ☐ Employer Directive 2015-03
- ☐ Employer Directive 2017-05

Watch Computer Based Trainings on PALMS

- ☐ Creditable Compensation

Reduced Workload Program

This section covers the eligibility factors for employees to participate in the Reduced Workload Program (RWP) and only applies to employers who have elected to offer RWP.

Read the Teachers' Retirement Law

☐ Education Code 22713

Read Employer Circulars and Directives

☐ Employer Circular Volume 27-03 (2011)

☐ Employer Directive 2017-07

Review Forms

☐ *Reduced Workload Program Eligibility Certification* (ES 1161)

Watch Computer Based Trainings on PALMS

☐ Reduced Workload Program

Reporting and the Secure Employer Website

This section outlines various resources within the Secure Employer Website. This information can be used to assist you with understanding how to submit accurate reporting.

Read the File Specification Document

- ☐ SEW F496 File Specification (Defined Benefit Reporting)

Review Job Aids and Reference Sheets

- ☐ Access and Navigate SEW
- ☐ CalSTRS Employer Resources
- ☐ Common F496 File Code Reference Sheet
- ☐ Working After Retirement Information Sheet

Watch Videos on the Secure Employer Website

- ☐ Access and Navigate SEW
- ☐ Manage Files – Associate Contributions to a File
- ☐ Manage Files – Contribution Lines
- ☐ Manage Files – Upload, Transmit, View
- ☐ Manage Reports
- ☐ Access and Navigate SEW

Read the File Specification Document

- ☐ Defined Benefit Reporting Requirements
- ☐ Unused Sick Leave
- ☐ Working After Retirement