

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.

Revised: 03/19/2021

Account Receivable Contact Type

The Account Receivable contact type is responsible for reviewing 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 in Secure Employer Website:

- 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 should be 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.

The screenshot shows the CALSTRS Dashboard with various navigation options. The 'Pending Work Items' panel is highlighted with a red circle. Below it is a table showing request statistics.

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 2:

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

This is a close-up of the 'Pending Work Items' table. The row for 'Service Purchase Requests' is highlighted with a red oval, indicating the target for the next step.

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.

ESSService Purchase Request Search

01001 COUNTY OFFICE OF EDUCATION
TRN2 - 2.0.540.1 - Green Region

Dashboard 0 ESSService Purchase Req... X ← Displaying page 1 of 1. →

[1 Records met the search criteria.]

Client ID: First Name: Last Name:

Service Credit Purchase Type: Status: Action Status:

Organization Code: Created Date From: Created Date To:

Search Results

<input type="checkbox"/>	Service Purchase Request ID	Client ID	Last Name	First Name	Service Credit Purchase Type	Status	Action Status	Created Date
<input type="checkbox"/>	7531	1562532620	SGGLZXO	ETWOETESTFOUR	Maternity or Paternity Leave	Review	Submitted for Employer Approval	01/27/2020

Step 4:

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

ESSPurchasable Service Maintenance
7531

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Dashboard 0 ESSService Purchase Req... ESSPurchasable Service ... X ← Displaying page 1 of 1. →

[Record displayed. Please make changes and press SAVE.]

Person Detail

Client ID: [1562532620](#) Person Name: ETWOETESTFOUR DO NOT USE SGGZXO

Membership Account: [CalSTRS Defined Benefit - 01/01/1999 - Active](#) Service Credit: 20.792239

Benefit Program: CalSTRS Defined Benefit Tier: DB 2% at 60 Sub Tier: 2% @ 60 Regular

Purchasable Service

Purchasable Service ID: 7531 Status: Review Action Status: Submitted for Employer Approval

Service Credit: 0.000000 Service Credit Purchase Type: Maternity or Paternity Leave Organization - Employment: 01001 - COUNTY OFFICE OF EDUCATION

Service Start Date: Service End Date: Suppress Warnings:

Comments:

<input type="checkbox"/>	Assignment Code	Annualized Pay Rate	Pay Period Start Date	Pay Period End Date	Earning Type	Earnings	Service Credit	Capped Service Credit
No records to display.								

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**.

Note: The **Service Start Date** and **Service End Date** fields can be edited if data is not accurate. If the service spans over fiscal years separate lines need to be added.

Purchasable Service

Purchasable Service ID: 12393 Status: Valid Action Status: Submitted for Employer Approval

Service Credit: 0.000000 Service Credit Purchase Type: Maternity or Paternity Leave Organization - Employment: 01001 - COUNTY OFFICE OF EDUCATION

Service Start Date: 02/01/2021 Service End Date: 06/30/2021 Suppress Warnings:

Comments:

Add **Delete**

Assignment Code	Annualized Pay Rate	Pay Period Start Date	Pay Period End Date	Earning Type	Earnings	Service Credit	Capped Service Credit
<input type="checkbox"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="\$0.00"/>	0.000000	0.000000

Step 6:

Review the **Service Credit Purchase Type** and **Organization-Employment** fields to ensure the information is accurate. If the information is inaccurate, since those fields cannot be edited, the request should be rejected.

Purchasable Service

Purchasable Service ID: 12393 Status: Valid Action Status: Submitted for Employer Approval

Service Credit: 0.000000 **Service Credit Purchase Type: Maternity or Paternity Leave** **Organization - Employment: 01001 - COUNTY OFFICE OF EDUCATION**

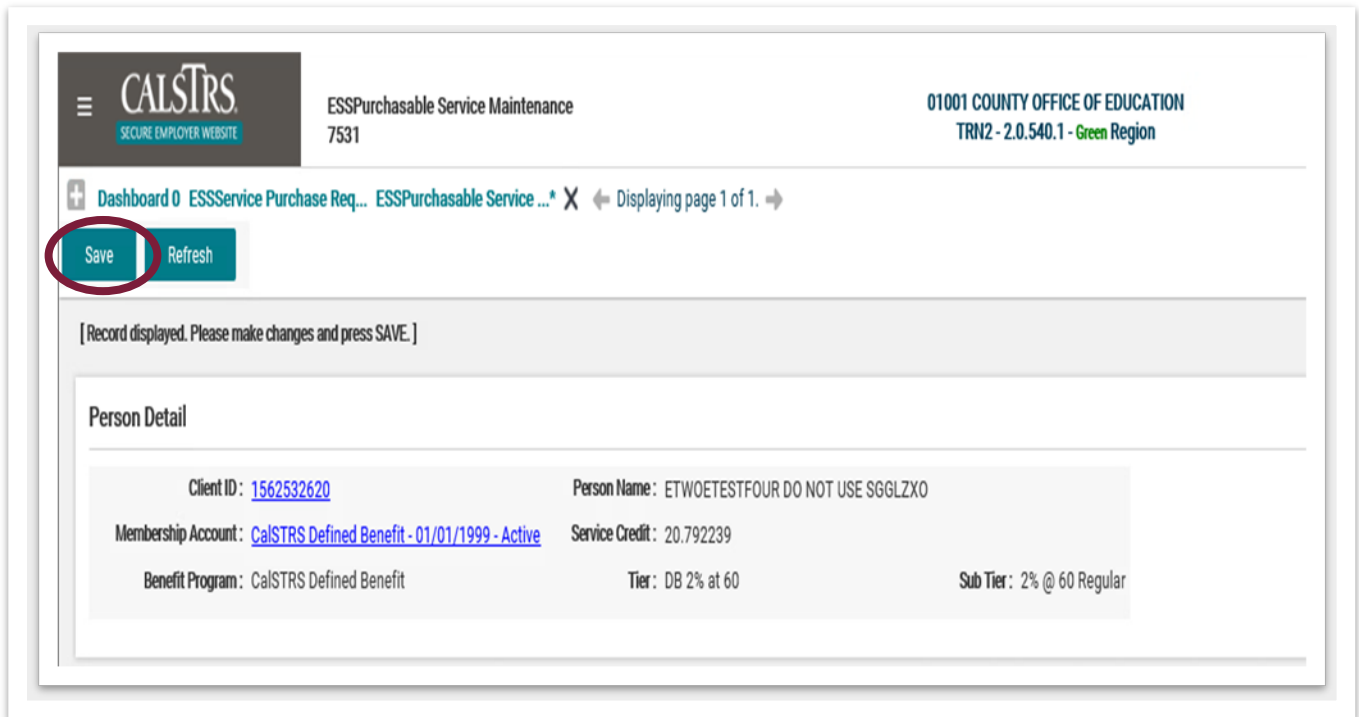
Service Start Date: 02/01/2021 Service End Date: 06/30/2021 Suppress Warnings:

Comments:

Add **Delete**

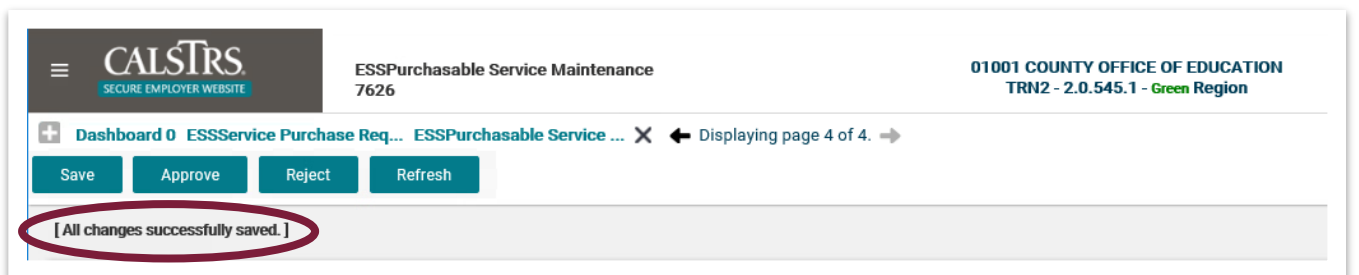
Step 7:

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."



Note: 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.

The screenshot shows the top navigation bar of the CALSTRS website. The header includes the CALSTRS logo and the text 'SECURE EMPLOYER WEBSITE'. The main navigation area displays 'ESSPurchasable Service Maintenance 7626' and '01001 COUNTY OFFICE OF EDUCATION TRN2 - 2.0.545.1 - Green Region'. Below the navigation bar, there is a breadcrumb trail: 'Dashboard 0 ESSService Purchase Req... ESSPurchasable Service ...'. A row of action buttons is visible: 'Save', 'Approve' (circled in red), 'Reject', and 'Refresh'. A status message at the bottom of the panel reads '[All changes successfully saved.]'.

Step 10:

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

The screenshot displays the 'Purchasable Service' panel. It contains the following information:

- Purchasable Service ID: 12393
- Status: Valid
- Action Status: Approved (circled in red)
- Service Credit: 1.000000
- Service Credit Purchase Type: Maternity or Paternity Leave
- Organization - Employment: 01001 - COUNTY OFFICE OF EDUCATION
- Service Start Date: 02/01/2021
- Service End Date: 06/30/2021
- Suppress Warnings:
- Comments:

<input type="checkbox"/>	Assignment Code	Annualized Pay Rate	Pay Period Start Date	Pay Period End Date	Earning Type	Earnings	Service Credit	Capped Service Credit
<input type="checkbox"/>	Early Retirement Incentive Program	\$65,000.00	02/01/2021	06/30/2021	Salary	\$65,000.00	1.000000	1.000000