Training Tips Forum Quarter 2 Questions and Answers- October 29, 2025

This document lists the questions and answers from the Training Tips Forum for Quarter 2 which was held on October 29, 2025.

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

Revised:11/17/2025

Questions and Answers

Enrollment

Question	Answer
I'm attempting to enroll a member in the STRS system but am receiving the error message "More than one person exists with same name and birth date under different tax ID." I'm unable to view the instructions.	This is a defect, but the current workaround is: If the member's name is Rod Smith, submit the transaction as Ron Duplicate Smith where Duplicate Smith is in the **Last Name** field. Once the enrollment is created, immediately navigate to the member's **Demographic Information** panel and change the Last Name to Smith. If you receive the same error when updating the last name, please reach out to Employerhelp@calstrs.com. Additionally, there is a defect related to viewing the instructions. The instructions are difficult to see. We do not know when this defect will be fixed. In the meantime, for instructions on correcting most errors, please see the file specifications located on employersupport.calstrs.com
When will the issue of SEW allowing nonmember enrollments for members be corrected?	The fix for this defect is currently scheduled for a late 2025 release. This will most likely be corrected in December.

Question	Answer
If we accidentally put someone in as a nonmember and they are members, how do we update it?	If they were members prior to the nonmember date your employer organization added, contact EmployerHelp@CalSTRS.com for support. A conflict in member and nonmember dates can only be corrected by CalSTRS staff. If this was the only transaction, submit a member enrollment using transaction code 11 or 81.
How do we add appointments for retired annuitants?	Employers should submit reporting on the F496 with Assignment Code 61 to automatically open the enrollment. For working after retirement, no additional enrollment transaction is needed. All working after retirement activities should be reported with Assignment Code 61 regardless of assignment.
For memberships, will we be able to fix membership dates and records without going to Employer Help?	There are cases where an online employment transaction can correct the employment record information, but membership account adjustments can only be completed by CalSTRS staff.
We enrolled a member in the legacy system but they don’t appear in the new system. Why is this? Do I need to enroll them?	Enrollment records were created based on posted payroll detail records, so if you enrolled a member in REAP but never submitted reporting for them in old SEW, an enrollment record would not have created in the new system. The CID will have converted, but you would need to enroll them again to create the enrollment record.
Which transaction type do we use to create appointments for employees who have elected STRS using the ES372?	You should use Transaction Code 11 to enroll a member who is electing STRS via the ES372.
The **Enroll Member** button within the Membership Account panel automatically defaults to nonmember accounts. Would it possible to fix it so that it would be blank, and we would be able to use the selection?	That has been identified as a later enhancement, but an implementation date has not been determined.

Question	Answer
Which date do you use to enroll an employee when they are already a member and have different dates of employment with different districts? Would it be the date the employee worked for the district or the member date?	The enrollment date should be the date the employee began working for the reporting organization. This will vary by employer.
If we have an employee who was a substitute and takes on a full-time assignment, do we need to change or add an employment record for the new assignment?	If they're already a member with your district, there is no need to submit another online transaction as there is an employment record indicating that they are a member at your school.
When an employee resigns are we required to terminate them in the new SEW?	Employers are only required to submit termination information when prompted by CalSTRS to process a retirement or refund application. Employers may submit termination information proactively but are not required to do so at this time.
Will we get employer notifications like we did in the old SEW system? For example: when a nonmember becomes a member with a different employer or when a member's status changes to retiree?	You will not receive a notification; however, you may download the Employee Status Change Report from the **Online Reports** panel which will provide this information.

Navigation

Question	Answer
Can we receive an all-inclusive list of the issues the system currently has with any "work around" that has been shared?	We will be publishing a Problem Incident Report (PIR) job aid to ESP which will detail all the known issues. Additionally, ERT publishes Release Notes regularly which have details about identified system issues.
How can we add and remove contacts?	To add or remove employer contacts, you can reference the Employer Contacts job aid which can be found on the Employer Support Portal employersupport.calstrs.com.

Question	Answer
How can we view a member's service credit totals?	You can refer to the Viewing Service Credit Totals job aid for guidance on how to download a spreadsheet of a members contribution reporting and manually sum the service credit. Additionally, members may view their service credit information through their *my*CalSTRS account.
In the future, will we be able to view service credit without having to download a spreadsheet and sum up the data?	This is an enhancement tentatively scheduled to be implemented in mid-2026.
Do you have a guide for how to navigate through SEW?	We have several job aids available that demonstrate navigating through SEW. The Using the Secure Employer Website is a good place to start. Additionally, we have several computer-based trainings available on the Employer Learning Center that demonstrate how to navigate in SEW.
How can we distinguish from a lump sum/refund versus a monthly retirement pension allowance under the CalSTRS defined Benefits?	Please refer to the Employee Maintenance for Employers job aid which has a detailed table of each status that will be reflected in SEW and what they mean. This highlights that the status for a retired member will be "Retired" and the status for a member who refunded will be "Withdrawn."
I'm attempting to complete an action in the system but I'm being blocked or seeing a message indicating that I do not have access. How can I tell what access I need or have?	The Employer Contacts job aid details what actions can be taken based on the role assigned. You may also use this job aid to determine what roles you have and what roles you may request from your county administrator.
When downloading the **Transaction Details** from the Defined Benefit account to identify the total amount of service credit, we noticed negative lines and 0.00 earnings that our organization did not submit? Why are these lines displayed?	Internal CalSTRS generated transactions are appearing with employer reporting detail. We have an enhancement to remove CalSTRS related transactions coming in 2026.
Where can we find the invoices for Excess Sick Leave and Retirement Incentives?	These are posted in the Contribution Account Portal. For questions about CAP please reach out to contributions@calstrs.com.

Sick Leave and Termination Information

Question	Answer
Can you please confirm there is no more need for employees to complete the express benefit report?	The Express Benefit Report is retired effective 09/15/2025 and you now submit the information in the new SEW. Once the member submits the Service Retirement Application, the report units who submitted reporting during the member's last fiscal year of service will receive a pending work item in SEW to report the termination and unused sick leave. Please see the Submitting Termination and Sick Leave Data job aid available at employersupport.calstrs.com.
Will employers be able to upload bulk express benefit information, or is this process only for one employee at a time?	The transactions can only be submitted individually at this time. When the new file format is implemented in 2027 you will be able to submit in bulk.
Do pending work items have to be completed in a certain order before a certain request type? Eg: When attempting to complete the unused sick leave request it doesn't let us complete while the termination request is still outstanding	The Employment File Specification does require termination requests to be completed before the unused sick leave requests, but other pending work items like employer reporting requests do not have a specific order for actions to be completed.
In the old portal we had access to view future retirement dates, will this new portal post future retirement dates? Example: if a member retires in December and the application is complete, will we be able to see the future retirement date posted now?	Employers will not have the ability to see future retirement dates in the new system. However, once a member's retirement application has been processed by CalSTRS, the applicable reporting organizations will receive a pending work item to submit the termination and sick leave information.

Question	Answer
For a death, do we submit a termination?	In the event of a member's death a pending work item will be created to submit the Employer Certification for Death Before Retirement which includes termination information. Employers are not required to submit a separate termination transaction. See the Employee Change Request- Employer Certification for Death Before Retirement job aid available at employersupport.calstrs.com for more information.
Can we enter term date in advance of the term date?	Yes, termination information can be submitted in advance of the termination date.
When would the last day worked and last day compensation date be different?	If an employee used compensated leave after their last day of work this would result in the last day of work and last date of compensation being different.
Could you please assist with how to calculate excess unused sick leave for members?	Please refer to the Unused Sick Leave job aid at www.calstrs.com/employer-job-aids for information about how to calculate unused and excess sick leave.

Contribution Reporting

Question	Answer
Is there a way to download a spreadsheet of all members for our district without a limitation of 1,000 lines?	We have an enhancement request to add an **Export All** button that is currently slated as a mid-2026 release.
Is there a report we can run/get that shows what STRS is calculating for EE & ER contributions by line.	The **Download Processed File** button in the **Downloadable Contribution File Extracts** panel on the **Payroll Summary** screen will display calculated contributions by line.
Will there be an update to allow editing file uploads to fix "errors" without reuploading the entire file?	Some errors are structural in nature and cannot be fixed on screen (e.g., invalid dates, letters in numeric field, etc.). These require correction and upload of a new file. Nonstructural error types can be modified onscreen.
When uploading our monthly report with contributions, we noticed some employees receive errors because the calculated contributions are showing $0? Is this a defect in the system, and when will this be corrected?	There is a defect around the 30301187-variance error. We are still researching the root cause for why it's calculating zero contributions in certain instances. We do have this as a high priority defect. In the meantime, clicking the **Save and Validate** button on the payroll detail line can sometimes clear the error. If it does not clear the error, please reach out to employerhelp@calstrs.com.

Question	Answer
How do we delete files from the "Processed Files Search"?	These cannot be deleted. Only files that have processed and created a payroll summary can be deleted. Files in a Processed status will be archived after 24 months. Files in all other statuses will be deleted after 12 months.
Are you able to edit a file that was not processed within SEW or would we have to discard file and then reupload the file?	When a file is uploaded, it generates a Payroll Summary. This Summary can be edited as needed until it is submitted and processed. Once the file has been processed by CalSTRS, it can no longer be edited.
Is there a way to stop a file from being transmitted to the system if at this last step a line or more ends up with an error?	Once you click 'Submit to CalSTRS' there is no way to stop a file from processing. You can validate all the headers prior to submitting the file to make sure no new business rules generate between the time the file was uploaded and being submitted. This should prevent this issue in most cases.
Is there a way to retrieve an updated F496 in text format?	Currently there is no way to retrieve an updated/modified F496. The only option available is the original file.
Are we able to name our Payroll Summaries created live in the system?	This functionality currently does not exist; however, each payroll summary is assigned a unique number/identifier. You can use the Payroll Summary ID to identify files.
What happens when reporting retro pay paid to an employee that has retired and no longer has an active account? It generates an error, how do we correctly report?	Please request assistance from employerhelp@calstrs.com.There are some existing defects impacting this process.
Can we submit a September file before August file is submitted?	You cannot submit the September file before the August file.
How can we submit the valid lines to STRS when we have hard errors that we cannot resolve on our own due to defects or because we are waiting for assistance?	When you review the individual payroll details within the summary, you can reject the lines that have errors. This will allow your file to show a Valid status at which point it can be submitted to CalSTRS. Once your valid file submits to STRS a new payroll summary will be created with those rejected lines. Additionally, you may create separate files, one containing all the valid lines and one containing the lines with errors. These files can be submitted separately.

Question	Answer
What is the difference between rejecting and voiding line within a payroll summary?	If you reject a line a new payroll summary with all rejected lines will be created once you submit the file. If you void a record, it will be disregarded.

Secure Messaging

Question	Answer
Is there a way to see message history when sending documents through Secure Message?	Sent messages should display by clicking the **Search** button on the **Secure Message** screen. Additionally, when opening a secure message there is a panel entitled **Secure Message History** which displays the chain of messages associated with the message displayed. If you are not seeing a message you sent please reach out to employerhelp@calstrs.com. Please refer to the SEW Communications job aid for more information about navigating to, sending and receiving secure messages in SEW.
Is it preferred that we email Employer Help with our requests for assistance, or use the secure message system in SEW?	If your request contains personal identifiable information such as a SSN, please use secure messaging. Otherwise, you are more than welcome to email employerhelp@calstrs.com.
Do you have to put attention to?	You do not need to complete the **Attention To** field when sending a secure message.
After you attach and send the message do you hit **Complete**?	Do not hit **Complete**. That button is meant for internal users after a communication chain is totally completed. An enhancement request to remove visibility of this button is in process but we do not yet have a date that it will be completed.
Do we need a certain clearance to have access to secure message?	Yes, you must have specific roles to be able to view and/or respond to SEW Secure messages. Please see the Employer Contacts job aid available on the Employer Support Portal to see what role(s) are required.
When sending member documents or forms through secure message is the recommendation to upload one document per message or are we able to submit multiple documents in one message.	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.

Question	Answer
Will there be any confirmation of receipt (or notification of assignment) for secure messages?	If you click 'Search' on the **Secure Message** screen you should see the message has been sent and the assigned status. Employer Help will send an acknowledgement email when the message has been assigned to an analyst.
Will the ability to secure message other organizations be available?	We will take this back to log as a potential enhancement that would allow a COE to send a secure message to units under them. In the meantime, you can send a secure message to another contact at the unit you're logged in at. So, if you are logged in at the COE you can send a secure message to another contact at the COE. A workaround can be to set yourself up as a contact at the district or charter and send the message that way.

ECM

Question	Answer
Is there a way to see documents that we have uploaded throughout ECM?	Employers can only view organization documents uploaded through ECM. Employers will not have visibility of member documents previously uploaded to a member file.
Is the Upload Documents the correct place to submit the permissive membership forms?	Yes, from the **Global Navigation Menu**, click **ECM**, and **Upload Documents** to upload member documents like the ES350, CB533 and ES372.

Miscellaneous

Question	Answer
We have a pending work item to approve a service credit purchase. Who can we reach out to for support on this item?	For support on service credit purchases, you would contact SCP@CalSTRS.com.

Question	Answer
From the **Dashboard**, the **Pending Work Items** initiated by Employer Help seem related to ES 756 requests, but I'd like to know if the COEs see all requests to Districts, or if there are specific requests that go directly to Districts?	The Employer Reporting Requests (formerly ES756) will appear as pending work items for the associated COE. They will not appear this way for the districts; however the districts can view and respond to the requests by navigating to the **Employer Reporting Request Lookup** screen from the **Global Navigation Menu**. When a district completes the request, it will clear the pending work item for the COE. All other **Pending Work Item** requests go directly to the districts. COEs cannot see district specific pending work items and districts cannot see COE specific pending work items. There is an enhancement scheduled for 2026 that will allow COEs to view all pending work items for all districts within the county.
For Employer Reporting Requests, it seemed like you could create a Payroll Summary from transactions that are needing resolution, but the button doesn't appear to work. Is this a defect?	Yes, there is a defect related to the **Create Summary** button. We do not have an estimated timeframe for when this defect will be resolved. In the meantime, employers may submit adjustments through an online transaction or by submitting an F496 file. Please refer to the Submitting an Online F496 File Transaction job aid for more information about how to submit online adjustments.
For RWP do we still need to submit the ES 1161 forms now that we are entering the information from them?	The ES1161 form has been retired. Please refer to the Employee Change Request – Reduced Workload Program job aid for more information about how to submit RWP requests.