

Supporting Documentation for Common Employer Request Types

This document identifies supporting documentation required for Employer Help to fulfill common employer inquiry requests. In our continued effort to improve efficiencies within our division, we have created this job aid to detail the supporting documentation needed for common employer inquiry request types. Including accurate supporting documentation will support Employer Help's commitment to enhancing the service we provide our employers and assist with the timely resolution of each inquiry assigned to our analysts.

Revised: 09/13/2024

Teachers' Retirement Law

Creditable Service Inquiries

- Position duty statement document
- Job description document
- Job posting

Creditable Compensation Inquiries

- Publicly available written contractual agreement(s) which may include the following:
 - Memorandum of Understanding
 - Collective Bargaining Agreement
 - Employment Agreement
 - Salary Schedule
 - Approved Board Minutes

Account Information Updates

To update member or nonmember account information, please provide documentation that includes the employee's full name as well as any additional identifiers that validate the identity of the employee such as: date of birth (DOB), social security number (SSN), CalSTRS Client ID, employer's name, and the documentation specific for each account information update request.

For documentation with personal identifiable information such as a DOB or SSN, please submit documentation to the ES Forms Queue through the Secure Employer Website (SEW) Secure Messaging Center.

Membership/Nonmember Date and/or Status Change

- Completed *Permissive Membership* (ES 350) form, if applicable
- Completed *Retirement System Election* (ES 372) form, if applicable

- Payroll document or screenshot of a payroll document identifying the employee's hire date

Benefit Structure Change

- Screenshot of the enrollment date from another public retirement system
 - If the other public retirement system is CalPERS, members or Employer Help Analysts can contact Member_Election_Team@calpers.ca.gov for this information.
- Screenshot of payroll lines (excluding reversals) reported to the other public retirement system six months prior to CalSTRS membership.

Person Maintenance – Social Security Number

- Social Security card or a court document that verifies the SSN

Personal Maintenance – Name

- Marriage certificate
- Court order indicating the name change
- Social Security card matching the name change request
- Passport identification page or passport card
- Unexpired government issued signed driver's license or identification card
- US military identification

Personal Maintenance – Birthdate

- Unexpired government issued signed driver's license or identification card
- Passport identification page or passport card
- Birth certificate

Person Maintenance – Gender

- Unexpired government issued signed driver's license or Identification card
- Court documentation
- Passport identification page or passport card

SEW User Maintenance

Adding an Administrator

To be added an administrator, the SEW user must have an existing SEW account that has no report source or report unit assigned. If no SEW account exists for the user that has no report source or report unit assigned, the SEW registration process must be completed.

Adding a New User

Please contact your County Administrator for a registration link and the SEW Site Access form. Once the form is completed, please fax the access request form to 916-414-6963 with "Service Desk" in the **Attention** field.

Reactivating and Re-enabling an Account

Please contact your County Administrator for them reach out to Employer Help and approve the reactivation or re-enabling of your account. For disabled accounts, you may be asked to reregister and create a new account.

Password Reset

To reset your SEW password, on the SEW login webpage select the **Forgot Your Password** link. The **Password Hint** page populates. If you are unable to successfully reset your password, please contact your County Administrator for assistance. If additional assistance is needed, please contact EmployerHelp@CalSTRS.com.