

Employee Change Request – Employer Certification for Death Before Retirement

This document provides an overview of the different statuses and action statuses of an Employee Change Request. Also, this document explains the step-by-step process employers take to certify an Employee Change Request for death before retirement.

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Statuses and Action Statuses

Statuses

The Status of an Employee Change Request indicates the current state of the request.

Term	Definition
Valid	The Employee Change Request meets the criteria, errors are resolved, and warnings are suppressed.
Review	The Employee Change Request either has incomplete fields or errors or warnings that must be addressed in order to submit the information to CalSTRS.

Action Statuses

The Action Status of an Employee Change Request applies to the different stages of the request being moved through the process.

Term	Definition
Approved	Criteria has been met, no errors exist, and warnings are suppressed.
Denied	Criteria has not been met.
Returned to Employer	CalSTRS review has determined a possible data entry error exists. CalSTRS has returned the request to the employer organization for correction.

Certify Death Before Retirement

Step 1:

On the Dashboard in the **Pending Work Items** panel, a number displays as a link in the **New Request** column for **Employer Certification for Death Before Retirement**. Click the **New Request** link.

The screenshot shows the CALSTRS Dashboard for the 01001 COUNTY OFFICE OF EDUCATION. The 'Pending Work Items' table is as follows:

	Progress Request	Total Outstanding Request
Employer Certification for Death Before Retirement	12	18
Service Purchase Requests	25	30
Termination Requests for DB SR	1	1

Step 2:

The **Employee Change Request Search** screen displays. The Employee Change Requests for the **Employer Certification for Death Before Retirement** automatically display in the **Search Results** panel. Click the **Change Request Type** link for **Employer Certification**.

The screenshot shows the Employee Change Request Search screen. The search filters are: Client ID, Last Name, Effective Date From, Created Date From, First Name, Effective Date To, Created Date To, Organization Code, Status, and Action Status. The search results table is as follows:

Change Request Subtype	Client ID	Last Name	First Name	Organization Name	Status	Action Status	Created Date
Employer Certification	1530817785	SAURASH	DONOTUSE	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	10/21/2020
Employer Certification	1528701713	SAURASH	DONOTUSE	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	10/06/2020
Employer Certification	1528582149	SAURASH	DONOTUSE	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	10/05/2020
Employer Certification	152685552	SAURASH	DONOTUSE	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	09/21/2020
Employer Certification	1524903187	SAURASH	DONOTUSE	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	09/05/2020
Employer Certification	1524581378	SAURASH	DONOTUSE	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	09/02/2020
Employer Certification	1524576775	SAURASH	DONOTUSE	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	09/02/2020
Employer Certification	1517854492	CKJO	GUMIFF	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	08/12/2020
Employer Certification	1517851379	CKJO	DONOTUSE	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	07/09/2020
Employer Certification	1561193479	TestData	DoNotUse	COUNTY OFFICE OF EDUCATION	Valid	Pending Approval	07/06/2020

Step 3:

The Employer Certification Maintenance screen displays. Enter the applicable details in the Employment Information panel.

The screenshot shows the 'Employer Certification Maintenance' screen for a member named GUMJFF CLONE CLOJ. The 'Employment Information' section is highlighted with a red box and contains the following fields:

- Employment Start Date: 08/01/2009
- Employment End Date: 12/15/2020
- Last Compensation Date: 12/14/2020
- Current Employment Status: No
- Was Employee on Approved Leave: No
- Was Employee a Substitute: No
- Sick Leave, Other Paid Leave, Differential Pay, and Unpaid Leave: Each with 'From' and 'To' date pickers.
- Employment Remarks: A text input field.

Step 4:

Review the statements regarding one-year final compensation and reduction in school funds. If the statement applies to the member, select the applicable checkbox.

The screenshot shows the bottom portion of the form, with the certification statements and checkboxes highlighted by a red box:

- I certify pursuant to the district bargaining agreement, that the present-value payment for one-year final compensation will be made to CalSTRS within 30 days of receiving billing for the member who has fewer than 25 years of service credit
- I acknowledge the following years were provided as years of salary reduction. If there are additional years to consider for this member, I understand this information must be provided through the Reduction in School Funds provision transaction in order to be considered for the member's benefit calculation.
- School Years: No records to display.

Below this section is the 'Validation Information' panel, which also shows 'No records to display.' and an 'Audit Information' panel at the bottom.

Step 5:

At the top of the screen, click the **Save** button. The system validates the information entered and any applicable errors and warnings display. Hard errors, which prevent you from submitting the Employee Change Request, will display at the top of the screen in red text. These errors normally occur when a field is missed or completed incorrectly. Soft errors display in the Validation Information panel. Hard and soft errors must be resolved before you can submit the request.



Step 6

Click the **Submit** button. A message displays stating: **“All changes successfully saved.”**

