# **Managing Payroll Summaries**

This is a step-by-step process on how to delete and merge payroll summaries. It also includes eligibility requirements for both processes.

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

Revised: 09/05/2025

# **Eligibility Requirements**

The information listed below is important information after a payroll summary has been deleted and eligibility requirements for payroll summaries merging. Please note that the system will only display payroll summaries that are eligible to be merged and will not allow users to delete an ineligible payroll summary.

#### **Deleted Payroll Summaries**

- Cannot be restored after deletion
- Cannot be submitted to CalSTRS
- Are not eligible for a payroll summary merge
- Are removed permanently from the Secure Employer Website

## **Merged Payroll Summary Eligibility Requirements**

If	Then
Report Source is the same	Payroll Summary Status is Review or Valid
Reporting Period is the same	File Type is the same
Benefit Program is the same	Cannot be already submitted to CalSTRS



# **Deleting Payroll Summaries**

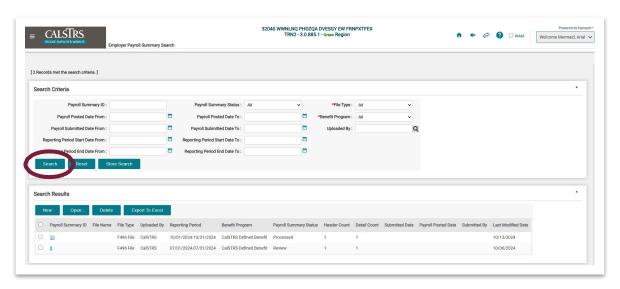
# Step 1:

Select Employer Reporting then Employer Reporting Summary from the Global Navigation menu.



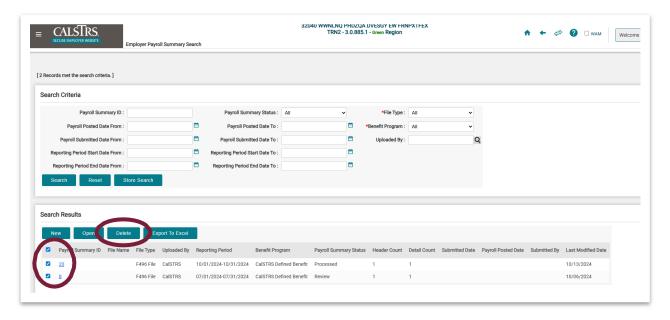
### Step 2:

The **Employer Payroll Summary Search** screen displays. Enter in desired search criteria in the **Search Criteria** panel. Click the **Search** button and results display in the **Search Results** panel.



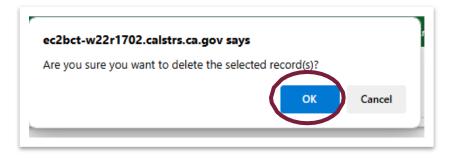
#### Step 3:

Click the checkbox next to each Payroll Summary ID to be deleted. Click the Delete button.



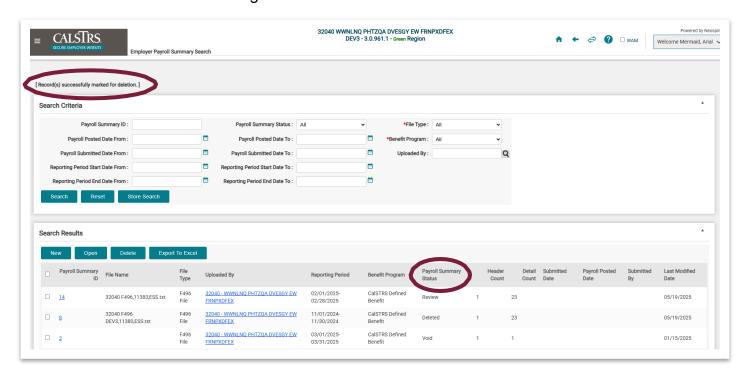
### Step 4:

A message pops up and asks, "Are you sure you want to delete the selected record(s)?" Click the **OK** button.



# Step 5:

A message displays "[Record(s) successfully marked for deletion]" and the **Payroll Summary Status** is updated to **Deleted.** If you attempt to delete a payroll summary that is not eligible to be deleted, a message displays at the top of the screen: "Error Occurred. One or more summaries is not eligible for deletion."





# **Merging Payroll Summaries**

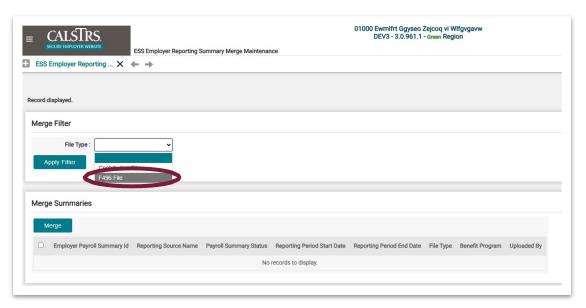
# Step 1:

Select **Employer Reporting** then **Employer Reporting Summary Merge** from the **Global Navigation** menu.



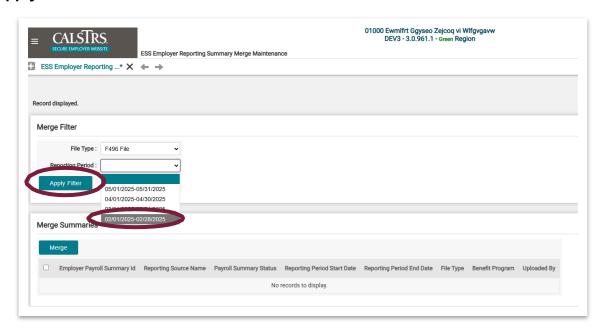
### Step 2:

The **Employer Reporting Summary Merge Maintenance** screen displays. The **Merge Filter** panel allows you to filter payroll summaries that are eligible to be merged. Select **F496 File** from the **File Type** dropdown.



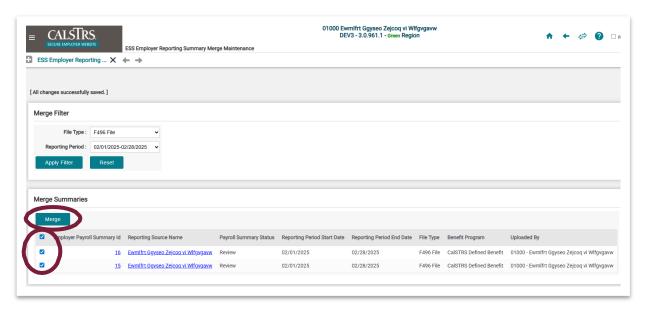
# Step 3:

The **Reporting Period** dropdown displays. Select the appropriate reporting period and click the **Apply Filter** button.



### Step 4:

Payroll summaries that are eligible to be merged will display in the **Merge Summaries** panel. Select the applicable payroll summaries by clicking the checkbox next to the **Employer Payroll Summary ID**. Click the **Merge** button.



## Step 5:

A message pops up and asks, "Are you sure you want to merge selected record(s)?" Click the **OK** button.



### Step 6:

A new message displays at the top of the screen: "[Employer Reporting Summaries have been successfully merged into Summary ID XXX]." The **Payroll Summary ID** will be different with each Payroll Summary Merge the user completes. The status for the payroll summaries that have been merged will change to **Merged**.

