Uploading a Contribution File

This is a step-by-step process for users to upload a Contribution File in the new Secure Employer Website. This same process applies to the Contribution - AR File type, however different dropdown fields will be available depending on the file type selected.

Revised: 10/07/2019

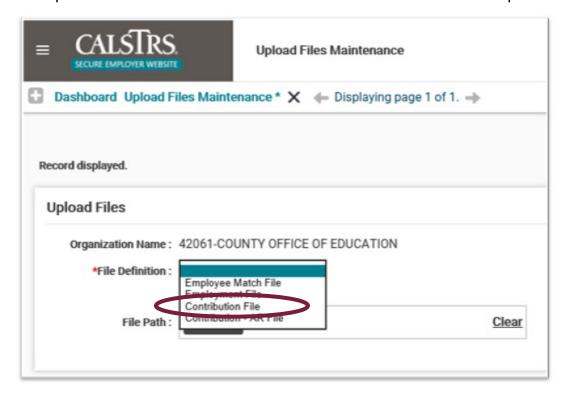
Step 1:

Navigate to the Upload Files Maintenance screen by clicking the Upload Files quick link.



Step 2:

The **Upload Files Maintenance** screen displays. This is where you upload files. In this example we select the **Contribution File** from the **File Definition** dropdown field.



Step 3:

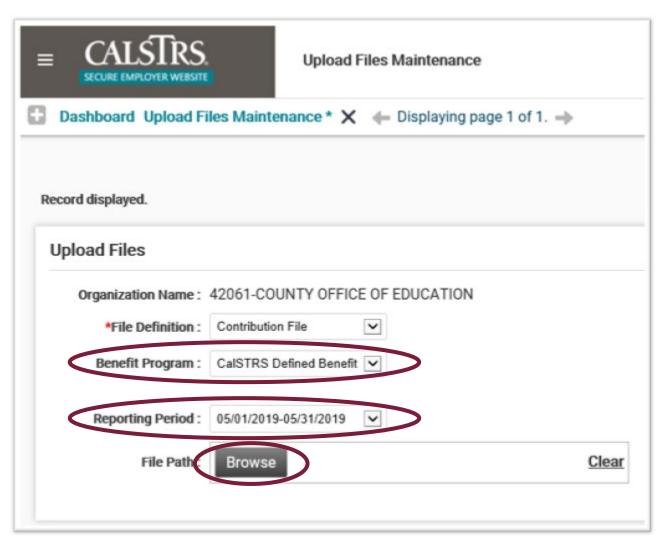
Select **CalSTRS Defined Benefit** from the **Benefit Program** dropdown field. If another file type was selected, such as the Contribution - AR File, other dropdown fields become available.

Step 4:

Select the **Reporting Period** from the **Reporting Period** dropdown field.

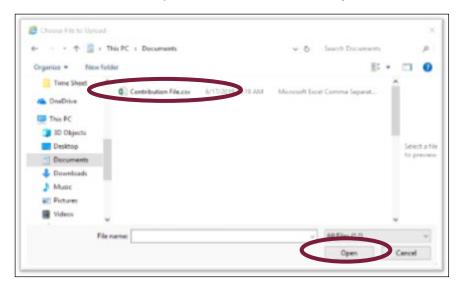
Step 5:

Select the **Browse** button to search for the file to upload. Please note that with New File Format, the files need to be in a .CSV format.



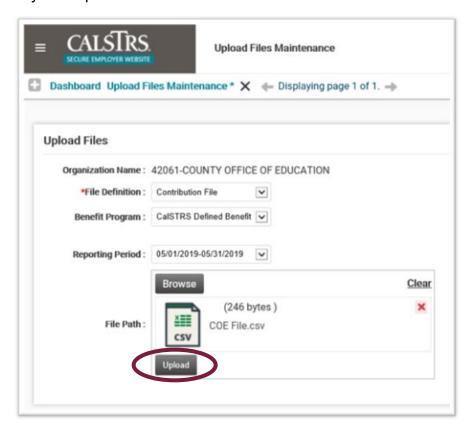
Step 6:

Select the file to be uploaded and select the **Open** button.



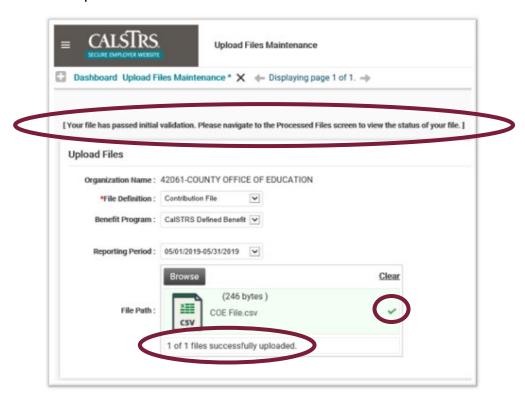
Step 7:

Select the **Upload** button. The Contribution File will go through its first validation to check for any File Upload Errors.



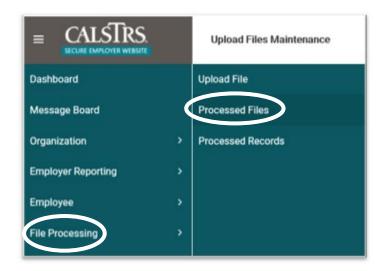
Step 8:

You will know the file upload was successful and has passed initial validation because of the green checkmark, the messages found under the File Path box and the message displayed at the top of the screen.



Step 9:

Navigate to the **Processed Files Search** screen and confirm the file status. Select **File Processing** from the **Global Navigation** menu. Next, select **Processed Files**.

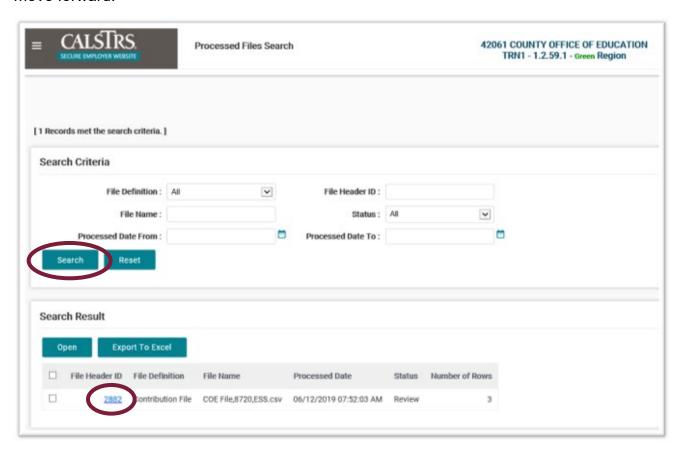


Step 10:

The **Processed Files Search** screen displays. This screen is used to confirm the status of the Contribution File and to locate the **File Header ID**. Enter in desired **Search Criteria** and select the **Search** button

Step 11:

The search results display under the **Search Result** panel. Take note of the **File Header ID** and then navigate to the **Employer Payroll Header Search** screen to begin working the Contribution File. Please note that the Contribution File needs to be in a Processed status to move forward.



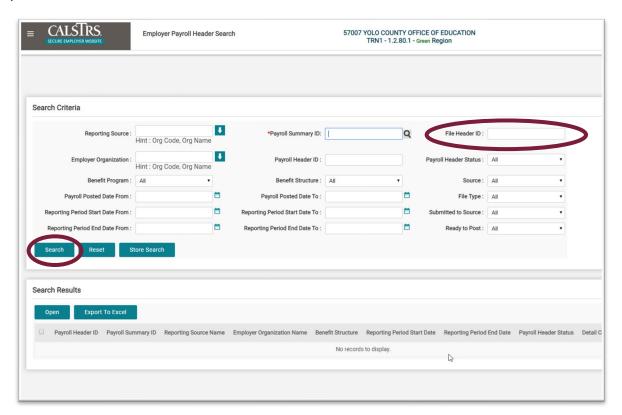
Step 12:

Select **Employer Reporting** from the **Global Navigation** menu. Next, select **Employer Reporting** Header.



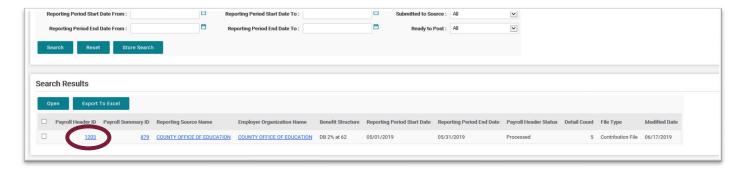
Step 13:

The **Employer Payroll Header Search** screen displays. Enter in the **File Header ID** from the previous screen and select the **Search** button.



Step 14:

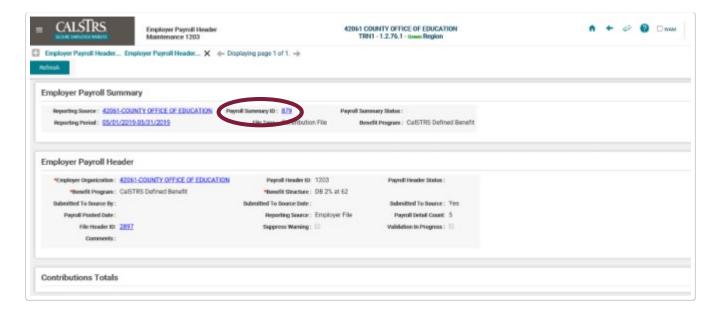
The search results display under the **Search Results** panel. To view the Payroll Header record, click the **Payroll Header ID** link.



Step 15:

The **Employer Payroll Header Maintenance** screen displays. When a Report Source uploads their Contribution File the Payroll Headers are automatically marked as submitted to the Report Source. The Report Source has the option to click the **re-open** button to make additional changes to the Payroll Header. Click the **Payroll Summary ID** link to navigate to the **Employer Payroll Summary Maintenance** screen.

Note: if the employer is a Report Unit they need to submit their Payroll Header to their Report Source. Report Units will have a **Submit to Reporting Source** button on this screen that allows them to submit their Payroll Headers to their Report Source.



Step 16:

The **Employer Payroll Summary Maintenance** screen displays. Once Business Rule Errors have been resolved and payments have been associated, the Report Source can complete the Contribution File process by selecting the "**Submit to CalSTRS**" button.

