Submitting an Online Enrollment Transaction

This is a step-by-step process for submitting an online Enrollment Transaction in the new Secure Employer Website. This process applies to all Enrollment Transactions types; however, different conditional fields will be available depending on the Transaction type selected. Both required and conditional fields can be found in the *Employment Specification* document.

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Step 1:

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EMPLOYER TRAINING SERVICES

Navigate to the **Employment Detail Search** screen by clicking the **Employment** quick link.



Step 2:

The **Employment Detail Search** screen displays. For this new enrollment example, you will populate the required and conditional fields. You may also search for existing records here; three fields are required. **Transaction Type, Benefit Program** and **Organization Code.**

CALSTRS. SECURE EMPLOYER WEBSITE	E	mployment Detail Loo	kup		UNTY OFFICE OF EDUCATION 1.2.80.1 - Green Region	
earch Criteria						
Transaction Type :	Enrollment		Transaction Sub-Type :	•	Benefit Program :	CalSTRS Defined Benefit
*Organization Code :	57007		Transaction Status :	All	Source :	All
					File Type :	All
Employee First Name :			Employee Last Name :		File Header ID :	
Client ID :		Q	Employment Start Date From :		Employment Start Date To :	
SSN :			Employment End Date from :		Employment End Date from :	E
Submitted Flag :			Submitted Date From :		Submitted Date To :	
Employment Detail ID :			Transaction Effective Date From :		Transaction Effective Date To :	
Message ID :	All	•				
Search Reset	Store	Search				
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Step 3:

When creating new employment transactions, select the **New** button found in the **Search Results** panel.

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Search Results			
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New Open	Export To Excel		

Step 4:

The **Employment Detail Maintenance** screen displays. The **Employment Detail** panel shows data that was entered on the **Employment Detail Search** screen. The **Person Detail** panel is where users enter all required and conditional information. For this example, the required fields are **Date of Birth, Last Name** and **Gender**.

Employment Detail Lookup Employment Detail Maint 🗙 🔶 Displaying page 1 of 1. →					
ave					
ecord displayed. Plea	ase make changes and press	SAVE.]			
Employment Det	ail				
Organizatio	n Name : <u>57007 - YOLO CO</u>	OUNTY OFFICE OF EDUCATION	Employment Detail ID :		
Transacti	on Type : Enrollment				
Benefit P	rogram : CalSTRS Defined	Benefit Benefit Structure :	▼		
	Source : Employer Portal	File Header ID :	Employment Detail Status :		
	ted Flag :	Submitted By :	Submitted Date :		
Suppress Warnin	igs Flag : 🔲	Comments :		2	
				_	
Person Detail					
SSN :		Confirm SSN :	Date Of Birth :		
First Name :		Middle Name :	t ast Name :		
Name Prefix :	•	Name Suffix I :	Name Suffix II :	•	
Marital Status :	•	*Gender :	Email :		
Phone :		Secondary Phone :	Mobile Phone :		
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Step 5:

The **Address Detail** panel is where users will populate address information. The **Suggested Address** panel allows the address to be verified prior to submitting the transaction. After entering the address information, select the **Get Suggestion** button, which will provide any missing elements, as well as Zip Code with the last 4 digits. To use the suggest address, select the radio button next to the address that is desired.

Person Address			Sugges	ted Address					
Address Line 1 :	100 Waterfront		Get St	uggestion	Use Selected	Address			
Address Line 2 :			Select	Addr Line 1	Addr Line 2	City	State	ZIP Code	ZIP 4 Code
City :	West Sacramento			100 Waterfront Pl		West Sacramento			2807
State :	California 🔽	1		Too waterront PI		west Sacramento	CA	95605	2807
Country :	United States								
ZIP Code :									
Do Not Validate :									

Step 6:

In the **Enrollment Detail** panel, the **Employment Start Date** field is required and can be populated by manually entering or clicking the calendar icon to select the date.

Enrollment Detail	
*Employment Start Date :	
Member Type :	Batch Number :



Step 7:

Users will select the **Save** button on the top left of the screen to trigger the validation process. Selecting the **Save** button also transitions the employment transaction into an employment record. Once saved, records cannot be deleted, they can only be voided or submitted.



Step 8:

As the transaction data is validated, informational messages, warnings and errors may appear at the top and/or bottom of the screen. No action is required for informational messages. Warnings may be suppressed; however, errors must be corrected before the transaction can be submitted to CalSTRS. When the record is error free and the **Save** button is selected, the **Submit** button will appear and allow submission to CalSTRS.

