

Employee Change Request – Certification for Disability

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 Certification for Disability.

Revised: 04/02/2021

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 the 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

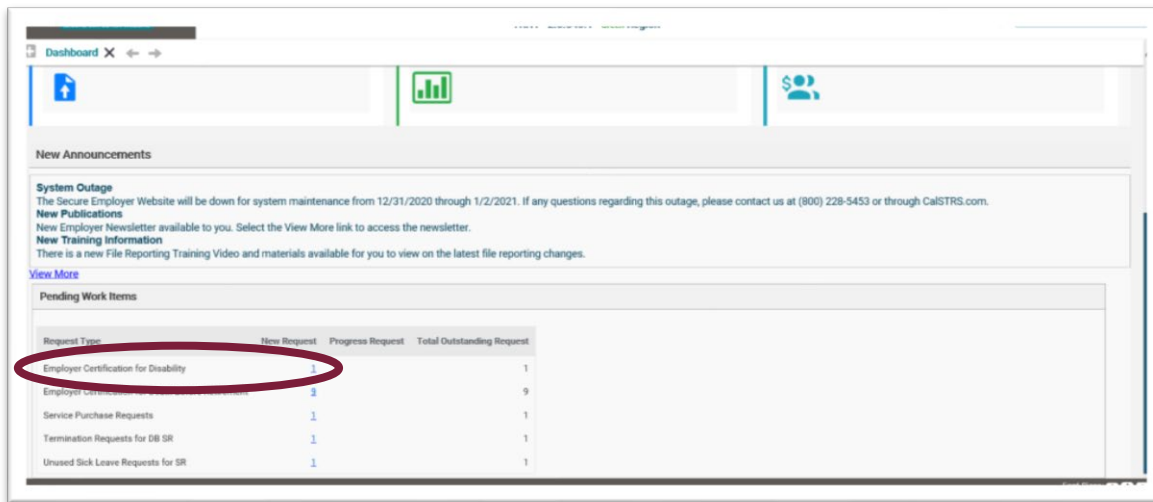
The Action Status of an Employee Change Request applies to the different stages of the request being moved through the process.

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 One-Year Final Compensation

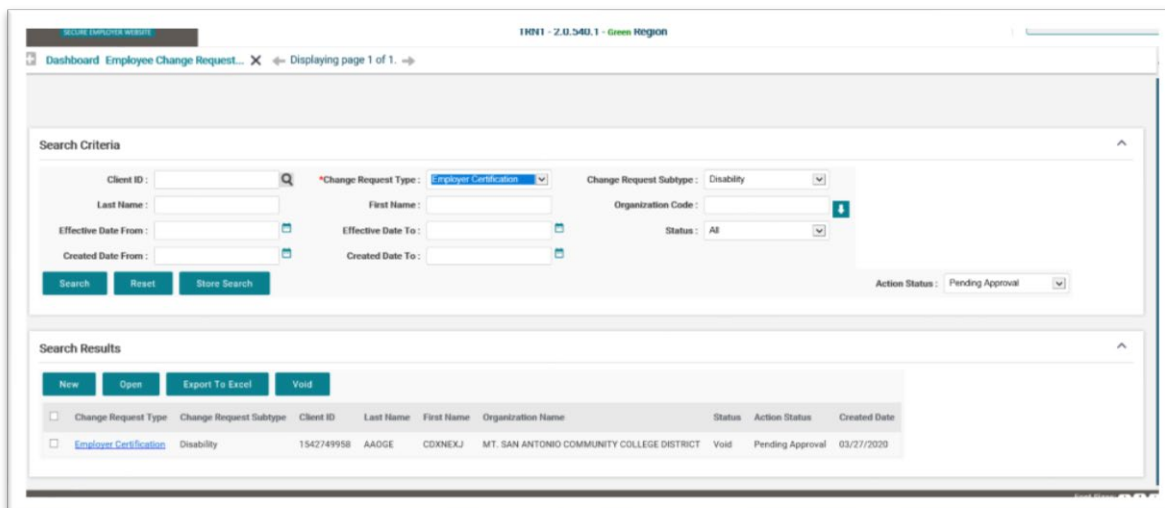
Step 1:

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



Step 2:

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



Step 3:

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

The screenshot shows the 'Employment Information' panel with the following fields and values:

- Employment Start Date: 09/12/1988
- Employment End Date: 12/14/2020
- Current Employment Status: Paid Sick Leave
- Last Day of Work: 12/15/2020
- Last Compensation Date: 12/14/2020
- Days of Absence in Current School Year: 30
- Days of Absence in Prior School Year: 45
- Are dismissal proceedings contemplated or pending?: No
- Employment Remarks: (empty text area)

Step 4:

Enter the applicable details in the **Income Protection Plan Information** panel.

The screenshot shows the 'Income Protection Plan Information' panel with the following fields and values:

- Is a monthly benefit payable from any income protection plan such as indemnity or annuity?: Yes
- Premiums paid by school district?: (dropdown menu)
- Company Name: (text field)
- Address: (text field)
- City: (text field)
- State: (dropdown menu)
- Zip Code: (text field)
- Phone Number: (text field)
- Income Protection Plan Remarks: (empty text area)

Step 5:

Enter the applicable details in the **Worker's Compensation Information** panel.

The screenshot shows the 'Worker's Compensation Information' panel with the following fields and values:

- Has the member applied for benefits through Worker's Compensation?: Yes
- Date of Injury: (text field)
- Weekly Rates of Benefits: 0
- Benefits: (text field)
- Benefits are paid directly to: (dropdown menu)
- Were benefits awarded as lump sum?: (dropdown menu)
- Company Name: (text field)
- Address: (text field)
- City: (text field)
- State: (dropdown menu)
- Zip Code: (text field)
- Phone Number: (text field)
- Worker's Compensation Remarks: (empty text area)

Step 6:

Review the statements regarding one-year final compensation and reduction in school funds. If a statement applies to the member, select the applicable checkbox. In this example, neither statement is selected.

Worker's Compensation Information

Has the member applied for benefits through Worker's Compensation?:

Weekly Rates of Benefits: Effective Date of Benefits: Date of Injury:

Were benefits awarded as lump sum?: Benefits are paid directly to:

Company Name: Address: City:

State: Zip Code: Phone Number:

Worker's Compensation Remarks:

This member is under agreement to receive one-year final compensation with less than 25 years of service. 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

School Years
No records to display.

Step 7:

Scroll down to the **Employer Authorization** panel. Certify the information provided is true and accurate by selecting the checkbox next to the statement.

Dashboard Employee Change Request... ESSEmployer Certificati... X ← Displaying page 1 of 1. →

Save Reset

No records to display.

Employer Authorization

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct. I understand that perjury is punishable by imprisonment for up to four years (Penal Code section 126). I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering a benefit administered by CalSTRS and it may result in penalties, including restitution, up to one year in jail and/or a fine of up to \$5,000 (Education Code section 22010).

Authorized Date:

Authorized Employee Name: Authorized Employee Title: Authorized Employee Telephone Number:

Step 8:

In the **Authorized Employee** fields, enter your name, title and telephone number.

Employer Authorization

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct. I understand that perjury is punishable by imprisonment for up to four years (Penal Code section 126). I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering a benefit administered by CalSTRS and it may result in penalties, including restitution, up to one year in jail and/or a fine of up to \$5,000 (Education Code section 22010).

Authorized Date:

Authorized Employee Name: Authorized Employee Title: Authorized Employee Telephone Number:

Step 9:

Scroll to the top of the screen and 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.

The screenshot shows the top portion of the CALSTRS web application. The header includes the CALSTRS logo, the text 'Employer Certification Maintenance', and the user's information: '19630 MT. SAN ANTONIO COMMUNITY COLLEGE DISTRICT TRN1 - 2.0.540.1 - Green Region'. A navigation bar contains a 'Save' button and a 'Reset' button, both of which are circled in red. Below the navigation bar is the 'Employment Information' section, which contains several input fields for dates and status, and a dropdown menu for 'Are dismissal proceedings contemplated or pending?'. The 'Employment Remarks' field is also visible.

Step 10:

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

The screenshot shows the same web application after the 'Submit' button has been clicked. The 'Submit' button is circled in red. Below the navigation bar, a message box displays the text 'All changes successfully saved.' in a green box, which is also circled in red. Below the message box is the 'Person Details' section, which displays the following information: Client ID: 1542749558, Member Name: CDXNEXJ T AAOGE, and Active Alert Exists: Yes. The 'Employee Change Request Details' section is also visible below.