

### Employer Success Criteria Checklist

During Soft Launch, Report Sources are required to complete a series of Success Criteria in the dedicated testing environment to demonstrate readiness for the new Secure Employer Website. Success Criteria checklists, one for mandatory and one for strongly recommended success criteria, are included below for Report Sources to track and complete the necessary readiness activities. Report Sources will contact their Employer Services Representative and provide the data indicated in the checklist so CalSTRS can validate each Report Sources' readiness progress .

#### Mandatory Success Criteria Checklist

<input checked="" type="checkbox"/>	Success Criteria	Readiness Activity	Data to Provide CalSTRS
<input type="checkbox"/>	<b>1. Register System Administrator</b>	Register at least one user with the Administrator Contact role.	<ul style="list-style-type: none"> <li>Organization Code</li> <li>Administrator Contact first and last name</li> </ul>
<input type="checkbox"/>	<b>2. Register Payroll User</b>	Register at least one user with the Payroll Contact role.	<ul style="list-style-type: none"> <li>Organization Code</li> <li>Payroll Contact first and last name</li> </ul>
<input type="checkbox"/>	<b>3. Submit Enrollments</b>	Submit at least ten 'Enrollment' transactions using file submission or online entry.	<ul style="list-style-type: none"> <li>Organization Code</li> <li>CID or Person Name who was on the enrollment transaction</li> </ul>
<input type="checkbox"/>	<b>4. Upload DB Contribution File</b>	Upload and transmit a Defined Benefit Contribution File that represents a normal monthly volume of transactions that must contain transaction types 'Regular' and 'Adjustment.'	<ul style="list-style-type: none"> <li>Organization Code</li> <li>Payroll Summary ID</li> </ul>
<input type="checkbox"/>	<b>5. Upload CB Contribution File</b>	If Applicable: Upload and transmit a Cash Balance Contribution File that represents a normal monthly volume of transactions and must contain transaction types 'Regular' and 'Adjustment.'	<ul style="list-style-type: none"> <li>Organization Code</li> <li>Payroll Summary ID</li> </ul>

### Strongly Recommended Success Criteria Checklist

<input checked="" type="checkbox"/>	Success Criteria	Readiness Activity	Data to Provide CalSTRS
<input type="checkbox"/>	<b>6. Merge Payroll Summaries</b>	Merge two Payroll Summaries in the system.	<ul style="list-style-type: none"> <li>Organization Code</li> <li>At least two Payroll Summary IDs</li> </ul>
<input type="checkbox"/>	<b>7. Submit A/R transactions</b>	Submit Account Receivable transactions using either the Contribution File - AR or online entry.	<ul style="list-style-type: none"> <li>Organization Code</li> <li>Payroll Summary ID</li> </ul>
<input type="checkbox"/>	<b>8. Upload Employment File</b>	Upload and transmit an Employment File and download the Employment Response File.	<ul style="list-style-type: none"> <li>Organization Code</li> <li>Employment Summary ID</li> </ul>
<input type="checkbox"/>	<b>9. Submit Match File</b>	Submit an Employee Match File and retrieve the Match Response File as a secure message.	<ul style="list-style-type: none"> <li>Organization Code</li> <li>File Header (optional)</li> </ul>
<input type="checkbox"/>	<b>10. Send Secure Message **</b>	Use the self-service functionality to send a Secure Message to your Employer Services Representative.	<ul style="list-style-type: none"> <li>Organization Code</li> <li>Name of message recipient</li> </ul>
<input type="checkbox"/>	<b>11. Upload Document **</b>	Use the self-service Functionality to upload a document.	<ul style="list-style-type: none"> <li>Organization Code</li> <li>Name of uploaded document</li> </ul>

\*\* This Success Criterion can only be completed after Maintenance Release 2 – March 2021.

See the *Employer Readiness Environment Testing Guide* in the Employer Toolkit for more information regarding completing the Success Criteria, submitting data to CalSTRS, and validating readiness for the new Secure Employer Website.