

# Purchasable Service Credit Records

This document provides a description of how to create a purchasable service credit record in the Secure Employer Website.

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

Revised:09/03/2021

### Step 1:

From the **Dashboard**, click the **Global Navigation Menu**.

Employer Self Service Portal   Dashboard	01001 COUNTY OFFICE OF EDUCATION TRN1 - 2.0.724.1 - Green Region	
Employer Self Service P X ← →		
Record displayed.		
Secure Employer Website Welcome to the Secure Employer Website (SEW), the Employer Self Service portal, w	where you can view your Contacts, Benefit Program, Employees and other information.	
Employment +	Employee Profile	Employ
Upload Files	Online Reports	Contribu



## Step 2:

Select Employee. Then, select Service Credit Purchase.





#### Step 3:

The Service Purchase Request Search screen displays. Enter the Client ID, select the Service Credit Purchase Type, and enter the Organization Code. Then, under the Search Results panel, click the New button. If the Service Credit Purchase Type is USERRA please also send a secure message and select Financial Services Branch in the Program Area dropdown field to notify us.

E CALSTRS	ESSService Purchase Re	quest Search		01001 COUNTY O TRN1 - 2.0.72	FFICE OF EDUCATION 4.1 - Green Region
Client ID :	1540141086	First Name :		Last Name :	
Service Credit Purchase Type :	Maternity or Paternity Leav 🗸	Status :	All 🗸	Action Status :	All 🗸
Organization Code :	01001	Created Date From :		Created Date To :	
Search Reset	Store Search				
Search Results					
New Open	Export To Excel				
Service Purchase Request	t ID Client ID Last Name	Frist Name Service Cre	dit Purchase Type Status	Action Status Created Da	ate 🔺
		No records to display.			



#### Step 4:

The **Purchasable Service Maintenance** screen displays. Under the Purchasable Service panel, enter the **Service Start Date** and the **Service End Date**. Then click the **Save** button.

E CALSTRS	ESSPurchasable Service Maintenance	-	01001 COUNTY OFFICE OF EDUCATION TRN1 - 2.0.724.1 - Green Region	
ESSService Purchase R Save Refresh	eq ESSPurchasable Service 🗙 🔶 Displ	aying page 1 of 1. 🔶		
Record displayed. Please ma	ke changes and press SAVE. ]			
Person Detail				
Client ID :	1540141086	Person Name : SUSAN CLONE MEM	BER	
Membership Account :	CalSTRS Defined Benefit - 08/30/1990 - Active	Service Credit: 11.510372		
Benefit Program :	CaISTRS Defined Benefit	Tier: DB 2% at 60	Sub Tier: 2% @ 60 Regular	
Purchasable Service	<b>4</b>			
Purchasable Service ID	:	Status :	Action Status :	
Service Credit	: 0.000000 Service Cred	it Purchase Type : Maternity or Paternity L	_eave Organization - Employment : 010	01 - COUNTY OFFICE OF EDUCATIO
Service Start Date		Service End Date :	Suppress Warnings :	
Comments	:	<i>li</i> .		
Assignment Code	Annualized Pay Rate Pay Period Start Date Pay	Period End Date Earning Type Earnings	Service Credit Capped Service Credit	



### Step 5:

A message displays "[All changes successfully saved.]." Under the **Purchasable Service** panel, click the **Add** button.

II changes successfully save	d.]							
Person Detail								
Purchasable Service								
Purchasable Service ID :	12425		Status :	Review			Action Status :	Work in Progress
Service Credit :	0.000000		Service Credit Purchase Type :	Maternity or	Paternity Lea	ve Or	ganization - Employment :	01001 - COUNTY OFFICE OF EDUCATIO
Service Start Date :	09/01/2020		Service End Date :	12/01/2020			Suppress Warnings :	
Comments :				li				
Add Delete	l							
Assignment Code	Annualized Pay Rate	Pay Period Star	t Date Pay Period End Date	Earning Type	Earnings Se	ervice Credi	t Capped Service Credit	
			No records to display					



#### Step 6:

New fields display in the **Purchasable Service** panel. For these fields, add the payroll information for the work the employee would have performed. Select the **Assignment Code.** Then enter the **Annualized Pay Rate**, **Pay Period Start Date**, and **Pay Period End Date**. Select the **Earning Type** and enter the **Earnings**. Add additional lines and repeat these steps as needed. Then click the **Save** button. Please note that if the service spans fiscal years, separate lines need to be added.

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+ ESSS	ervice Purchase Req E	SSPurchasat	ole Service 🗙 🗲 Disp	olaying page 2 of 2. 🔶								
Save	Refresh											
Persor	n Detail											
Purcha	asable Service											
	Purchasable Service ID :	12425		Stat	us: Valid			Action Status	: Work in Pro	gress		
	Service Credit :	1.000000	-100.00	Service Credit Purchase Ty	pe: Maternity or I	Paternity Leave	Organizat	ion - Employment	: 01001 - CO	UNTY OFFICE O	F EDUCATI	ON
	Service Start Date :	09/01/2020	<b>—</b>	Service End Da	ite: 12/01/2020		Su	ppress Warnings	: 🗆			
	Comments :			1								
Ad	ld Delete											
	Assignment Code		Annualized Pay Rate	Pay Period Start Date	Pay Period End Da	ite Ea	arning Type	Earnings		Service Credit	Capped Se	rvice Credit
	Contract	~	\$50,000.00	09/01/2020	09/30/2020		Salary 🗸		\$5,000.00	0.100000		1.000000



## Step 7:

A message displays "[ All changes successfully saved.]." Click the **Approve** button.

	SPurchasable Service Maintenance 12	2425	01001 COUNTY OFF TRN1 - 2.0.724.7	ICE OF EDUCATION 1 - Green Region		•	← ¢	? 🗆 wa
ESSService Purchase Req ESSPur Save Approve Reject	chasable Service 🗙 🔶 Displ	laying page 2 of 2. 🔶						
[All changes successfully saved.]								
Purchasable Service ID : 1242	5	Status	Valid		Action Status · Work in Proc	Tress		
Service Credit : 1.000	000	Service Credit Purchase Type	: Maternity or Paternity Leav	ve c	rganization - Employment : 01001 - COU	JNTY OFFICE O	F EDUCATIO	N
Service Start Date : 09/07	1/2020	Service End Date	: 12/01/2020	<b></b>	Suppress Warnings :			
Comments :								
Add Delete								
Assignment Code	Annualized Pay Rate	Pay Period Start Date F	Pay Period End Date	Earning Type	Earnings	Service Credit	Capped Ser	vice Credit
Contract	♥ \$50,000.00	09/01/2020	09/30/2020	Salary	♥ \$5,000.00	0.100000		1.000000



### Step 8:

A box displays at the top of the screen stating, "Are you sure you want to approve? This will create a purchasable service credit record to enable the member to make the service credit purchase." Click the **OK** button.

ESSService Purchase Req ESSave	ESSPurchasable Serv SSPurchasable Service ect Refresh	ice Maintenance 12 X ← Displa	<b>425</b> aying page 2 of 2. =	vip Are ser pur	trneweb01.calstrs.ca.go you sure you want to appr vice credit record to enable chase	v says ove? This the mem	will create a purchasabl ber to make the service	le credit Cncel			A	+	\$	? 🗆 wam	Powered by Ne Welcome Contact, Ari
Person Detail															~
Purchasable Service															^
Purchasable Service ID :	12425			Statu	s: Valid				Action Status : Work	in Progr	ress				
Service Credit :	1.000000		Service Credit	Purchase Typ	e: Maternity or Paterr	ity Leav	/e	Organization	n - Employment : 0100	1 - COUN	NTY OFFICE	OF ED	UCATION		
Service Start Date :	09/01/2020	<b>—</b>	Se	ervice End Dat	e: 12/01/2020			Supp	press Warnings : 🗌						
Comments :				li											
Add Delete															
Assignment Code	Annualized	Pay Rate	Pay Period Start Date	e	Pay Period End Date		Earning Type		Earnings		Service Credi	it Cap	ped Servio	e Credit	
Contract	✓	\$50,000.00	09/01/2020	<b>•</b>	09/30/2020	<b></b>	Salary	~	\$5,0	00.00	0.10000	D	1	.000000	



## Step 9:

A message displays at the top of the screen stating, "[All changes successfully saved.]." The record is now read only. The action status is now approved.

ESSS		ESSPurcha	sable Service Maintenan	ice 12425			01001 COUNT TRN1 - 2.0	Y OFFICE OF EDUCATIO .724.1 - Green Region	N
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Pu	rchasable Service ID :	12425	Stat	tus: Valid			Action Status	: Approved	
	Service Credit :	1.000000 s	ervice Credit Purchase Ty	<b>pe</b> : Maternity or Pa	ternity Leave	Organizat	ion - Employment	:: 01001 - COUNTY OF	FICE OF EDUCATION
	Service Start Date : Comments :	09/01/2020	Service End Da	ate: 12/01/2020		Su	uppress Warnings	.: 🗆	
		Annualized Pay Rate	Pay Period Start Date	Pay Period End Date	Earning Type	Earnings	Service Credit	Capped Service Credit	
	Assignment Code								