

Purchasable Service Credit Records

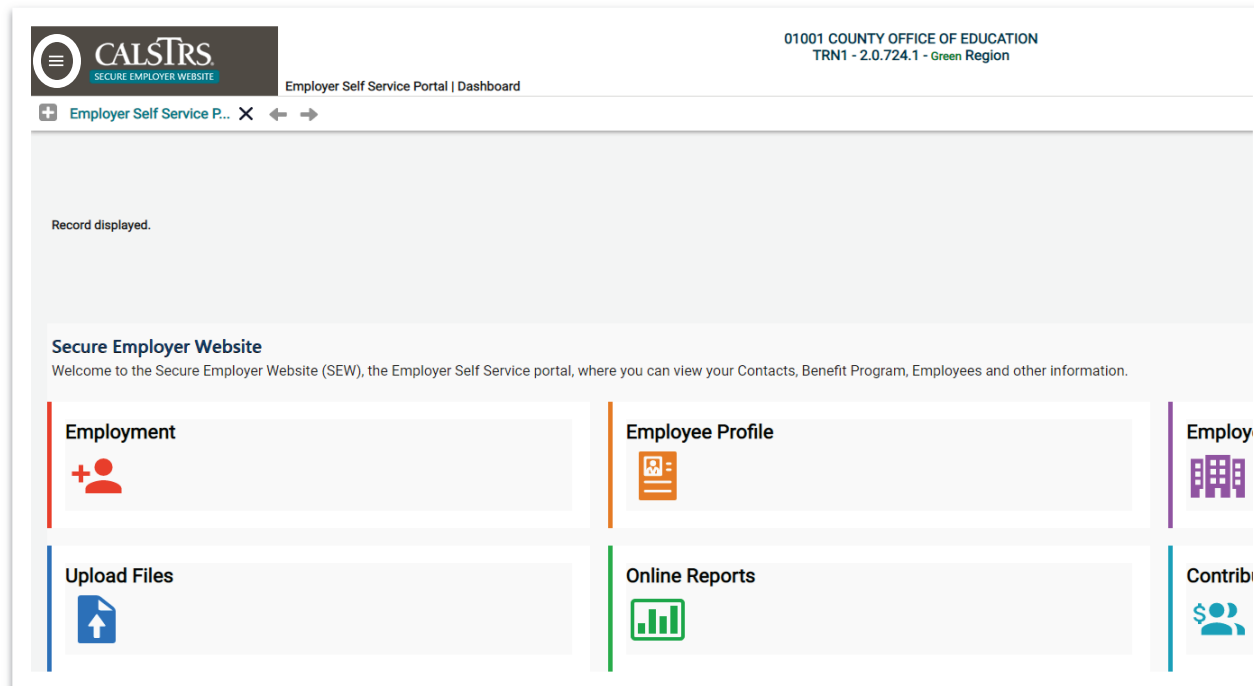
This document provides a description of how to create a purchasable service credit record in the Secure Employer Website.

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

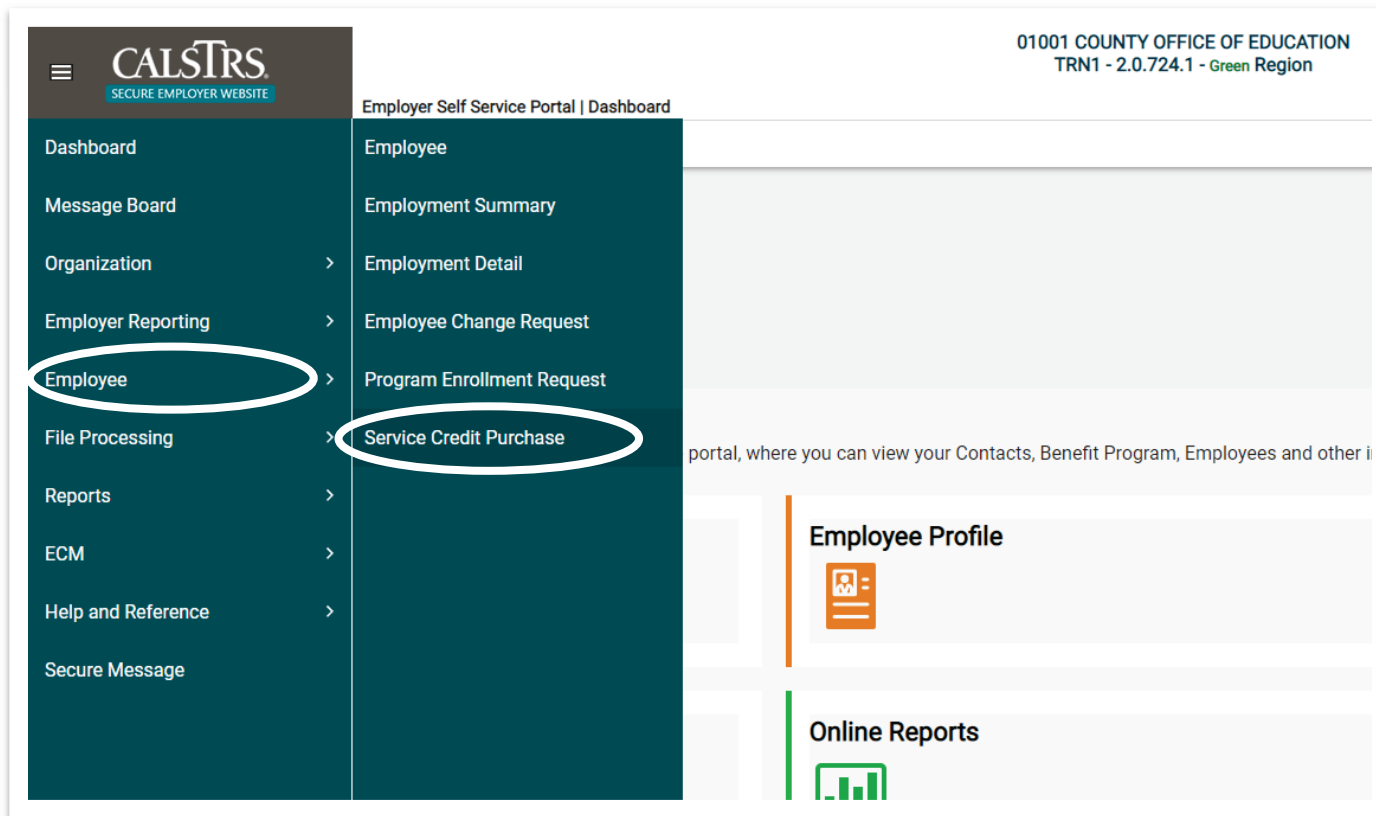
Step 1:

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



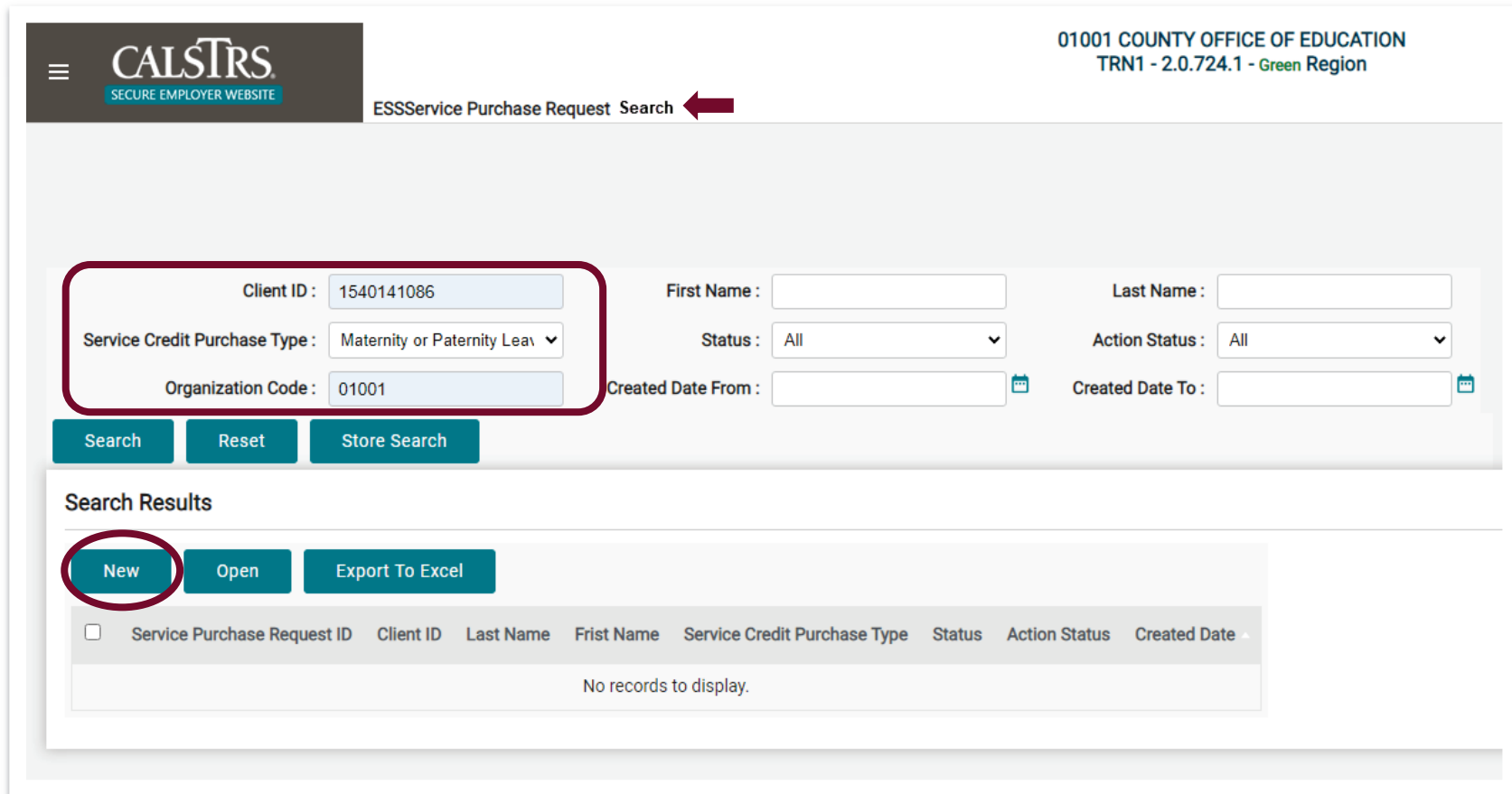
Step 2:

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.



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ESSService Purchase Request Search

Client ID : 1540141086
Service Credit Purchase Type : Maternity or Paternity Leave
Organization Code : 01001

First Name :
Last Name :
Status : All
Action Status : All
Created Date From :
Created Date To :

Search Reset Store Search

Search Results

New Open Export To Excel

<input type="checkbox"/>	Service Purchase Request ID	Client ID	Last Name	Frist Name	Service Credit Purchase Type	Status	Action Status	Created Date
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.

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ESSPurchasable Service Maintenance

ESSPurchasable Service Req... ESSPurchasable Service ... X ← Displaying page 1 of 1. →

Save Refresh

[Record displayed. Please make changes and press SAVE.]

Person Detail

Client ID : [1540141086](#) Person Name : SUSAN CLONE MEMBER
Membership Account : [CalSTRS Defined Benefit - 08/30/1990 - Active](#) Service Credit : 11.510372
Benefit Program : CalSTRS Defined Benefit Tier : DB 2% at 60 Sub Tier : 2% @ 60 Regular


Purchasable Service

Purchasable Service ID : Status : Action Status :
Service Credit : 0.000000 Service Credit Purchase Type : Maternity or Paternity Leave Organization - Employment : 01001 - COUNTY OFFICE OF EDUCATION
Service Start Date : Service End Date : Suppress Warnings :
Comments :

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.



[All changes successfully saved.] 

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 Leave Organization - Employment : 01001 - COUNTY OFFICE OF EDUCATION
Service Start Date :  Service End Date :  Suppress Warnings :

Comments :

<input type="checkbox"/>	Assignment Code	Annualized Pay Rate	Pay Period Start Date	Pay Period End Date	Earning Type	Earnings	Service Credit	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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ESSPurchasable Service Maintenance 12425

ESSService Purchase Req... ESSPurchasable Service ... X ← Displaying page 2 of 2. →

Save Refresh

Person Detail

Purchasable Service

Purchasable Service ID : 12425 Status : Valid Action Status : Work in Progress
Service Credit : 1.000000 Service Credit Purchase Type : Maternity or Paternity Leave Organization - Employment : 01001 - COUNTY OFFICE OF EDUCATION
Service Start Date : 09/01/2020 Service End Date : 12/01/2020 Suppress Warnings :
Comments :

Add **Delete**

<input type="checkbox"/>	Assignment Code	Annualized Pay Rate	Pay Period Start Date	Pay Period End Date	Earning Type	Earnings	Service Credit	Capped Service Credit
<input type="checkbox"/>	Contract	\$50,000.00	09/01/2020	09/30/2020	Salary	\$5,000.00	0.100000	1.000000

ESSPurchasable Service Maintenance 12425

ESSService Purchase Req... ESSPurchasable Service ... X ← Displaying page 2 of 2. →

Save **Approve** Reject Refresh

[All changes successfully saved.] ←

Person Detail

Purchasable Service

Purchasable Service ID : 12425

Status : Valid

Action Status : Work in Progress

Service Credit : 1.000000

Service Credit Purchase Type : Maternity or Paternity Leave

Organization - Employment : 01001 - COUNTY OFFICE OF EDUCATION

Service Start Date : 09/01/2020

Service End Date : 12/01/2020

Suppress Warnings :

Comments :


Add

Delete

<input type="checkbox"/>	Assignment Code	Annualized Pay Rate	Pay Period Start Date	Pay Period End Date	Earning Type	Earnings	Service Credit	Capped Service Credit
<input type="checkbox"/>	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.

ESSPurchasable Service Maintenance 12425

viptnweb01.calstrs.ca.gov says
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

Home Back Refresh Help WAM Welcome Contact, Ariel

ESSService Purchase Req... ESSPurchasable Service ... ← Displaying page 2 of 2. →

Save Approve Reject Refresh OK Cancel

Person Detail

Purchasable Service

Purchasable Service ID : 12425 Status : Valid Action Status : Work in Progress
Service Credit : 1.000000 Service Credit Purchase Type : Maternity or Paternity Leave Organization - Employment : 01001 - COUNTY OFFICE OF EDUCATION
Service Start Date : 09/01/2020 Service End Date : 12/01/2020 Suppress Warnings :
Comments :

Add Delete

Assignment Code	Annualized Pay Rate	Pay Period Start Date	Pay Period End Date	Earning Type	Earnings	Service Credit	Capped Service Credit
<input type="checkbox"/> Contract	\$50,000.00	09/01/2020	09/30/2020	Salary	\$5,000.00	0.100000	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.

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ESSPurchasable Service Maintenance 12425

ESSService Purchase Req... ESSPurchasable Service ... X ← Displaying page 2 of 2. →

Refresh

[All changes successfully saved.] ←

Read Only : Read Only Rule - Purchasable Service Credit Record

Person Detail

Purchasable Service

Purchasable Service ID : 12425 Status : Valid Action Status : Approved ←

Service Credit : 1.000000 Service Credit Purchase Type : Maternity or Paternity Leave Organization - Employment : 01001 - COUNTY OFFICE OF EDUCATION

Service Start Date : 09/01/2020 Service End Date : 12/01/2020 Suppress Warnings :

Comments :

<input type="checkbox"/>	Assignment Code	Annualized Pay Rate	Pay Period Start Date	Pay Period End Date	Earning Type	Earnings	Service Credit	Capped Service Credit
<input type="checkbox"/>	Contract	\$50,000.00	09/01/2020	09/30/2020	Salary	\$5,000.00	0.100000	1.000000