

## Reduction in School Funds

This job aid provides step-by-step instructions for submitting a reduction in school funds transaction and correcting a reduction in school funds transaction.

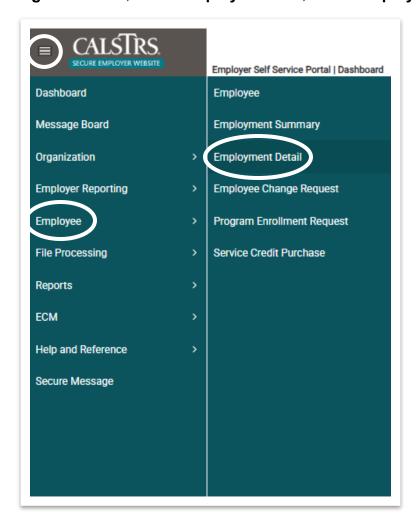
Questions? Contact <a href="mailto:PSEmployerReadiness@CalSTRS.com">PSEmployerReadiness@CalSTRS.com</a>.

Revised: 04/03/2025

## **Submitting a Reduction in School Funds Transaction**

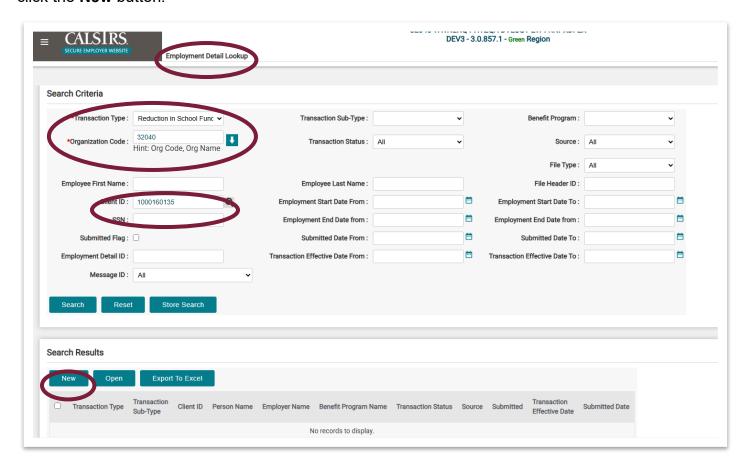
### Step 1:

From the Global Navigation Menu, select Employee. Then, select Employment Detail.



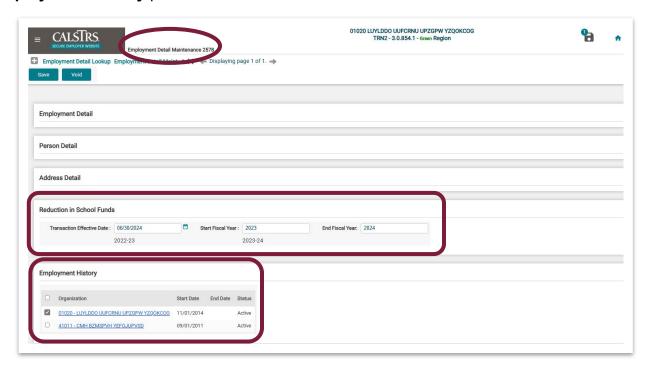
### Step 2:

The **Employment Detail Lookup** screen displays. Select "Reduction in School Funds" from the **Transaction Type** drop-down menu. Enter the **Organization Code** and **Client ID**, then click the **New** button.



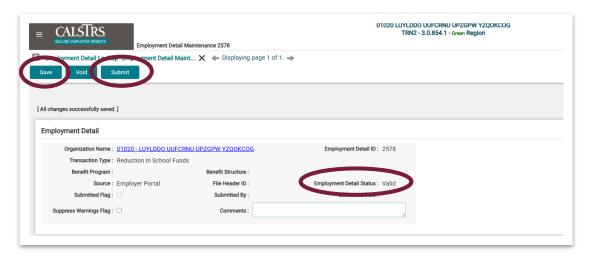
#### Step 3:

The **Employment Detail Maintenance** screen displays. Enter the **Transaction Effective Date**, **Start Fiscal Year**, and **End Fiscal Year** in the **Reduction in School Funds** panel. Then, select the applicable organization by checking the checkbox next to its name in the **Employment History** panel.

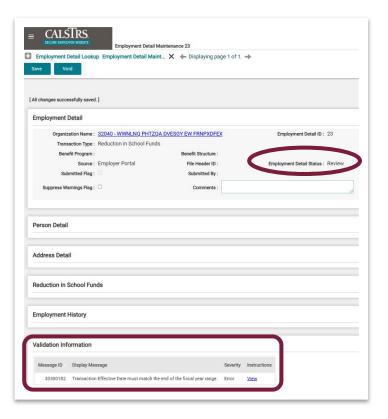


### Step 4:

Click the **Save** button. If the transaction has saved without errors, a message appears stating "All changes successfully saved." The **Employment Detail Status** will change to **Valid** and the **Submit** button will appear. Click the **Submit** button.

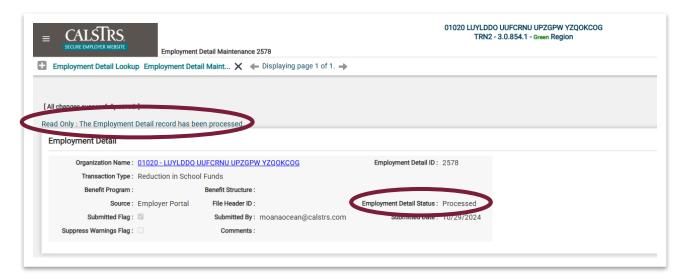


If there is an error, the **Employment Detail Status** will change to **Review**. You can review error messages in the **Validation Information** panel at the bottom of the **Employment Detail Maintenance** screen. Correct the identified errors and click the Save button. Once all errors have been resolved and the status is **Valid**, click the **Submit** button.



## Step 5:

Once the transaction has been submitted the record will become read-only and the **Employment Detail Status** will change to **Processed**.

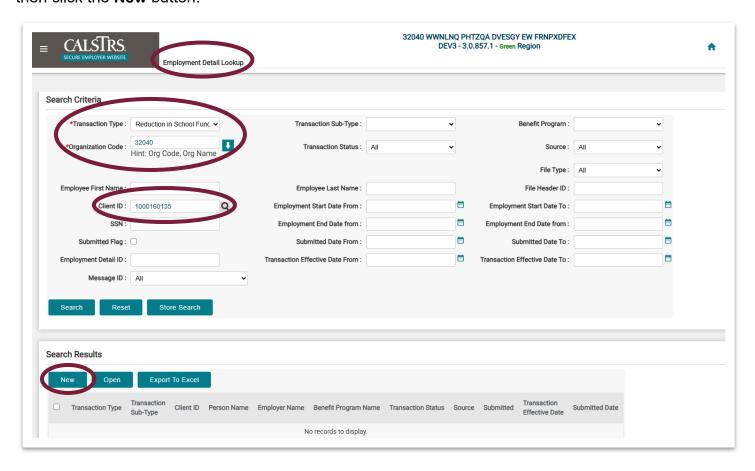




# **Correcting a Reduction in School Funds Transaction**

## Step 1:

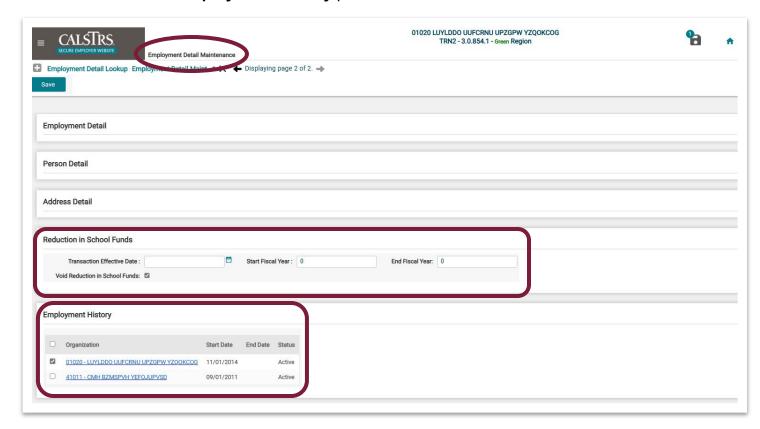
From the **Employment Detail Lookup** screen, select "Reduction in School Funds Correction" from the **Transaction Type** drop-down menu. Enter the **Organization Code** and **Client ID**, then click the **New** button.





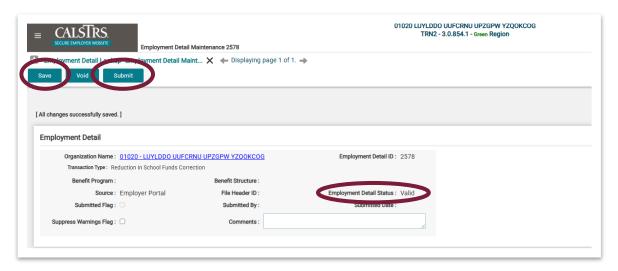
#### Step 2:

The Employment Detail Maintenance screen displays. Enter the Transaction Effective Date, Start Fiscal Year, and End Fiscal Year in the Reduction in School Funds panel. If you are cancelling the Reduction in School Funds transaction, check the Void Reduction in School Funds checkbox. Then, select the applicable organization by checking the checkbox next to its name in the Employment History panel.

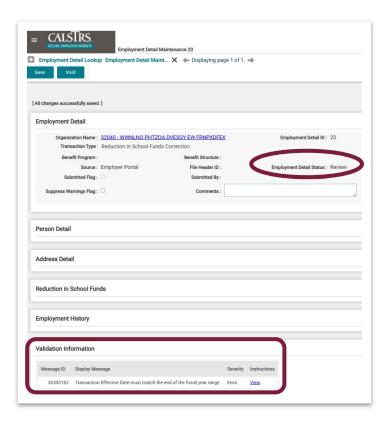


#### Step 4:

Click the **Save** button. If the transaction has saved without errors, a message appears stating "All changes successfully saved." The **Employment Detail Status** will change to **Valid** and the **Submit** button will appear.



If there is an error, the **Employment Detail Status** will change to **Review**. You can review error messages in the **Validation Information** panel at the bottom of the **Employment Detail Maintenance** screen. Once all errors have been resolved and the status is **Valid**, click the **Submit** button.





## Step 5:

Once the transaction has been submitted the record will become read-only and the **Employment Detail Status** will change to **Processed**.

