

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.

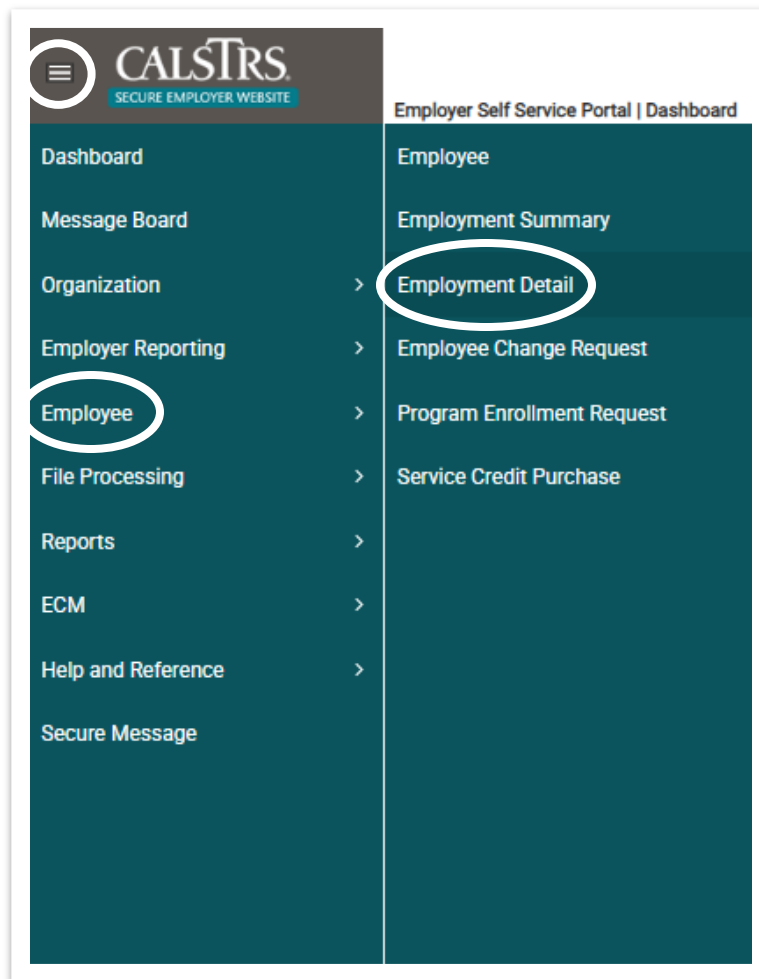
Questions? Contact PSEmployerReadiness@CalSTRS.com.

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.

Search Criteria

Transaction Type: Reduction in School Func
Transaction Sub-Type:
Benefit Program:
*Organization Code: 32040
Transaction Status: All
Source: All
File Type: All
Employee First Name:
Employee Last Name:
File Header ID:
Client ID: 1000160135
Employment Start Date From:
Employment Start Date To:
SSN:
Employment End Date from:
Employment End Date to:
Submitted Flag:
Submitted Date From:
Submitted Date To:
Employment Detail ID:
Transaction Effective Date From:
Transaction Effective Date To:
Message ID: All

Search Reset Store Search

Search Results

New Open Export To Excel

<input type="checkbox"/>	Transaction Type	Transaction Sub-Type	Client ID	Person Name	Employer Name	Benefit Program Name	Transaction Status	Source	Submitted	Transaction Effective Date	Submitted Date
No records to display.											

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.

01020 LUYLDDO UJFCRNU UPZGPW YZQKCOG
TRN2 - 3.0.854.1 - Green Region

Employment Detail Maintenance 2578

Employment Detail Lookup Employment Detail Maintenance 2578 - Displaying page 1 of 1. →

Save Void

Employment Detail

Person Detail

Address Detail

Reduction in School Funds

Transaction Effective Date: 06/30/2024 Start Fiscal Year: 2023 End Fiscal Year: 2024
2022-23 2023-24

Employment History

Organization	Start Date	End Date	Status
<input checked="" type="checkbox"/> 01020 - LUYLDDO UJFCRNU UPZGPW YZQKCOG	11/01/2014		Active
<input type="checkbox"/> 41011 - CMH BZMSPVH YEFQJUVSD	09/01/2011		Active

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.

01020 LUYLDDO UJFCRNU UPZGPW YZQKCOG
TRN2 - 3.0.854.1 - Green Region

Employment Detail Maintenance 2578

Employment Detail Lookup Employment Detail Maintenance 2578 - Displaying page 1 of 1. →

Save Void Submit

[All changes successfully saved.]

Employment Detail

Organization Name: 01020 - LUYLDDO UJFCRNU UPZGPW YZQKCOG Employment Detail ID: 2578
Transaction Type: Reduction in School Funds
Benefit Program: Source: Employer Portal Benefit Structure: File Header ID: Employment Detail Status: Valid
Submitted Flag: Submitted By:
Suppress Warnings Flag: Comments:

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.

The screenshot shows the 'Employment Detail Maintenance' screen for record ID 23. The 'Employment Detail' section shows the status as 'Review'. The 'Validation Information' section at the bottom contains a table with one error message.

Message ID	Display Message	Severity	Instructions
30300182	Transaction Effective Date must match the end of the fiscal year range.	Error	View

Step 5:

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

The screenshot shows the 'Employment Detail Maintenance' screen for record ID 2578. The 'Employment Detail' section shows the status as 'Processed'. A message at the top indicates the record is read-only. The 'Validation Information' section is empty.

[All changes successfully saved.]

Read Only: The Employment Detail record has been processed

Message ID	Display Message	Severity	Instructions
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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.

The screenshot shows the 'Employment Detail Lookup' interface. The top navigation bar includes the CALSTRS logo and the text '32040 WWNLNQ PHTZQA DVESGY EW FRNPXFEX DEV3 - 3.0.857.1 - Green Region'. The main content area is divided into 'Search Criteria' and 'Search Results' sections.

Search Criteria:

- Transaction Type:** Reduction in School Func (circled in red)
- Organization Code:** 32040 (circled in red)
- Client ID:** 1000160135 (circled in red)
- Transaction Sub-Type: [Empty]
- Transaction Status: All
- Benefit Program: [Empty]
- Source: All
- File Type: All
- File Header ID: [Empty]
- Employee First Name: [Empty]
- Employee Last Name: [Empty]
- Employment Start Date From: [Empty]
- Employment Start Date To: [Empty]
- Employment End Date from: [Empty]
- Employment End Date from: [Empty]
- Submitted Date From: [Empty]
- Submitted Date To: [Empty]
- Transaction Effective Date From: [Empty]
- Transaction Effective Date To: [Empty]
- Submitted Flag:
- Employment Detail ID: [Empty]
- Message ID: All

Search Results:

- New** (circled in red), **Open**, **Export To Excel**
- Table headers: Transaction Type, Transaction Sub-Type, Client ID, Person Name, Employer Name, Benefit Program Name, Transaction Status, Source, Submitted, Transaction Effective Date, Submitted Date
- Message: No records to display.

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.

01020 LUYLDDO UUFCRNU UPZGPW YZQOKCOG
TRN2 - 3.0.854.1 - Green Region

Employment Detail Maintenance

Save

Employment Detail

Person Detail

Address Detail

Reduction in School Funds

Transaction Effective Date: Start Fiscal Year: End Fiscal Year:

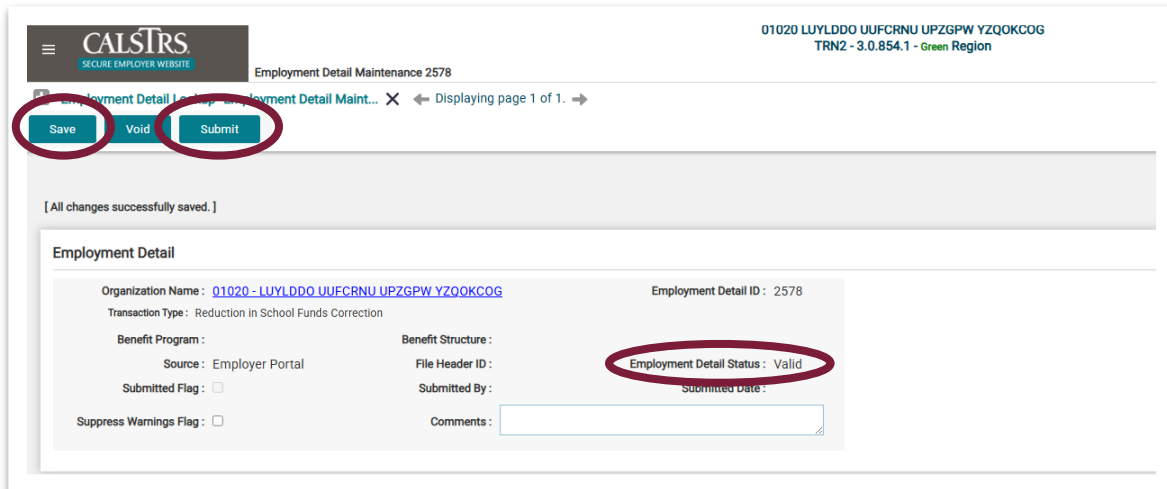
Void Reduction in School Funds:

Employment History

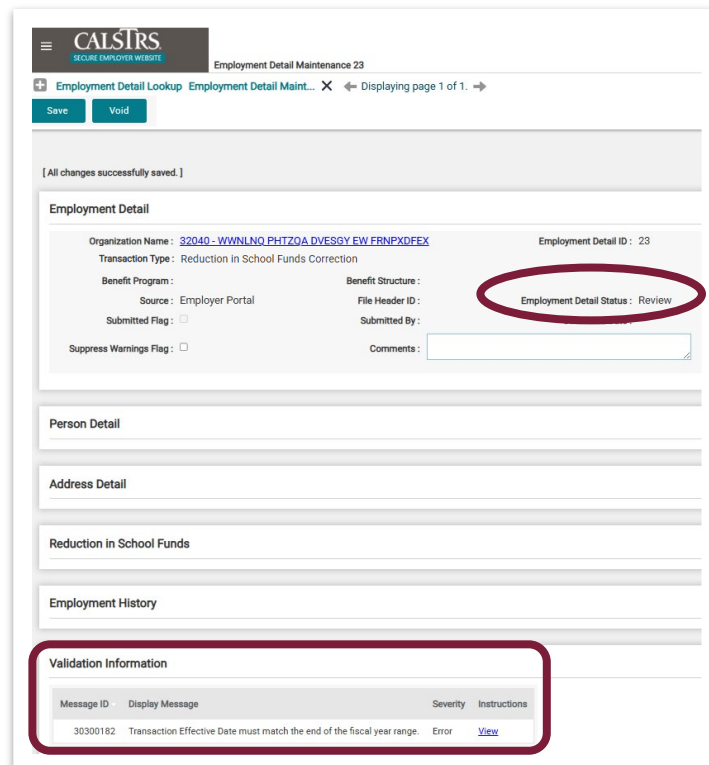
Organization	Start Date	End Date	Status
<input checked="" type="checkbox"/> 01020 - LUYLDDO UUFCRNU UPZGPW YZQOKCOG	11/01/2014		Active
<input type="checkbox"/> 41011 - CMH BZMSPVH YEFQJUPVSD	09/01/2011		Active

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**.

The screenshot displays the CALSTRS Secure Employer Website interface for 'Employment Detail Maintenance 2578'. The top navigation bar includes the CALSTRS logo and the text '01020 LUYLDDO UJFCRNU UPZGPW YZQKCOG TRN2 - 3.0.854.1 - Green Region'. Below the navigation bar, there are tabs for 'Employment Detail Lookup' and 'Employment Detail Maint...'. A message box states '[All changes successfully saved.]' and 'Read Only: The Employment Detail record has been processed'. The main content area is titled 'Employment Detail' and contains the following information:

Organization Name: 01020 - LUYLDDO UJFCRNU UPZGPW YZQKCOG	Employment Detail ID: 2578
Transaction Type: Reduction in School Funds Correction	
Benefit Program:	Benefit Structure:
Source: Employer Portal	File Header ID:
Submitted Flag: <input checked="" type="checkbox"/>	Submitted By: moanaocean@calstrs.com
Suppress Warnings Flag: <input type="checkbox"/>	Comments:
	Submitted Date: 10/29/2024

The 'Employment Detail Status: Processed' text is circled in red in the original image.