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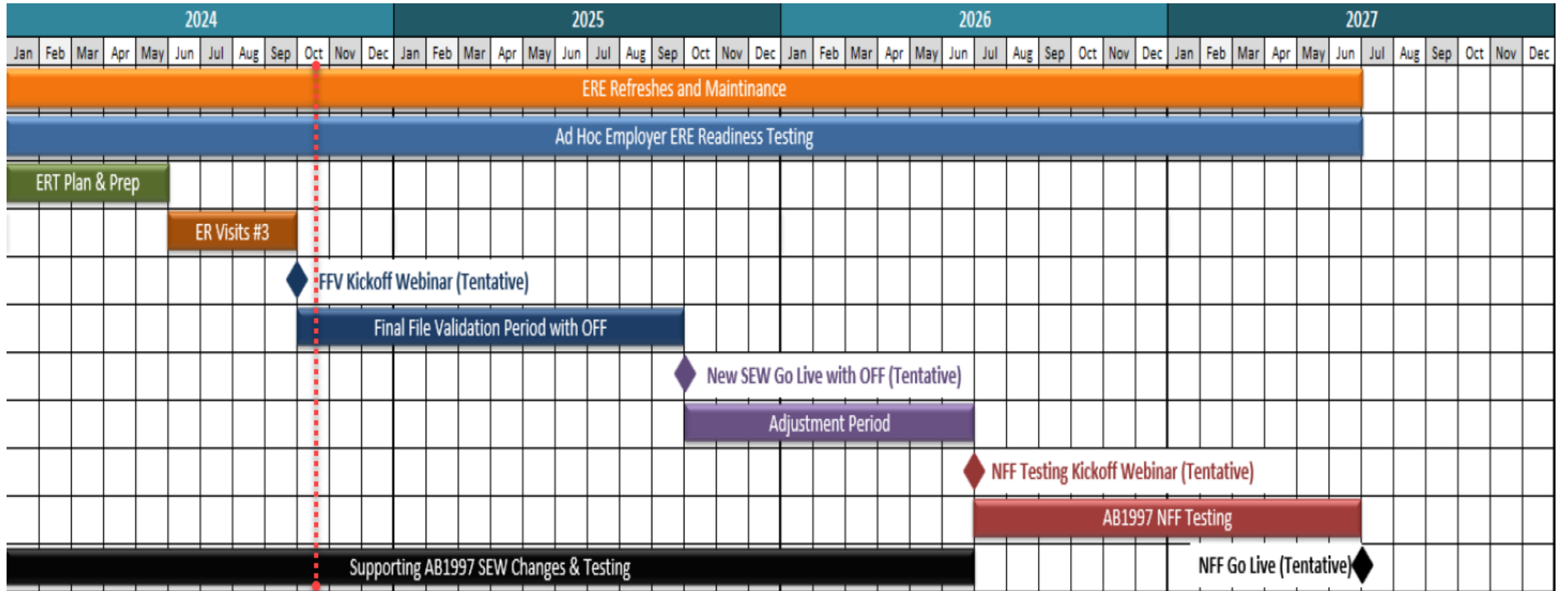
https://youtu.be/mOFkdZw3jeM

CALSTRS®
PENSION SOLUTION

Employer Readiness Fall Webinar

October 23, 2024

Agenda

- Project schedule
- Cutover
- Penalties and Interest
- Database refresh schedule
- Mandatory success criteria
- Express Benefit Report
- Testing tips

Project schedule

Cutover

- Production SEW is tentatively scheduled to be decommissioned mid/late September 2025.

- Employers will not be able to access the Secure Employer Website or Contribution Account Portal until the new Secure Employer Website is live (tentatively 10/02/2025)

- CalSTRS will communicate exact dates when known.

Penalties and Interest

- CalSTRS is developing a plan on how to administer Penalties and Interest during cutover and after implementation

- More information will be shared in Spring 2025 regarding how penalties will be assessed during this period

Database refresh schedule

- The Employer Readiness Environment will be refreshed every two months.

- Database refresh schedule:
  - November 2024 (September 2024 data)
  - January 2025 (November 2024 data)
  - February 2025 (January 2025 data)
  - April 2025 (March 2025 data)
  - June 2025 (May 2025 data)
  - August 2025 (July 2025 data)

Mandatory success criteria

All report sources and some report units are required to complete certain testing activities (success criteria) over the next 12 months.

CalSTRS will be monitoring and tracking completion.

Completion of the success criteria as well as any additional testing better prepares you for a successful transition to the new Secure Employer Website.

Access the Success Criteria and Testing Guide within the Employer Toolkit on the Employer Support Portal (employersupport.calstrs.com) for more information.

Mandatory success criteria

Success criterion 1

- Register organization contact(s).
  - Organization users who upload partial files.
  - Organization users who submit member/nonmember enrollments via REAP.

Mandatory success criteria

Success criterion 2 (complete April 2025 through August 2025)

- Upload and transmit a Defined Benefit F496 file representing a normal monthly volume of transactions.

  - Partial file uploaders must upload a F496 file.

  - Submit DB member/non member enrollments.

  - Suppress Warning type errors.

  - Void an F496 record.

  - Download All Errors Report.

Mandatory success criteria

Success criterion 3 (complete April 2025 through August 2025)

- Upload and transmit a Cash Balance VDF file representing a normal monthly volume of transactions.

- Submit Cash Balance Participant and/or Alternative Retirement enrollments.

- Create Cash Balance Reporting Schedule.

Mandatory success criteria

Success criterion 4 (complete April 2025 through August 2025)

- Submit Account Receivable transactions.
  - F496 file with Contribution Code 4 records comingled with non Contribution Code 4 records.
  - Contribution File – AR.
  - Employer Application Suite (FoxPro) will be decommissioned and cannot be used to submit Account Receivable transactions in the new Secure Employer Website.

Money must be associated to a file prior to submittal to CalSTRS. The amount associated must fully cover the sum of Account Receivable transactions otherwise the file will not process.

Negative Account Receivable transactions are not allowed

Express Benefit Report

The Express Benefit Report will be decommissioned and cannot be used to submit termination and sick leave information at retirement.

Employers must submit termination information and sick leave information through the new Secure Employer Website using onscreen transactions.

Testing tips

CalSTRS encourages you to upload an F496 and/or VDF file after each database refresh

CalSTRS will notify Report Sources via email after a refresh is complete and encourage file upload

Test early and often to ensure readiness

Get comfortable with enrollment, termination, and sick leave transactions

Resources

Employer Support Portal: https://employersupport.calstrs.com/

Employer Learning Center: https://training.calstrs.com/

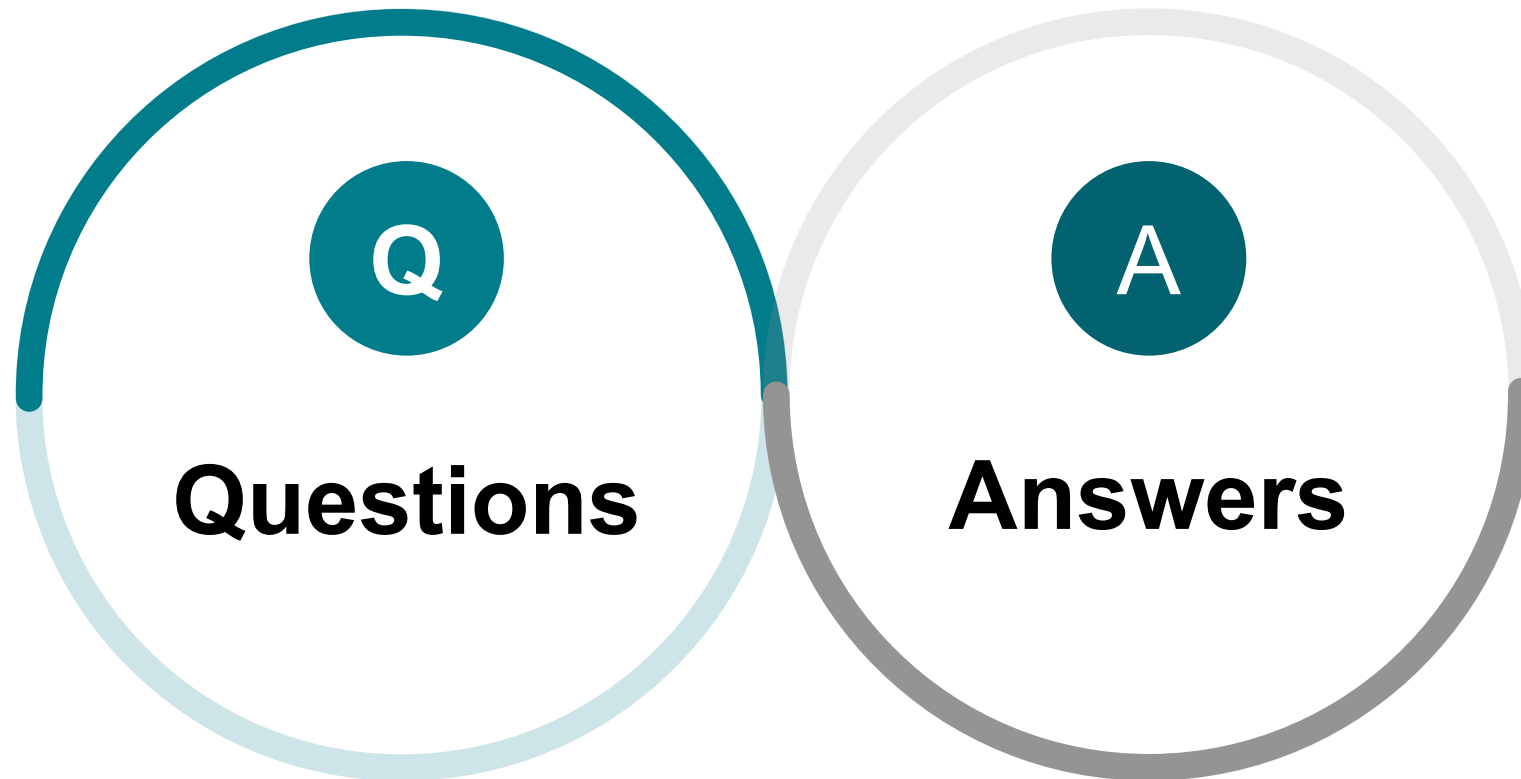Employer Readiness Environment: https://ere.calstrs.com/

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Questions and Answers