

Employer Contacts Job Aid

This job aid contains descriptions of the different Employer Contact types with a list of the processes that can be performed in the Secure Employer Website and contains a step-by-step process for managing Employer Contacts in the Secure Employer Website. Employer contacts are individuals who have been assigned roles, known as contact types, to access and perform tasks on behalf of your organization. Depending on the type of work employer contacts are performing, they may have one or more contact types assigned to them. This job aid includes how to create a new Employer Contact, update an Employer Contact, re-enroll an Employer Contact, and unlock an Employer Contact. You must have the Administrator contact type to complete these tasks.

Revised: 03/16/2022

Account Receivable

This contact type can upload, process, and submit the Contribution File – AR. They are also responsible for creating Purchasable Service Credit records and reviewing as well as approving Service Credit Purchase Requests.

Add or Edit Capability:

- Upload and process the Contribution File – AR
- View and upload documents
- Change user password
- View and send secure messages
- Create and approve service purchase requests

Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- Create Benefit Program enrollments
- View and create employee change requests
- View reports
- View online help and reference materials
- View home screen
- View Cash Balance Contribution Rates (if applicable)

Administrator

This contact type is assigned to manage employer contacts and employer organization information.

Add or Edit Capability:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View and upload documents
- Change user password
- View and send secure messages

Read-Only:

- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- Create Benefit Program enrollments
- View and create employee change requests
- Upload and process files
- View reports
- View online help and reference materials
- View home screen
- View Cash Balance Contribution Rates (if applicable)

Benefit

This contact type is assigned to perform benefit-related tasks such as disability certification, certification of death before retirement and processing Retirement Incentive Program information.

Add or Edit Capability:

- View and create employee change requests
- Submit and maintain retirement incentive transactions
- View and upload documents
- Change user password
- View and send secure messages

Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address

- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- Create Benefit Program enrollments
- View reports
- View online help and reference materials
- View home screen
- View Cash Balance Contribution Rates (if applicable)
- Upload and process files

Employment

This contact type is assigned to perform employment related tasks but may not perform tasks related to contribution reporting.

Add or Edit Capability:

- Upload and process the Employment and Match files
- Submit manual Employment transactions
- Edit member demographic information
- Create Benefit Program enrollments
- View and create employee change requests
- View and upload documents
- Change user password
- View and send secure messages
- View reports

Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- View online help and reference materials
- View home screen
- View Cash Balance contribution rates (if applicable)

Leave of Absence

This contact type can submit only specific employment transactions related to leaves of absence.

Add or Edit Capability:

- Upload and process Leave of Absence and Leave of Absence Correction transactions via the Employment file
- Upload and process Leave of Absence Return and Leave of Absence Return Correction transactions via the employment file
- Submit manual Leave of Absence and Leave of Absence Correction transactions
- Submit manual Leave of Absence Return and Leave of Absence Return Correction transactions
- Change user password
- View and send secure messages
- View and upload documents

Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- View online help and reference materials
- View home screen
- Create Benefit Program enrollments
- View and create employee change requests
- View reports
- View Cash Balance contribution rates (if applicable)

Payroll

This contact type is assigned to perform tasks related contribution reporting but may not perform employment related tasks.

Add or Edit Capability:

- Upload and process the Contribution and Match file
- Submit manual Contribution transactions
- View and upload documents
- Change user password

- View and send secure messages
- View reports
- Add Cash Balance contribution rates (if applicable)
- Add Cash Balance reporting schedules (if applicable)

Read-Only:

- Create Benefit Program enrollments
- View and create employee change requests
- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- View online help and reference materials
- View home screen

Payroll and Employment

This contact type is assigned to perform employment related tasks and CalSTRS contribution reporting. This includes submitting both payroll and enrollment data manually or via file upload.

Add or Edit Capability:

- Upload and process the Contribution, Employment, and Match files
- Submit manual Employment transactions
- Submit manual Contribution transactions
- Edit member demographic information
- Create Benefit Program enrollments
- View and create employee change requests
- View and upload documents
- Change user password
- View and send secure messages
- View reports
- Add Cash Balance contribution rates (if applicable)
- Add Cash Balance reporting schedules (if applicable)

Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information

- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- View online help and reference materials
- View home screen

Read Only

This contact type provides read-only access to the Secure Employer Website and may only view information in the system.

Add or Edit Capability:

- Change user password

Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- View online help and reference materials
- View home screen
- Upload and process files
- Create Benefit Program enrollments
- View and create employee change requests
- View and upload documents
- View and send secure messages
- View reports
- View Cash Balance contribution rates (if applicable)

Reduction in School Funds

This contact type can submit only specific employment transactions related to salary reductions due to a reduction in school funds.

Add or Edit Capability:

- Upload and process Reduction in School Funds and Reduction in School Funds Correction transactions via the Employment file
- Submit manual Reduction in School Funds and Reduction in School Funds Correction transactions

- Change user password
- View and send secure messages
- View and upload documents

Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- View online help and reference materials
- View home screen
- Create Benefit Program enrollments
- View and create employee change requests
- View reports
- View Cash Balance contribution rates (if applicable)

Sick Leave

This contact type can submit only specific employment transactions related to sick leave.

Add or Edit Capability:

- Upload and process sick leave transactions via the Employment file
- Submit manual sick leave transactions
- Change user password
- View and upload documents
- View and send secure messages

Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- View online help and reference materials
- View home screen
- Create Benefit Program enrollments

- View and create employee change requests
- View reports
- View Cash Balance contribution rates (if applicable)

Superintendent/Chancellor

This contact type is assigned to Superintendents, Chancellors, or equivalent level at the county offices of education, school district offices or community college district offices.

Add or Edit Capability:

- Change user password
- View and send secure messages

Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- Create Benefit Program enrollments
- View and create employee change requests
- Upload and process files
- View reports
- View and upload documents
- View online help and reference materials
- View home screen
- View Cash Balance Contribution Rates (if applicable)

Termination

This contact type can submit only specific employment transactions related to termination of employment.

Add or Edit Capability:

- Upload and process Termination and Termination Correction transactions via the Employment file
- Submit manual Termination and Termination Correction transactions
- Change user password
- View and send secure messages
- View and upload documents

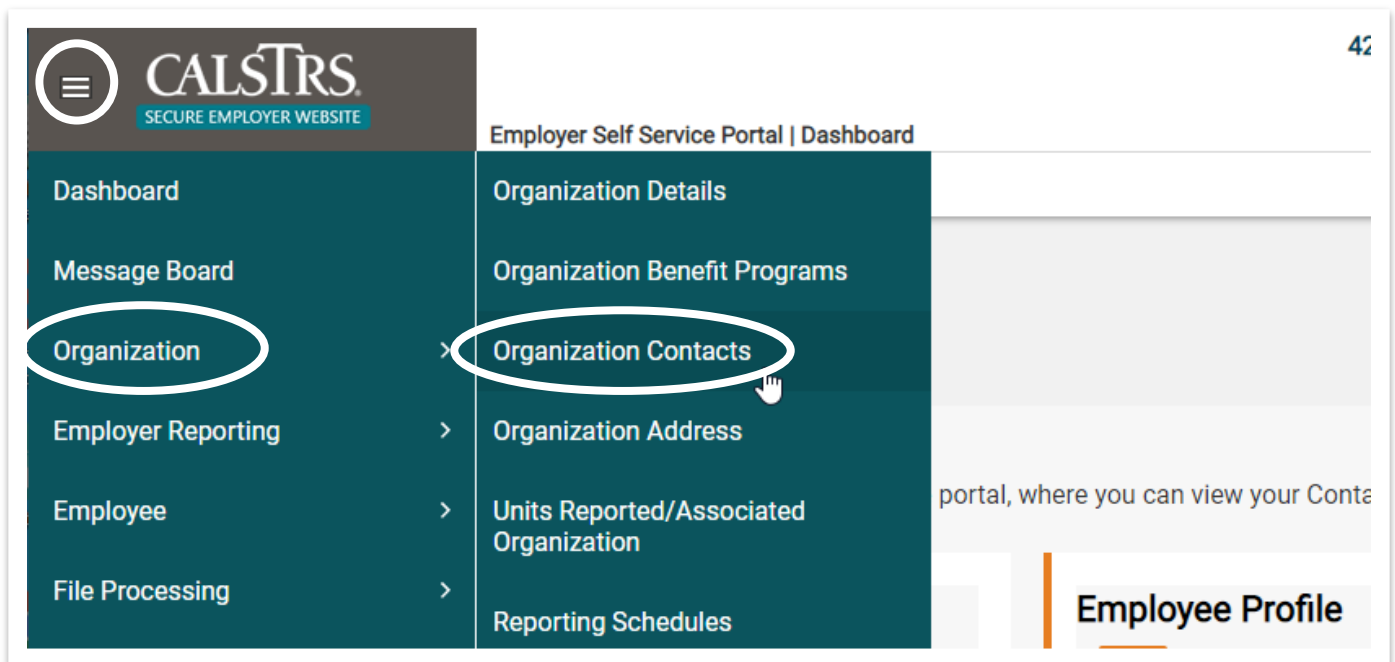
Read-Only:

- Create and maintain Organization details
- Create and maintain Organization address
- Create and maintain Organization Contact information
- View Units Reported/associated Organization information
- View Organization Benefit Program information
- View Organization reporting schedules
- View employee information
- View online help and reference materials
- View home screen
- View reports
- Create Benefit Program enrollments
- View and create employee change requests
- View Cash Balance contribution rates (if applicable)

1) Creating a New Employer Contact

Step 1:

From the **Global Navigation Menu**, select **Organization** and then select **Organization Contacts**.



Step 2:

The **Organization Contact Maintenance** screen displays. In the **Contacts** panel, select the **New** button.

Search for Organization

Search for Organization (Hint: Org Code, Org Name) : 42061
↓
Search

Contacts for 42061-COUNTY OFFICE OF EDUCATION

New
Export To Excel

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▶ ▶
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Full Name	Status	Email Address	Contact Type
Jane Contact	Inactive	tsj_vivbfykma@qgith.puo	
Kevin Contact	Inactive	tsj_ytkyny@nijfz.ywc	

Step 3:

Scroll down to the **Contact Details** panel and enter the Employer Contact's information. Fields with an asterisk are required and must be completed. In the **Contact Types** panel, check the appropriate Contact Type(s). Note that Employer Contacts may have multiple Contact Types selected. In this example, **Administrator** would be checked. Click the **Save** button.

Contact Details

Contact Details

***First Name :**

Name Prefix :

Primary Phone Number :

Primary Phone Extension :

***Primary Email Address :**

Job Title :

Middle Name :

Name Suffix :

Secondary Phone Number :

***Confirm Primary Email Address :**

***Status :**

***Last Name :**

Gender :

Mobile Phone Number :

Secondary Email Address :

Contact Types

Account Receivable

Administrator

Benefit

Employment

Leave of Absence

Payroll

Payroll and Employment

Read Only

Reduction in School Fund

Step 4:

The employer contact information is successfully saved when a message appears at the top of the page that states “[All changes successfully saved.]”

SECURE EMPLOYER WEBSITE

ESS Organization Contact Maintenance 920

Logo

ESS Organization Contac...

X

←

→

[All changes successfully saved.]

Search for Organization

Search for Organization (Hint: Org Code, Org Name) : 42061

↓

Contacts for 42061-COUNTY OFFICE OF EDUCATION

Step 5:

From the **Organization Contact Maintenance** screen, scroll down to the **Contacts** panel and click the **Full Name** link for the newly added contact.

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[New](#)
[Export To Excel](#)

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Full Name ▾	Status	Email Address	Contact Type
Jane Contact	Active	JaneContact@County.xorg	Account Receivable, Administrator, Benefit, Superintendent/Chancellor, Termination
Gisela Villa	Active		Administrator, Benefit, Payroll and Employr
Gilbert Contact	Active	gcontact@county.xorg	Administrator, Benefit, Payroll and Employr
Contact Test	Active	contacttest@coe.org	Administrator
Coco Contact	Active	cococontact@county.xorg	Administrator

Step 6:

Scroll down to the **Self Service Details** panel. Select the **Register** button.

Self Service Details

Register

User Name (Email ID) :	ESS ID :	Entrust Unsuccessful Attempts :
Password Last Changed :	Status :	Entrust OTP :
Last Successful Login :	Enrollment Completed :	Entrust OTP Expiry Date :
Previous Login :	Is OTP Set :	Entrust Last Authentication Failure :
Successful Login Attempts :	Password Exp Flag :	
Total No Of Unsuccessful Attempts :	Is Reenrolled Set :	Migrated To Entrust :
No of Unsuccessful Attempts Since Last Success :		
Internal Message :		
External Message :		

Note: The Employer Contact will receive an email with a temporary password to complete registration within 24 hours. If registration does not occur within 24 hours, the temporary password will need to be regenerated by clicking the **Re-Enroll** button.

2) Updating an Employer Contact

Step 1:

On the **Organization Contact Maintenance** screen, scroll down to the **Contacts** panel and click the **Full Name** link for the contact that needs updates.

Contacts for 01001-COUNTY OFFICE OF EDUCATION

[New](#) [Export To Excel](#)

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Full Name	Status	Email Address	Contact Type
Anthony Contact	Active	anthonycontact@county.xorg	Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment, Superintendent/Chancellor
Ariel Contact	Active	arielcontact@county.xorg	Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment, Superintendent/Chancellor
Barb Ruggiero	Active		Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment
Barbara Ching	Active		Account Receivable, Administrator, Benefit, Employment, Leave of Absence, Payroll, Payroll and Employment, Read Only, Reduction in Scho Superintendent/Chancellor, Termination
Barbara Ching	Active		Payroll and Employment
Becky Contact	Active	beckycontact@county.xorg	Account Receivable, Administrator, Benefit, Employment, Leave of Absence, Payroll, Payroll and Employment, Reduction in School Funds, S Termination
Bella Contact	Active	bellacontact@county.xorg	Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment, Superintendent/Chancellor
Betsy Contact	Active	bcontact@county.xorg	Payroll

Step 2:

Update the necessary information or change the Contact Type and select the **Save** button.

Contact Details

Contact Details

[Save](#)

*First Name: Middle Name: *Last Name:

Name Prefix: Name Suffix: Gender:

Primary Phone Number: Secondary Phone Number: Mobile Phone Number:

Primary Phone Extension:

*Primary Email Address: *Confirm Primary Email Address: Secondary Email Address:

[bellacontact@county.xorg](#)

Job Title: *Status:

Contact Types

Account Receivable Administrator Benefit Employment Leave of Absence Payment Contact Payroll Payroll and Employment Read Only Reductio Termination

Step 3:

The employer contact information is successfully saved when a message appears at the top of the page that states “[All changes successfully saved.]”

[All changes successfully saved.]

Search for Organization

Search for Organization (Hint: Org Code, Org Name) :

Contacts for 01001-COUNTY OFFICE OF EDUCATION

3) Re-enrolling an Employer Contact

An employer contact may need to be re-enrolled for a password reset, to regenerate a temporary password, or when the answers to security questions have been forgotten.

Step 1:

On the **Organization Contact Maintenance** screen, scroll down to the **Contacts** panel and click the **Full Name** link for the contact that needs to be re-enrolled.

Contacts for 01001-COUNTY OFFICE OF EDUCATION

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Full Name	Status	Email Address	Contact Type
Anthony Contact	Active	anthonycontact@county.xorg	Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment, Superintendent/Chancellor
Ariel Contact	Active	arielcontact@county.xorg	Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment, Superintendent/Chancellor
Barb Ruggiero	Active		Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment
Barbara Ching	Active		Account Receivable, Administrator, Benefit, Employment, Leave of Absence, Payroll, Payroll and Employment, Read Only, Reduction in Scho Superintendent/Chancellor, Termination
Barbara Ching	Active		Payroll and Employment
Becky Contact	Active	beckycontact@county.xorg	Account Receivable, Administrator, Benefit, Employment, Leave of Absence, Payroll, Payroll and Employment, Reduction in School Funds, S Termination
Bella Contact	Active	bellacontact@county.xorg	Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment, Superintendent/Chancellor
Betsy Contact	Active	bcontact@county.xorg	Payroll

Step 2:

In the **Self Service Details** panel, select the **Re-Enroll** button.

Self Service Details

User Name (Email ID) : bellacontact@county.xorg	ESS ID : 3829	Entrust Unsuccessful Attempts :
Password Last Changed : 11/15/2021 02:47:14 PM	Status : Registered	Entrust OTP : JP9CDP3M
Last Successful Login : 02/01/2022 09:38:26 AM	Enrollment Completed : Y	Entrust OTP Expiry Date : 11/16/2021 10:44:28 PM
Previous Login : 12/22/2021 02:55:28 PM	Is OTP Set : N	Entrust Last Authentication Failure : PASSWORD
Successful Login Attempts : 24	Password Exp Flag : N	
Total No Of Unsuccessful Attempts : 2	Is Reenrolled Set : N	Migrated To Entrust : Y
No of Unsuccessful Attempts Since Last Success :		
Internal Message :		
External Message :		

Step 3:

A pop-up message appears. Click the **OK** button to confirm your choice. An email is sent to the email ID registered.

viptnneweb01.calstrs.ca.gov says

Are you sure you want to re-enroll?

4) Unlocking an Employer Contact

Step 1:

On the **Organization Contact Maintenance** screen, scroll down to the **Contacts** panel and click the **Full Name** link for the Contact that needs to be unlocked.

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[New](#) [Export To Excel](#)

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Full Name	Status	Email Address	Contact Type
Anthony Contact	Active	anthonycontact@county.xorg	Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment, Superintendent/Chancellor
Ariel Contact	Active	arielcontact@county.xorg	Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment, Superintendent/Chancellor
Barb Ruggiero	Active		Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment
Barbara Ching	Active		Account Receivable, Administrator, Benefit, Employment, Leave of Absence, Payroll, Payroll and Employment, Read Only, Reduction in School Superintendent/Chancellor, Termination
Barbara Ching	Active		Payroll and Employment
Becky Contact	Active	beckycontact@county.xorg	Account Receivable, Administrator, Benefit, Employment, Leave of Absence, Payroll, Payroll and Employment, Reduction in School Funds, S Termination
Bella Contact	Active	bellacontact@county.xorg	Account Receivable, Administrator, Benefit, Payroll, Payroll and Employment, Superintendent/Chancellor
Betsy Contact	Active	bcontact@county.xorg	Payroll

Step 2:

On the **Organization Contact Maintenance** screen, navigate to the **Self Service Details** panel and select the **Unlock** button.

Note: The unlock button will only appear if the employer contact is locked out.

Self Service Details

[Unlock](#) [Re-Enroll](#)

User Name (Email ID): bellacontact@county.xorg	ESS ID: 3829	Entrust Unsuccessful Attempts:
Password Last Changed: 11/15/2021 02:47:14 PM	Status: Registered	Entrust OTP: JP9CDP3M
Last Successful Login: 02/01/2022 09:38:26 AM	Enrollment Completed: Y	Entrust OTP Expiry Date: 11/16/2021 10:44:28 PM
Previous Login: 12/22/2021 02:55:28 PM	Is OTP Set: N	Entrust Last Authentication Failure: PASSWORD
Successful Login Attempts: 24	Password Exp Flag: N	
Total No Of Unsuccessful Attempts: 2	Is Reenrolled Set: N	Migrated To Entrust: Y
No of Unsuccessful Attempts Since Last Success:		
Internal Message:		
External Message:		

Step 3:

A pop-up message appears. Click the **OK** button to confirm your choice. The employer contact will receive an email to login within 24 hours to complete unlock process.

