Program Enrollment Requests

This document provides a list of the required forms, common reasons a Program Enrollment Request would be rejected and the step-by-step process for an employer to submit Program Enrollment Requests for the Retirement Incentive Program.

Revised: 03/09/2021

Required Forms

To submit a Program Enrollment Request for a Retirement Incentive, four forms are required. If all four forms are not attached to the request, errors will be triggered.

Form	Description
MS 1169-1	Certification of Employer Participation
MS 1169-2	Certification Information
MS 187	Employer Certification of Member Eligibility
Board Resolution	An MOU can be submitted in place of board resolution

## Common reasons for rejecting Program Enrollment Requests

Program Enrollment Requests can be rejected for several reasons, the following are common reasons:

- No true cost savings to the district

- Forms are missing appropriate signatures

- Incorrect forms were uploaded

- Incomplete board resolution

- Requested window period starts prior to the board resolution date

Steps to Submit a Program Enrollment Request for a Retirement Incentive

Step 1:

From the Dashboard, click the **Global Navigation Menu**. When the **Global Navigation Menu** displays, click **Employee,** then click **Program Enrollment Request.**
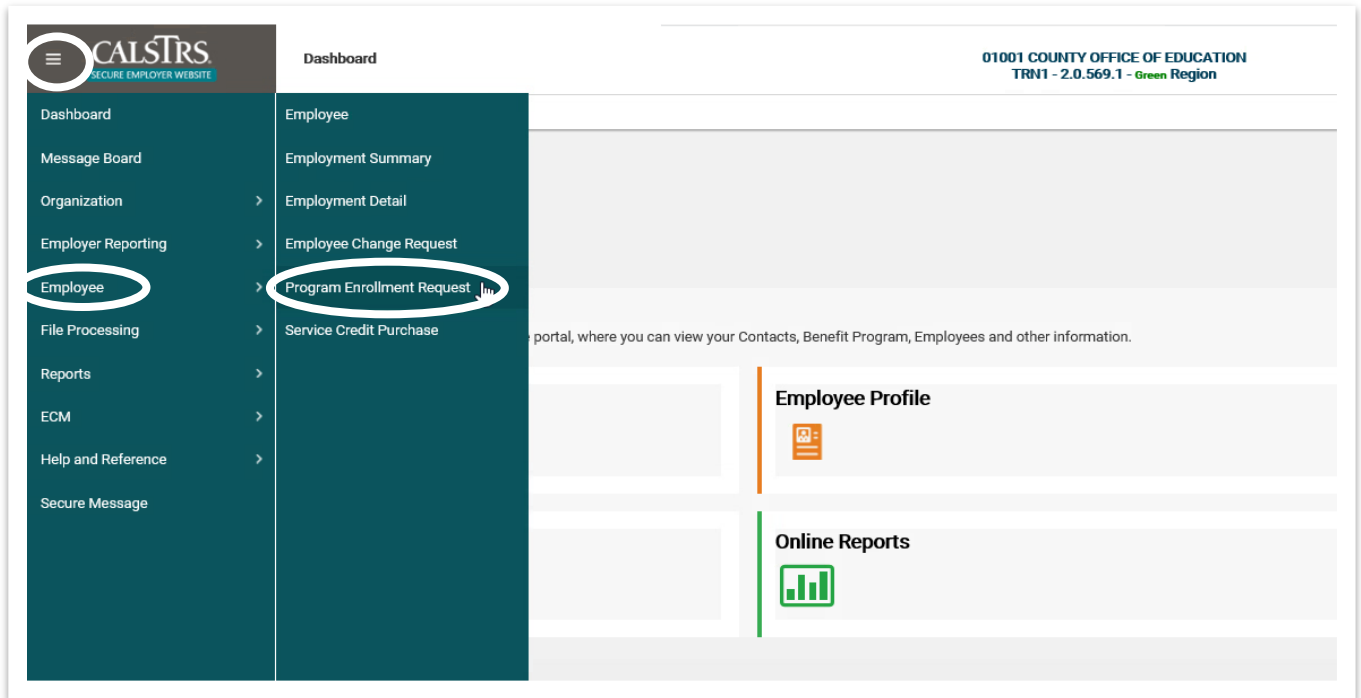
Step 2:

The **Program Enrollment Search** screen displays. Click the **New** button in the **Search Results** panel.

Step 3:

The **Program Enrollment Maintenance** screen displays. The **Organization Code** and **Organization Name** fields will auto-populate based on your organization.

Step 4:

From the **Program Name** dropdown field, select **Retirement Incentive – 2 years of SC**.

Step 5:

Additional fields display in the **Retirement Incentive Program Details** panel.

Step 6:

Enter the applicable dates in the **Enrollment Window Period Start**, **Enrollment Window Period End** and **Board Approval Date** fields.

Note: if you are using an MOU in place of a Board Resolution, fill in the **MOU date** field instead of the **Board Approval Date** field.

Step 7:

From the **Payment Plan** dropdown field, select a **Payment Plan**. In this example, **Lump Sum** is selected.

Step 8:

Click the **Save** button.

Step 9:

Additional panels display. In the **Search Members** panel, enter the **Client ID** in the **Client ID** field to add applicable members to the request.

Step 10:

Click the **Search** button.

Step 11:

In the **Search Results** panel, select the **checkbox** next to the member record(s) you want to include in the request.

Step 12:

Click the **Include** button. Repeat steps 9-12, as needed, for each applicable member.

Step 13:

The **Members List** panel displays. Enter proper amounts in the **2 Yrs of Post Retirement Healthcare Benefit Costs** and **Retiree Salary & Benefits** fields.

Step 14:

Click the **Calculate Cost Savings** button to calculate the cost of the retirement incentive and the net savings.

Members List

Delete	Calculate Cost Savings

	Client Id	Last Name	First Name	Middle Name	Date Of Birth	Admin Fee, Present Value Plus Any Interest
☐	1540125195	MEMBER	SUSAN	CLONE	05/23/1965	$0.00

Cost : $35,000.00

Net Saving : $75,000.00

Step 15:

Upload the required documents in the **Upload Documents** panel. From the **Document Type** dropdown field, select the appropriate document type.

Upload Documents

Document Type :

Board Resolution
Certification Information forms (MS 1169-2 and MS 1169-3)
Certification of Employer Participation form (MS 1169-1)
Employer Certification of Member Eligibility form (MS 187)

File Path :

Delete

	Document Type	Attachment	Uploaded Date
☐			

No records to display.

Step 16:

Click the **Browse** button.

Step 17:

From the **Choose File to Upload** window, select the document you wish to upload. Click the **Open** button.
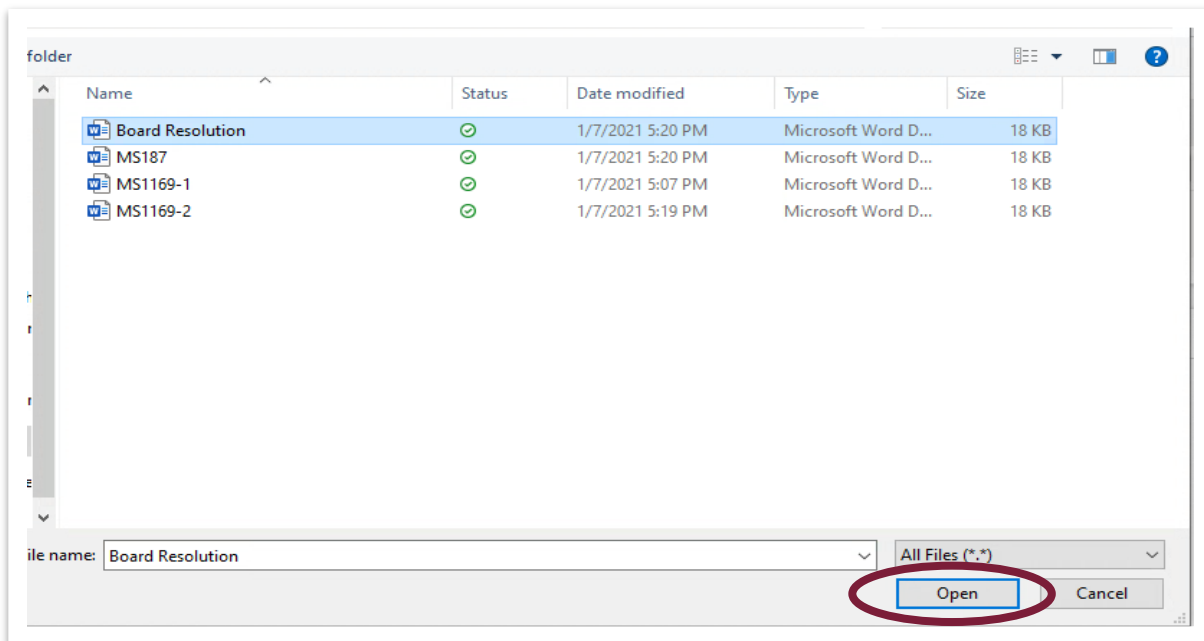
Step 18:

The file displays in the **File Path** field. Click the **Upload** button.

Step 19:

Check the top of the screen to ensure the message, "File uploaded successfully" displays. Repeat steps 15-18 for each required document.
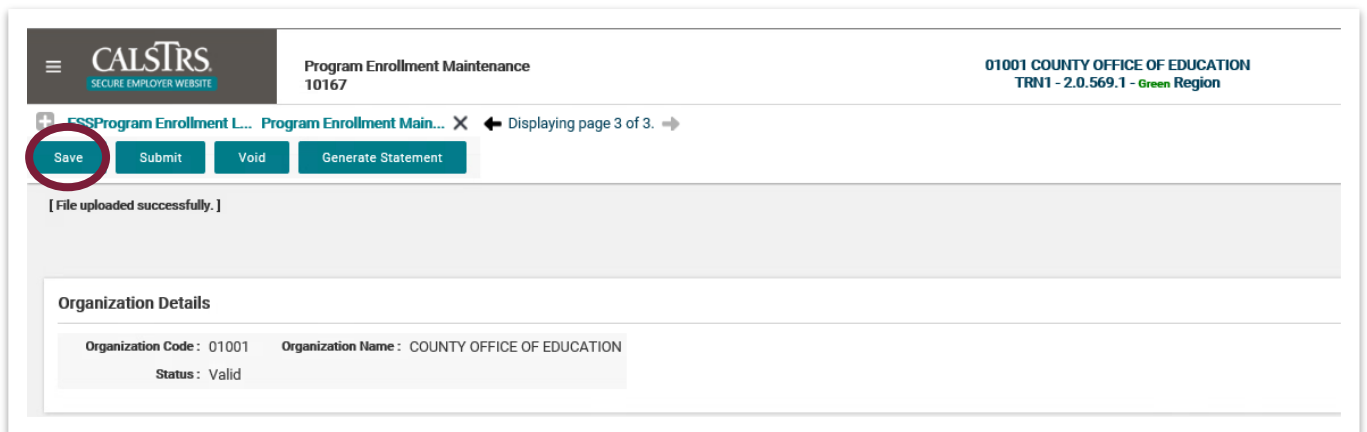
Step 20:

Check the **Validation Information** tab in the **Other Details** panel to ensure no soft errors display.
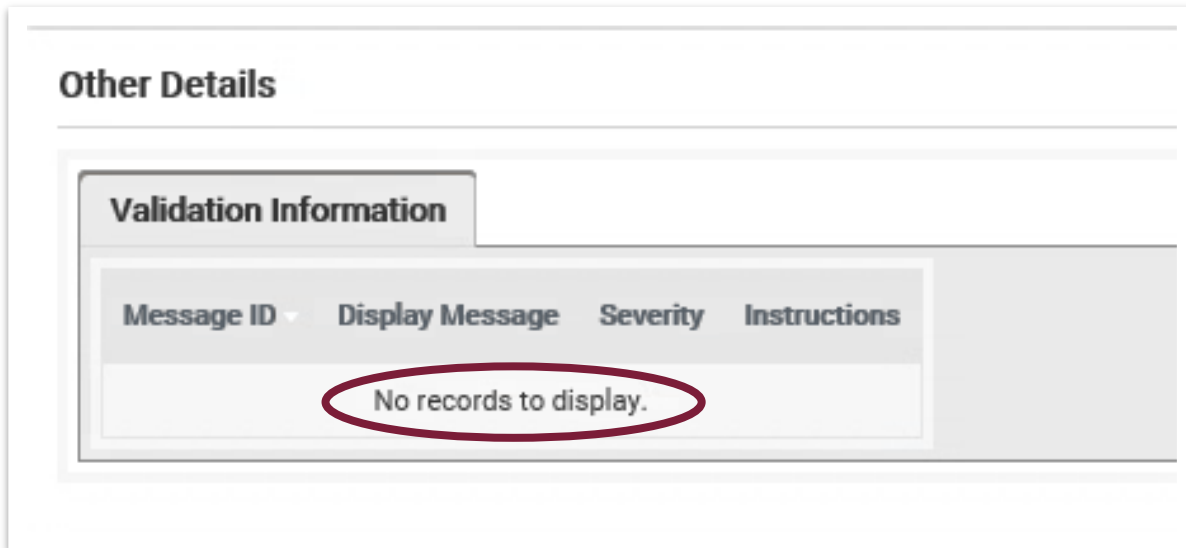
Step 21:

Click the **Save** button.

Note: Saving a Program Enrollment Request does not submit the request to CalSTRS.

Step 22:

Scroll to the **Retirement Incentive Program Details** panel to ensure the **Status** is Valid and the **Action Status** is Pending.

Step 23:

Click the **Submit** button.

Step 24:

A message displays at the top of the screen stating, "All changes successfully saved".
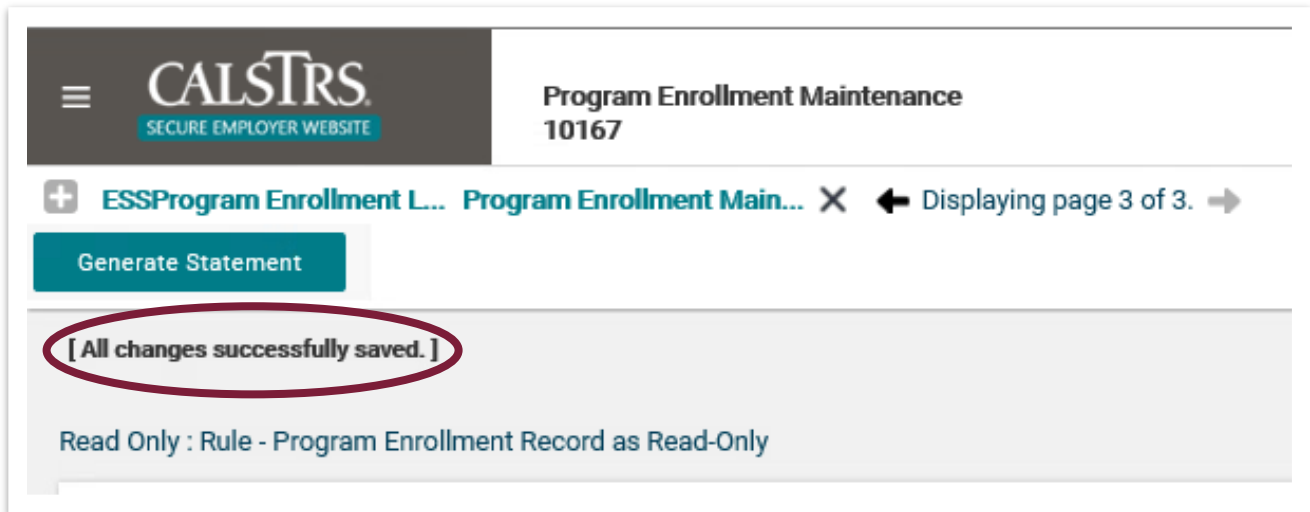
Step 25:

Scroll to the **Retirement Incentive Program Details** panel, the **Action Status** is now Pending Approval.

Note: The Program Enrollment Request has been submitted to CalSTRS for review.