

Employee Maintenance for Employers

This job aid provides step-by-step instructions for viewing an employee's record including membership dates, statuses, account details, and transactions. This job aid also provides step-by-step instructions for updating demographic information and employee addresses.

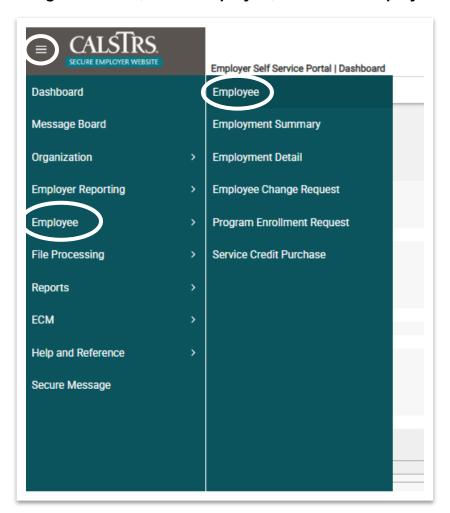
Questions? Contact EmployerHelp@calstrs.com.

Revised: 10/28/2025

Reviewing a person record

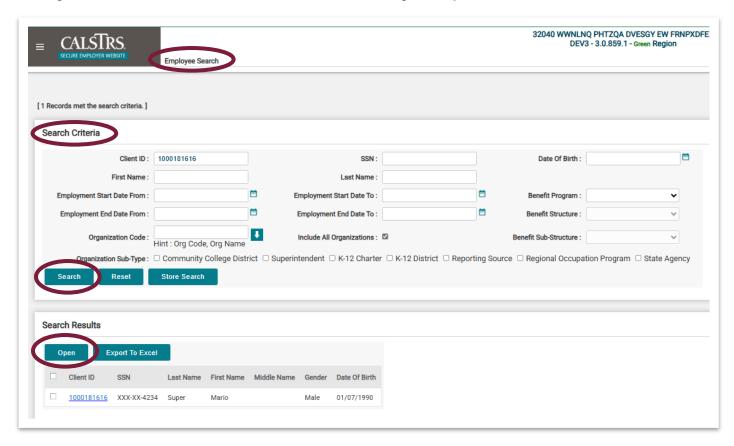
Step 1:

From the Global Navigation Menu, select Employee, then select Employee again.



Step 2:

The **Employee Search** screen displays. Enter information in the **Search Criteria** panel to search for a specific member, then click the **Search** button. Select the applicable member by clicking the checkbox next to their **Client ID** and clicking the **Open** button.

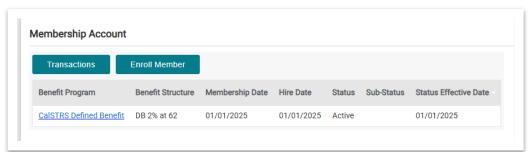




Step 3:

The **Employee Maintenance** screen displays. The following four panels display:

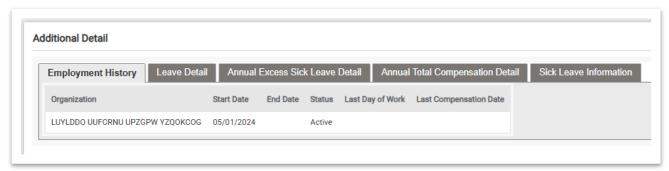
1. **Membership Account-** This panel displays the member's **Benefit Program**, **Benefit Structure**, **Hire Date**, **Status** and **Status Effective Date** for all employers they may be employed with. Information in this panel cannot be edited via **Employee Maintenance** screen.



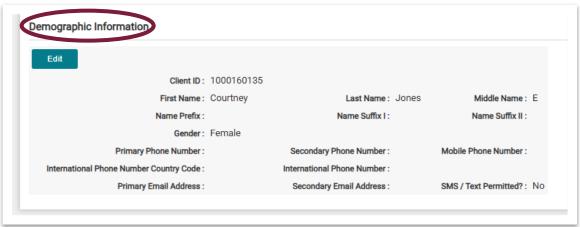
Some common statuses and their definitions are listed below:

Status Name	Status Meaning
Active	An active account
Closed	An account closed from termination or closed after being opened in error
Disabled	An account for a member on disability benefit
Disabled Deceased	An account for a member previously on disability, now deceased
Deceased	An account for a member now deceased
Non-contributing	An account not contributed to; unrelated to their membership or for a Cash Balance account not currently contributed to
Retired	An account that service retired
Redeposited	An account that redeposited contributions after retirement or refund
Withdrawn	A member account that was refunded

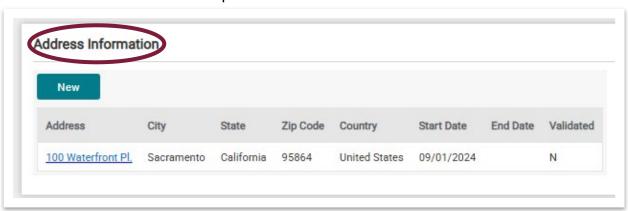
 Additional Detail- This panel displays five tabs: Employment History, Leave Detail, Annual Excess Sick Leave Detail, Annual Total Compensation Detail and Sick Leave Information. Information in this panel cannot be edited via Employee Maintenance screen.



3. **Demographic Information-** Displays basic demographic information such as name, Client ID and contact information. Some fields can be edited by the employer.



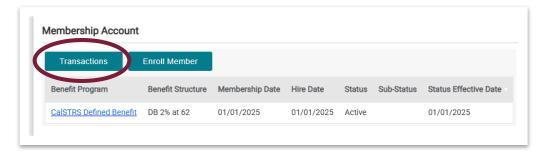
4. **Address Information-** Displays the members' current and previous addresses. Employers can add new addresses in this panel.



Reviewing a member's account transactions

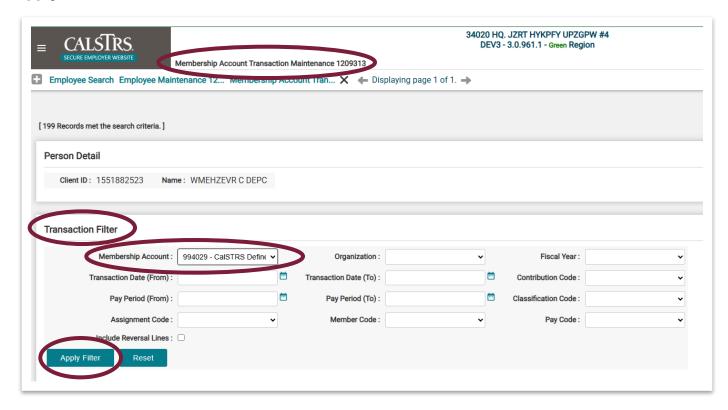
Step 1:

From the **Membership Account** panel, click the **Transactions** button.



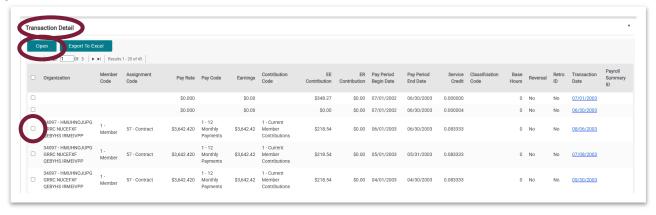
Step 2:

The Membership Account Transaction Maintenance screen displays. Select the applicable membership account from the dropdown menu in the Transaction Filter panel. A member may have multiple membership accounts. The Defined Benefit, Defined Benefit Supplement and Cash Balance accounts will be separate membership accounts. Use the other filters in the Transaction Filter panel to narrow down their search for specific transactions. Once the membership account has been selected and the applicable search criteria is entered, click the Apply Filter button.



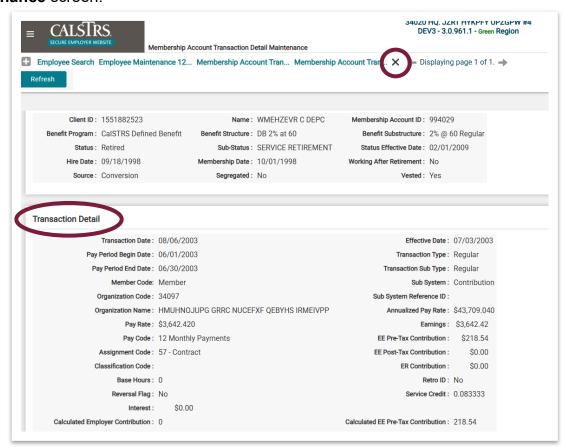
Step 3:

The **Transaction Detail** panel populates the employee's contributions. To view a more detailed overview of each line, select the checkbox next to the applicable line and click the **Open** button.



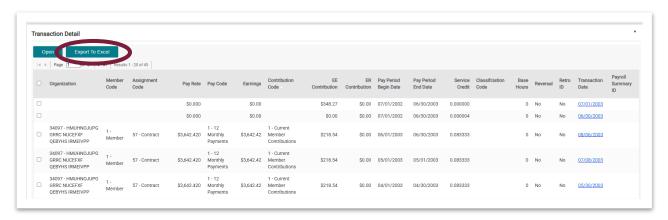
Step 4:

The Membership Account Transaction Detail Maintenance screen displays. The Transaction Detail panel provides an overview of the transaction. Click the X button in the Breadcrumb Navigation bar to return to the Membership Account Transaction Maintenance screen.



Step 5:

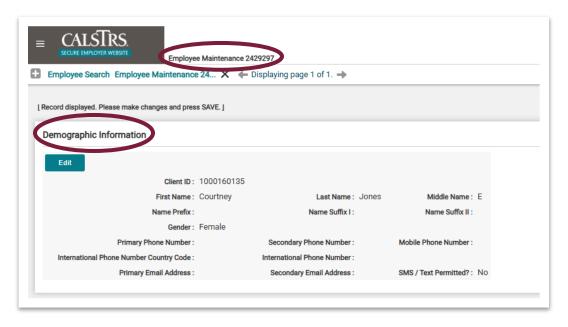
The **Membership Account Transaction Maintenance** screen displays. To view the transactions in an Excel spreadsheet, click the **Export to Excel** button.



Updating a member's demographic information

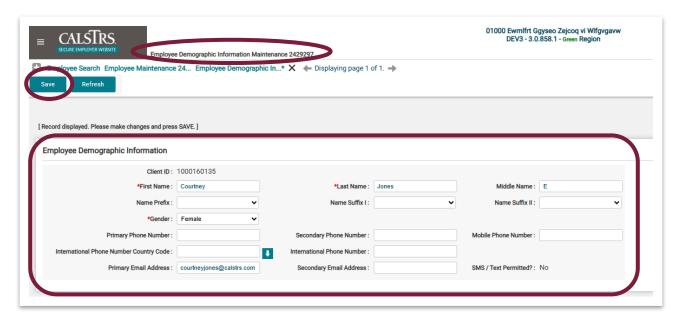
Step 1:

From the **Employee Maintenance** screen, click the **Edit** button under the **Demographic Information** panel.



Step 2:

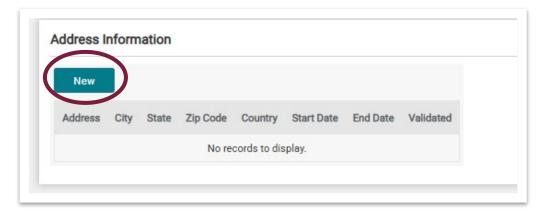
The **Employee Demographic Information Maintenance** screen displays. Use the fields in the **Employee Demographic Information** panel to make the applicable edits. Click the **Save** button.



Adding an address for a member

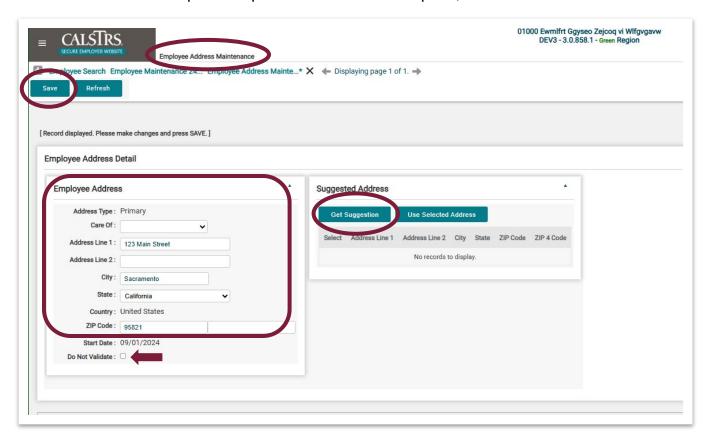
Step 1:

From the **Employee Maintenance** screen, click the **New** button under the **Address Information** panel.



Step 2:

The **Employee Address Maintenance** screen displays. Enter in the member's address information. Click the **Get Suggestion** button to validate the address or check the **Do Not Validate** checkbox to skip this step. Once the form is complete, click the **Save** button.



Step 3:

When the address has been saved successfully, a message will appear at the top of the screen stating, "All changes successfully saved." The record will become read-only.

