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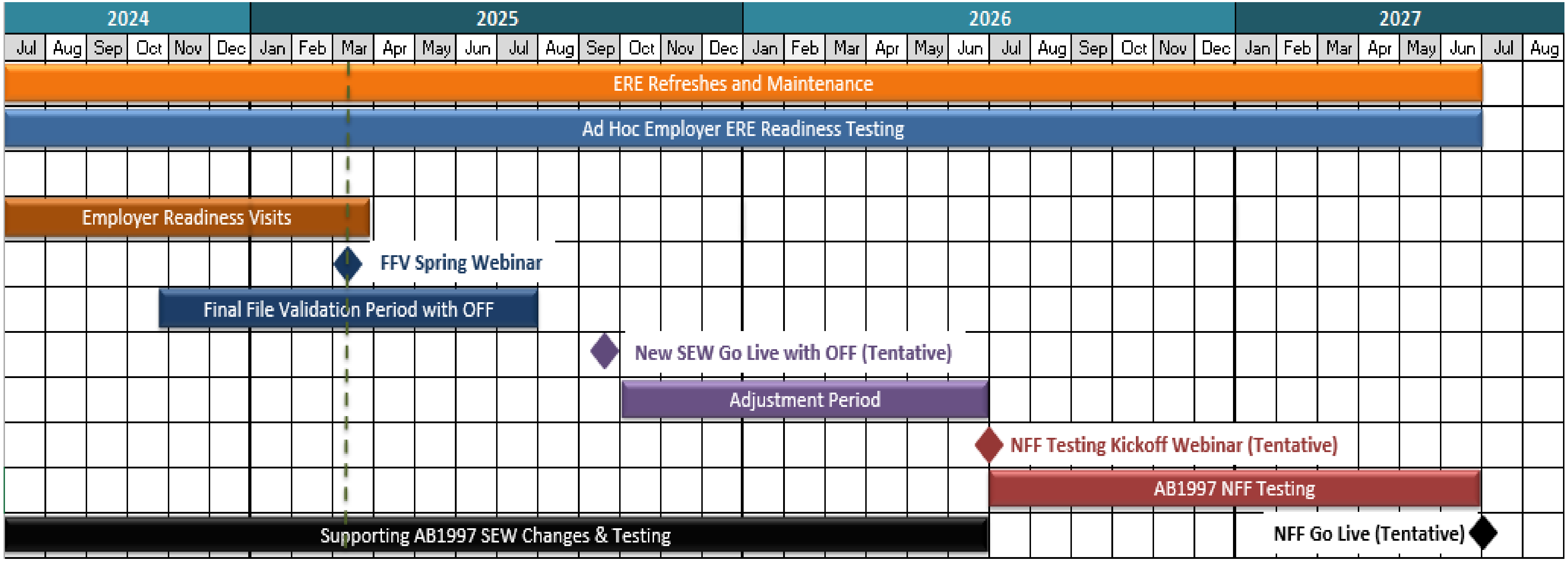
Employer Readiness District Webinar

April 2025

Agenda

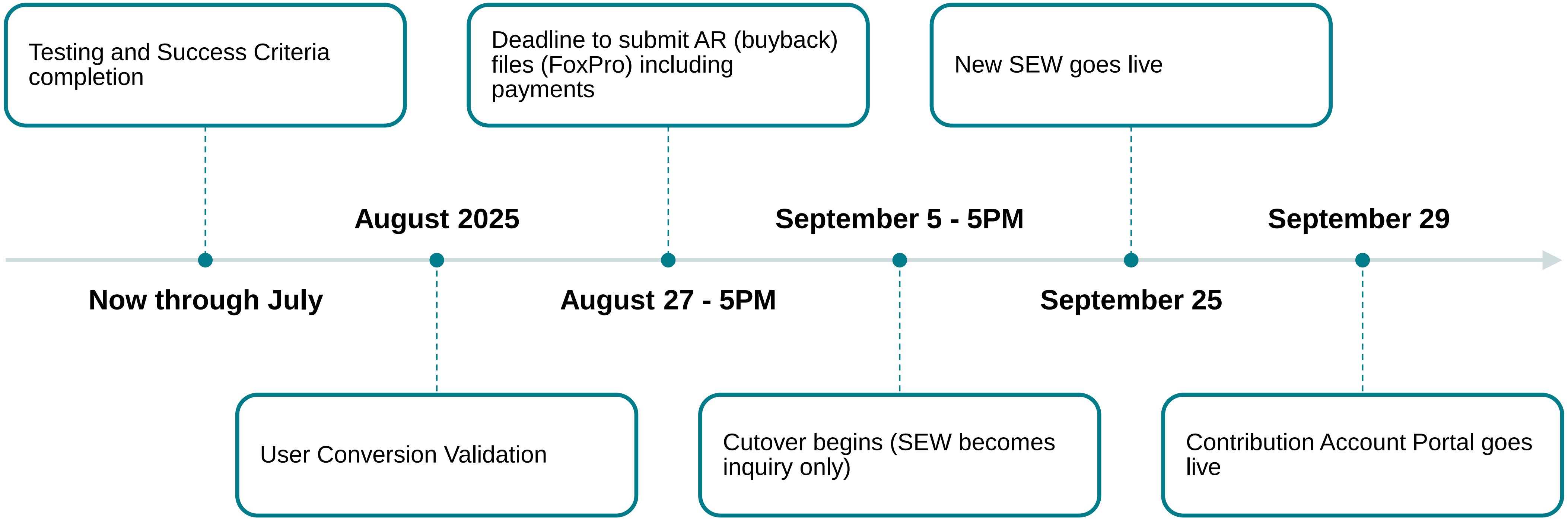
- Project schedule and database refresh schedule
- Employer Support Portal
- Employer-related forms crosswalk
- Final File Validation
- Employee Lookup
- Employment Transactions
- File Processing

Project schedule



Project schedule

Tentative Cutover Timeline



Database refresh schedule

2025 Database refresh dates:

- March 6th (Data as of 1/17/2025)
- May 1st (Data as of 3/14/2025)
- July 3rd (Data as of 5/16/2025)
- August 3rd (Data as of 6/13/2025)

Forms crosswalk

The submittal process for several existing forms are changing and some existing forms will be retired at implementation.

Please refer to the Employer-Related Form Crosswalk document within the Employer Toolkit on the Employer Support Portal to understand the changes.

https://employersupport.calstrs.com/

Final File Validation

Commencing with the latest refresh (March 6th), now is the time to complete the mandatory success criteria:

- Success Criteria 1: Register Organization Contacts
- Success Criteria 2: Upload and transmit a Defined Benefit F496 file representing a normal monthly volume of transactions
- Success Criteria 3: Upload and transmit a Cash Balance VDF file representing a normal monthly volume of transactions
- Success Criteria 4: Submit Account Receivable transactions

Please contact your Employer Readiness Contact or PSEmployerreadiness@calstrs.com after completing each criterion.

Account Receivable

The County Offices of Education are required to submit Account Receivable information on the F496 file or separately on the Contribution – AR File.

Districts (non report sources) cannot submit Contribution – AR Files directly to CalSTRS.

Reminders:

- 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

Support

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

Q

Questions

A

Answers

- Q: Can we upload files during the cutover?
- A: No, file upload will be disabled during cutover.

- Q: Based on the project schedule, the August file will need to be transmitted on the New SEW between 09/25 and the due date, correct?
- A: No, we are not expecting you that. Most reporting will not be subject to penalties due to the shortened timelines. For more information refer to the March webinar which goes into detail on penalty impacts. https://employersupport.calstrs.com/GetFile/e07177cf-708a-43b8-86cb-adce4f69d0e7

- Q: Will we be uploading and posting our July 2025 file in August 2025 with the old SEW?
- A: Yes, you will still be using the old SEW in August for your July file.

- Q: Do districts that only have read only, and sick leave access see all tiles at the landing page?
- A: Yes, the view on the dashboard won't change per permissions.

- Q: Is the file upload format the same or are there new specifications to report payroll?
- A: There is no change for the file format at go live. You will continue to use the existing F496 or VDF file.

- Q: On the new express benefit transactions, will we get an email notification that something is waiting for us (something pending) or do we have to go in and check the website daily?
- A: You will get a very general email that says you have something on the message board for you to review.

- Q: What if someone put in a future date for a membership or hire date, can we put a prior hire date or membership date?
- A: Possibly yes, it depends if the date causes any conflicts with reporting history. In some cases, you can back date the membership in other cases you cannot. We would need a real case with actual details to tell you whether you can back date.

- Q: Are we supposed to automatically have access to the test environment? Or is there a specific process we need to follow to obtain access?
- A: No, you need to request access from your county administrator. They can set you up.

- Q: Will Districts have the capability to change the employees address/name change directly on the website?
- A: Yes, if you have the employment permissions then you can add a new address or edit demographic information

- Q: The express benefit report used to have to be signed by an officer. Is that requirement being removed?
- A: CalSTRS does not monitor who is authorized to sign the form, but with the form going away there will be nothing to sign. It’s the employer's responsibility to ensure those submitting the express benefit information are authorized to do so.

- Q: So, every time someone leaves our district, we need to submit the termination transaction and then go back and do a sick leave information transaction?
- A: No, termination and sick information are only required when someone retires or goes on disability. When someone leaves the district but does not retire this information is not required.

- Q: Do we need to terminate an employee if they are only working as a substitute for the district?
- A: This is not required. Termination information is only required when someone retires or goes on disability.

- Q: Can there be more than one active user account with the same email address?
- A: The email address is tied to the contact so there cannot be multiple contacts with the same email address, nor can there be multiple unique passwords for a contact.

- Q: What access role is needed to submit an employee change request?
- A: The benefit role would allow you to submit and employee change request.

- Q: Will we get a message board message if one of our RWP applicants is approved or will I have to check them all regularly?
- A: The organization associated with the RWP provision, and the reporting source of that organization will receive a message board notification.

- Q: When enrolling a sub teacher, will the system keep track of all the days the sub worked in a school year within the same school district or multiple districts?
- A: Just like today, the system will calculate the possible days/hours via the payroll that is reported by all districts, if the person hits the qualification, you will receive an error when uploading a file.

- Q: Will the system be able to tell us if a sub has reached 100 days from other school districts within the same school year before we enroll that employee?
- A: No, an error or warning will display when a payroll detail is uploaded if they reached 100 days.

- Q: Where do we upload the ES350 and ES372 forms and social security form SSA 1945?
- A: You can use the CBT or Job aid on the support portal for a resource to walk you through the process. There is an ECM page from the global navigation dropdown where you can upload the document. https://employersupport.calstrs.com/GetFile/0c982cc6-8710-4527-a656-65cde5a8a837

- Q: As a charter school, currently when I submit an F496 file for errors it is submitted as a .prn file. Is that changing to a .txt file submission now?
- A: Yes, the new system requires a .txt extension

- Q: How do I toggle between different reporting units as a Charter School employer? I just requested access to a second reporting unit.
- A: There is a button next to the question mark at the top right of the screen. It's the button the has two arrows facing in opposite directions.

- Q: Can you show how it was separated by column? When downloaded it doesn't look like what he showed on the spreadsheet.
- A: This requires text to columns, which we have a job aid that can walk you through the process. https://employersupport.calstrs.com/GetFile/367b8f73-583f-481a-823c-21343df2c90a

- Q: If I selected Save and Validate, where would I see the result of the validation?
- A: Ideally the record would change from review to valid status. If the error is still present or a new one generates you can always scroll down to the validation details panel. That's where the errors or warnings from a file will display.

- Q: Where would we be able to view the PEPRA Compensation cap warning?
- A: There is an online report. You can select the quick link on the dashboard and the report is the ESS Compensation Cap Threshold report.

- Q: Where can I find the retirement enhancement invoice?
- A: You can find this on the Contribution Account Portal under the ‘Invoices and Notices’ tab.

- Q: Will we still be processing an address file to STRS twice a year since it's no longer creating an account?
- A: The address file will no longer be required.

- Q: How many people can we search at a time - SEW had a limit of 20?
- A: Unfortunately, it is single look up.

- Q: When an employee refunds STRS contributions, will it show on the inquiry like it does now?
- A: Yes, the benefit program will show with a status of 'Withdrawn'.

- Q: Will associating files and payments still be done in CAP via Account Manager?
- A: It will be handled the same way you do it today, if you do that in CAP you can continue to do so.

- Q: Between Sept 5 - 25, there is a blackout period? But we can still inquire about members on the SEW?
- A: Yes, existing SEW will go into an inquiry only mode.

- Q: Will we be able to upload a file with all employee's information for the Express benefit form?
- A: Not currently. You will need to go to the employment screen and do them individually. At NFF there will be an employment file that will allow you to submit in bulk.

- Q: So, each member needs to be appointed to each district they work at? Does this include subs?
- A: Yes, this includes subs.

- Q: Does the person stay "active" in each district they were or continue to be reported under or does the system deactivate them at some point?
- A: The system will not deactivate them.

- Q: I do not currently enter any of this data, the county does, so in the new system, this will change?
- A: You should reach out to your COE and see if they will require you to submit any of this data.

- Q: So, we need to submit any documents when we change the name in STRS system?
- A: No, you do not have to submit and documents for a name change.

- Q: Is there a penalty for late enrollment, or will the penalty still be centered around late reporting?
- A: Penalties are still based on late reporting.

- Q: What if a member refunds? Then gets rehired at the same district. Do they need a new appointment?
- A: Yes, when a member refunds the benefit program and all underlying enrollment records are closed.

- Q: When will the RWL Program Eligibility Participation Form ES 1161 Retire? For new RWL applicants for the 25/26 school year our instruction is to submit by Mid-May do I use the ES 1161 form via the old process or is there a new process?
- A: The RWP form will be retired when the new portal goes live. If you submit RWP forms in May, then it will be the same process for FY25/26.

- Q: When we enroll subs in multiple districts and is there any requirement to report zero payroll when there were no earnings at any of the districts?
- A: No, if they don't work during a pay period you don't need to report for them.

- Q: Can you enroll someone at a different district # than the one you're logged into?
- A: Yes, if you're logged in as a COE you can enroll in other districts in your county.

- Q: When an employee retires, do all positions need to be terminated separately in this new system? Or does processing one terminate all relationships?
- A: Only the district a person is retiring with requires a termination.

- Q: If a bene form is file, will we still get an error form when changing a name
- A: You will be allowed to change the name.

- Q: Where is the new client ID after you enter the enrollment?
- A: After the enrollment is complete, the Client ID will automatically generate, and you can see it in the Person Details panel.

- Q: Will we be submitting Sick leave in hours or days?
- A: Days, same as you do today.

- Q: Can the termination date and last day worked be the same?
- A: Yes, they can be the same.

- Q: If a district submits pay for a full month (e.g. 3/1-3/31) and then submit a term date such as 3/25, would they get an error that prevents entering the term date without updating the posted pay first?
- A: They will not get an error in this scenario.

- Q: Once this goes live, we no longer submit the actual express benefits form any longer and submit the information directly on the site?
- A: Correct, the Express Benefit Report form will be retired at go live and the information will be submitted directly through the new portal.

- Q: Will employee search results be limited to only employees of the district, or will it return all members with matching criteria?
- A: The default option is to return all results from other districts, but you can uncheck the 'include all organizations' to only see results from the district you are logged in as.

- Q: Will we be notified when the retirement is submitted and complete so we can complete the unused sick?
- A: Yes, you will get a message board notification email as well as a pending work item on the dashboard.

- Q: Are we allowed to report sick leave time for employees that are leaving the district, but are not retiring?
- A: No, a retirement application must be on file in order to submit sick leave information.

- Q: Can more than one district submit sick leave if a sub retires, or will the system automatically only accept it from the final employer(s)?
- A: Yes, more than one district can report sick leave.

- Q: Will the new system show whether the DB member is mandatory or permissive elect?
- A: Yes, if you click on that membership account, there is a panel that displays that employment information.

- Q: How long can the district keep sick leave on file once an employee has terminated?
- A: When an employee retires you should submit sick leave with the same time frame as you do today.

- Q: Since you said we will get a notification when there is an item to complete like the e-mail we currently receive when a file is uploaded are we going to get this e-mail for every item our district needs to complete as well since you will not know if the district is going to complete it or the County? Does contact types have any determination on what notification e-mails a person will receive or not receive?
- A: No, the COE contact will not receive a notification every time a district needs to complete something. Contact types do not have any determination in who receives notification emails.

- Q: Currently, when there is a reporting unit that establishes an account, but there is another reporting unit that hires them earlier and we need to contact STRS to back date or update the effective date...will that be the same in this new portal?
- A: This depends. If there is no conflict between member and nonmember you should be able to backdate the membership.

- Q: When filling out the Express Benefit Form we get a lot of them returned due to the date on the form not matching the retirement date. What we have found out is the employee puts one retirement date with STRS and gives the district another date. Is there a way to look at what date the employee gave STRS before we send in the form?
- A: You should see the retirement date in the membership account panel on the Employee Maintenance screen once CalSTRS processes the retirement application.

- Q: Is there a cheat sheet for what rights each contact type on the ESS Organization contact maintenance is granted? Like if I don't want my districts to have access to all the things that I do?
- A: Yes, the Contact Types Job Aid: https://employersupport.calstrs.com/GetFile/e23e65d3-bd42-4dd7-9c5d-82b7e795a24d

- Q: Our district ask for the CalSTRS reports for auditing. Will we be able to have access to contribution reports as before?
- A: The transaction history will be available like REAP, but it will need to be exported in CSV format.

- Q: Our COE does our DB reporting, and we submit our CB reporting, enrollments, etc. I currently have 2 SEW accounts, one for everything I need to do for CB, the other for DB inquiry when COE submits reports. Will I still need 2 accounts?
- A: No, you will have one login for both CB and DB.

- Q: Will we still get an email when the file has completely uploaded and is ready to view.
- A: Yes, you will continue receiving an email when the file has completed processing.

- Q: Will we still be able to process partial F496 files for a future reporting period? Or only current and past?
- A: You can upload a file for any reporting period that appears in the dropdown.

- Q: If there is a structural error, do we get a notification on what is wrong and then we have to update the TXT file and try a new upload?
- A: No, you will have to see the error on the File Processing screen.

- Q: If the file has errors, are the COE or districts allowed to annotate like we are in the old SEW?
- A: Yes, you can make annotations as you do today.

- Q: Will the payroll detail be updated after a "void" is added? Example, it can be downloaded with the updated status.
- A: The payroll detail record will be updated to a void status but will not go away. You will still see the record when you download the errors report but it will also reflect the void status.

- Q: Can we still download the files that have annotations on them?
- A: The payroll detail report that has all the errors and the error messages. Yes, the new system has a "detail error report" in CSV format.

- Q: Is there a guide for the file processing in SEW? Or will you be sending one out.
- A: Yes, https://employersupport.calstrs.com/GetFile/ac9db3e7-55d1-4d22-9f23-e26b2e748419

- Q: Doesn't the COE have to merge all the districts files together before submitting to CalSTRS?
- A: No, but this is an option. You can also handle business in the same manner as you do today.

- Q: Are CB reporting units included in the new rule where the county needs to submit on their behalf?
- A: If you report direct for CB today that will not change.

- Q: We currently use the contribution code 4 in the F496 file do we need to do anything special when we submit/transmit the files?
- A: No, that process will be the same as today.

- Q: Currently our CB districts used STRSAPPs to generate their CB files... is that the same as an AR file?
- A: That is the same program used to create AR files. If you have downloaded the program on your computer, you will still be able to use it to create VDF files only. Please keep in mind that CalSTRS will no longer support the program, so if it's removed from your computer, you cannot regain access and if there are issues with the program CalSTRS will not provide support.

- Q: August 27th is the last time to use FoxPro to generate buybacks, correct?
- A: Yes, the money and file must be received by CalSTRS COB 8/27

- Q: Can you please confirm what will happen with the accounts created in the test environment? I created a lot of accounts for the districts and set them up with the correct access.
- A: Those will remain active in the testing environment but will not be converted to the production system when we implement in September. We will be converting user from production SEW.

- Q: We don't currently add an address for new members in REAP. Is this something that we will need to do in the new system?
- A: It's not required to add/update a member's address.

- Q: How would an employee who was a member then refunded display in the membership account panel?
- A: You would see a separate membership account with a status of 'Withdrawn'

- Q: Will COEs able to tell if an employee became a member via an ES372 form? and will we be able to see ES372s transmitted to CalSTRS for employees under our county?
- Yes, when clicking on the membership account, the next screen has a panel where you can click the employment history to see if they elected membership, but you will not be able to see the form.

- Q: If you try to submit a file with someone that has not been enrolled at your district, you will receive a warning?
- A: Yes, you will get an 'no employer exists' warning

- Q: How would you do an enrollment if the elected membership date is not the same as the hire date?
- A: When completing the enrollment, you will want the start date to be on or before the pay period begin date of the reporting you will be submitting on the F496 otherwise the contribution reporting will be marked with an error.

- Q: If a sub or hourly staff member who is being tracked for their membership threshold for multiple districts meets their threshold, will the other districts be made aware?
- A: Just like today, when they upload a file they will receive the mandatory qualification warning. There is also an 'Online Report' that replaces the Employer Notification tab in production SEW. This report will list all status changes that occur within a different district/county if they are also employed in your district/county.

- Q: Is it possible you can share the settings or the best option to set up users only having access to term them and express benefits.
- A: Termination and Sick Leave permissions will give them those specific transactions, with read only to anything else.

- Q: If the district submits a file to the County, and the County does not want it. Does the County have to return the file back to the district so that the district can delete it or is the County able to delete it?
- A: If the district submits to source, the COE/Source now "owns" the file and can do what they want.

- Q: Are we able to delete review files?
- A: Yes, you can click the box on the left for the file, then click the delete button. The status will change to delete, and our overnight job will run and delete the file.

- Q: If the Source uploads the file, are they able to "pass control" to the district to clear their own errors?
- A: Yes, the source can pass a header to a district to clear their own errors.

- Q: Is there a way to download all the employees within our organization so that we can automate getting the client IDs to populate into our HR system?
- A: We recommend uploading a match file, you can do that in production or the test environment (remember there is a snapshot date) and you will receive a response file with all the client IDs and other information.

- Q: Can I as the county delete "pending" files from my districts without them passing control?
- A: Right now, you cannot. The district will have to delete their own files.

- Q: Is there a list of the error listings to reference what the errors are. I uploaded our Jan file and it's hard to understand what the errors are.
- A: There is an updated file specification on the Employer Support Portal in the Employer Toolkit that contains all the business rules/message ID's and their error resolutions.

- Q: If you click on the I agree to skip the association of payment at the time you submit the file, would you then associate the payments in the Contribution account portal once the file is transmitted?
- A: Yes, you would need to associate in CAP.

- Q: Will the View link on the Validation Information screen showing show the error information? I believe right now you just get an error.
- A: Yes, the error resolutions will be entered and will display at go-live.

- Q: For ER approvable errors, will we be able to upload back up to the error line at the time the error line is suppressed, or will we wait until STRS asks for it at a later time?
- A: That will remain the same for now. You will wait until STRS asks.

- Q: Can we still enroll an employee even though the previous school district forgot to put a termination date for that employee?
- A: If they are still in member status, then yes you can enroll them at your district.

- Q: Our STRS buy backs are included on the F496 so wouldn't those amounts be included in the totals in the payroll summaries?
- A: They are separated out from the totals for your regular lines, and you have to associate a payment line to them.

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