

Employer Contact Types - Employer Readiness Environment

This document contains descriptions of the different Employer Contact types and a list of the processes that can be performed in the Employer Readiness Environment (ERE). Employer contacts are individuals who have been assigned roles, known as contact types, to access and perform tasks in ERE 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.

Revised: 03/29/2021



Senior Admin Contact

This contact type is assigned to Superintendents, Chancellors or equivalent level at the County Office of Education, K-12 or Community College District offices.



Admin Contact

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



Benefit Contact

This contact type is assigned to perform benefit-related tasks such as employer retirement incentives.



Accounts Receivable Contact

This contact type is only allowed to upload, process and submit the Contribution File – AR to CalSTRS.

Employer Contact Types - Employer Readiness Environment



Payroll Contact

This contact type is assigned to perform employment related tasks and CalSTRS contribution reporting.



Payroll Contact - Non Maintenance

This contact type is assigned to upload contribution files but not submit employment information.



Payroll Contact - Read Only

This contact type is assigned to view information but not execute certain functionality such as uploading files and submitting employment information

As-Is	To-Be
Admin Role	Admin Contact
User Role	Accounts Receivable Contact, Benefit Contact, Payroll Contact, Senior Admin Contact, Payroll Contact - Read Only, Payroll Contact - Non Maintenance

Processes performed in SEW by Employer Contacts legend:	Senior Admin Contact	Admin Contact	Benefit Contact	Account Receivable Contact	Payroll Contact	Payroll- Read Only Contact	Payroll- Non Maintenance Contact
E = Execute. Employer contacts have the ability to add and/or edit information for a specific entity or process. R = Read-only. Employer contacts can view information on a specific screen but not add or edit information on the screen. Blank = No access. Employer contacts cannot access the screen.							
Create and maintain Organization details	R	E	E	R	R	R	R
Create and maintain Organization addresses	R	E	R	R	R	R	R
Create and maintain Organization Contact information	R	E	R	R	R	R	R
View Units Reported/associated Organization information	R	R	R	R	R	R	R
View Organization Benefit Program information	R	R	R	R	R	R	R
Add Cash Balance contribution rates					E		E
View Organization reporting schedules	R	R	R	R	R	R	R
Add Organization reporting schedules					E		E
View employee information	R	R	R	R	R	R	R
Create Benefit Program enrollments	R	R	R	R	E	R	R

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View and create employee change requests	R	R	E	R	E	R	R
Upload and process files	R	R	E	E	E	R	E
View processed file status and details	R	R	R	R	R	R	R
View reports	R	R	R	R	R	R	R
View and upload documents	R	E	E	E	E	R	E
Change user password	E	E	E	E	E	E	E
View online help and reference materials	R	R	R	R	R	R	R
View and send secure messages	E	E	E	E	E	R	E
View home screen	R	R	R	R	R	R	R

Managing Employer Contacts

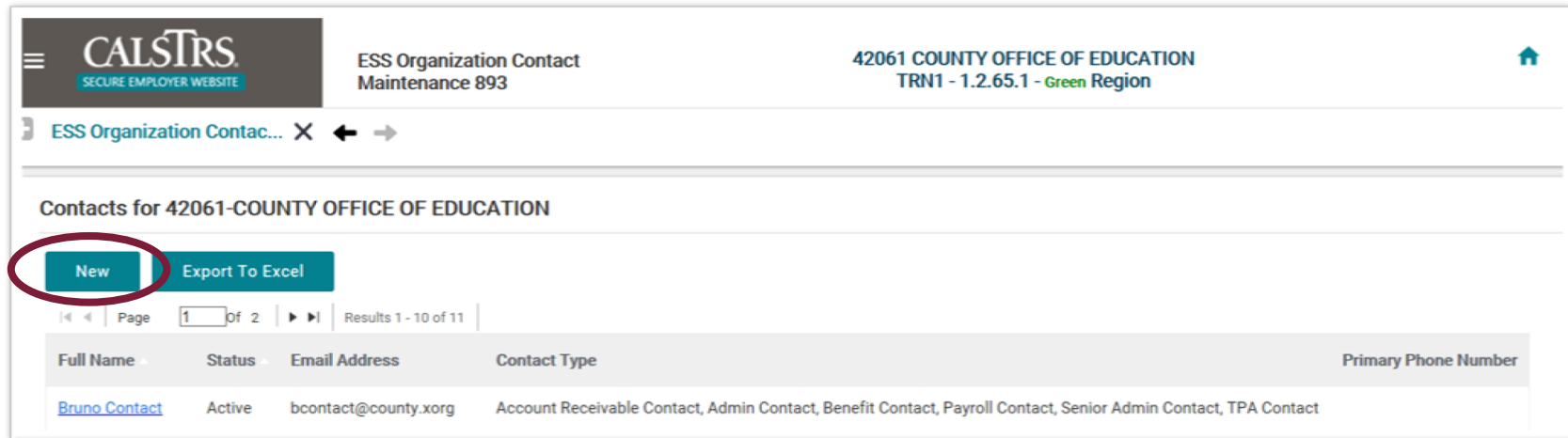
This is a step-by-step process for managing Employer Contacts in the Employer Readiness Environment. Including how to create a new Employer Contact, update an Employer Contact, re-enroll an Employer Contact, and unlock an Employer Contact.

1) Creating a New Employer Contact

Step 1: From the **Global Navigation Menu**, hover over **Organization** and select **Organization Contacts**.



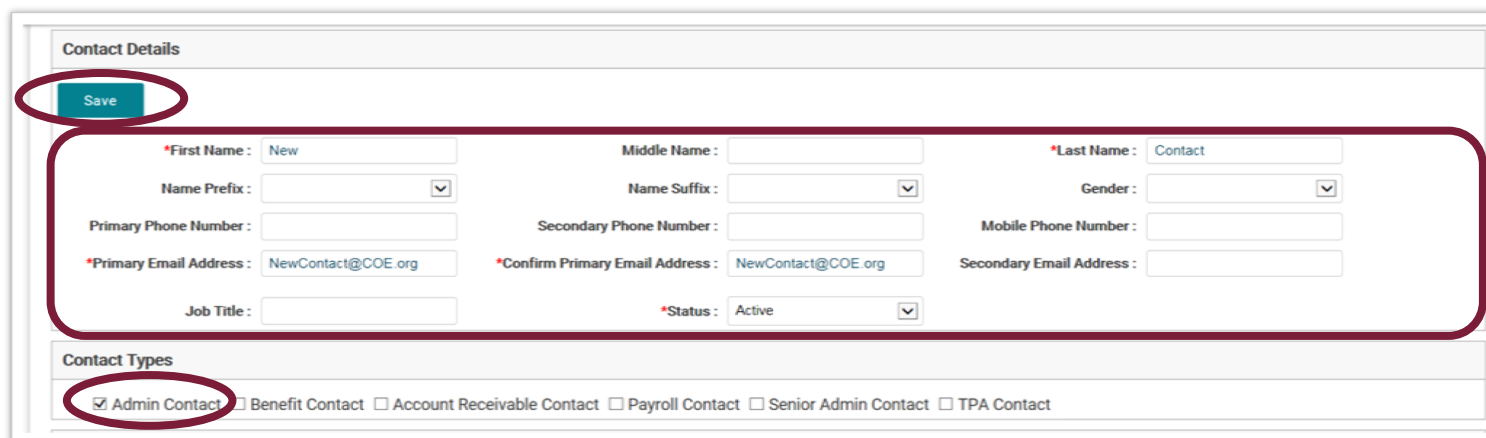
Step 2: The **ESS Organization Contact Maintenance** screen displays. From the **ESS Organization Contact Maintenance** screen, select the **New** button.



The screenshot shows the 'ESS Organization Contact Maintenance 893' screen for the '42061 COUNTY OFFICE OF EDUCATION' in the 'Green Region'. The 'New' button is circled in red. Below the buttons, there is a table of contacts for the organization.

Full Name	Status	Email Address	Contact Type	Primary Phone Number
Bruno Contact	Active	bcontact@county.xorg	Account Receivable Contact, Admin Contact, Benefit Contact, Payroll Contact, Senior Admin Contact, TPA Contact	

Step 3: In the **Contact Details** panel, enter the Employer Contact's information. In the **Contact Types** panel, check the appropriate Contact Type. In this example, **Admin Contact** is checked. Select the **Save** button.



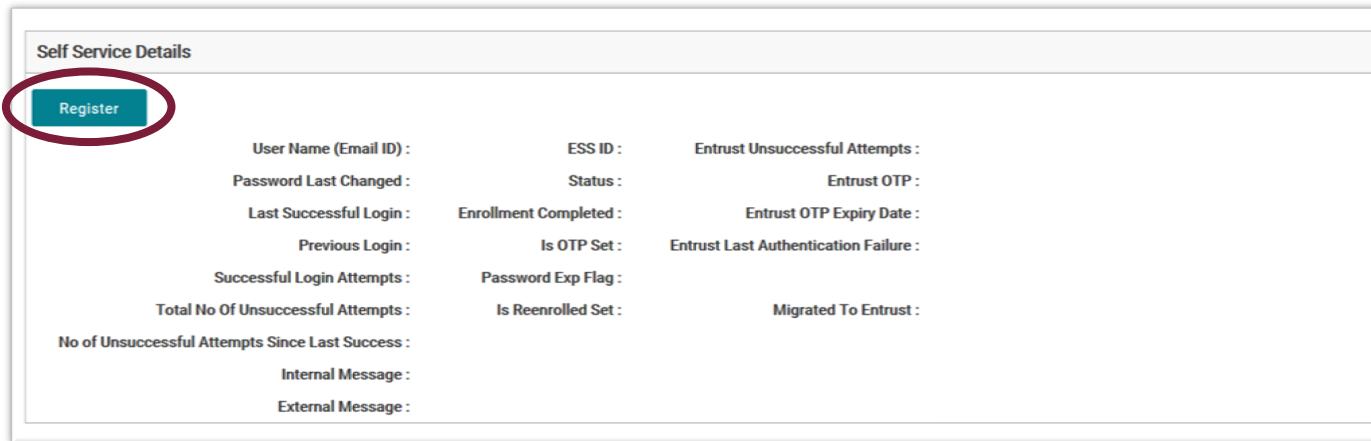
The screenshot shows the 'Contact Details' and 'Contact Types' panels. The 'Save' button is circled in red. The 'Contact Details' panel contains the following information:

- *First Name: New
- Middle Name:
- *Last Name: Contact
- Name Prefix:
- Name Suffix:
- Gender:
- Primary Phone Number:
- Secondary Phone Number:
- Mobile Phone Number:
- *Primary Email Address: NewContact@COE.org
- *Confirm Primary Email Address: NewContact@COE.org
- Secondary Email Address:
- Job Title:
- *Status: Active

The 'Contact Types' panel shows the following options:

- ☒ Admin Contact
- ☐ Benefit Contact
- ☐ Account Receivable Contact
- ☐ Payroll Contact
- ☐ Senior Admin Contact
- ☐ TPA Contact

Step 4: From the **ESS Organization Contact Maintenance** screen, select the newly added contact and navigate to the **Self Service Details** panel. Select the **Register** button.



The screenshot shows the 'Self Service Details' panel. A teal 'Register' button is circled in red. Below the button, there are several fields for user information, including 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, and 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 Employer Contact will need to be re-enrolled.

2) Updating an Employer Contact

Step 1: From the **ESS Organization Contact Maintenance** screen, update necessary information or change the Contact Type and select the **Save** button.



The screenshot shows the 'Contact Details' panel. A teal 'Save' button is circled in red. Below the button, there are several input fields for contact information, including First Name (with a dropdown menu), Middle Name, Last Name (with a dropdown menu), Name Prefix (with a dropdown menu), Name Suffix (with a dropdown menu), Gender (with a dropdown menu), Primary Phone Number, Secondary Phone Number, and Mobile Phone Number.

3) Re-enrolling an Employer Contact

Step 1: From the **ESS Organization Contact Maintenance** screen, select the **Re-Enroll** button on the **Self Service Details** panel.

Self Service Details

Re-Enroll

User Name (Email ID) : contacttest@coe.org

ESS ID : 2980

Entrust Unsuccessful Attempts :

Password Last Changed :

Status : Registration Pending

Entrust OTP : 2TH217VJ

Last Successful Login :

Enrollment Completed : N

Entrust OTP Expiry Date : 06/21/2019 09:07:35 PM

Previous Login :

Is OTP Set : Y

Entrust Last Authentication Failure :

Successful Login Attempts :

Password Exp Flag : Y

Total No Of Unsuccessful Attempts :

Is Reenrolled Set : N

Migrated To Entrust : N

No of Unsuccessful Attempts Since Last Success :

Internal Message : Set to enroll by batch.

External Message : Entrust User ID is created and set to Enroll.

4) Unlocking an Employer Contact

Step 1: On the **ESS Organization Contact Maintenance** screen, navigate to the **Self Service Details** panel and select the **Unlock** button. The unlock button will only appear if the user is locked out. They will receive an email to login within 24 hours to complete unlock process.

Self Service Details

Unlock

Re-Enroll

User Name (Email ID) : katiecontact@county.xorg

ESS ID : 2973

Entrust Unsuccessful Attempts :

Password Last Changed : 06/28/2019 11:15:21 AM

Status : Locked

Entrust OTP : VHFDYRJK

Last Successful Login : 06/28/2019 11:16:51 AM

Enrollment Completed : Y

Entrust OTP Expiry Date : 06/29/2019 06:14:19 PM