Employee Change Request – SR Earnings Limit Exemption

This document provides an overview of the different statuses and action statuses of an Employee Change Request for SR Earnings Limit Exemption. Also, this document explains the step-by-step process employers take to submit an Employee Change Request for SR Earnings Limit Exemption.

Revised: 04/02/2021

Statuses and Action Statuses

Statuses

The Status of an Employee Change Request indicates the current state of the request.

Term	Definition
Valid	The Employee Change Request meets the criteria, errors are resolved, and warnings are suppressed.
Review	The Employee Change Request either has incomplete fields or errors or warnings that must be addressed in order to submit the information to CalSTRS.

Action Statuses

The Action Status of an Employee Change Request applies to the different stages of the request as it moves through the process.

Term	Definition
Approved	Criteria has been met, no errors exist, and warnings are suppressed.
Denied	Criteria has not been met.
Returned to Employer	CalSTRS review has determined a possible data entry error exists. CalSTRS has returned the request to the employer organization for correction.



Submit SR Earnings Limit Transaction

Step 1:

From the **Global Navigation Menu**, select **Employee**. Then, select **Employee Change Request**.

		Dashboard	01001 COUNTY OFFICE OF EDUCATION TRN1 - 2.0.540.1 - Green Region	🕈 🗲 🗢 🕐 🗆 WAM 🛛 Welcom
Dashboard		Employee		
Message Board		Employment Summary		
Organization	>	Employment Detail		
Employer Reporting	¢.	Employee Change Request		
Employee	>	Program Enrollment Request	e portal, where you can view your Contacts, Benefit Program, E	mployees and other information.
File Processing		Service Credit Purchase	nployee Profile	Employer Profile
Reports				800
ECM				
Help and Reference			line Reports	Contribution Account Portal (CAP)
Secure Message				\$ 2
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Step 2:

The Employee Change Request Search screen displays. Enter the member's Client ID in the Client ID field. From the Change Request Type dropdown field, select SR Earnings Limit Exemption. Click the New button.

Client ID : Q	*Change Request Type : SR Earnings	Limit Exempl V Change Request Subtype :		
Last Name :	First Name :	Organization Code :		
Effective Date From : 🛗	Effective Date To :	Status : All		
Created Date From :	Created Date To :			
Search Reset Store Search			Action Status : All	~



Step 3:

The **SR Earnings Limit Exemption** screen displays. Enter information in the required fields that display a red asterisk. Click the **Next** button. When the Next button is clicked, basic eligibility requirements for the exemption will be validated. You will receive an error at the top of the screen notifying you if the member does not meet these requirements.

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	SR Earnings Limit Exemption Position Information	
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	Change Request Type : SR Eatrings Limit Exemption Change Request Subtype : 180 Day Requirement	
	* Client Dr. 1.25002460 Henniker Haman KHSHPICLONE CANEN	
	CalifyR5 Comments 1	
	Benefit Effective Date for DB : 11/13/2020 Benefit Effective Date for CB :	
	Appointing Authority Information	
	*Name 1 Territy Contact *Title : Payrol Managar	
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	Finish Next	Previous

Step 4:

The SR Earnings Limit Exemption Document Upload panel displays. Click the Document Type dropdown field and select Resolution.

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The	Resolution document must include the following items:	
1. T	he Nature of the employment (a general description of the position)	
2. A retir	finding that the appointment is necessary to fill a critically needed position and must be filled before the retired member's 180 calendar day separation-from-service period has passed since the member's most recent ement date	
3. A	finding that the retired member did not receive additional service credit pursuant to California Education Code section 22714 or 22715, or any financial inducement to retire from any public employer	
4. A	finding that the retired member's termination of employment is not the basis for the critically needed position	×



Step 5:

Click the Browse button in the File Path field to upload the Board Approved Resolution.

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Check each to certify compliance	
The Resolution document must include the following items:	
1. The Nature of the employment (a general description of the position)	
2. A finding that the appointment is necessary to fill a critically needed position and must be filled before the retired member's 180 calendar day separation-from-service period has passed since the member's most recent retirement date	
3. A finding that the retired member did not receive additional service credit pursuant to California Education Code section 22714 or 22715, or any financial inducement to retire from any public employer	
4. A finding that the retired member's termination of employment is not the basis for the critically needed position	~

Step 6:

The **Choose File to Upload** window displays. Select the file to upload, then click the **Open** button.

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Step 7:

Click the **Upload** button. The document displays in the **Document Upload** grid.

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	Check each to certify compliance	
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	3. A finding that the retired member did not receive additional service credit pursuant to California Education Code section 22/14 or 22/15, or any financial inducement to retire from any public employer	
	4. A finding that the retired member's termination of employment is not the basis for the critically needed position	• *
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Step 8:

Select the checkboxes next to each statement to certify compliance with the SR Earnings Limit Exemption requirements. Click the **Next** button. If you do not select a checkbox, an error message displays at the top of the screen. To move forward, the error must be resolved.

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	3. A finding that the retired member did not receive additional service credit pursuant to California Education Code section 22714 or 22715, or any financial inducement to retire from any public employer	
	4. A finding that the retired member's termination of employment is not the basis for the critically needed position	
	Appointing authority certifies the following are true:	
	5. The position has been approved by the employer's governing body in a public meeting. The governing body adopted a resolution prior to the performance of activities by the retired member.	
	6. The approval of the appointment was not placed on a consent calendar	
	7. The cetied members is of normal othermont are when the compensation is earned	
	Finish Next	Previous

Step 9:

The **SR Earnings Limit Exemption Summary** panel displays. Use this screen to review the information entered for this Employee Change Request. Scroll down to select the checkbox to certify the information you provided is true and correct.

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	The position has been approved by the employer's governing body in a public meeting. The governing body adopted a resolution prior to the performance of activities by the retired member. The resolution includes all of the above stated requirements.	Yes	^
	6. The approval of the appointment was not placed on a consent calendar	Yes	
	7. The retired member is of normal retirement age when the compensation is earned	Yes	
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	1 understand if CaISTRS does not approve this exemption that the member shall be subject to the earnings limit outlined in Education Code section 24214.5.		v
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Step 10:

Click the **Finish** button to submit the request.

5. The position has been approved by the employer's governing body in a public meeting. The governing body adopted a resolution prior to the performance of a activities by the retired member. The resolution includes all of the above stated requirements.	Yes	^
6. The approval of the appointment was not placed on a consent calendar	Yes	
7. The retired member is of normal retirement age when the compensation is earned	Yes	
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I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering a benefit administered by CalS year in jail and a fine of up to \$5,000 (Education Code section 22010).	TRS and it may result in penalties, including restitution, up to one	
I understand if CaISTRS does not approve this exemption that the member shall be subject to the earnings limit outlined in Education Code section 24214.5.		
Save		•