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.

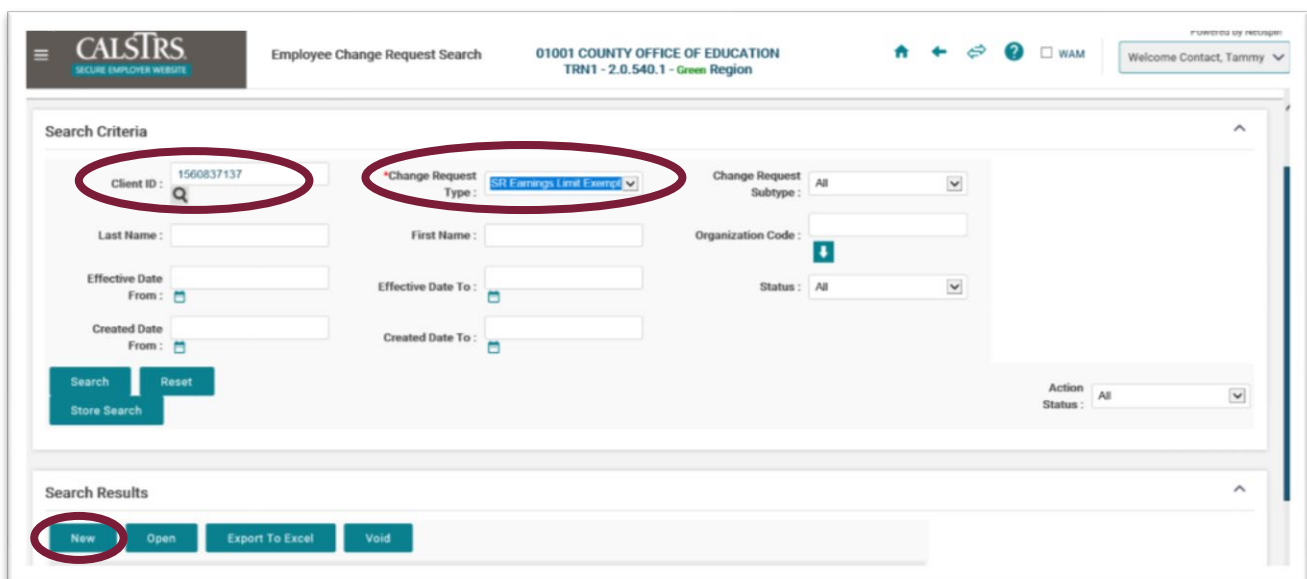## Submit SR Earnings Limit Transaction

Step 1:

From the **Global Navigation Menu**, select **Employee**. Then, select **Employee Change Request**.
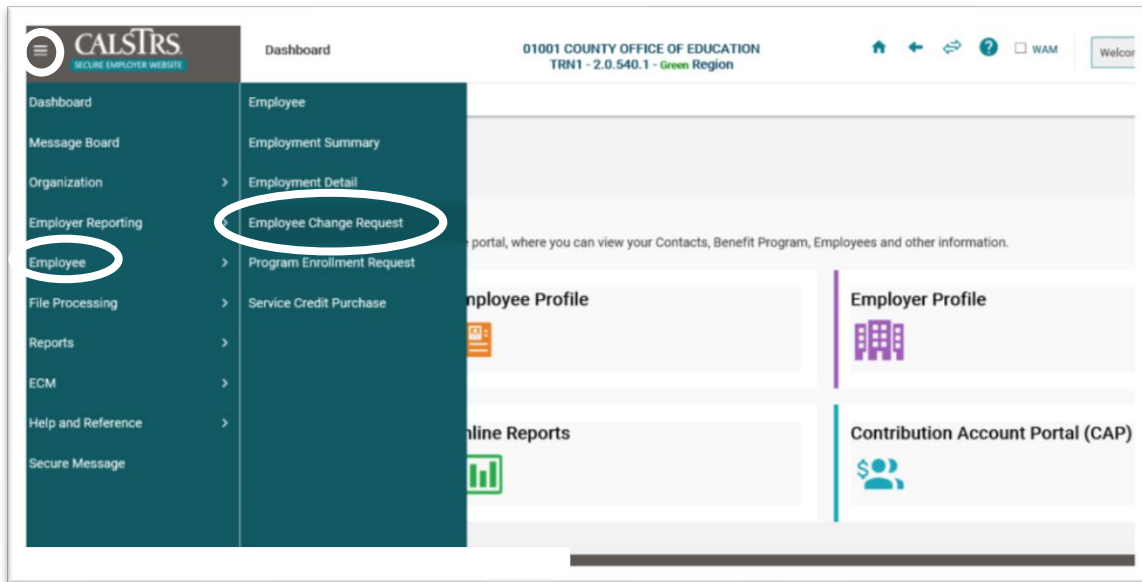
Step 2:

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.

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.

Step 4:

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

Step 5:

Click the **Browse** button in the **File Path** field to upload the **Board Approved Resolution**.
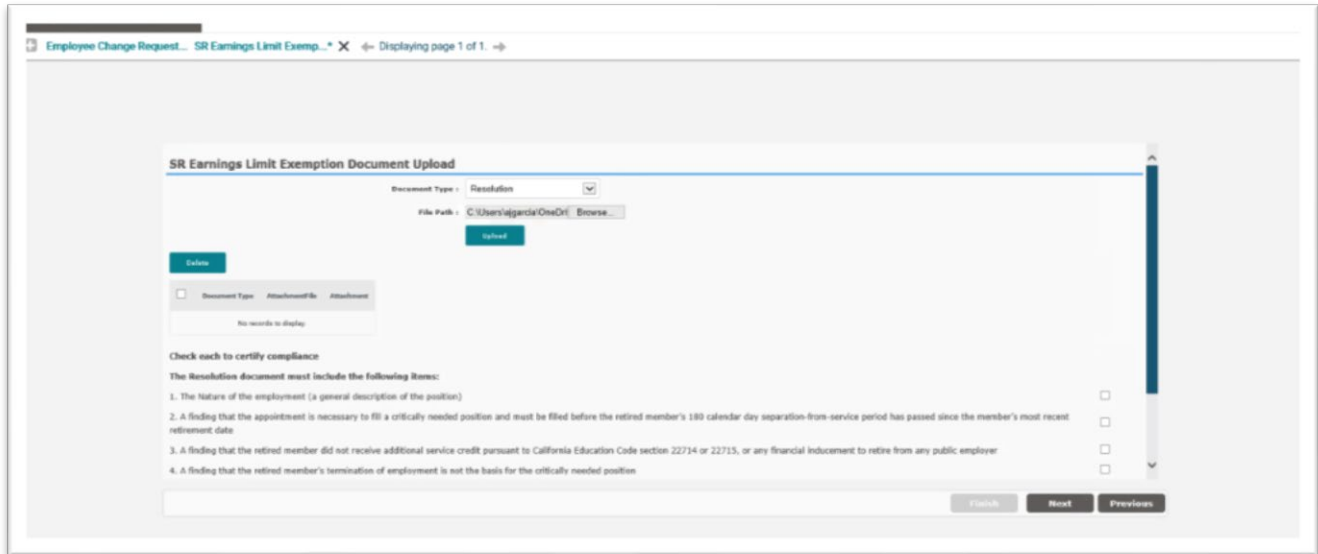
Step 6:

The **Choose File to Upload** window displays. Select the file to upload, then click the **Open** button.
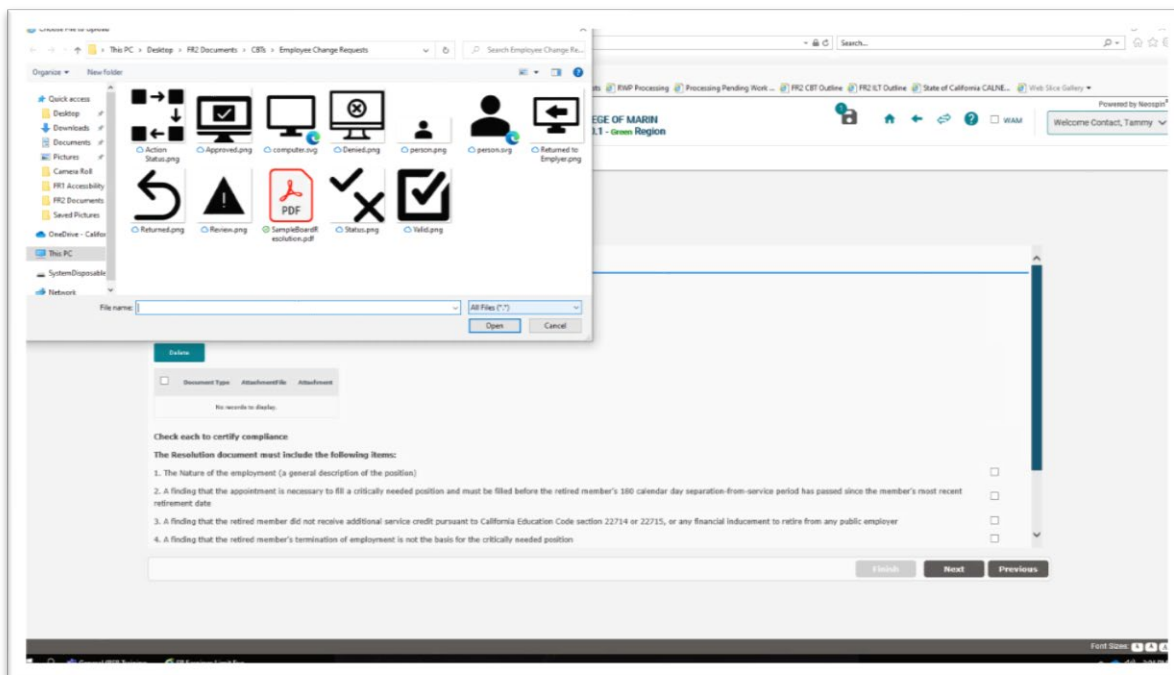
Step 7:

Click the **Upload** button. The document displays in the **Document Upload** grid.
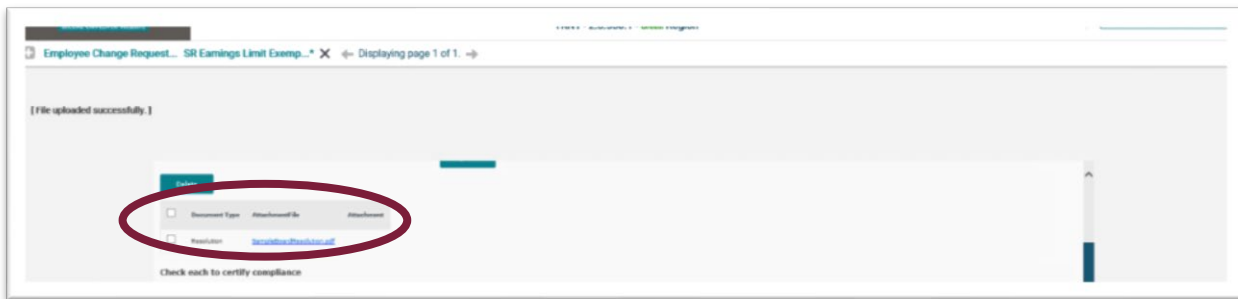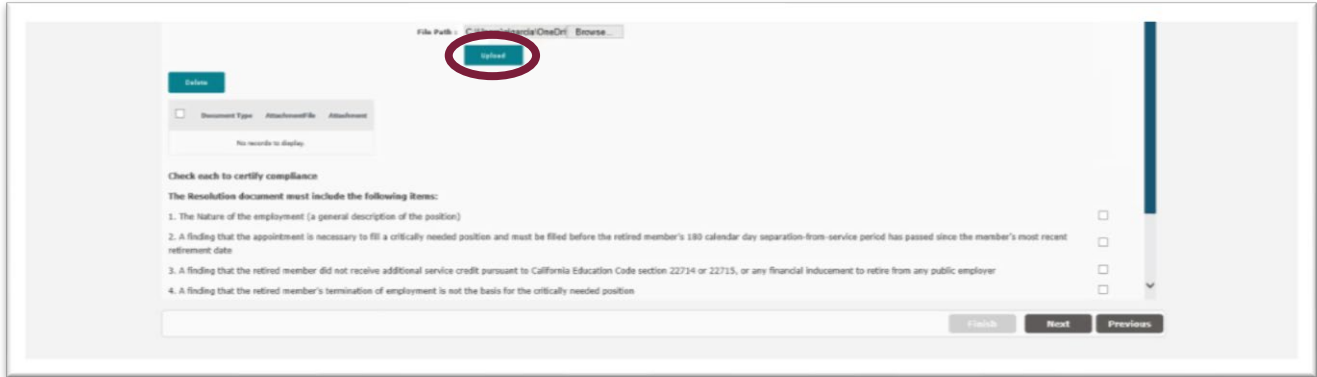
Step 8:

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.

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.

Step 10:

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