

CALSTRS

CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM

Pension Solution Bill Frerichs

**Employer Advisory Committee Meeting
November 8, 2016**



Agenda

- Implementation Plan Update
- Functional Rollout #1
- New File Formats
(subject to rulemaking process)

Implementation Plan

Proposed Dates Subject to Change

Functional Rollout #1 – early 2018:

- Readiness Conference Calls – early-mid 2017
- User Acceptance Testing – late 2017/early 2018
- Employer Training – late 2017/early 2018

Functional Rollout #2 – early 2019:

- New file formats (subject to rulemaking process)

Functional Rollout #3 – late 2019:

- Contribution Account Portal

**Functional Rollout #1
Employer Self-Service
(ESS) Portal**

File Upload/Submit and Online Functionality

- Similar file processing functionality plus added features, tools, and various improvements.
 - File formats remain unchanged at Functional Rollout #1.
 - Improved business rule logic and validations.
 - Ability to create a file online through the portal.
 - Capability for employers who control payroll or prepare reporting to upload or submit online to their report source through the portal.

Enrollment processes

(Online/MR87 Upload and Address File)

- All new hires will require an enrollment.
 - Existing CalSTRS members/nonmember/CB participants will be converted to the new system.
- Existing data fields remain unchanged for enrollment.
- Existing file format as used today for enrollment.

Notifications and Secure Messages

- Employer Notifications:
 - Similar to announcements.
 - Granular level.
 - May include reminders and past due notifications.
- Secure Messages:
 - Direct communication between employers and CalSTRS.

Forms and Documents

The ESS Portal will offer employers the functionality to:

- Request, save and print pre-filled forms.
- Upload/submit documents directly to CalSTRS.
- Search and view documents linked to their organization.

- CalSTRS is evaluating the following SEW tools to determine which functionality will be replicated in the new ESS system:
 - Manage Reports.
 - Remittance Advice.
- Employer Notification:
(Status Changes and 2% @ 62 Compensation Cap)
 - Will be an on-demand report with the ability to filter criteria.

Functional Rollout #2

New File Formats

(Subject to rulemaking process)

Proposed New File Formats

(Subject to rulemaking process)

- CalSTRS is working to refine the new file formats.
- Anticipate the new file formats will be finalized by the end of 2016 (subject to change).
- These new file formats will be implemented as part of Functional Rollout #2, proposed for 2019 (subject to change).
- New file formats will be phased in as employers are ready.

Questions?

PSEmployerReadiness@CalSTRS.com