

CALSTRS

CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM

Pension Solution Update

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Employer Advisory Committee Meeting
August 3, 2016

**CALSTRS**

Agenda

- Employer Readiness
- Employer Communication
- Implementation Plan
- Functionality within Rollout 1
- Testing/Training

Employer Readiness

Employer Readiness

- Ensure employers are prepared to use the tools and functionality in the new pension system through partnership with CalSTRS.
- Assess employers' current status, identify/mitigate challenges/opportunities and support employers.

Employer Readiness Approach

- Pre-planning: document reporting changes, identify employers impacted.
- Assessment: communicate changes, document challenges/opportunities.
- Checklist: follow-up and monitor progress, gauge readiness.

Readiness Topics

- SEW User conversion
- Account Receivable File
- Creation of Enrollment records for existing members/nonmembers/CB Participants
- Enrollment record required for every employer for each employee
- F496, VDF, MR87 and online transaction business rule changes
- F496 and VDF reporting process
- MR87 and Match File changes

Employer Communications

Planned Employer Communications for FR1

- EmployerConnect newsletter
- SEW ebulletins/announcements
- Circulars and Directives
- Employer Events (CASBO, Sutter Roundtable, etc.)
- Employer Advisory Committee
- Webinars
- Employer Forum

Implementation Plan

The new pension system will be implemented in three functional rollouts:

- Functional Rollout 1 – Late 2017*
 - Employer Portal and Member Account
- Functional Rollout 2 – Early 2019*
 - Benefit Management and New File Formats
- Functional Rollout 3 – Late 2019*
 - Contribution Account Portal and Member Portal

**Dates are subject to change*

Functionality within Rollout 1

Secure Employer Website will be replaced with Employer Self Service portal:

- New look and feel, tools and features.
- New portal administration and registration process.
- File upload and processing.
- Member account setup/maintenance (similar to REAP).
- Secure messaging, announcements, reports, reference items.

**Implementation late 2017*

Member setup and maintenance (Online update/ MR87 File, Match File and Address File)

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

**Implementation late 2017*

Contribution Reporting (F496 and VDF)

- Account Receivable File replacement.
- Expanded report unit capabilities.
- Slight modifications to business rule edits.
- Existing data fields remain unchanged.
- Existing file formats as used today.

**Implementation late 2017*

Testing/Training

- Select group of Employer Forum participants will participate in user acceptance testing to:
 - Identify system issues
 - Identify potential design improvements
 - Identify training opportunities
- Testing scheduled mid-2017.

Employer Training:

- Delivered through partnership between Employer Readiness Team, MAS Trainers and Employer Support staff.
- In person training and computer based training.
- In person training will be held regionally at CalSTRS Member Service Centers and select employer sites.
- Training scheduled mid-2017.

Course Name	Course Contents
Employer Self-Service Portal	Introduction to self-service portal navigation, organization maintenance, contact maintenance and security role maintenance.
Member Enrollment Process	<ul style="list-style-type: none"> • Submitting enrollment data • Files and templates for enrollment • Data validation • Correspondence • Enrollment tracking
Data Reporting for Employers	<ul style="list-style-type: none"> • File submission methods • File format changes • Source file journaling • Remittances and invoices • Errors, warnings and alerts • Processing data edits

New File Format

- Replaces all existing files submitted today (F496, VDF, Address, MR87, Match File, Account Receivable).
- New, retired and modified data fields.
- New file formats will be phased in as employers are ready (deadline to adopt new format to be determined).

**Implementation 2019*



New File Format

- CalSTRS is working with a focus group of employers (Employer Forum) to develop the new file formats.
- New file format anticipated by late 2016.
- CalSTRS will distribute new file layouts/formats as soon as possible.

Questions?

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