

PENSION SOLUTION PROJECT

Functional Rollouts and New File Formats

Pension Solution, the CalSTRS project to replace the current pension system technology and processes, is well underway. Before the conclusion of this significant project, multiple systems used by employers, CalSTRS staff and members will be replaced. The replacement of the current versions of the Secure Employer Website (SEW) and the Contribution Account Portal (CAP) will bring the greatest changes to employers.

The project is being rolled out in three phases to occur over the next several years:

Functional Rollout #1 – Enrollments and Contributions

Functional Rollout #1 (FR1) is currently scheduled for spring 2018 and will introduce a new employer web portal to replace some of the current functions of SEW.

The new employer web portal will provide access to CalSTRS announcements, reference items, and forms and publications. With FR1, you can start using the new employer web portal to upload enrollment, contribution and demographic reports. The existing file formats for these reports will not change significantly during this period.

At FR1, we plan to limit current SEW functionality to uploading Accounts Receivable files and viewing limited historical contribution files.

Functional Rollout #2 – Calculations and Payments

Functional Rollout #2 (FR2) is currently scheduled to be implemented in fall 2019. This implementation will launch new file formats for enrollment and contribution reporting, and will further decommission the current version of SEW.

At FR2 there will be two new file formats to replace the current file formats: an Employee Maintenance File and a Contribution File. These two files will replace the MR87, Address, Accounts Receivable, VDF and F496 files.

- **The Employee Maintenance File** is associated with new hires, terminations, deaths, demographic changes or other employment status changes (for example, teacher to administrator).
- **The Contribution File** is associated with monthly payroll contribution reporting.

The latest draft versions of the new file formats are located on SEW under “Reference Items,” and at FR1 will be moved to the new employer web portal for reference.

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Employers will be phased in to using the new file formats. Once the new file formats are fully functional and are adopted by all employers, the current version of SEW will be decommissioned, and all transactions will occur through the new employer web portal.

Functional Rollout #3 – Customer Service Management

Functional Rollout #3 is currently scheduled for 2020 and will introduce the new employer account management portal to replace the existing CAP. Additionally, once this phase has been implemented, there will be a re-launch of *myCalSTRS* for members.

Your Participation is Important

As an employer subject to the Teachers' Retirement Law, and playing a significant role in administering the pension system for California educators, you are a key partner in the successful implementation of the new pension administration system. This multiyear project needs your participation and support to be successful. We are committed to supporting our partnership and will ensure your involvement throughout the project.

Certain aspects of the file formats are subject to the administrative rulemaking process, which requires us to bring proposed changes to the Teachers' Retirement Board for their consideration, invite public comments and work closely with other state agencies to ensure those elements of the updated file specifications constitute the most effective approach to implementing the relevant law.

Please stay engaged by attending employer forums, webinars and meetings such as the Employer Advisory Committee. The Pension Solution Employer Readiness Team will connect with you before scheduled implementation dates to assess your readiness for the implementations. Contact PSEmployerReadiness@CalSTRS.com if you have any questions.