

Person Maintenance

This job aid provides information on updating a person’s account information with the Remote Employer Access Program (REAP) tool on the Secure Employer Website (SEW). REAP allows SEW users access to search or update person account information. If you do not have the REAP tool or the ability to make updates, please contact your SEW Administrator at the county office of education to request access. Access to Query or Query and Update with the REAP tool is granted by your SEW Administrator at the county office of education.

SEW users with the Query and Update access can change persons’ name, birthdate, and/or gender. To change other person information such as the social security number (SSN) please submit your personal information change request to EmployerHelp (MAS) Queue through the Secure Messaging Center. Please provide one form of supporting documentation for the change request. For example, a copy of a social security card or legal documents verifying the SSN.

Questions? Contact EmployerHelp@CalSTRS.com or submit a secure message to EmployerHelp (MAS) Queue through the Secure Message Center on SEW. Please include supporting documentation for review.

Revised: 09/15/2023

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Search and Review Person Information

Searching for a Person

Step 1:

Log in to SEW, navigate to the left-hand side of the home page and click the quick link for **REAP**. If the **REAP** option does not display, please contact your county administrator for access to the tool.

The screenshot shows the CalSTRS Secure Employer Web Site interface. On the left, a navigation menu lists various options, with 'REAP' highlighted in a red box. The main content area displays a 'Welcome' message and an announcement titled 'Employer Directive 2023-02: 2023-24 PEPRA Compensation Cap and Reporting Requirements Now Available'. The announcement includes a link to the full directive and a summary of its purpose. On the right, there are sections for 'Web Site Information' and 'Quick Reference Items', both containing links to various resources.

CALSTRS Secure Employer Web Site		Help Logout
My Account:		
Home	Welcome,	Web Site Information
Manage Files	Congratulations! You have successfully logged onto the CalSTRS Secure Employer Web Site. This Web site is provided for employers and CalSTRS to communicate member account information securely. Many features are provided to assist in protecting and ensuring the confidential data of our members.	<ul style="list-style-type: none"> Employer Administrator List File Enforcement
Manage Reports		Quick Reference Items
Maintain Users	For information on the latest updates and features be sure to check the Announcements below and for more information, the Release Notes under Web site Information.	<ul style="list-style-type: none"> User Manuals and Training Frequently Asked Questions File Specifications File Submission and Remittance Schedules Employer Support Portal
REAP		Application Downloads
Employer Notification	Announcements	<ul style="list-style-type: none"> Employer Application Suite (Version 2.06)
Secure Message Center	Employer Directive 2023-02: 2023-24 PEPRA Compensation Cap and Reporting Requirements Now Available	
Reference Items	<p>Employer Directive 2023-02: Fiscal year 2023–24 creditable compensation limit for CalSTRS 2% at 62 Defined Benefit Program members and Cash Balance Benefit Program participants subject to PEPRA, and reporting requirement for creditable compensation that exceeds the annual creditable compensation cap is now available online at calstrs.com/employer-and-administrative-directives.</p> <p>The purpose of this employer directive is to inform employers of the 2023–24 fiscal year limit on creditable compensation for CalSTRS 2% at 62 Defined Benefit (DB) Program members and Cash Balance (CB) Benefit Program participants subject to the California Public Employees' Pension Reform Act of 2013 (PEPRA), and reporting requirements when reporting creditable compensation that is above the annual creditable compensation cap.</p>	
Forms & Publications		
My Links		

Step 2:

Access the person's account by selecting the **Search by ID** radio button. From **REAP** you will have the option to look up a person's information using the **Tax ID, Client ID, or LAUSD Number** radio button. Select the option that best addresses your needs and enter the required information into the **text box** field. Then click the **Search** button.

The **Search by DB Exception** radio button has been decommissioned but is still visible in the system. The "No F496 Contribution Lines with exceptions, match user supplied criteria" message will populate if you try to use this search function.

REAP Single Person/Account

Search by ID Search by DB Exception [Mass Update](#)

Search [Hide](#)

Tax ID Client ID LAUSD Number

CALSTRS Secure Employer Web Site 

My Account: [Help](#) | [Logout](#)

Home

Manage Files

Manage Reports

REAP

Employer Notification

Secure Message Center

Reference Items

Forms & Publications

My Links

- SEW F496 File Specification Contribution File Specification
- SEW Match File Specification
- SEW MR87 File Specification
- FY 23-24 DB Standard F496 Submission Schedule
- FY 23-24 DB Standard Remittance Schedule

REAP Single Person/Account

No F496 Contribution Lines with exceptions, match user supplied criteria.

Search by ID Search by DB Exception

Search [Hide](#)

Report Source: 01 Alameda County Office of Education

Report Unit: All

Fiscal Year: 2022-2023

Report Period: All or Supp. Seq Nbr: All

Exception Nbr: All

Step 3:

The **REAP Single Person/Account** page populates upon clicking the **Search** button. The page will display two sections of information.

Additionally, there are three separate tabs labeled **Person/Account**, **DB Contribution Lines** and **Service Credit Balance**. A fourth tab labeled **Update** is available if you have the required access to update person information. Access is granted from your county administrator.

REAP Single Person/Account

Search by ID Search by DB Exception

Search
Hide

Tax ID
 Client ID
 LAUSD Number

Teacher, Sub Tax ID: 111-11-1111 Client ID: 0123456789 LAUSD Number:
Hide

Retirement Formula : 2% at 60

Gender: F	Birth Date: 01/01/1950 (v)	Death Date:	Coverage: B
DB Status: MEMBER	DB Date: 07/31/2003	CB Status:	CB Date:

Person / Account

DB Contribution Lines

Service Credit Balance

The **Person** section contains a record of any name changes. It includes previous names and the date the record was updated.

Person / Account

DB Contribution Lines

Service Credit Balance

Person

History:

Change Date	Tax ID	Name	Birth Date
02/21/2011	111-11-1111	Teacher, Sub	01/01/1950
02/17/2001	111-11-1111	Cook, Sub	01/01/1950

The **DB Account** section contains information about the person's Defined Benefit (DB) account including their account history. The account history tracks the membership status. Possible statuses include:

- Member
- Nonmember
- Refund
- Service Retirement (SR)
- Disability Retirement (DR)
- Disability Allowance (DA)

DB Account

RWP Indicator: Temporary: N Retirement System:

RWP Effective Date: AB1586: System Election:

Account History:

Status	Status Date	Future	Permissive Election	Report Source/Unit
MEMBER	07/31/2003			27
NONMBR	05/17/1982			

The **CB Account** section will contain information if the person is a Cash Balance Benefit Program (CB) participant. If they are not a CB participant, the fields will be blank.

CB Account

CB Indicator:

Account History:

Sub Accounts:

The **Person Address** section displays the person's current mailing address.

Person Address

Current Mailing Address: 123 Street Place
Anywhere, CA 98765

Reviewing Person Information: DB Contribution Lines Tab

The **DB Contribution Lines** tab is comprised of three sections. The three sections allow employers to filter the person's contribution line information, view the lines and review any additional information that may be available on the line.

Person / Account | **DB Contribution Lines** | Service Credit Balance

Filter

Fiscal Year: 2022-2023 ▼

Report Source / Unit: All ▼

Include lines reported this year for a prior fiscal year

Only lines with exceptions

Filter

DB Contribution Lines [Download Report](#)

Rpt Unit	Mem Code	As Cd	Pay		Earnings	Contribution			Service Period		Srv Crdt	Pre/Post	Period	FY	Flag
			Rate	Cd		Rate	Cd	Amount	Begin	End					
27099	1	57	12362.13	1	12362.13	0.10250	1	1267.12	07/01/2022	07/31/2022	0.0833	Pre	MO01		A
27099	1	57	166.67	0	166.67	0.10250	6	17.08	07/01/2022	07/31/2022	0.0000	Pre	MO01		A
27099	1	57	12362.13	1	12362.13	0.10250	1	1267.12	08/01/2022	08/31/2022	0.0833	Pre	MO02		A
27099	1	57	166.67	0	166.67	0.10250	6	17.08	08/01/2022	08/31/2022	0.0000	Pre	MO02		A
27099	1	57	12656.47	1	12656.47	0.10250	1	1297.29	09/01/2022	09/30/2022	0.0833	Pre	MO03		A
27099	1	57	166.67	0	166.67	0.10250	6	17.08	09/01/2022	09/30/2022	0.0000	Pre	MO03		A

Additional Contribution Line Details

Name: _____ Tax ID: _____ Classification Code: _____ Base Hours: _____

Remarks: _____

Exceptions: _____

Within the **Filter** section, an employer can select the contribution lines by fiscal year or by the person’s report source and report unit. Employers may filter the DB contribution lines with either one of the options to "Include lines reported this year for a prior fiscal year" or by "Only lines that contain exceptions". Click the **Filter** button when all necessary filters have been applied.

Filter

Fiscal Year 2022-2023

Include lines reported this year for a prior fiscal year

Report Source / Unit All

Only lines with exceptions

Filter

The **DB Contribution Lines** section displays the filtered lines based on the options selected. There is also a **Download Report** link to save the information queried.

DB Contribution Lines [Download Report](#)

Rpt Unit	Mem Code	As Cd	Pay		Earnings	Contribution			Service Period		Srv Crdt	Pre/ Post	Period	FY	Flag
			Rate	Cd		Rate	Cd	Amount	Begin	End					
27099	1	57	12362.13	1	12362.13	0.10250	1	1267.12	07/01/2022	07/31/2022	0.0833	Pre	MO01	A	
27099	1	57	166.67	0	166.67	0.10250	6	17.08	07/01/2022	07/31/2022	0.0000	Pre	MO01	A	
27099	1	57	12362.13	1	12362.13	0.10250	1	1267.12	08/01/2022	08/31/2022	0.0833	Pre	MO02	A	
27099	1	57	166.67	0	166.67	0.10250	6	17.08	08/01/2022	08/31/2022	0.0000	Pre	MO02	A	
27099	1	57	12656.47	1	12656.47	0.10250	1	1297.29	09/01/2022	09/30/2022	0.0833	Pre	MO03	A	
27099	1	57	166.67	0	166.67	0.10250	6	17.08	09/01/2022	09/30/2022	0.0000	Pre	MO03	A	

The **Additional Contribution Line Details** section displays any additional information for the DB contribution line.

Additional Contribution Line Details

Name:	Tax ID:	Classification Code:	Base Hours:
Remarks:			
Exceptions:			

Reviewing Person Information: Service Credit Balance Tab

This last tab displays a record of the person's service credit balances and any applicable refunds or service credit balance adjustments. The fiscal year creditable earnings are displayed at the bottom of the tab.

Person / Account
DB Contribution Lines
Service Credit Balance

Fiscal Year Service Credit

Fiscal Year 2022-2023 Include Subsequent Year Activity

Filter

Activity	Service Credit
BEG BAL 07/01/2022	24.133
07/01/2022 03/31/2023	0.750
SUBSEQUENT YEAR	0.000
END BAL 06/30/2023	24.883

Fiscal Year Creditable Earnings: \$114,819.58

Within the **Fiscal Year Service Credit** section, the employer can filter the service credit balance by fiscal year and can include subsequent year activity. When the desired information is selected click the **Filter** button.

Fiscal Year Service Credit

Fiscal Year 2022-2023 Include Subsequent Year Activity

Filter

Activity	Service Credit
BEG BAL 07/01/2022	24.133
07/01/2022 03/31/2023	0.750
SUBSEQUENT YEAR	0.000
END BAL 06/30/2023	24.883

Fiscal Year Creditable Earnings: \$114,819.58

Add or Update Person Information

Adding/Updating Individual Member Information

Step 1:

Log in to SEW, navigate to the left-hand side of the homepage and click the link for **REAP**. If the **REAP** option does not display, please contact your county administrator for access to the tool.

The screenshot shows the CalSTRS Secure Employer Web Site interface. The top navigation bar includes the CalSTRS logo and the text 'Secure Employer Web Site'. Below this is a 'My Account:' section with a 'Help | Logout' link. The main content area is divided into three columns. The left column is a navigation menu with items: Home, Manage Files, Manage Reports, **REAP** (highlighted with a red box), Employer Notification, Secure Message Center, Reference Items, Forms & Publications, and My Links. The middle column contains a 'Welcome' message, a congratulatory paragraph, an 'Announcements' section with a sub-heading 'SEW Unavailable July 21-23' and a paragraph explaining the maintenance, and an 'Importance of Remittance Advices' section with a paragraph and a contact email. The right column contains 'Web Site Information' with links to 'Employer Administrator List' and 'File Enforcement', 'Quick Reference Items' with links to 'User Manuals and Training', 'Frequently Asked Questions', 'File Specifications', 'File Submission and Remittance Schedules', and 'Employer Support Portal', and 'Application Downloads' with a link to 'Employer Application Suite (Version 2.06)'.

Step 2:

Access the person's account by selecting the **Search by ID** radio button. Then select the method of search: **Tax ID, Client ID, or LAUSD Number**, enter the identifiable information into the text box and click the **Search** button.

The **Search by DB Exception** radio button has been decommissioned but is still visible in the system. The "No F496 Contribution Lines with exceptions, match user supplied criteria" message will populate if you try to use this search function.

CALSTRS Secure Employer Web Site

My Account: Help | Logout

Home

Manage Files

Manage Reports

REAP

Employer Notification

REAP Single Person/Account

Search by ID Search by DB Exception

Search Hide

Tax ID Client ID LAUSD Number

CALSTRS Secure Employer Web Site

My Account: Help | Logout

Home

Manage Files

Manage Reports

REAP

Employer Notification

Secure Message Center

Reference Items

Forms & Publications

My Links

- SEW F496 File Specification Contribution File Specification
- SEW Match File Specification
- SEW MR87 File Specification
- FY 23-24 DB Standard F496 Submission Schedule
- FY 23-24 DB Standard Remittance Schedule

REAP Single Person/Account

No F496 Contribution Lines with exceptions, match user supplied criteria.

Search by ID Search by DB Exception

Search Hide

Report Source: 01 Alameda County Office of Education

Report Unit: All

Fiscal Year: 2022-2023

Report Period: All or Supp. Seq Nbr: All

Exception Nbr: All

Step 3:

Select the **Update** tab, navigate to the **Transaction** field and click on the arrow for a list of available transactions.

Select the appropriate **transaction type**, enter a date in the **effective date** field, enter required information into any other fields related to the transaction type. For example, the **Birth Date** field for the 51 – Birth Date and/or Gender modification **transaction type**. You may leave all other fields as is or blank.

If you are signed in as the COE, you may select the report unit for which the person is employed or leave it blank.

The screenshot displays the 'REAP Single Person/Account' interface. On the left is a navigation menu with options like 'Home', 'Manage Files', 'Manage Reports', 'Maintain Users', 'Authorize Users', 'REAP', 'Employer Notification (0)', 'Contribution Account Portal', 'Remittance Advice', 'Secure Message Center', 'Reference Items', 'Forms & Publications', and 'My Links'. The main content area shows search options (Search by ID or Search by DB Exception) and a search bar. Below the search bar are fields for Tax ID, Client ID, and LAUSD Number. A 'Retirement Formula' section is also present. The 'Update' button is highlighted with a red box. The 'Transaction' dropdown is set to '51 - Birth Date and/or Gender modification'. The 'Effective Date' is set to 07/07/2023. The 'Birth Date' field is set to 11/24/1970, with a calendar open for November 1970 showing the 24th selected. Other fields include Gender, Last Name, First Name, MI, LAUSD Number, Report Unit, DB Status, and DB Date. A 'Reset' button is located at the bottom right of the form.

Step 4:

Click the **Submit** button at the bottom of the page and review the message at the top of the **Update** tab.

If the information you are trying to update has already been verified or the account holds any of the following statuses, the transaction will not be processed. For assistance, please contact EmployerHelp@CalSTRS.com.

- Refund
- Service Retirement (SR)
- Disability Retirement (DR)

CALSTRS Secure Employer Web Site Help | Logout

My Account: Help | Logout

REAP Single Person/Account [Mass Update](#)

Search by ID Search by DB Exception

Search Hide

Tax ID Client ID LAUSD Number

Tax ID: Client ID: LAUSD Number: Hide

Retirement Formula: Hide

Gender:	Birth Date:	Death Date:	Coverage: B
DB Status:	DB Date:	CB Status:	CB Date:

Person / Account

Transaction processed successfully.

Transaction: 51 - Birth Date and/or Gender modification Effective Date: 07/07/2023 (After 01/01/2013)

Tax ID: Last Name: First Name: MI:

Gender: Birth Date: 11/24/1970 LAUSD Number:

Report Unit: Retirement Formula:

DB Status: DB Date: CB Status: CB Date:

Step 5:

Verify the update by clicking on the **Person Account** tab and reviewing the **Person Account** sections. Notice in the **Person** section of the **Person/Account** tab shows the historical change to the person's birth date.

CALSTRS Secure Employer Web Site Help | Logout

My Account: Home | Manage Files | Manage Reports | Maintain Users | Authorize Users | REAP | Employer Notification (0) | Contribution Account Portal | Remittance Advice | Secure Message Center | Reference Items | Forms & Publications | My Links

REAP Single Person/Account

Search by ID Search by DB Exception [Mass Update](#)

Search Hide

Tax ID Client ID LAUSD Number

Tax ID: Client ID: LAUSD Number: Hide

Retirement Formula

Gender: Birth Date: Death Date: Coverage: B
 DB Status: DB Date: CB Status: CB Date:

Person

History:	Change Date	Tax ID	Name	Birth Date
	07/07/2023			11/24/1970
	03/14/2020			11/24/1971

DB Account

RWP Indicator: Temporary: N Retirement System:
 RWP Effective Date: AB1586: System Election:

Account History:	Status	Status Date	Future	Permissive Election	Report Source/Unit

Adding or Updating Multiple Member Information

Within REAP you may complete a mass update for two or more person accounts. Please contact your county administrator for permission to query and update in REAP.

Step 1:

Log in to SEW, navigate to the left-hand side of the home page and click the link for **REAP**. If the **REAP** option does not display, please contact your county administrator for access to the tool.

CALSTRS Secure Employer Web Site

My Account: Help | Logout

- Home
- Manage Files
- Manage Reports
- REAP**
- Employer Notification
- Secure Message Center
- Reference Items
- Forms & Publications
- My Links
 - SEW F496 File Specification Contribution File Specification
 - SEW Match File Specification SEW MR87 File Specification FY 23-24 DB Standard F496 Submission Schedule
 - FY 23-24 DB Standard Remittance Schedule

Welcome,

Congratulations! You have successfully logged onto the CalSTRS Secure Employer Web Site. This Web site is provided for employers and CalSTRS to communicate member account information securely. Many features are provided to assist in protecting and ensuring the confidential data of our members.

For information on the latest updates and features be sure to check the Announcements below and for more information, the Release Notes under Web site Information.

Announcements

SEW Unavailable July 21-23

Due to scheduled maintenance, the Secure Employer Website will be unavailable from Friday, July 21 at 6:30 p.m. to Sunday, July 23 at 5:30 p.m. We apologize for any inconvenience.

Importance of Remittance Advices

CalSTRS is recommending employers utilize the remittance advice feature in SEW. Remittance advices provide CalSTRS with important information when employers submit payments of contributions for payroll files or penalty and interest invoice payments. Utilizing this process assists CalSTRS with posting the payments appropriately.

If you have questions about the remittance advice process, please contact us at Contributions@CalSTRS.com

Web Site Information

- Employer Administrator List
- File Enforcement

Quick Reference Items

- User Manuals and Training
- Frequently Asked Questions
- File Specifications
- File Submission and Remittance Schedules
- Employer Support Portal

Application Downloads

- Employer Application Suite (Version 2.06)

Step 2:

Click the **Mass Update** link on the **REAP** page.

REAP Single Person/Account

Search by ID Search by DB Exception

Mass Update

Search Hide

Step 3:

The REAP Mass Update allows for 20 Tax IDs. Enter the **persons' Tax IDs** into any of the **Tax ID** boxes and click **Search**.

The screenshot shows the CALSTRS Secure Employer Web Site interface. On the left is a navigation menu with items: My Account, Home, Manage Files, Manage Reports, Maintain Users, Authorize Users, REAP, Employer Notification (0), and Contribution Account Portal. The main content area is titled "REAP Mass Update" and features a search form. The form includes a "Search" label, a "Hide" button with an eye icon, and a link for "Single Account/Person". Below the label, there are five input boxes for "Tax ID:". The first two boxes contain the text "XXX-XX-1234" and "XXX-XX-5678" respectively. At the bottom of the form are "Search" and "Reset" buttons. The bottom of the page shows "Search Results".

Step 5:

Click the **Submit** button at the bottom of the page and review the message at the top of each **transaction** box.

Please note, if the information you are trying to update has already been verified or the account holds any of the following statuses, the transaction will not be processed.

- Refund
- Service Retirement (SR)
- Disability Retirement (DR)

If you would like to complete additional updates to multiple person accounts, click the **New Search** button and complete Steps 3 to 5 of the *Adding or Updating Multiple Member Information* section of this job aid.

CALSTRS Secure Employer Web Site

My Account: [Help](#) | [Logout](#)

REAP Mass Update

Search [Hide](#) [Single Account/Person](#)

Tax ID: XXX-XX-1234 XXX-XX-5678

Search Reset

Search Results

Transaction: [Dropdown] Effective Date: [Calendar] (After 01/01/2013)

Tax ID: XXX-XX-1234 Last Name: [Text]

First Name: [Text] MI: [Text]

Gender: [Dropdown] Birth Date: [Calendar]

LAUSD Number: [Text]

Report Unit: [Dropdown] Retirement Formula: [Text]

DB Status: [Text] DB Date: [Text] CB Status: [Text] CB Date: [Text] [Reset](#)

Transaction: [Dropdown] Effective Date: [Calendar] (After 01/01/2013)

Tax ID: XXX-XX-5678 Last Name: [Text]

First Name: [Text] MI: [Text]

Gender: [Dropdown] Birth Date: [Calendar]

LAUSD Number: [Text]

Report Unit: [Dropdown] Retirement Formula: [Text]

DB Status: [Text] DB Date: [Text] CB Status: [Text] CB Date: [Text] [Reset](#)

[Submit](#) [Reset All](#) [New Search](#)

Step 6:

Verify the updates by completing Steps 1, 2, and 5 of *Adding/Updating Individual Member Information* section of this job aid.

CALSTRS Secure Employer Web Site Help | Logout

My Account:

- Home
- Manage Files
- Manage Reports
- Maintain Users
- Authorize Users
- REAP
- Employer Notification (0)
- Contribution Account Portal
- Remittance Advice
- Secure Message Center
- Reference Items
- Forms & Publications
- My Links

REAP Single Person/Account

Search by ID Search by DB Exception [Mass Update](#)

Search

Tax ID: Client ID: LAUSD Number:

Retirement Formula

Gender: **Birth Date:** **Death Date:** **Coverage:** B
DB Status: **DB Date:** **CB Status:** **CB Date:**

Person

History:	Change Date	Tax ID	Name	Birth Date
	07/07/2023			11/24/1970
	03/14/2020			11/24/1971

DB Account

RWP Indicator: **Temporary:** N **Retirement System:**
RWP Effective Date: **AB1586:** **System Election:**
Account History:

Status	Status Date	Future	Permissive Election	Report Source/Unit