

For Santa Clara School Districts

District Business and Advisory Services

Bulletin: 21-029

Date: February 16, 2021

To: District Chief Business Officers District Fiscal Directors District Human Resource and Payroll Managers District Human Resource and Payroll Personnel

From: Nghia Do, District Business Advisor

Re: California State Teachers' Retirement System (CalSTRS): Employer Tools and Resources

The CalSTRS Employer Support Portal provides updates and resources to support school districts during the transition to the new Secure Employer Website (SEW) in fall 2021. The portal includes access to the Pension Administration Learning Management System (PALMS) which is the repository for employer training.

Districts' staffs in both the human resource and payroll department are encouraged to register for PALMS and take the computer-based trainings available in PALMS to prepare for the transition. Trainings are designed to allow you to move through the content at your own pace. Training topics include the following:

- Introduction to the New Secure Employer Website
- Employment Maintenance
- Contribution Reporting
- Soft Launch Orientation
- New File Format (Employment File)

Attached is the step-by-step instructions on how to access CalSTRS PALMS.

Please distribute this memo within your District as deemed appropriate.

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PALMS Instructions

This is a step-by-step process on how to access the CalSTRS Pension Administration Learning Management System (PALMS).

1) Creating a New Account

Step 1: Navigate to the weblink: "<u>https://palms.calstrs.com</u>" - the Log in screen will display. Click **Create new account.** Please note, you may need to update your browser settings to unblock the CalSTRS.com site.

CalSTRS Pension Administr	ration Learning Management System
Log in	Is this your first time here?
Username Password Password Remember username Log in Forgotten your username or password?	For full access to this site you first need to create an account.
Cookies must be enabled in your browser (?)	

Step 2: Complete the required fields. When you have completed the required fields, click **Create my new account**.

The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 upper case letter(s). At least 1 upper case letter(s), at least 1 upper case letter(s). At least 1 upper case letter(s), at least 1 upper case letter(s).	tter(s)
Choose your username and password Username btrainer The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case let Password result address btrainer@county.xorg	tter(s)
Username) btrainer The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case let Password 0 More details Email address 0 btrainer@county.xorg	tter(s)
The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s) at least 1 upper case lett	tter(s)
Password 0 ········· More details Email address 0 btrainer@county.xorg	
More details Email address 0 btrainer@county.xorg	
Email address () btrainer@county.xorg	
Email address () btrainer@county.xorg	
Email (again) 😝 btrainer@county.xorg	
First name () Bee	
Last name 9 Trainer	
Email (again) btrainer@county.xorg First name Bee Last name Trainer 1	



Step 3: A confirmation message displays saying "**An email should have been sent to your** address...". Click **Continue.**

CalSTRS Pension	Administration Learning Management System
# Home Confirm your account	
An email should have been sent to your address	
It contains easy instructions to complete your registration	
If you continue to have difficulty, contact the site adminis	trator. Continue

Step 4: Check your inbox for the confirmation email with the subject "**Pension Administration Learning Management System: account confirmation**". Click the blue hyperlink to confirm your new account and complete your registration. If you do not receive a confirmation email, check your junk folder and confirm that CalSTRS.com is an approved (unblocked) site.

Subject: Pension Administration Learning Management System: account confirmation A new account has been requested at 'Pension Administration Learning Management System' using your email address. To confirm your new account, please go to this web address: https://palms.calstrs.com/login/confirm.php?data=C5sMPSkm8V7sZhP In most mail programs, this should appear as a blue link which you can just click on. If that doesn't work, then cut and paste the address into the address line at the top of your web browser window. If you need help, please contact the site administrator, Employer Help EmployerHelp@calstrs.com



Step 5: A new web page will display with a message confirming your registration. Click Continue.

a My courses ►	Alex	
CalSTRS Pension Administration Learning Management System		
Home Your registration has been confirmed		
Tha	anks,	
	Your registration has been confirmed	
	Continue	
ah NA	VIGATION	
# Hom	e Inbard	
Site	pages	
Cour	Ses .	

Step 6: The landing page for PALMS will display. You've successfully created an account.





2) Log in to PALMS

Step 1: Navigate to the weblink: "<u>https://palms.calstrs.com</u>" - the Log in screen will display. Enter your **Username** and **Password**, click Log in.



Step 2: The landing page displays. Here you can quickly access **Available Trainings**, **Training Announcements**, and the **Employer Support Portal**.





3) Self-Enroll in a Course

Step 1: From the landing page, scroll down to select My Courses page direct link.

N AVAILABLE TRAININGS	r TRAINING ANNOUNCEMENTS	EMPLOYER SUPPORT PORTAL
All available trainings display in the My courses section below. Clicking a linked Course Category navigates you to the second seco	New course information and other training updates will be posted in the Site news alerts. Access the link below for a full list of alerts.	This site provides resources to support your success during soft launch, including the Employer Toolkit, New File Format Regulations and FAQs.
My Courses page direct link.	Site News page direct link.	Employer Support Portal direct link.

Step 2: Click the course category you are interested in taking. For this example, we select **Soft Launch Employer Training.**

My courses CalSTR Home Courses	S Pension	Administration	Learning Ma	▲ nagement System
 NAVIGATION Home Dashboard Site pages Courses Intro to New SEW Employment Maintenance Contribution Reporting 	Soft Lau Emplo Traini	3 Search cours unch yer ing	ses:	Go

Step 3: Click the training topic **Title** you are interested in taking. For this example, we select **Introduction to the New Secure Employer Website.**

\square Introduction to the New Secure Employer Website	
DEmployment Maintenance	*)
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Step 4: Select Enroll me.



Step 5: The course contents will display. Click the **Course Activity** icon. If needed, you may need to update your browser settings to unblock the CalSTRS training pop-up window that will play the course. In this example, we are clicking **Employer Contact Types**.

Employer Contact Types	
Duration: 5 minutes	
Employer Contact Types	
Take a short quiz based on the content from this section.	

Step 6: Click the Play Button to begin the training.

5	<section-header><section-header></section-header></section-header>
CALSTRS EMPLOYER TRAINING SERVICES	



Step 7: When the training is complete you may choose **Repeat Demonstration** or **Begin Knowledge Check**. Click **Begin Knowledge Check**.



Step 8 : Select Attempt quiz now.

Introduction to Website	the New Secu	re Employer
Knowledge Chec	ĸ	Return to: Employer Contac 🔿
Take a short quiz based on the conter	nt from this section.	
This	quiz opened at Tuesday, October 29, 2	019, 11:04 AM
This qu	uiz will close at Thursday, October 29,	2020, 11:04 AM
	Grading Methods Higher Egrad	e
Employer Contact Types	Jump to	Accessing Employee Information ►
	Return to: Employer Contac	C



Step 9: Click Submit all and Finish to complete the quiz.

Introduction to the New Secure Employer Website			
	Knowle	dge Check	Return to: Employer Contac Đ
		Summary of atter	npt
Question		Status	
1			
2		Answer saved	
3			
4		Answer saved	
Return to attempt			
	This attempt	must be submitted by Thursday, Oct	ber 29, 2020, 11:04 AM.
		Submit all and finish	
Employer Con	tact Types	Jump to	► Accessing Employee Information
		Return to: Employer Contac	. •)

Step 10 : Once you've answered all the questions in the knowledge check, click the **Submit all and finish** button.





Step 11: A new window will display with the status of each quiz question. Click **Finish review** to complete the quiz.

		Finish review
Employer Contact Types	Jump to	Accessing Employee Information >
	Return to: Employer Contac 🔊	

Step 12: If you have completed all the trainings in the course, you will have an option to complete feedback on the course. Select **Provide Feedback** to provide comments on the course.

Knowledge Check	2	Return to: Employment and 🌒
Take a short quiz based on the conten	t from this section.	
This qu	iz opened at Wednesday, October 30, 2019, 3	:03 PM
This	quiz will close at Friday, October 30, 2020, 3:0	3 PM
	Grading method: Highest grade	
	Attempt quiz now	
 Employment and Membership Account Information 	Jump to	Provide Feedback 🕨
	Return to: Employment and 🔿	

Step 13: Select **Answer the questions...** to enter your feedback. After you provide feedback and select **Submit Your Answers**, you may return to other courses.

Provide Feedback	K @	Return to: Course Evaluati
Thank you for completing at least one	training in the Introduction to the New Secure Employer We	bsite course. Please complete this course survey to assist us in
Answer the questions	iming experience. Your responses will be anonymous.	
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Step 14: You may return to other courses at anytime by selecting **My Courses** from the **Breadcrumb Navigation** at the top of the screen, or by selecting **My Courses** from the **Navigation Window** to the left of the screen.

Breadcrumb Navigation



Navigation Window

