Instructions for Web Administrators

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Responsibilities of a Web Administrator

You have been designated by your Head of Institution to serve as the Web Administrator for your reporting entity (RE). As Web Administrator, you will be responsible to:

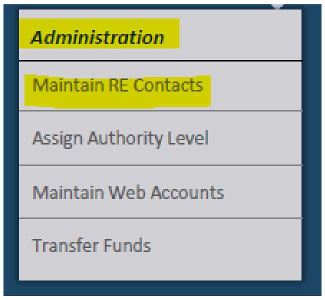
- Authorize users of your RE to access the Teacher Retirement System of Texas (TRS) RE Portal.
- Take appropriate measures to verify the identity and business need for access of anyone requesting access to the RE Portal before activating his or her account.
- Create, activate, update, and deactivate Web Accounts for the RE's users.
- Communicate to the RE's users the importance of protecting User IDs and passwords to avoid compromising security.
- Ensure that RE's users are proficient in usage of the RE Portal
- Report any unauthorized access or use of TRS member information to TRS as soon as it is identified.

Each RE is required to always have someone designated in each of the following contact types: Head of Institution, Reporting Official, and Payroll Contact.

As the Web Administrator, your first task is to set up all other RE contacts in the RE Portal and assign them authority levels for their web account. Adding someone as a contact and assigning an authority level will generate emails to the contact giving them their User ID and a temporary password to log into the RE Portal and set up their security profile.

Step 1: Adding a Contact

From the Administration menu, select **Maintain RE Contacts**.



The Contact List screen appears. If no contacts have been created for your reporting entity, the message "No contact detail on record" is displayed.

If one or more contacts have been created, they are listed on the screen.

Click **Add Contact** to add a new contact. The Contact Details screen appears. If you are adding a second contact record for a person for a different role, you must use the Contact Search to populate some of their information.

Click **Search For Contact**. The Contact Search screen appears.

Enter the contact's email address and click **Search**. If a contact record with that e-mail address exists, the Contact Detail screen appears with the First Name, Middle Name, Last Name, Generation, and E-mail Address fields populated with the information from that existing contact. Fields populated in this manner are read-only.

If no contact record matches the email address, the Contact Details screen appears with an informational message displayed at the top.

Enter or update the remaining information in the fields on the Contact Details screen.

Important Notes:

If the person is serving as a contact for multiple REs and is using the same email address at each RE, it is very important that the First Name, Middle Name, Last Name, Generation, and E-mail Address is entered the exact same way at each RE. This also applies if the person is serving as more than one contact type at an individual RE.

A reporting entity can have only one Active contact of a specific type, except for Staff Contact. This means only one person at a time may be designated as any of the following: Head of Institution, Web Administrator, Payroll Contact, Reporting Official, TRS-ActiveCare or HR Contact. Other contacts who are not in one of these specific roles may be designated as ‘Staff Contact.” There may be multiple Staff Contacts at any given time.

An individual person may serve as multiple contact types (i.e. Payroll Contact and Reporting Official).

Check the **Address (Different than RE)** box if the contact has an address that is different from the entity's main address. If this box isn't checked, the contact is automatically assigned to the reporting entity's main address.

Contact Types

Head of Institution: The head of the reporting entity (e.g., the superintendent, president, chancellor, commissioner, director, or executive director). The head of the reporting entity remains ultimately responsible for the report and its accuracy and completeness.

Payroll Contact: The staff member designated by the Head of Institution to serve as the main contact for TRS reporting.

Reporting Official: For TRS purposes, the Reporting Official is the primary reporting contact responsible for certifying to the accuracy and completeness of all reported information. The Reporting Official may authorize others to report information to TRS and certify as to its accuracy and completeness.

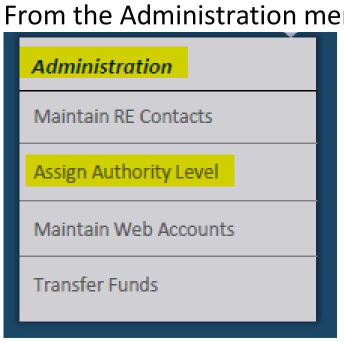
Staff Contact: A reporting entity contact who is authorized by the Head of Institution to have access to the Reporting Entity Portal, but is not designated as the Payroll Contact, Reporting Official or other contact type.

TRS Active-Care Contact: The staff member selected to be responsible for submitting TRS Active Care information.

HR Contact: The staff member designated as the lead Human Resource contact for the employer.

Step 2: Assigning Authority Level

From the Administration menu, select **Assign Authority Level**



The Assign Authority Level screen appears. From the drop down list on the far right, select the contact's authority level, which determines their ability to access the Reporting Entity Portal on behalf of your reporting entity, as well as the actions they can perform if access is granted.

Authority Levels

- **No Access:** The contact will not have access to the Reporting Entity Portal on behalf of your reporting entity. This is the default selection.
- **Display**: The contact will be able to access the Reporting Entity Portal, but will not have the ability to enter, edit, or delete any information.
- **Submit:** The contact will be able to access the Reporting Entity Portal, and will have the ability to create, edit, and delete reports.
- **Signature:** The contact will be able to access the Reporting Entity Portal, have the ability to create, edit, delete reports, and will have the ability to accept or reject report signatures.
- **Administration (only TRS can assign this authority level):** The contact will have web administrator rights with access to create, read, update, and delete activities as well as accept or reject report signatures. The contact will also be able to manage web accounts for other Reporting Entity contacts.

A contact assigned to multiple contact types will appear only once and will have only one authority level.

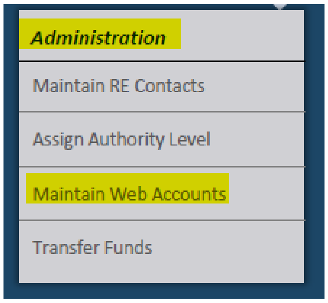
The Web Administrator's authority level cannot be changed, and the Web Administrator contact is not displayed on this screen. Contact TRS if you need to change your reporting entity's Web Administrator contact.

If a new user does not receive their log in credentials, first make sure that contact has an authority level other than no access assigned to them. Next, you should verify that their email address was entered correctly. If the user has an authority level other than no access and the email address is correct and the user did not receive their log in credentials through their email, then you will want to contact your IT department to verify the security settings are not blocking the emails. If you are still having issues, please contact your RE Coach.

Resetting a User's password

If a User enters an incorrect password three times, he or she will be locked out of the RE Portal and will need to have the password reset by the Web Administrator.

From the Administration menu, click **Maintain Web Accounts**

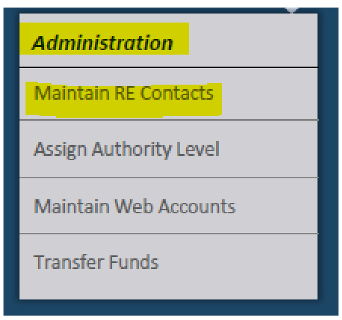


The User Accounts screen appears. On the far right of the User Accounts screen, under the ‘Action’ column, click the ‘Reset Password’ link for the contact for whom you wish to reset the password. A temporary password will be emailed to the user.

The Web Administrator cannot reset his or her own password. If the Web Administrator gets locked out of the RE Portal, he or she will need to contact the RE’s reporting coach to have the password reset.

Deactivating a User’s access

From the Administration menu, select **Maintain RE Contacts**



To deactivate a contact, enter an ‘End Date’ that is the last date the contact is valid for the reporting entity. The contact remains valid until that date. The authority level for a contact is automatically set to No Access on the contact’s End Date.

Please note that this will only deactivate the contact so they no longer have access to the portal. However, their information will still show in the portal as an inactive contact. To maintain an audit history, the inactive contact cannot be deleted from the portal.

Changing a Web Administrator

In order to update the Web Administrator, a new TRS 597A must be sent to reporting@trs.texas.gov. Please include your 4-digit TRS reporting entity number in the subject line along with 'Web Administrator Change'. The top section of the 597A will need to be completed by the Head of Institution and the bottom section will need to be completed by the new Web Administrator. Below is a link to the form:

https://www.trs.texas.gov/TRS%20Documents/form_597A.pdf

Please keep in mind that if the Web Administrator will be out for an extended period of time, a new TRS 597A can be sent in to change the Web Administrator for the time being.

Additionally, if any personal information for a Web Administrator needs to be updated (i.e. name, email address, phone number), a new TRS 597A with the applicable changes will be needed.