

UPDATE

TRS MEMBERS:

KEEP AN EYE OUT FOR ANNUAL MEMBER STATEMENTS

TRS members will soon be receiving their TRS annual statements. These statements contain the total amount of member contributions pertaining to the recently completed 2019-20 school year. The statement also includes the total accumulated contributions in the member's account and the amount of service credit TRS recognizes.

TRS encourages all members to review their annual statements carefully. If an employee has questions related to their statement, first refer them to the *Your Annual Statement of Account (Annual Statement)* section of the [FAQs: MyTRS](#) page located on the TRS website.

As a reminder, the annual salaries referenced on the statements are the amounts paid to the employee and reported for September 2019-August 2020. If the Reporting Employer (RE) or a member encounters a salary discrepancy, review the data actually reported each month to TRS on the Regular Payroll (RP) report. Contact your TRS coach related to salary discrepancies only if the salaries were not reported correctly after reviewing the data reported each month.

If your entity did not complete all FY 2020 reports (September 2019-August 2020) by the Sept. 16, 2020 deadline, the amounts on the member's statement may be inaccurate. Please inform the TRS-eligible employees of which report months were not included on the statement. The missing months would be any reports not completed by Sept. 16, 2020.

HOW TO REPORT PERFORMANCE PAY

Performance Pay is a type of compensation category that specific employees are able to earn if they meet qualifications that were approved by the RE in advance. Performance Pay applies only to public and charter schools (see TRS Laws, Section 822.201 of the Texas Government Code for additional information).

Performance Pay is considered to be TRS-eligible compensation, provided that the employee meets all the requirements for the pay. The criteria include:

- A complete description of how an employee can earn Performance Pay must be adopted as part of the total compensation plan by the board of the RE. The eligibility criteria to receive the Performance Pay must be clearly defined.
- Classroom teachers must be included in at least one type of Performance Pay.
- The performance standard may be based on evaluations or goal achievement of the individual employee or of the group in which the individual belongs.
- **There must not be an element of retention to receive the Performance Pay.** This means that if an employee earned the right to receive the payment, they will receive it even if they have since left the RE.

Performance Pay will be credited to the month and year in which it is paid. Both the member and employer must pay any applicable contributions due on Performance Pay at the current contribution rates.

Entities must certify the Performance Pay in the RE Portal prior to reporting it on the RP Report. (Section 5.2 of the RE Portal User Guide – Page 81)

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HOW TO REPORT PERFORMANCE PAY *continued from page 1*

Performance Pay Certification	
Section 25.24 of the TRS Rules provides that "PERFORMANCE PAY" is comprehensive for service as an employee in a Texas public educational institution that is paid under a valid employment agreement based upon a performance standard published in written documents adopted by the employer. The performance standard may be based on evaluations or goal achievement of the individual employee or of the group in which the individual belongs. Specific amounts of performance pay will be credited to the year in which the performance pay is paid. Performance pay earned during the school year in which the member retires or any previous school year and paid after the member has begun receiving retirement benefits is not creditable by TRS and will not be used in any benefit calculation.	
TRS RE Number	2371
I have read Section 822.201 of the Texas Government Code and Section 25.24 of the TRS Rules and certify that the performance pay is paid pursuant to a Performance Pay Plan which complies with the criteria set forth in these TRS laws and rules. The Plan is a part of a total compensation plan approved by the Board of Trustees of the district and includes the following information.	
Eligibility Criteria 1	<input type="checkbox"/> Complete description of all elements of compensation received by or available to all employees
Eligibility Criteria 2	<input type="checkbox"/> Provides for the availability of at least one type of performance pay to classroom teachers
Eligibility Criteria 3	<input type="checkbox"/> Identifies each type of performance pay, the performance criteria for each type of performance pay, and classes of employees eligible for each type of performance pay
Eligibility Criteria 4	<input type="checkbox"/> Contains sufficient information to ascertain the amount of each qualifying employees pay
Eligibility Criteria 5	<input type="checkbox"/> Contains performance criteria for earning performance pay that precludes the exercise of discretion for awarding the pay on any basis other than the evaluation of employee or group performance or availability of funding

When reporting Performance Pay on the RP record, the amount is included in the 'Total Gross Compensation' field, but is not included in the 'TRS Eligible Gross Compensation' field.

Example of RP20 with Performance Pay:

In this example, the Total Gross Compensation of \$6,000 is the sum of the Eligible TRS Gross Compensation of \$5,000 and the Performance Pay Gross of \$1,000. No ineligible compensation is being reported.

The Member Contribution is calculated on the sum of the Eligible TRS Gross Compensation and the Performance Pay Gross: $\$6,000 \times 7.7\% = \462 . The Member TRS-Care Contribution is $\$6,000 \times 0.65\% = \39 .

Eligible TRS Gross Compensation	\$ 5,000.00
Performance Pay Gross	\$ 1,000.00
Total Gross Compensation	\$ 6,000.00
Member Contribution	\$ 462.00
Member TRS-Care Contribution	\$ 39.00

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SUBMITTING ED40 RECORDS FOR WHOLLY SEPARATE POSITIONS

Many TRS members work multiple jobs throughout their career in public education. A teacher might also drive a bus route, or a food service worker may also take tickets at sporting events. Neither of these additional jobs are part of the person's primary work agreement, and therefore they must be reported separately.

Originally, TRS advised REs to either submit the additional ED40 to cover the entire school year, or to submit ED40s month-by-month depending on when the employee actually worked in their other position. Due to recently implemented validations, TRS is now asking employers to only submit an ED40 for a secondary position once the employee has actually begun working in that position. The dates of the contract must reflect when the employee will be actually working under the wholly separate position. This may result in multiple small contracts related to the wholly separate position throughout the year.

For example, if a teacher is taking tickets at the football games during the fall from October–November under an O3 position, then the ED40 contract dates for the O3 position will only cover October–November. If the employee takes tickets during the volleyball games in the spring from March–May under an O3 position, there will be a separate ED 40 for the O3 position covering these dates. There should not be an O3 contract with dates covering the months between the two assignments (December – February) if the employee is not working in the position, as it will result in errors.

If an RE submits an ED40 at the beginning of the school year with dates that span the entire school year, but the employee does not work in the separate position in the first month of the contract, **error** message 802 will populate on the RP report: *'Days worked must be reported for the first month of employment in a TRS-eligible position. The TRS-Eligible Contract start date for this position is <<Contract Start Date>>.'*

An employer may encounter warning message 801 if an RP record is not submitted each month of the employee's separate position: *'The contract start date for this position is prior to the current report month and RP transactions for the prior months do not exist'.*

Warning 804 may also kick in if the RP report does not contain an RP record for the employee's separate position. *'For regular payroll report period MONTH YEAR; no records found for NAME SSN. If the employee has terminated, please submit ED90. If the employee did not work and did not receive any pay in the report period, please submit an RP20 with zeros to confirm'.*

Both warnings 801 and 804 will be changed to errors in the future.

Submitting contract dates based on when the employee will work in the separate position and submitting RP records for each report month under the active position will reduce the number of warnings and errors an employer will receive on their monthly TRS reports.

PRIMARY CARE PROVIDER REQUIREMENTS FOR TRS-ACTIVECARE

Now that the new TRS-ActiveCare plan year has begun, participants are able to begin using their new benefits through Blue Cross and Blue Shield of Texas.

As a reminder, employees enrolled in TRS-ActiveCare Primary or TRS-ActiveCare Primary+ will need to choose a primary care provider (PCP) in order to access their benefits and referrals to specialists. If they haven't chosen a PCP, please encourage them to visit www.bcbstx.com/trsactivecare/doctors-and-hospitals and follow the listed steps.

If they use a provider other than the PCP on file, their coverage will not apply and they will be responsible for the full cost of the medical services.

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BLUE ACCESS FOR EMPLOYERS RECORDED TRAINING

The Blue Access for EmployersSM (BAESM) portal is Blue Cross and Blue Shield of Texas' (BCBSTX) secure website for employer groups. In the BAE portal, you can:

- access membership information for participants in your district, including addresses, medical plans and primary care providers
- check eligibility
- request an ID card by mail or print a temporary ID card for your employees

You can access a [quick, 12-minute recorded BAE training](#) anytime to learn about the different functions and features of BAE.

If you need help with your login or access to BAE, contact the BCBSTX Internet Help Desk at 1-888-706-0583, Monday– Friday, 8 a.m.–6 p.m., or Saturday from 7 a.m.–3:30 p.m.

TRS-CARE UPCOMING INFORMATION SESSIONS

If you have district employees considering retirement or beginning the process, TRS is hosting virtual information sessions for TRS-Care Standard and TRS-Care Medicare Advantage. These are a great resource for employees or Benefits Administrators who want to know more about how the TRS-Care plans work, especially as the plans get ready to switch vendors starting on Jan. 1, 2021.

To find a full schedule and registration links, visit www.trs.texas.gov/trs-care-events.

TRS SEEKS NOMINATIONS FOR THE BOARD OF TRUSTEES PUBLIC SCHOOL DISTRICT EMPLOYEE POSITION

TRS is now accepting nominations for eligible members to qualify as candidates for the election of the Public School District Employee position on the TRS Board of Trustees. The term begins as early as Sept. 1, 2021 and ends Aug. 31, 2027. An eligible member for this election is a current employee of a public school district, charter school or regional education service center. Also, an eligible member cannot have terminated membership in TRS or be a participant in the Optional Retirement Program. TRS is offering two ways in which a nominee may collect the required 250 signatures of eligible members for nomination.

1) Electronic Petitions – A nominee will declare his/her interest to be a nominee to the [Secretary to the Board of Trustees](#). Once the member's eligibility is validated, the member's name will be posted on the [nomination site](#) where the nominee may direct eligible members to sign the nominee's electronic petition. The names of nominees will be listed on a first-come, first-listed basis. To sign the electronic petition, eligible members will need to provide identifying information in order to verify their eligibility to sign the petition. The process is easy and only takes a few minutes. For an electronic petition, the nominee does not need to submit anything further to TRS but must have 250 eligible member signatures by Jan. 25, 2021 to be considered a candidate.

2) Paper Petitions – TRS will also continue to allow nominees to collect signatures with paper petitions. TRS must receive a nominee's paper petitions, with 250 eligible member signatures, no later than Jan. 25, 2021. You may download a [petition \(pdf\)](#) from the Resources section on the Nominations for TRS Board of Trustees Public School District Employee Position page on the [TRS website](#). If you do not have access to a printer, please contact the Secretary to the Board of Trustees to request a petition be mailed to you.

TRS MEMBER EDUCATION VIDEO SERIES

Learn all about your TRS pension benefits by watching our [Member Education Videos!](#) Help us spread the word about the series by downloading a [poster](#) from our website and displaying it at your school.