

UPDATE

SUBMITTING DOCUMENTATION FOR DEMOGRAPHIC ERRORS

When you submit an ED25 record to update employee demographic information, some of the updates may require overrides by TRS. When overrides are required, your coach will request additional documentation to process the override. Please only send additional documentation when requested by your coach, and please send all documentation in a secure format.

Here are examples of changes requiring overrides and the documentation TRS requires. Please note that this is not a comprehensive list and sometimes additional documentation may need to be provided on a case by case basis.

- Social security number change
 - Copy of legible social security card
- Date of birth and/or gender change due to error
 - Copy of government-issued ID
- Partial name change
 - Copy of legible social security card
- Complete name change (must verify this is truly the same person)
 - Legal/court documents authorizing complete name change
 - Social security card (old & new if available)
 - Driver's license
- Gender identity change
 - Copy of court documents
 - Social security card
 - Driver's license

ELIGIBILITY CHANGES – INELIGIBLE TO ELIGIBLE

Whenever an employee is hired or changes positions, TRS membership eligibility requirements must be applied at the time that the person is hired or the job agreement changes. If the employee was previously working in a position that was not TRS eligible, but the new position meets all of the [TRS eligibility criteria](#), they must be reported as TRS eligible going forward with the new position.

To report a member who changes to an eligible position, the Reporting Employer (RE) will need to submit an ED45 to end the ineligible position and add the eligible position, as long as there is no gap in employment. The RE must submit the ED45 in the report month in which the position changes. In the example shown below, the ED45 should be submitted with the December 2020 reports.

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Example: a tutor (position code 03) was originally hired to work for the entire 2020-21 school year in a less than half-time (not TRS eligible) position. The original ED40 should look like this:

| POSITION CODE | TRS ELIGIBILITY FLAG | BEGINNING DATE OF CONTRACT/WORK AGREEMENT | ENDING DATE OF CONTRACT/WORK AGREEMENT |
|---------------|----------------------|---|--|
| 03 | NO | 09/01/2020 | 06/05/2021 |

Effective Dec. 1, 2020 the employee began a half-time or more position as a tutor with the same position code 03 and will continue working in that position until the end of the school year. The employer submitted an ED45 to end the non-eligible position and add the eligible position. The contracts for this employee should look like this after the ED45 posts to the system:

| POSITION CODE | TRS ELIGIBILITY FLAG | BEGINNING DATE OF CONTRACT/WORK AGREEMENT | ENDING DATE OF CONTRACT/WORK AGREEMENT |
|---------------|----------------------|---|--|
| 03 | NO | 09/01/2020 | 06/05/2021 |
| 03 | YES | 12/01/2020 | 06/05/2021 |

It can also be challenging to report on an employee transitioning from an ineligible position to a TRS-eligible position when it comes to creditable compensation. Many REs pay in arrears, which causes the final compensation for the ineligible position to be paid in the month after the ineligible position ended. The report-when-paid rule requires REs to report the employee's compensation to TRS in the month it is paid, regardless of when it was earned. If compensation was earned while the employee was working in an ineligible position, then it must be reported as only Total Gross Compensation and no contributions may be withheld on the pay from the ineligible position.

- Let's say the employee in our example above concludes their ineligible position in November, and then the compensation for the time they worked is paid in December. Since the time worked for the ineligible position was paid in December, the compensation is **not** considered creditable compensation and contributions should **not** be withheld on the pay from the ineligible position.

Example: the tutor is paid \$1,500 in December for time worked Nov. 1, 2020-Nov. 30, 2020. The \$1,500 is **not** subject to member and employer contributions on the December 2020 Regular Payroll (RP) report. In December, the RE will report the employee as earning only Total Gross Compensation, but the days and hours for the **eligible** position must be included on this RP20 record for December.

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ELIGIBILITY CHANGES – INELIGIBLE TO ELIGIBLE *continued from page 2*

- If the same employee receives compensation for their prior ineligible position and new TRS-eligible position in the same report month, and the position codes are the same, the current month RP20 record will include both Total Gross Compensation and TRS-Eligible Gross Compensation.

Compensation earned by the employee when they worked in the eligible position will be reported as TRS-Eligible Gross Compensation. The Total Gross Compensation will include the compensation paid for both positions since this field is to report eligible and ineligible compensation.

If the positions fall under separate position codes, two current month RP records must be reported.

Example: the tutor is paid \$500 in December for time worked Nov. 12, 2020-Nov. 30, 2020 **and** \$750 for time worked Dec. 1, 2020-Dec. 15, 2020. The \$500 earned in the ineligible position is **not** subject to member and employer contributions on the December 2020 RP report; this amount should only be included on the Total Gross Compensation field of the RP20 record for December 2020. The \$750 earned in the eligible position **is** subject to member and employer contributions since it was earned while working in an eligible position. Total Gross Compensation will be \$1,250. The RP20 for this example would look like this:

| POSITION CODE | TOTAL GROSS COMPENSATION | TRS ELIGIBLE GROSS COMPENSATION | DAYS WORKED (OR SCHEDULED) | HOURS WORKED (OR SCHEDULED) |
|---------------|--------------------------|---------------------------------|----------------------------|---|
| 03 | 1250.00 | 750.00 | 20 | 160 (or 40 if reporting weekly scheduled hours) |

The hours and days reported on the December 2020 RP report should include all days and hours the employee worked or used paid leave for the calendar month of December 2020. Please keep in mind that REs are only permitted to report *scheduled* days or hours if the person does not track their time in any way. If the employee tracks their time, the employer **must** report the actual time worked in the calendar month.

REPORTING RECENT RETIREES

Because many retirees retired at the end of last school year and due to the processing times associated with the TRS retirement process, recent retirees may not yet show as a TRS retiree on the View Employee information screen.

If you have hired an employee who has retired from TRS and they are not yet showing in the TRS system as a retiree, please reach out to your coach for assistance.

Proactively identifying recent retirees who may not yet be coded in the TRS system can prevent many corrections and save you time on your reports later in the year.

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TEMPORARY EMPLOYMENT VS. PART-TIME EMPLOYMENT

For TRS purposes, temporary employment is when the length of the employment is expected to last less than four and one-half months. TRS has recently clarified the definition of four and one-half months to be 18 weeks. If a person's total employment meets or exceeds 18 weeks, then the employee cannot be classified as a temporary employee.

Employment that is sporadic, seasonal or irregular but is expected to take place over the entire fiscal year without meeting half time or more for 18 weeks or more should be categorized as "Less than Half Time" rather than "Temporary".

However, if the employment type changes **or** the employee meets or exceeds half-time employment for a period of 18 weeks in the fiscal year, then they would need to be reclassified as TRS eligible going forward.

If a person is expected to be employed in any capacity for four and one-half months (18 weeks) or longer, they should not be classified as a temporary employee for TRS reporting purposes.

NEW TRS-ACTIVECARE PLAN YEAR IN EFFECT AS OF SEPT. 1, 2020

On Sept. 1, 2020, the new TRS-ActiveCare plan year took effect with Blue Cross and Blue Shield of Texas (BCBSTX) as the medical plan administrator. We're excited to work with BCBSTX and provide our participants with access to their expanded network and lower negotiated rates for medical services.

With this new year of coverage, employees have new tools to manage their benefits and get the most out of their plan. These include:

- [BCBSTX TRS-ActiveCare website](#): official site for the TRS-ActiveCare 2020-21 plan year with access to all plan benefits and details.
- [Blue Access for MembersSM](#) (BAM): online portal where participants can check the status of claims, view claims history, request ID cards and more.
- [Provider Finder[®] directory](#): participants can look up doctors, hospitals and other providers by location, patient reviews, certifications and recognition information.
- Personal Health Guides (PHGs): available 24/7, PHGs can answer questions about plan benefits, get cost estimates, find in-network providers and more. They can be reached at 1-866-355-5999.

YOUR ENHANCED TRS-ACTIVECARE SUPPORT

TRS knows this year is not like any other year and has worked to ensure that your district has strong support. Benefits Administrators will continue to have the same responsive, high-quality support for eligibility and enrollment needs from a dedicated Benefits Administrator Advocate (BAA) through bswift, plus new strategic support for your district leadership from your TRS District Ambassador.

NEW! Your dedicated TRS District Ambassador will:

- Serve as the primary relationship contract for district leadership to help meet strategic district goals,
- help you maximize the value TRS-ActiveCare provides your district now and with future plan enhancements,
- identify health care utilization trends and collaborate on tangible solutions, and
- provide support for benefit fairs, on-site clinics and wellness initiatives. Contact your District Ambassador now!

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ACTIVATE YOUR HEALTH WITH TRS-ACTIVECARE 2020-21 BENEFITS

The 2020-21 TRS-ActiveCare plan year has an extensive suite of resources to help participants take charge of their wellness. Participants in TRS-ActiveCare can:

- Live well with Well onTarget®. This website and mobile app will help participants reach their wellness goals and manage their health conditions. Download the AlwaysOn app on any device or [visit their website](#).
- Use BCBSTX's Well onTarget® library of videos, podcasts and other tools to learn about how to manage conditions like asthma, back pain, diabetes, etc.
- Work one-on-one with a health coach by phone or secure online messaging through Well onTarget.
- Join the fitness program to access discounts to gym memberships.
- Talk to a nurse through the 24/7 Nurseline about mild health conditions like dizziness, headaches, back pain, etc.
- Connect with cancer specialists who provide support through the journey and help participants understand care options.
- Receive extensive women's and family health support through Ovia Health®†. This program can guide participants step-by-step through fertility, pregnancy and parenting. Download the app on any device.

All of these resources are included in each TRS-ActiveCare 2020-21 health plan option and for all tiers.

TRS-CARE INFORMATION SESSIONS THIS FALL FOR RETIRING EMPLOYEES

This fall, TRS will host information sessions about the upcoming 2021 TRS-Care plan year. If your district has employees considering retirement in the next year, these sessions will explain what their new benefits will be.

Visit our health care events page at www.trs.texas.gov/trs-care-events to see the schedule and available materials.

TRS-ACTIVECARE RESOURCES FOR COVID-19

We know many of you are concerned about COVID-19. TRS has made sure we can bring peace of mind and predictability to your medical costs during this unpredictable time.

We'll continue to provide \$0 COVID-19 testing, telemedicine and hospital stays for all of 2020 in addition to your current TRS health plan benefits.

We are closely monitoring the impact of COVID-19 on the financial position of health plans and balancing that with the goal of providing coverage that brings our participants peace of mind during this unpredictable time.

In the coming months, we'll continue to rely on public health officials and work with our vendors to find the best long-term solution for additional COVID-19 coverage in 2021. We'll communicate all decisions and relevant information as it evolves.

[Visit our COVID-19 resource webpage](#) to access FAQs and learn more about what is covered.

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NEW ORP BROCHURE DEVELOPED FOR MEMBERS

TRS has developed a new brochure for members outlining the differences between TRS retirement and the Optional Retirement Program (ORP) for qualifying employees of Texas institutions of higher education.

The brochure is designed for the purpose of assisting employees with determining which retirement plan is best for them. TRS has linked the brochure on the RE page of our website, as well as under General Information and RE Portal Resources.

We encourage higher education employers to refer their newly ORP-eligible employees to the brochure for information on making their retirement plan decision.

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

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.

WATCH AND LEARN: 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.