



— WELCOME TO THE —

Teacher Retirement System of Texas!

Check in, Security badges, and I-9 forms
should be administered now

The background image is a blue-tinted photograph of a modern building with a courtyard. In the foreground, there is a large, abstract sculpture made of dark, jagged pieces. Behind the sculpture is a tiered seating area made of concrete blocks. The building in the background has many windows and a modern architectural style. The text "A Warm Welcome from the Executive Council" is overlaid in the center of the image, enclosed in a white rectangular box.

**A Warm Welcome
from the Executive Council**

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, textured material, possibly stone or metal, standing on a raised platform. The sculpture has a central, pointed form with several smaller, rounded shapes around it. The entire scene is overlaid with a semi-transparent blue filter. A white rectangular box is centered over the image, containing the text "TRS Culture and You".

TRS Culture and You

Our Work is at the heart of the Mission

TRS Vision:

Earning your trust every day.

TRS Mission:

Improving the retirement security of our members by prudently investing and managing the Trust assets and delivering benefits that make a positive difference in their lives.



Workforce Culture: the way of life of a group of people; the customs, values, morals, attitudes and goals shared by group of people.

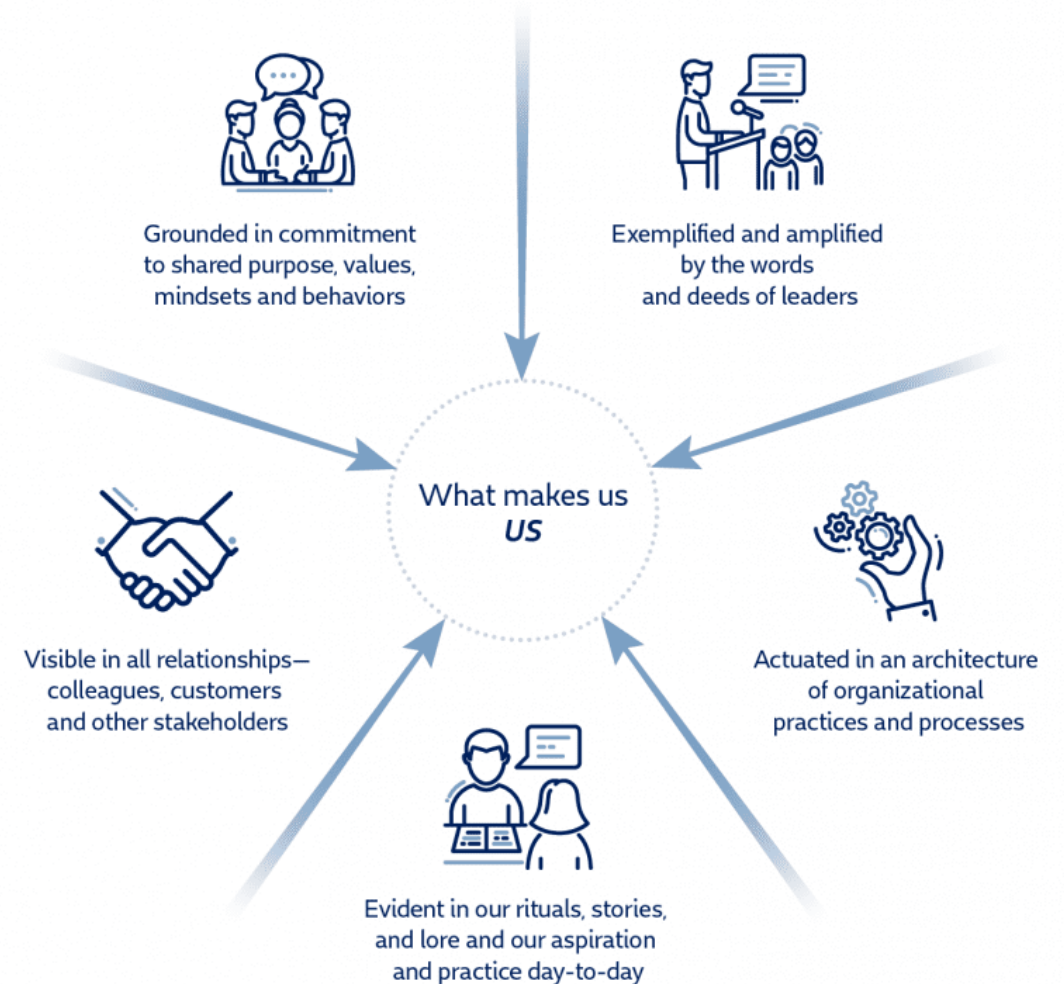
Inclusive



Organizational Culture: the way of operating an organization grounded in commitments, exemplified in actions and evident in how business is conducted.

We All Belong

What is Organizational Culture?





TRS Culture grounded in values

“Our values represent a mutual understanding about responsibilities, expectations and communication in the way we treat each other and those we serve.”

Earning your trust every day.



Member Focus

We exist to serve our members.



Ethics

We act with integrity in everything we do.



Respect

We build and maintain trusting relationships by working collaboratively, embracing our differences, and treating each other with kindness.



Excellence

We are accountable for our performance, striving to exceed expectations and deliver superior service.



Innovation

We explore and embrace new ideas to create efficiencies and optimize business outcomes.



TRS Culture evident in behavior

“Our values represent a mutual understanding about responsibilities, expectations and communication in the way we treat each other and those we serve.”

Earning your trust every day.

TRS VALUES BEHAVIOR STATEMENTS	
	Member Focus • I work to earn the trust of our members. • I understand my role is to serve and exceed member expectations. • I make decisions and pursue our strategic vision, mission, and goals with members' best interests in mind. • I listen and respond empathetically to members' needs.
	Ethics • I act in the best interest of our members. • I abide by TRS rules, procedures, and policies. • I act with integrity and uphold ethical standards. • I take full responsibility for following guidelines and meeting expectations. • I encourage and challenge others to maintain high ethical standards.
	Respect • I understand we are one team with one mission to serve our members. • I work collaboratively in support of our mission. • I appreciate that our differences enable us to more effectively serve our members. • I understand and embrace how each person's uniqueness enriches TRS' culture. • I strive to build trust and treat others as they would like to be treated. • I respect and encourage others' ideas and contributions. • I act with kindness and empathy. • I appreciate the value of all departments and their contributions to our strategic goals. • I listen for points of agreement with others and build from there.
	Excellence • I strive to exceed expectations and goals. • I seek opportunities for personal and professional growth. • I recognize my actions impact member trust in TRS. • I follow through and keep my commitments. • I own my actions and their outcomes. • I contribute to my team's success.
	Innovation • I welcome and support new solutions to improve productivity and create value for our members. • I strive to be agile and creative when facing changes and challenges. • I consider best practices, emerging industry advancements, and available resources to inform my decision-making. • I offer suggestions to streamline processes. • I stay curious and open-minded.

If TRS was an animal, it would be a.....



Doing Your **BEST** Work

EVP:

1. Human-centered
2. Holistic
3. Service oriented
4. Achievement

TIPS:

1. Sign up for and participate in various training offered at TRS.

 **Learn. Connect. Grow.**



Welcome

Please use this portal to check out offerings for learning and development. You can complete training, browse for courses, check your transcript, and view your profile.















VIEW EVENTS

SNAPSHOT

PERFORMANCE

TRSALEERT

SERVICE TICKET

CAPPS

CAREER CENTER

My Training

No Training Available

My Approvals

View transcript
(0 approved training selection(s))
(Registered for 0 training selection(s))

My Action Items

No Pending Actions

TIPS:

2. Access and peruse the OCE site available through TRS SharePoint.

Outreach, Culture, and Engagement at TRS

The Outreach, Culture, and Engagement (OCE) team focuses on the impact that these three areas have on employees and the organization to help TRS keep a pulse on what is happening at the employee level.

Employees are where the work begins, gets done, and generates outcomes. OCE's work supports the sustainment of a workplace environment conducive to employees doing their best work on behalf of the TRS members and gaining professional satisfaction from it. This includes efforts for leveraging employee strengths, expanding outreach for the talent pipeline and the HUB program, enhancing organizational culture, and increasing employee engagement.

For more insight into our strategic plan, [click here](#).

OCE Consultation Services

Gain insight from our expertise. From quick documentation reviews to more involved collaborations in process establishment.



Important Links



Strategic Plan & Update



Employee Resource Groups and
OCE Council



Pension Importance for Public
Education Employees

April quick poll question:

With which TRS related social event(s) are you comfortable?

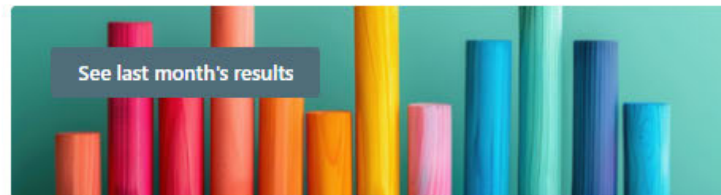
Submit your answer



March quick poll results:

What currently motivates you the most at work?

See last month's results



Upcoming Events

[See all](#)

+ Add event

MAY
14

EP: Social Hour
Wed, May 14, 5:00 PM

JUN
5

OCE Council Meeting: Q2 CY25
Thu, Jun 5, 2:00 PM

JUN
11

EP: Social Hour
Wed, Jun 11, 5:00 PM

JUN
18

BEN: Juneteenth Social Hour (TENT.)
Wed, Jun 18, 5:00 PM

JUL
9

EP: Social Hour
Wed, Jul 9, 5:00 PM

AUG
13

EP: Social Hour
Wed, Aug 13, 5:00 PM

Community Partners &
Engagement Opportunities

Learn more

Terminology

Autism:

Autism can be diagnosed at any age. It is said to be a "developmental disorder" because symptoms generally appear in the first two years of life. Autism is known as a

TIPS:

3. Be curious about your new colleagues and get to know as many of them as you can.



Let's MEET
Meet Efficiently, Effectively & Timely

Maximizing Your Work through Best Practices

Making the most of your workday is a priority. TRS wants to help you maximize time by sharing ways to do so. The *Let's MEET* initiative provides tools you can use right now. TRS launched the campaign in January as part of its ongoing effort to integrate efficiency daily. The yearlong initiative, brought forth by Deputy Director Caasi Lamb, promotes meeting best practices – techniques you can employ to improve all you do. *Let's MEET* kicked off with “5 to Thrive” followed up by “Decision Tree – To Meet or not to Meet.”

Each month a best-practice topic is highlighted, and resources are shared on the [Let's MEET page](#) on the intranet. There you'll find all the topics and videos explaining what you can implement.

Let's MEET has launched but YOU can help it land.



Billy Lowe
[5 to Thrive](#)



Meaghan Bludau
[To Meet or Not to Meet](#)

Let's MEET can only enhance the exemplar TRS has built its reputation. Our topics are to be beneficial. I encourage you to follow incorporating the information and best practices work. Our evolution as a retirement system the best possible service to those we serve and inspires everyone who work.
– Deputy Director Caasi Lamb

**TOP
WORK
PLACES
2024**

USA

**I am
a....**

Benefit Counselor

Katheryne Grahn is a Benefit Counselor who understands the importance of meeting member needs. She knows putting members first means ensuring new hires learn best practices after beginning their TRS

educating them on all their options and confident in their decisions. I was helping a member with his and grateful for the time and patience everything. He kept apologizing. I reassured him over and over

Congratulations to everyone!



Left to right: Richard Vasquez, Monica Bernal, Maverick Martinez

The Health Division's celebration of the TRS-Care Dental and Vision plans was a testament to the incredible dedication and efficiency



Left to right: Joe Wiggs and Glenn Louviere

TRS successfully completed its iPhone upgrade process. More than 300 older iPhones were transitioned to the new iPhone 15. This upgrade



Salman Chaudhry, Business Analyst Associate

Enterprise Program Management (EPM) Welcomes Salman Chaudhry. Salman joined TRS as the Business Analyst Associate on the Research & Analysis Team. He will play a key

APRIL 2025 • TRS NEWSLETTER

Chalkboard

Events & Initiatives, Careers, Employee Interests, Fun Facts, and More!

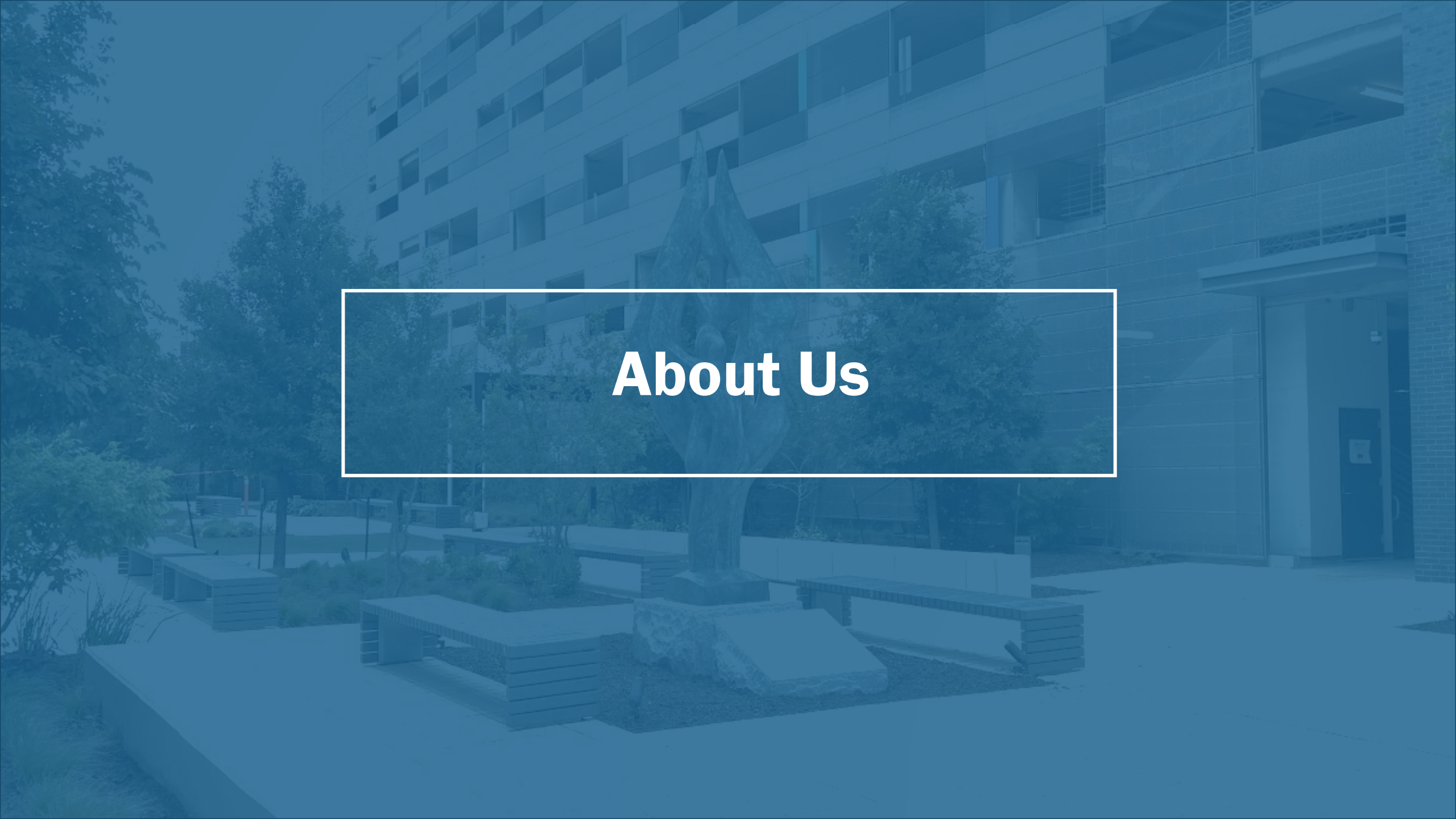


TIPS:

4. Attend Day 2 of NEO.

Questions?



The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, textured material, possibly stone or metal, standing on a concrete base. The sculpture has a central, pointed form with several smaller, rounded shapes around it. The entire scene is overlaid with a semi-transparent blue filter. A white rectangular box is centered over the image, containing the text "About Us".

About Us

TRS Mission



Improving the retirement security of our members by prudently investing and managing Trust assets and delivering benefits that make a positive difference in their lives.

Core Programs

 Benefit Services	 Health	 Investment Management
---	--	--

Support Services

Information Technology	Finance	Organizational Excellence	Legal & Compliance
Strategy	Internal Audit	Administrative Services	Contract Services
Governmental Relations		Communications	

TRS Strategic Plan 2023 - 2027



GOAL 1

Sustain a financially sound pension system.



GOAL 2

Continuously improve our benefit delivery.



GOAL 3

Facilitate access to competitive, reliable health care benefits for our members.



GOAL 4

Ensure that people, processes, and technology align to achieve excellence in the delivery of services to members.

Our History

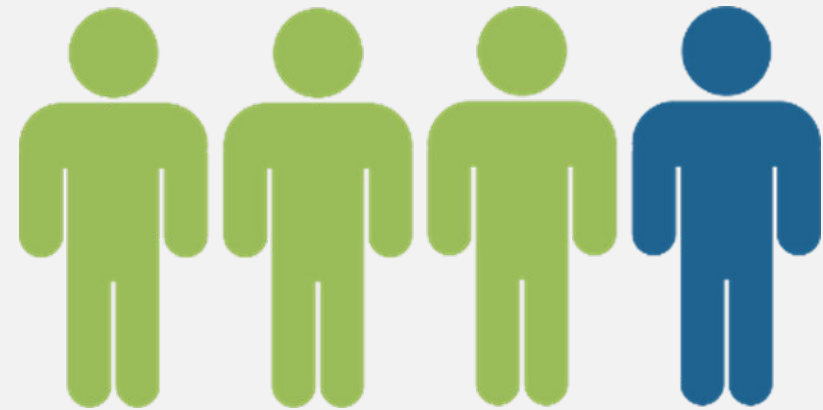
Established in 1937

by Texas legislation and governed
by a Board, Executive Director
and Executive Management staff.



TRS Member Demographics

Over 2 million members





Active members average
44.7 years old with 10.2 years of
service

On average members retire at age 60.6 with 24 years of service credit





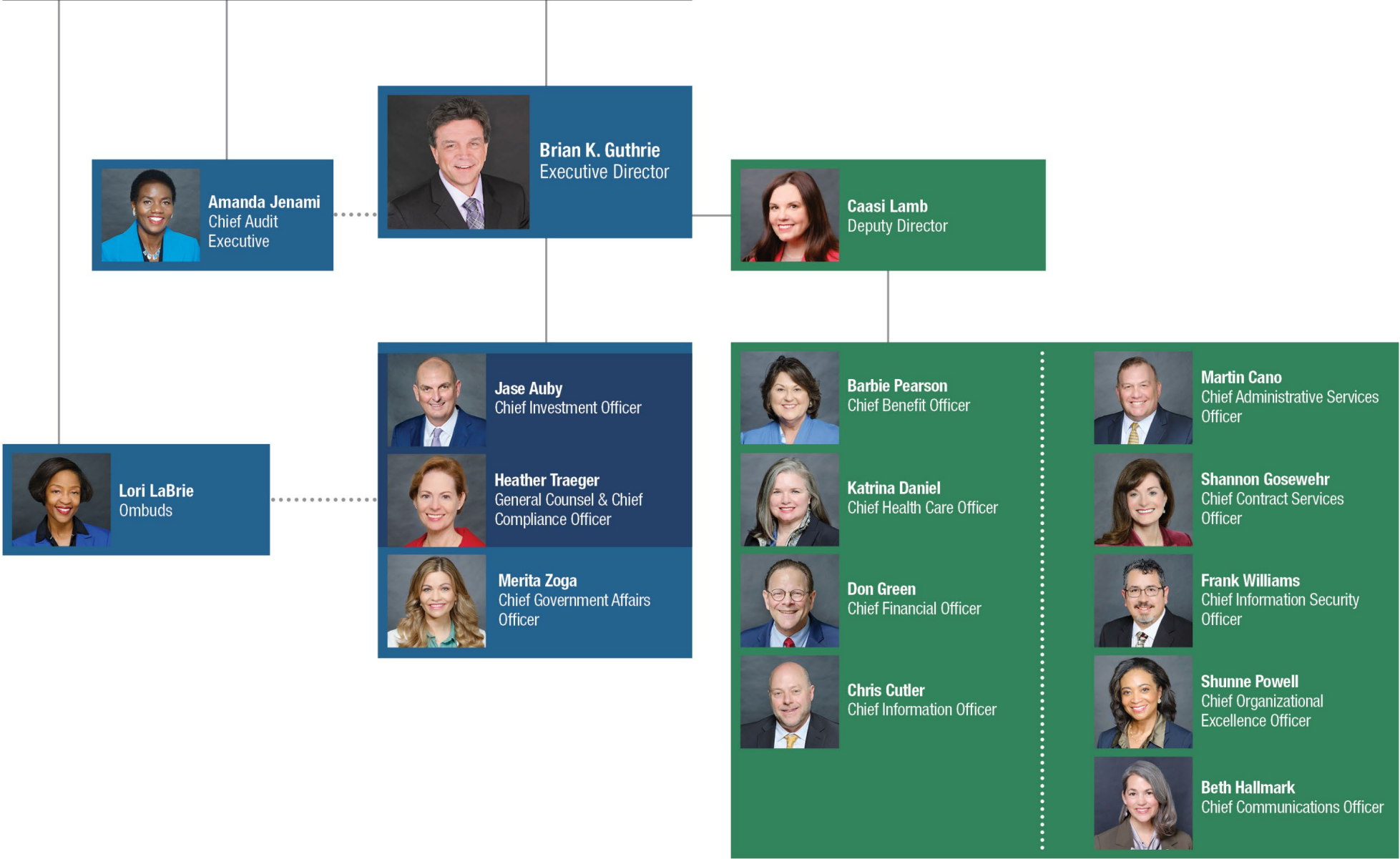
Average salary of
retirees in FY24 was
\$50,049

Average age for all
retirees is 72.7 years



Teacher Retirement System of Texas 2025 Executive Council

TRS Board of Trustees



Executive



Brian Guthrie
Executive Director



Caasi Lamb

Deputy Director

Core Programs



**Investment
Management:**
Jase Auby



Health:
Katrina Daniels



Benefit Services:
Barbie Pearson

Support Services

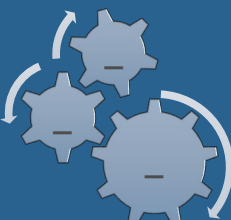


 Finance:
Don Green



 Organizational
Excellence:
Shunne Powell



 Administrative
Services:
Martin Cano

Support Services



**Information
Security:**
Frank
Williams



**Information
Technology:**
Chris
Cutler



**Contract
Services:**
Shannon
Gosewehr

Support Services



Communications:
Elizabeth
Hallmark



Outreach,
Culture and
Engagement:
Kellie Sauls

Support Services



Legal and
Compliance:
Heather
Traeger



Internal Audit:
Amanda
Jenami



Governmental
Relations:
Merita
Zoga

TRS Workforce Profile

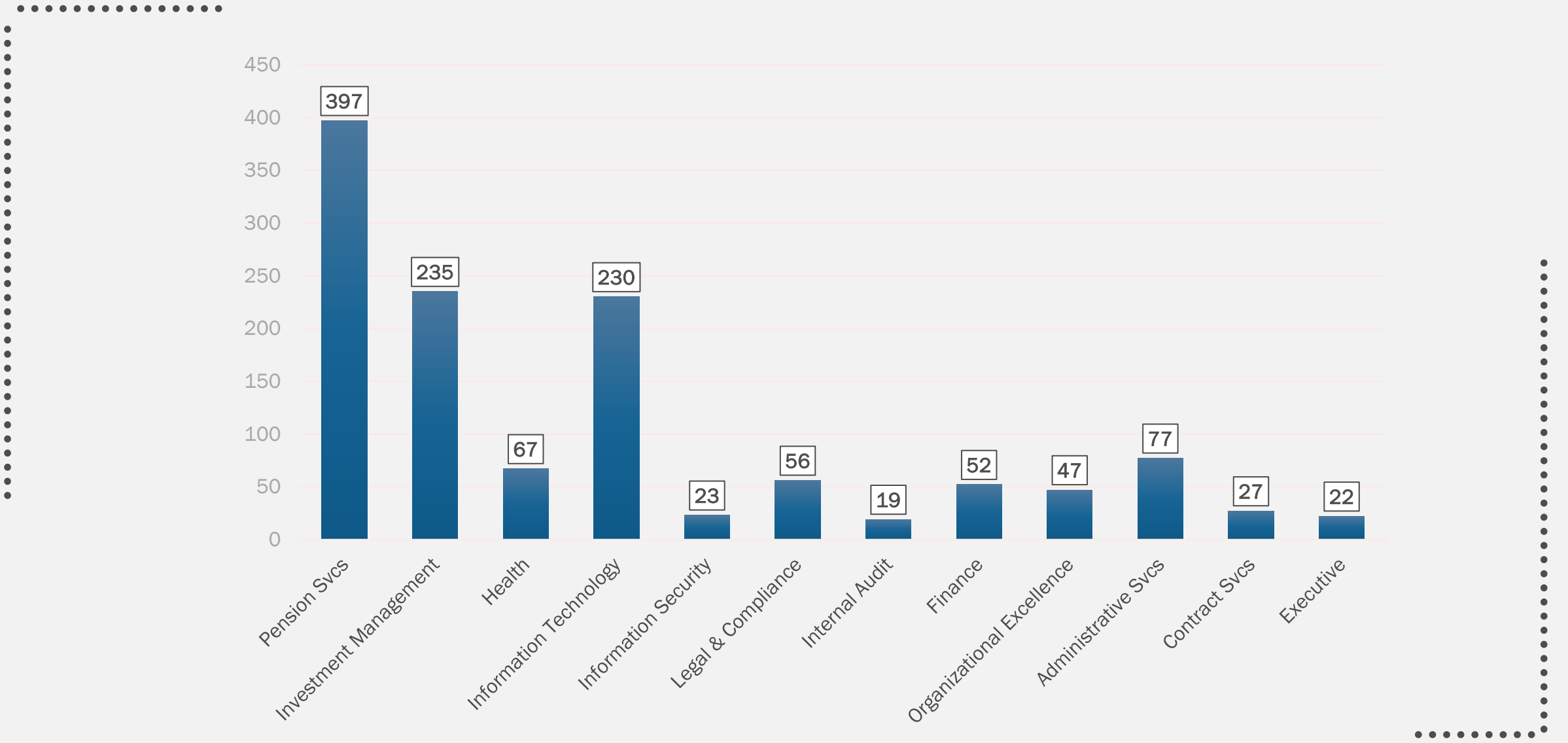
Average age is 43.5 years

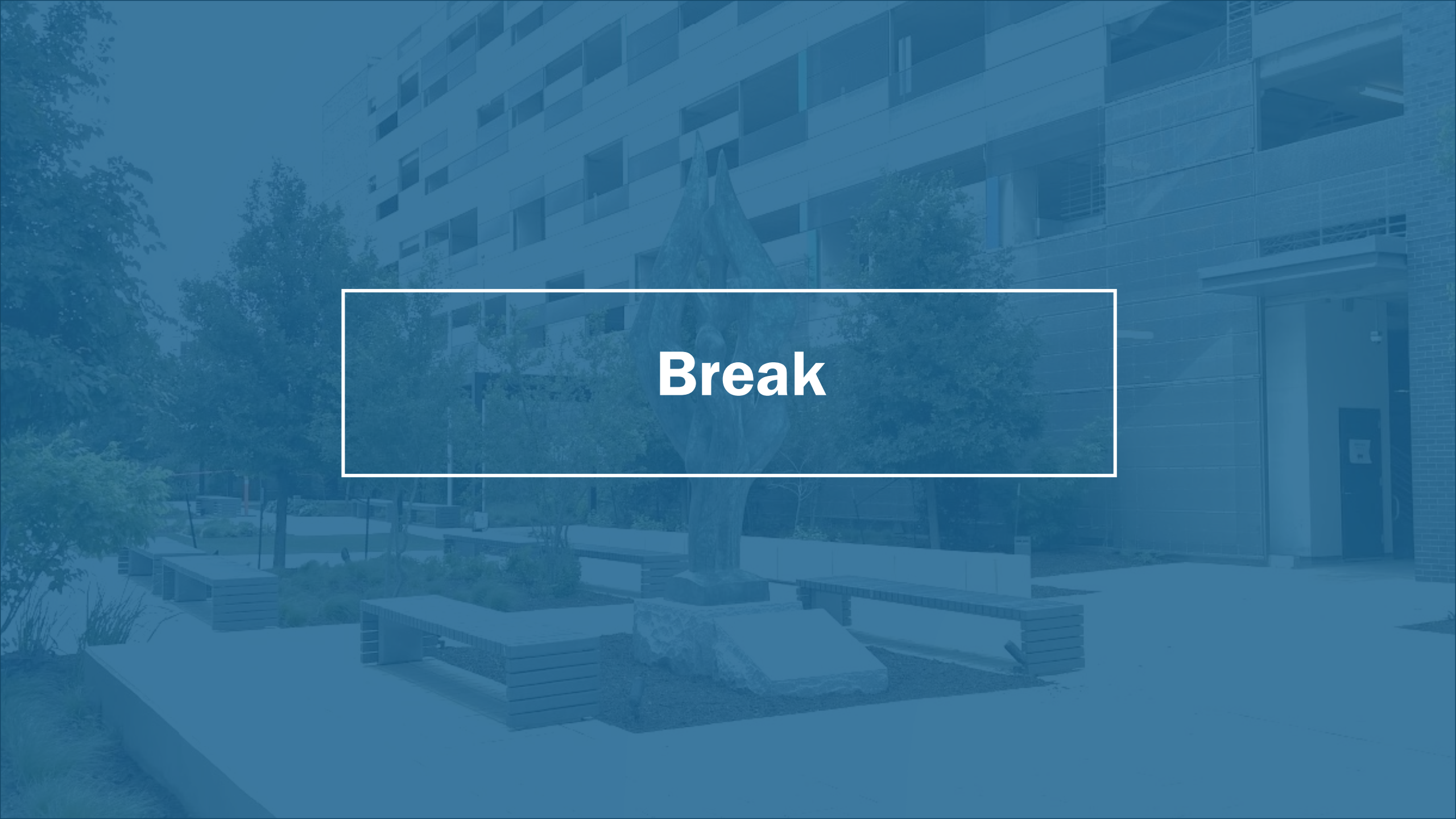


Average tenure with TRS is 6 years



Employees are based at Headquarters, El Paso or London, operating within twelve divisions



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Break

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, jagged stone or metal, standing on a raised platform. The scene is surrounded by trees and some low-lying plants. The entire image is overlaid with a semi-transparent blue filter.

Payroll



General Information:

- CAPPS is the system used to enter timesheets and process payroll.
- Timesheets drive payroll!
- Employees can access earning statements, W-2 forms and can also update personal information such as address, emergency contacts etc.



Confidential Treatment of Information Acknowledgement (CTIA):

- Users complete the CTIA before accessing any Comptroller systems or databases, including CAPPS.
- All agency personnel must formally acknowledge that they will comply with the security policies and procedures of the agency.
- Look for an email from the Payroll Team which will contain a Payroll New Hire Onboarding Details document. This document will contain a link for CTIA.
- Complete the acknowledgement and forward the confirmation email that you will receive to: "DL Comptroller Security Access."



Initial Login:

- After your CTIA completion confirmation is received, your CAPPS login credentials (User ID and Texas Digital Identity Solution- TDIS enrollment link), will be delivered via two emails.
- You must register in TDIS **within 72 hours** after receiving the email or your enrollment link will expire.
- **Immediate action required:** Once you login successfully, you are required to enter your Direct deposit banking information and your W-4 information into CAPPS.



Texas Digital Identity Solution (TDIS) Enrollment

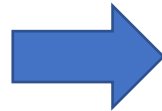
Please set a secure password.

Passwords must be at least eight characters.

Enter password
[password field]

Confirm password
[password field]

Back Next



An official website of the Texas state government. [Learn more](#)

Digital Identity Solution

Welcome

Email
[input field]

Password
[input field]

Sign In

[Forgot password](#)

Texas.gov Digital Identity Solution

The Texas.gov Digital Identity Solution allows authorized Texas government employees to access services and systems.

To get started, sign in with your enrolled employee account.



Texas Digital Identity Solution (TDIS) Login

 Digital Identity Solution


Non-Production

[Sign In](#)

[Forgot Password](#)

Employees using shared computers are advised to click Logout and then exit the browser after completing their session

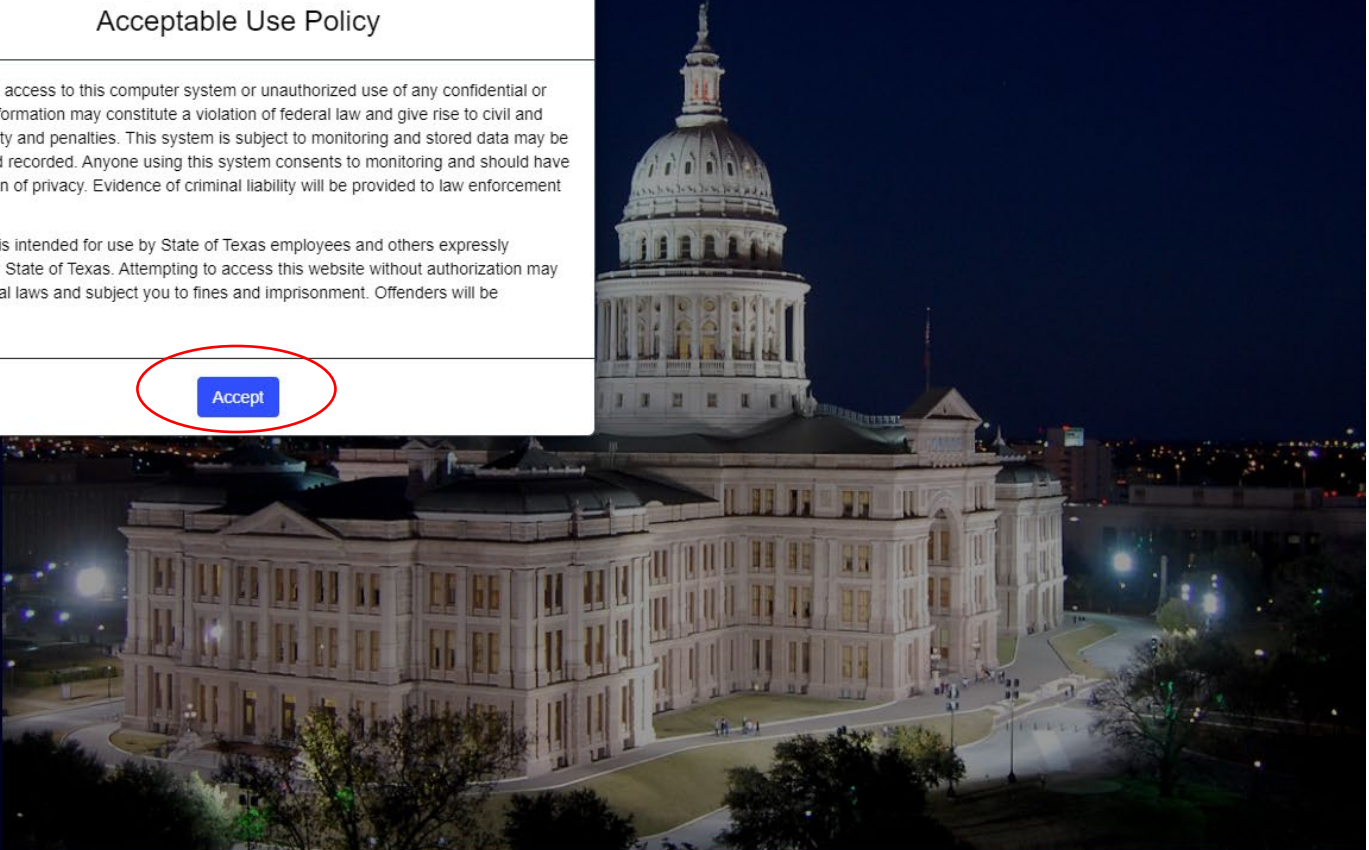
An official website of the Texas state government.

Texas Comptroller of Public Accounts Acceptable Use Policy

Unauthorized access to this computer system or unauthorized use of any confidential or federal tax information may constitute a violation of federal law and give rise to civil and criminal liability and penalties. This system is subject to monitoring and stored data may be accessed and recorded. Anyone using this system consents to monitoring and should have no expectation of privacy. Evidence of criminal liability will be provided to law enforcement agencies.

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[Accept](#)



[Glenn, Hegar, Texas Comptroller](#) | [Home](#) | [Contact Us](#)
[Texas.gov](#) | [Texas Records and Information Locator \(TRAIL\)](#) | [State Link Policy](#) | [Texas Homeland Security](#) | [Texas Veterans Portal](#)
[Privacy and Security Policy](#) | [Accessibility Policy](#) | [Link Policy](#) | [Public Information Act](#) | [Compact with Texans](#)



CAPPS Employee Self Service Dashboard

capps

Menu

Search in Menu

1 of 11

Employee Self Service

Benefits Summary

CAPPS News & Articles

Published News/Articles: 2

TDIS Security Enhancements for CAPPS Production: FAQs

The TDIS security enhancements for CAPPS Production are scheduled to move into Active Mode in early Spring. With these changes, users must have additional layers of authentication enabled when accessing the CAPPS environments.

All CAPPS users are strongly encouraged to register additional MFA methods by visiting the Accounts Settings page in the TDIS Portal. Users can select from the following options:

- A Mobile Phone number for receiving One-Time Passcodes via SMS or voice call
- An Authenticator app for mobile devices, such as Google Authenticator or Microsoft Authenticator
- A physical security key (such as YubiKeys)

Please refer to the FAQ document linked below for more detailed information. Agency Level 1 Support Staff and TDIS Delegated Admins may contact the CAPPS Help Line with any questions or concerns.

Attached File [FAQ_TDIS-Enhancements-EndUsers_03-20-24.pdf](#)

Source: CAPPS Communications Modified: 03/20/2024 12:34PM

My Time and Leave

My Pay

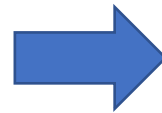
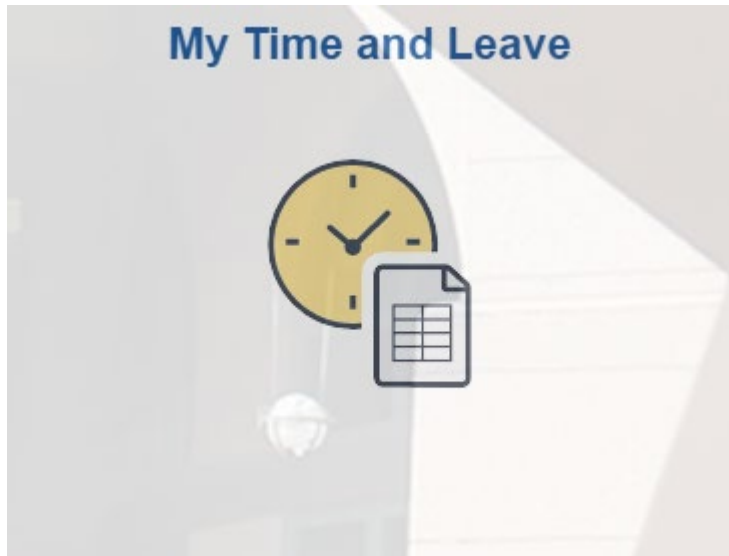
My Profile

Common Links

Texas.gov Employee Portal

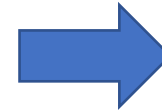
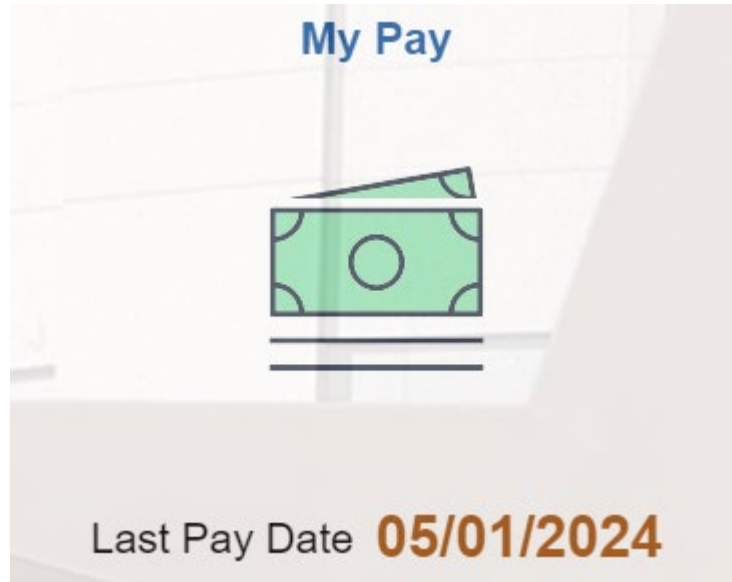
Digital Identity Solution

CAPPS Employee Self Service (ESS):



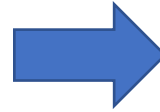
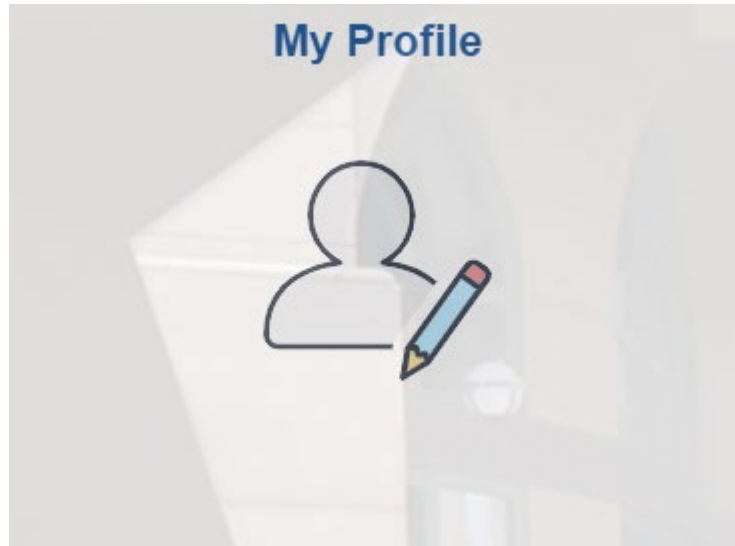
 Report Time
 Time Summary
 Payable Time
 Leave Balances
 Time Certification
 Employee Monthly Time Report
 Leave Balance Detail Report
 TX FMLA Balance Inquiry

Capps Employee Self Service (ESS):



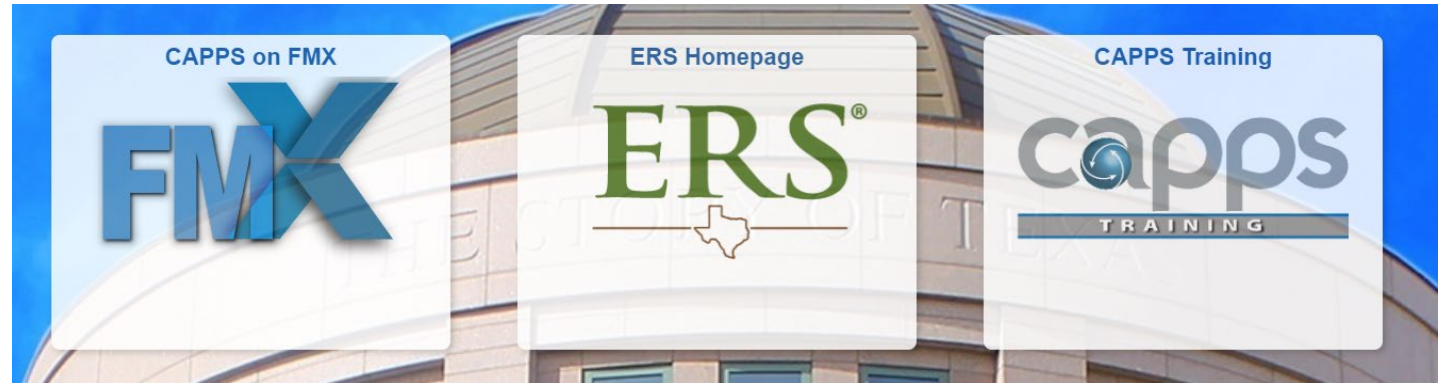
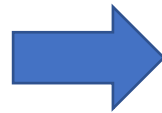
Paychecks	
	W-4 Tax Information 
	W-2/W-2c Consent
	View Form 1095-C
	Form 1095-C Consent
	View W-2/W-2c Forms
	Voluntary Deductions
	View/Edit Direct Deposit 
	View Compensation History
	Charity Deductions

CAPPS Employee Self Service (ESS):



	Home Address
	Contact Details
	Name
	Emergency Contacts
	Additional Information
	Release Indicators/CPO
	Educational Achievements

CAPPS Employee Self Service (ESS):





Payroll

Payday

Name

Tax Deductions

Important: please contact us directly if you are currently present in the U.S. on an F-1 student visa.

W4

Direct Deposit

Prior State Service



Leave Accounting

Exception Time Reporting
(Schedules)

Hourly Time Reporting

Certification

Accruals

Leave Without Pay

Holidays

Summary Email



ONBOARDING DETAILS: REGULAR EMPLOYEE



Welcome to TRS from the Employee Payroll and Time Administration Team.

During New Employee Orientation (NEO), we discussed information regarding Payroll and Time Administration. This document summarizes the topics discussed and items that may require your immediate attention.

CTIA

Confidential Treatment of Information Acknowledgement (CTIA)

Internal agency policy mandates users acknowledge the Confidential Treatment of Information Acknowledgement (CTIA) before accessing any Comptroller systems or databases. All employees must formally acknowledge that they will comply with the security policies and procedures of the agency.

Begin the online acknowledgement process by clicking the following link: <https://fmcpa.cpa.state.tx.us/ctia/>

Please select agency 323 - **Teacher Retirement System of Texas** when completing the online acknowledgement.

After you receive the e-mail confirming you have completed this acknowledgement, please forward the e-mail to DL Comptroller Security Access. (comptrollersecurityaccess@trs.texas.gov)

Please complete this process within the first two days of employment.

CAPPS

Accessing CAPPS-HR/Payroll

After the TRS Comptroller Security Access team receives your CTIA acknowledgement, you will receive two auto-generated emails from the Comptroller of Public Accounts (CPA).

- The first email will contain your CAPPS User ID number which consist of 11 numerical digits. Retain this number for your records as you will need it to access the CAPPS-HR Payroll system.
- The second email from **no-reply@myaccess.dir.texas.gov** will include your Texas Digital Identity Solution multi-factor authentication enrollment link which is the CPA's multi-factor authentication process. This email may be received the day after the first email that includes your CAPPS User ID number.

Note: The enrollment link will expire after 72 hours and is valid for only one use.

The following desk aid provides instructions on the process:

[CAPPS IAM-TDIS_MFA Getting Started Guide](#)

.....
CAPPS-HR/Payroll should be accessible via an icon on your desktop. However, below is the link to the application:

<https://erphcmprd.cpa.texas.gov/psp/pshcmprd1/?cmd=login&languageCd=ENG&>

Time Admin

Employee Time Administration

Employee Self Service Desk Aid: This helpful desk aid will provide instructions on how to access your employee timesheet via the CAPPS Employee Self-Service module and to complete your timesheet.

Quick Reminders

- Timesheet activity is reported on an exception basis.
- Submit timesheets on a weekly basis if you have leave taken or hours to report outside of your normal schedule.
- Complete the Time Certification process no later than the second workday of each month.

Employee Payroll & Time Administration



Moehlman,
Brian



Bond-Allen,
Kita



Metoyer,
Marcey



Faz, Veronica



Arias Cordero,
Juan



Ramos, Amy



Caballero,
Arlene

DL Payroll Team: PayrollTeam@trs.texas.gov



Payroll Support Request System

Warrant Pick Up: Cashier's Window - BRV6.3000

Contact Us

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, textured material, possibly stone or metal, standing on a raised platform. The scene is surrounded by greenery, including trees and shrubs. The entire image is overlaid with a semi-transparent blue filter.

Benefits and Leave

Benefit and Leave Team



Cynthia Walker

Benefit & Leave Coordinator



Kendra Alvi

Benefit & Leave Coordinator



Jeff Oommen

Benefit & Leave Coordinator



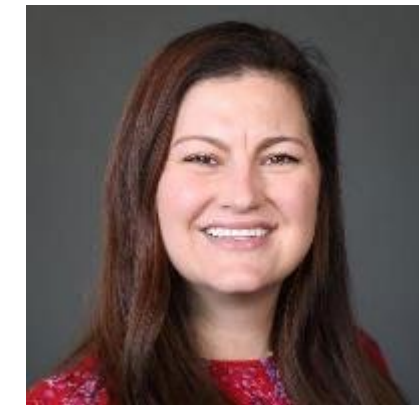
Tori Penland

Sr. Benefit & Leave Coordinator



Laura Velasquez

Team Lead



Michelle Walker

Director of Benefits & Leave

What can we help you with?

FMLA

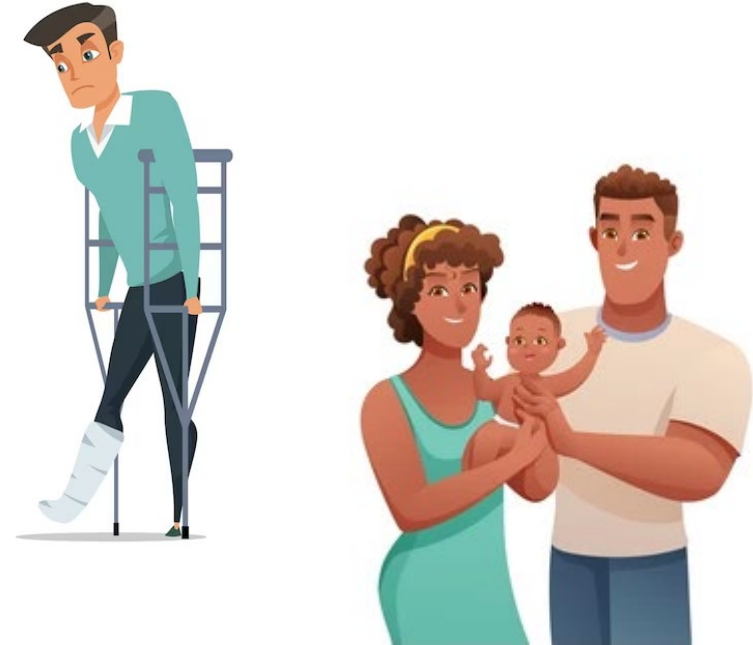
- Serious medical condition
- Must meet eligibility requirements
- Provides job protection and continuation of health insurance coverage

Parental Leave

- Unpaid job protected leave for birth, care, adoption or foster care placement of a child.

Special Leave

- Statutory Parental Leave, Jury Service, Bereavement, Military, Veteran's Medical, Sick Leave Pool, Extended Sick Leave, Family Leave Pool, Employee to Employee Donations.





Workplace Accommodations

- Individual with a qualified disability or an employee who has a temporary or minor physical or mental impairment
- Provides reasonable accommodations for employee to perform the essential functions of the job

Medical Documentation

- Do not provide any medical documentation to your department
- Send all medical documentation to the Benefit and Leave Coordinator

Alliance Work Partners

Employee Assistance Program

- Alliance Work Partners
- All services are confidential

Services

- Counseling
- SafeRide
- Legal and
- Financial services



Housekeeping Items



**REVIEW
ENROLLMENT
INSTRUCTIONS**



**REGISTER YOUR
ACCOUNT
WITH ERS**

[ERS.TEXAS.GOV](https://ers.texas.gov)



**REVIEW NEW
EMPLOYEE
BENEFITS
GUIDE**



**REVIEW TRS
BENEFITS
HANDBOOK
(RETIREMENT)**



When do I Enroll?

Optional add-on benefits

- Enroll within 31 days of hire – optional coverage begins the first of the following month

Health Coverage

- Enroll within 60 days of hire – health coverage begins on the first of the month, following your 60th day of employment.

Enrollment opens on your 2nd day of employment.

Dependents: Who can enroll?

- Spouse
- Eligible Dependents*



Dependent Eligible Coverage

- Medical
- Dental
- Vision
- Voluntary AD&D
- Dependent Term Life Insurance

***All dependents must be certified through Alight Solutions**



Understanding Your Health Plan Options



BlueCross BlueShield
of Texas

Plan Options

Plan Options		
HealthSelect ^{of Texas}		CONSUMER DIRECTED HealthSelect [™]
Point-of-Service Plan (POS)	Out-of-State Plan	High-deductible plan with Health Savings Account (HSA)



Page 7-22

HealthSelect

of Texas and
Out-of-State

Key Plan Features

- Primary Care Physician (PCP) Required*
- Specialist Physician Referrals Required*
- No deductible
- Copays and Coinsurance
- In-network Preventive Services Covered at 100%

**Out-of-state coverage does not require selection of a PCP or specialist referrals*



Consumer Directed **HealthSelect**

1

High-Deductible Health Plan

- No PCP
- No Specialist Referrals
- Upfront Deductible
- Coinsurance after deductible
- In-network preventive services covered at 100%

2

Health Savings Account - HSA

- Contribute money pre-tax
- Pay for qualified medical & RX expenses tax free
- Earn interest on the account tax free
- TRS monthly contribution



Health Plan Comparison

Benefit Feature	HealthSelect of Texas and Out-of-State		Consumer Directed HealthSelect	
	In-Network	Out-of-Network	In-Network	Out-of-Network
PCP	\$25	40%	20%	40%
Specialty Physicians	\$40	40%	20%	40%
Diagnostic x-rays and lab tests	20%	40%	20%	40%
Routine Preventive Care*	No Charge	40%	No Charge	40%

*Under the Affordable Care Act, certain preventive and women's health services are paid at 100% (at no cost to the participant) dependent upon physician billing and diagnosis.



Prescription Drug Coverage

Benefit Feature	HealthSelect of Texas and Out-of-State	Consumer Directed HealthSelect
Deductible	\$50 for each covered individual	Expenses applied to medical deductible
Copay/Coinsurance	Tiered copays	20% coinsurance after deductible
Mail Order	Yes	Yes
Extended Day Supply	Yes	Yes
Out-of-Network Benefits	Yes	Yes

www.HealthSelectRx.com



Health Insurance Opt-Out Credit

- Up to \$60 credit full-time employees (*\$30 part-time employees*)
- Health coverage equal to or better than that offered (*excluding Medicare & other state health coverage*)

Opting-out waives:

- Medical Insurance
- Prescription Drug Coverage
- \$5,000 Basic Term Life Insurance



Certify and Verify

ERS Child Certification*

- Certify each child when you enroll them in any coverage in ERS Online

Alight Solutions Dependent Verification

- Must verify that each dependent enrolled in health coverage is eligible by providing documentation to Alight Solutions

**Certifying dependents in ERS does not meet standard for verification through Alight Solutions.*



Dental Insurance

Benefit Feature	DeltaCare® USA DHMO	STATE OF TEXAS DENTAL CHOICE TOOTH PPO
Primary Care Dentist (PCD)	Yes*	No
Deductible	No	Yes
Copay/ Coinsurance	Yes	Yes
Maximum Calendar Year Benefit	Unlimited	\$2,000 40% after maximum met



- Lower out-of-pocket at in-network provider
- Add eligible dependents
- Orthodontic coverage – child & adult



**Services must be provided and coordinated through an in-network PCD.*

STATE OF TEXAS VISION

**Lower cost for
routine eye exam**



**Providers
available in
all 50 states**

**Save money using
in-network providers**



\$200

**Allowance
toward frames
or contacts**



or



**You must enroll
before enrolling
eligible dependents**

Life Insurance

- Optional Term Life Insurance
- Dependent Term Life Insurance
- Voluntary AD&D



Page 27-28

Optional Term Life Insurance



Who can enroll?

You only

Premium

Based on coverage selection

Coverage options

Elections 1, 2, 3, or 4

Double indemnity

Yes

Evidence of Insurability

No – 1 & 2 – initial enrollment

Dependent Term Life Insurance



Who can enroll?

Dependent only

Premium

\$1.45 per month

Coverage options

\$5,000

Double indemnity

Yes

Evidence of Insurability

No – during initial enrollment

Voluntary AD&D



Who can enroll?

You only or you plus family

Premium

Based on coverage selection

Coverage options

\$10,000 up to \$200,000

Double indemnity

No

Evidence of Insurability

No

Disability Insurance

Short-term Disability

- Up to 66% of salary
- Up to 5 months
- 14 day waiting period

Long-term Disability

- Up to 60% of salary
- 12 months up to Social Security retirement age
- 180 day waiting period



Enroll in one or both.

- ❖ Must use all available sick leave before eligible for pay out
- ❖ Pre-existing conditions subject to certain exclusions

Flexible Spending Accounts - FSA

- Health Care
- Limited-Purpose
- Dependent Care

Where to start....

- **Determine** the type of FSA you need and your annual expenses.
- **Divide** expenses by the number of paychecks you receive in a plan year.
- **Enroll** and set aside the amount pre-tax in a spending account for eligible expenses.

Health Care FSA

TEXFLEX



Who can participate?

Employee and tax dependents

Eligible Expenses

Medical, Dental, Vision, and
Prescription Drugs

Pledge Amounts

\$180 up to \$3,300

Debit Card

Yes

Carryover

Up to \$660

Limited- Purpose FSA

TEXFLEX



CONSUMER DIRECTED
HealthSelectSM

Who can participate?

Employee and tax dependents

Eligible Expenses

Dental and Vision only

Pledge Amounts

\$180 up to \$3,300

Debit Card

Yes

Carryover

Up to \$660

Dependent Care FSA

TEXFLEX



Who can participate?

Dependents only

Eligible Expenses

Dependent care expenses

Pledge Amounts

\$180 up to \$5,000

Debit Card

No

Carryover

None; 2.5-month grace period

TRS Defined Retirement Benefit Plan

- 8.25% mandatory pre-tax monthly contribution
- Earn service credit toward retirement eligibility
- Lifetime annuity
- No loan options



Contact:

Alejandro Martinez

www.trs.texas.gov

TEXA\$AVER



TEXA\$AVERSM
401(k) / 457 Program

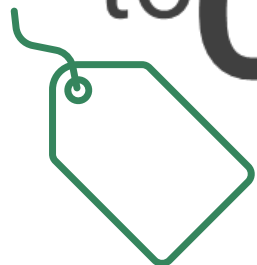
- 401(k) or 457 Program
- Pre-tax contribution
- Automatically enrolled at 1%
- Transfer funds



Page 33

Discount Purchase Program

Treat
Yourself
to **Cool
Deals**



DISCOUNT
Purchase Program
administered by BENEPLACE



Ready to Save?

- Shop online for discounted prices
- No membership fee
- Just shop and save!



Questions

NEED ASSISTANCE?

Benefits & Leave Coordinators

EmployeeBenefitLeave@trs.texas.gov

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a courtyard area with several rectangular concrete planters containing various plants and trees. The entire image is covered with a semi-transparent blue overlay.

12:15 to 1pm – Optional Benefits Q&A
1:10pm – Afternoon Orientation Session Begins

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, jagged, stone-like material, standing on a concrete base. The sculpture is surrounded by a landscaped area with low concrete walls and some greenery. The entire image is overlaid with a semi-transparent blue filter.

Ice Breaker

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, textured material, possibly bronze or stone, standing on a concrete base. The sculpture has several sharp, upward-pointing peaks. The entire scene is overlaid with a semi-transparent blue filter. A white rectangular box with a thin border is centered over the image, containing the text "Ethics and Compliance".

Ethics and Compliance

Ethics & Compliance Team



Heather Traeger

General Counsel &
Chief Compliance
Officer



Chris Bowlin

Sr. Compliance
Counsel



MaryEllen O'Neill

Mgr. Data Risk &
Compliance / Privacy
Officer



Michael Schaff

Compliance
Counsel



Adam Costa

Sr. Compliance
Officer



Carlos Montoya

Compliance
Officer



Elena Barreiro

Compliance
Officer



Soha Khan

Data Governance
and Ethics
Compliance Officer

Email: TRSCompliance@trs.texas.gov

Site: <https://trstexas.sharepoint.com/sites/legalhub/SitePages/Ethics-and-Compliance.aspx>

Day-to-Day Compliance Obligations

Agenda

- Gifts and Entertainment: Permissive Benefits
- Gifts and Entertainment Reporting
- Outside Business Activities
- Confidential information
- Material Non-Public Information (MNPI)
- Personal Trading
- Insider Trading
- Protected Health Information (PHI)
- Protecting all Confidential Information
- Fraud, Waste & Abuse
- Reporting Options



Day-to-Day Compliance Obligations: Gifts/Entertainment

An employee **shall not** solicit, accept, or agree to accept from any donor a benefit that:

- Is a consideration for the employee's decision, opinion, recommendation, vote or other exercise of discretion.
- Is a consideration for a violation of a duty imposed by the law.
- Might reasonably tend to influence the employee in the discharge of their duties.
- Is not identified or the employee knows or has reason to know the benefit is offered through an intermediary.
- Creates a foreseeable conflict of interest.

An employee may accept certain benefits under \$50 if they are infrequent, unsolicited and meet certain requirements.

Benefits Examples

Gifts



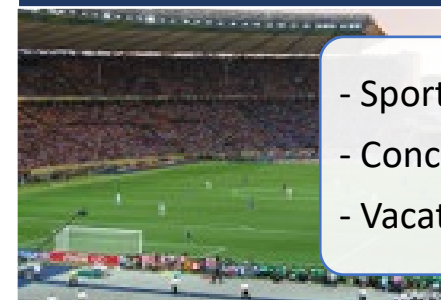
- Any items regardless of value

Cash



- Cash
- Gift Cards
- Stock

Entertainment



- Sporting Events
- Concerts
- Vacations

Day-to-Day Compliance Obligations: Gifts/Entertainment

An employee may accept certain benefits **under \$50** from a Restricted Donor if they are infrequent, unsolicited and meet certain requirements.

Restricted Donor:

- Persons or entities with which TRS does business;
- Persons or entities seeking to do business with TRS or with whom TRS is considering doing business;
- Non-publicly traded entities in which TRS invests or is considering investing;
- Publicly traded entities in which TRS invests or is considering investing, but only if the Employee knows that the publicly traded entity is interested in or likely to become interested in a TRS contract, purchase, payment, claim or transaction;
- Persons or entities seeking official action from TRS; or
- Any other person or entity who gives the Benefit because of the Employee's official position with TRS.



Day-to-Day Compliance Obligations: Gifts/Entertainment Ethics Reporting Log (ERL)

Business Meals

- Is the business meal **over \$100** per person?
- If yes, **report** it on the ERL

Gifts

- Is the gift \$50 or more?
- If yes, **report** it on the ERL and **return** to sender

Entertainment

- Executive Director's approval required
- **Contact** TRS Compliance for guidance

Ethics
Reporting
Log

Ethics
Reporting
Log

Day-to-Day Compliance Obligations: Outside Business Activities (OBA)

- Outside Business Activities are:
 - business or employment activities, whether compensated or not, including self-employment;
 - volunteer activities where the employee owes fiduciary duties.
- Prior approval is required.



Are you planning
to or currently
engaged in OBA?

Submit an OBA
form

Review

Decision

Day-to-Day Compliance Obligations: Confidential Information

Confidential information is that information that is identified as such by federal or state law, TRS policies and procedures, as well as information typically excepted from public disclosure through specified statutory carve outs or through decisions by the Open Records division of the Texas Office of the Attorney General. Access to this information should be very limited; it should be limited to a “need to know” based on your role at TRS.

Employees are required to:

- Only request and be given authorized access to Confidential information only when access is necessary to perform their assigned duties to conduct TRS business. (“Need to know” basis)
- Protect Confidential information from unauthorized disclosure and not disclose or provide access to Confidential information except as permitted by law, regulation, or rule, or TRS policies and procedures.
- Only disclose the minimum amount of Confidential information necessary to accomplish the purpose of the disclosure.

Two examples of information Confidential by law we are going to look at:

- MNPI
- PHI

Day-to-Day Compliance Obligations: MNPI

Definition

MNPI is information that is both:

- Not yet publicly known about a company
- Likely of being considered important to an investor when making an investment decision regarding a security of the company.

CONFIDENTIAL

Your Role at TRS

- Treat all MNPI on a need-to-know basis and keep highly confidential.
- If you have MNPI about a security, you:
 - may NOT participate in investment decisions regarding the security on behalf of TRS or conduct a Personal Securities Transaction regarding the security, and
 - must provide a Conflict-of-Interest form if you have a personal interest in a security related to the MNPI.

Employees are required to **contact Investment Compliance** IMDCompliance@trs.texas.gov as soon as you come into possession of MNPI.

Day-to-Day Compliance Obligations: TRS Personal Trading Policy

- TRS takes an active role in preventing **front running** and **insider trading** by individuals who have access to, or knowledge of, potential TRS trades or **material non-public information**.
- The Trading Policy **applies to ALL TRS employees and certain Non-TRS Workers**.
- The TRS Trading Policy outlines the requirements for personal trading and can be found on the Investment Compliance intranet site at:
https://trsnet/Pages/legal_compliance.aspx



Day-to-Day Compliance Obligations: Insider Trading

Insider Trading:

- is buying or selling a security in breach of a legal or fiduciary duty while in possession of MNPI about the security
- pertains to trades conducted on behalf of TRS as well as TRS employees' personal trades
- is a very serious crime that can result in severe civil and criminal repercussions for both the employee and TRS, such as sanctions and jail time



Employees with knowledge of insider trading must promptly report the violation to the Chief Compliance Officer, Executive Director or by contacting the TRS hotline

Day-to-Day Compliance Obligations: Personal Trading and Brokers



Consult with Investment Compliance or your attorney if you think you have MNPI before you conduct a securities transaction.

Covered Persons are (1) Key Employees, (2) Investment Management Division Employees, (3) Legal & Compliance Employees who work primarily on TRS investments; (4) Non-TRS Workers assigned to the Investment Management Division or to Legal & Compliance to work primarily on TRS investments or investment compliance; and (5) Employees designated as a Covered Person by their department head or the Chief Compliance Officer.

Personal Trading

- TRS uses software to monitor and review personal trading activity of Covered Persons.
- Covered Persons must submit initial certification within 30 days of start.

Approved Brokers:

- | | |
|------------------|---------------------|
| • Charles Schwab | Fidelity |
| • Goldman Sachs | Vanguard |
| • Raymond James | Interactive Brokers |
| • Merrill Lynch | Wealthfront |
| • RBC Wealth | |

Day-to-Day Compliance Obligations: Protected Health Information

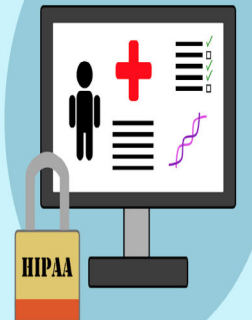
The Health Insurance Portability and Accountability Act of 1996 (HIPAA) sets forth **requirements for Covered Entities (such as TRS) to protect individual health information (Protected Health Information)** from being disclosed without the individual's consent.

Protected Health Information (PHI)= Individually identifiable Information (e.g. name, address, SSN, DOB, etc.) + health information.

- Health information examples: member health plan enrollment information, member health enrollment card, member claims data.
- All TRS employees are responsible for ensuring the protection of all member PHI.
- All requests for uses and disclosures of PHI must be approved by the TRS Privacy Officer: Privacyofficer@trs.Texas.gov

CONFIDENTIAL

Health Data
Privacy



Day-to-Day Compliance Obligations: Maintaining/Guarding Confidential Information

If you encounter PHI, MNPI, or other Confidential information, regardless of whether it is part of your job, you have the responsibility to protect it.

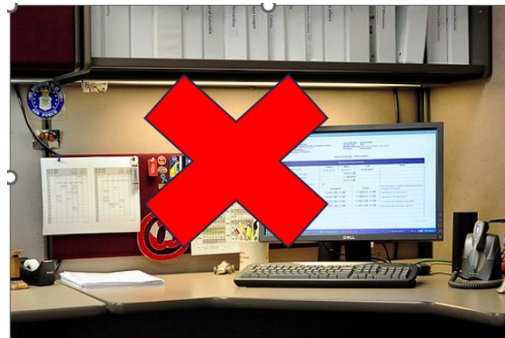
If you have questions, or a concern, contact the TRS Privacy Officer:
PrivacyOfficer@TRS.Texas.gov



Employees are the key. If you are away from your desk, your computer, your file cabinets (whether working at a TRS office or remotely **including your home**,) lock them.



Never put Confidential information in your trash or recycle bin. It must be placed in a secure shred bin. These bins are in every office and can be recognized by the lock on the bin.



A clean desk is a happy desk. Keep your workspace clear of all Confidential information whenever you are away from your workstation.

Day-to-Day Compliance Obligations: Fraud, Waste and Abuse Policy (FWAP)

Fraud



Use of one's employment or business relationship with TRS either for the improper or unauthorized:

- Personal third-party enrichment or advantage
- Detriment to TRS, through the deliberate misuse or misapplication of TRS processes, resources, or assets.

Waste



May be the result of unintentional actions, thoughtlessness, or carelessness

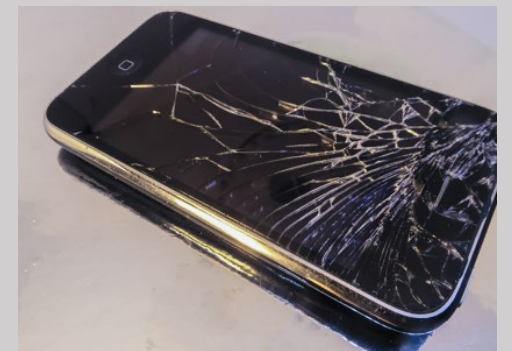


Abuse



Is the intentional excessive or the intentional improper use of TRS resources to the detriment or potential detriment of TRS.

Like **Waste**, a single act of abuse may not be to the detriment of TRS, but an accumulation of such acts can be.



Day-to-Day Compliance Obligations: Work Ethics / TRS Fraud Ethics Hotline

IF YOU SEE
SOMETHING,
**SAY
SOMETHING.**



Employees can make a verbal or written report to any of the following:

- Senior Leadership Team
- Manager
- Compliance
- Fraud and Ethics Hotline
 - <http://trstexas.ethicspoint.com>
 - **1-866-897-5071**
 - Gives the option to remain anonymous
- Texas State Auditor's Office
 - <https://sao.fraud.texas.gov/>



WELCOME
TO
TRS

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, textured material, possibly stone or metal, with several sharp, pointed peaks. The sculpture is situated in a landscaped area with concrete steps and low walls. The entire image is overlaid with a semi-transparent blue filter.

Security and Safety

Who we are and what we do.

Security & Facilities Management is dedicated to maintaining a clean, comfortable, and safe environment for all TRS personnel and visitors.

Hours: 24 hours a day, 7 days a week

- * Enforce Security and Safety Policies
- * Monitor TRS Facility Activities
including building alarms & security cameras
- * Respond to Emergencies
for Safety and Medical events
- * Provide Operational Support



Physical Security ID Badge Access

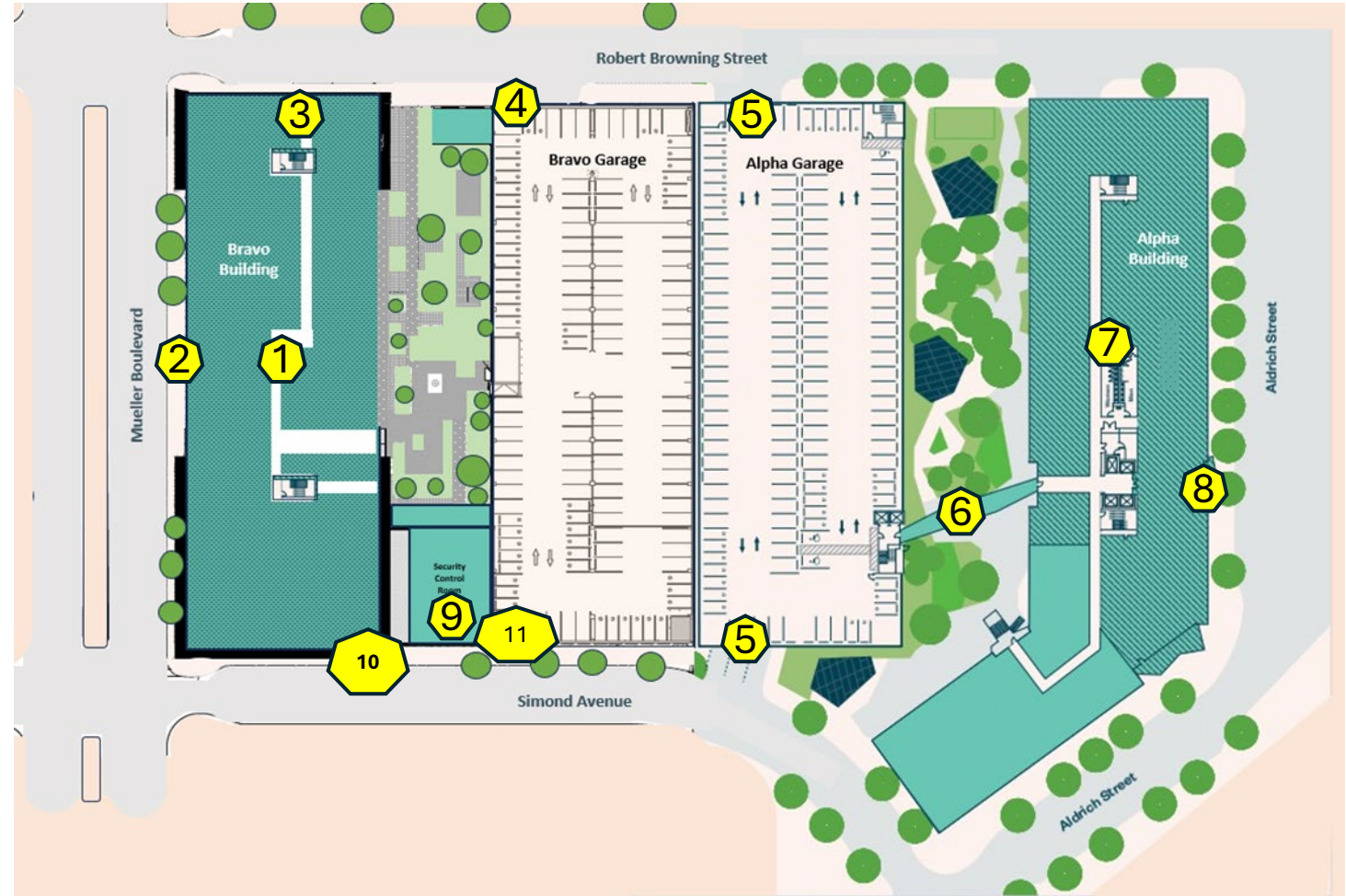
ID ACCESS

- TRS Security Department is responsible for issuing identification badges and managing building security access
- **ID Badge Visibility:** Always wear your TRS ID badge visibly on TRS property or while conducting TRS business
- **Personal Responsibility:** You are responsible for your badge and access use. Misuse will be reported to management.

*Please note:

- Each employee **must** use their own ID to gain access to TRS – tailgating is NOT allowed.

Location	Number
BRV Building	1
Mueller Entrance	2
BRV N. Stairwell	3
BRV Garage Entrance/Exit	4
ALP Garage Entrance/Exit	5
ALP Skybridge	6
ALP Building	7
Aldrich Entrance	8
BRV Security Control Room	9
Member Drop Off	10
Access from Garage	11



Alpha Parking

TRS does not own the Simond Avenue (Alpha) Garage

Parking garage entrance on Simond Avenue



Parking garage entrance on Robert Browning Street



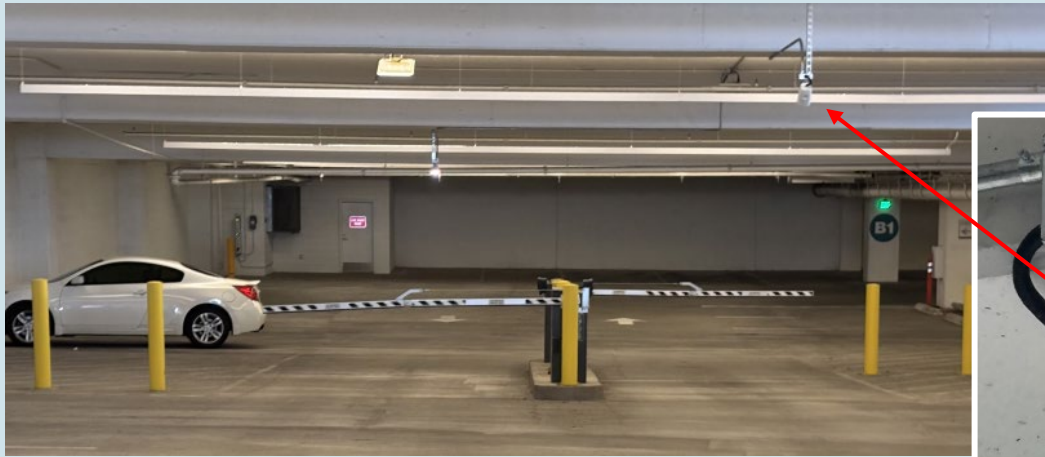
1 entrance and 2 exits – Access by rear License Plate Reader

Note Address - 1601 Robert Browning, Austin, Tx 78723

Alpha Designated Nesting Stations

Access to nesting stations are read by a rear License Plate reader

To B1-B2 Nesting Stations from Simond Avenue



235 TRS Exclusive parking spaces on lower levels B1-B2

To G2-G6 Nesting Stations Robert Browning Street

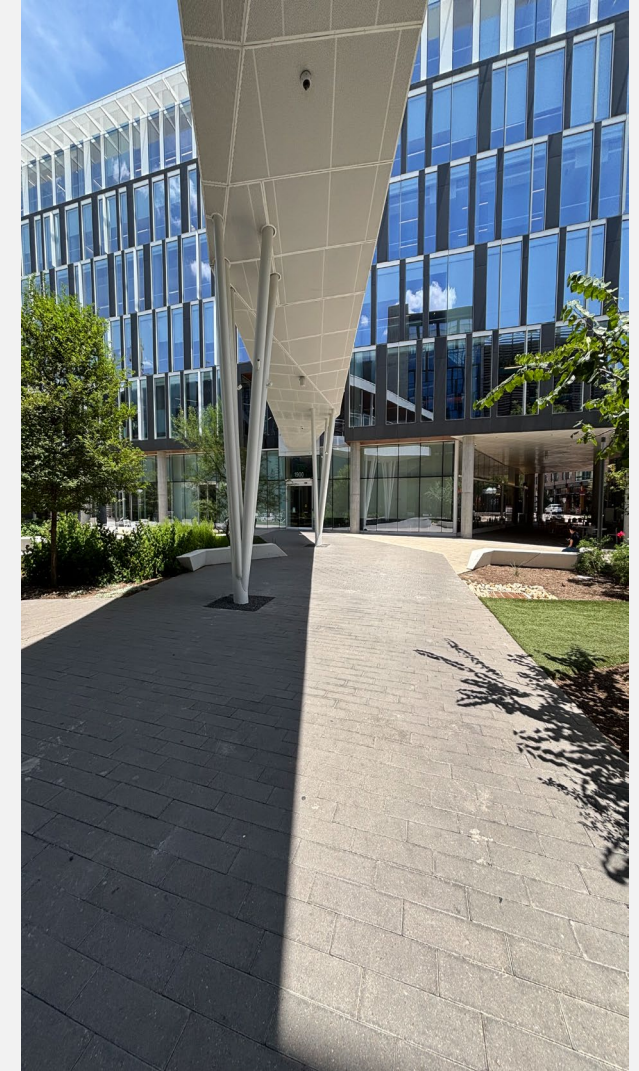


550 TRS Shared parking spaces on upper levels G2-G6.

Only 1 vehicle may pass with each gate lift

Alpha Garage Access to Building

Skybridge on G3 or Courtyard on G1



Bravo Parking

TRS owns the Bravo Garage



Parking Entrance & Exit on Robert Browning Street

Only 1 vehicle may pass with each gate lift

No Smoking/No Idling

Emergencies – Use Stairwell 4

Bravo Garage Address - 1517 Robert Browning, Austin, Tx 78723

Bravo Parking Access

Access by Toll Tag Reader or TRS ID

Use TRS ID badge to enter



Transcore Reader will read Toll Tag



Any Issues - Please press the call button on the access panel above the badge reader and Security Control will assist you.

Bravo Designated Parking

Member & Visitor Parking
G1 and Ramp leading to G2

Employee Parking
G2 thru G6.

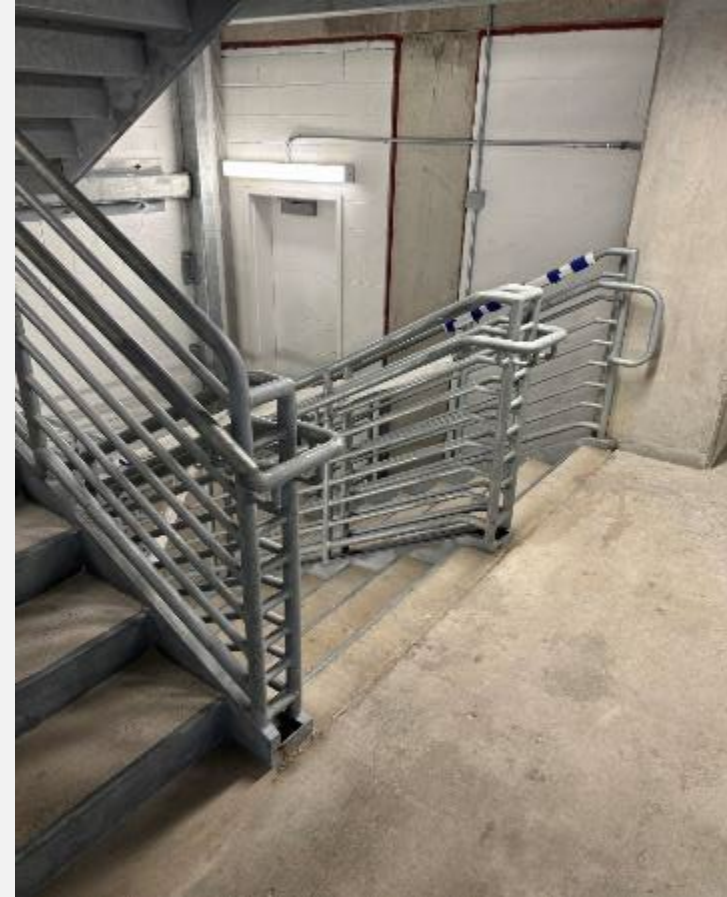
**Employees should never park
on G1 or Ramp as that is
reserved for Members &
Visitors.*

Speed Limit = 5mph



Go Slow and Keep Watch around corners!

Bravo Garage Access to Building



*Convenient Door Access – G3 down into Building Level 2

**This is not part of the evacuation egress from the building*

Register for Parking

Service Highlights
Section

or

See your New
Employee Tool
Kit.



Get Involved Highlights

- ... Diversity and Inclusion
- ... Go Green Committee
- ... Safety Committee
- ... Veteran Services
- ... Wellness Committee
- ... SECC



Service Highlights

- ... Submit a Service Desk Ticket
- ... Employee Directory
- ... Parking At TRS? Register Vehicle Here!
- ... Recharge Zone



Training Highlights

- ... TRS Lunch and Learns
- ... TRS Study Hall
- ... TRUST Information and Training
- ... Procurement and Contracts

Register for a parking pass (Continued)



Vehicle Parking & Garage Access Registration

Employee Information:

*Employee Name:	Guzman, Derrick	*Email:	Derrick.Guzman@trs.texas.gov
*Department:	4280 - EX-SAFETY AND SECURITY	*Account Type:	State Employee
*Access Type:	Select an item Alpha Garage Access Bravo Garage Access Opt-Out TRS Parking		

If any Employee Information is missing, please contact the TRS Helpdesk for assistance.

Submit

3 Options

Alpha Parking Option



Vehicle Parking & Garage Access Registration

Submit Date: 8/7/2025
Form ID: _____

Employee Information:

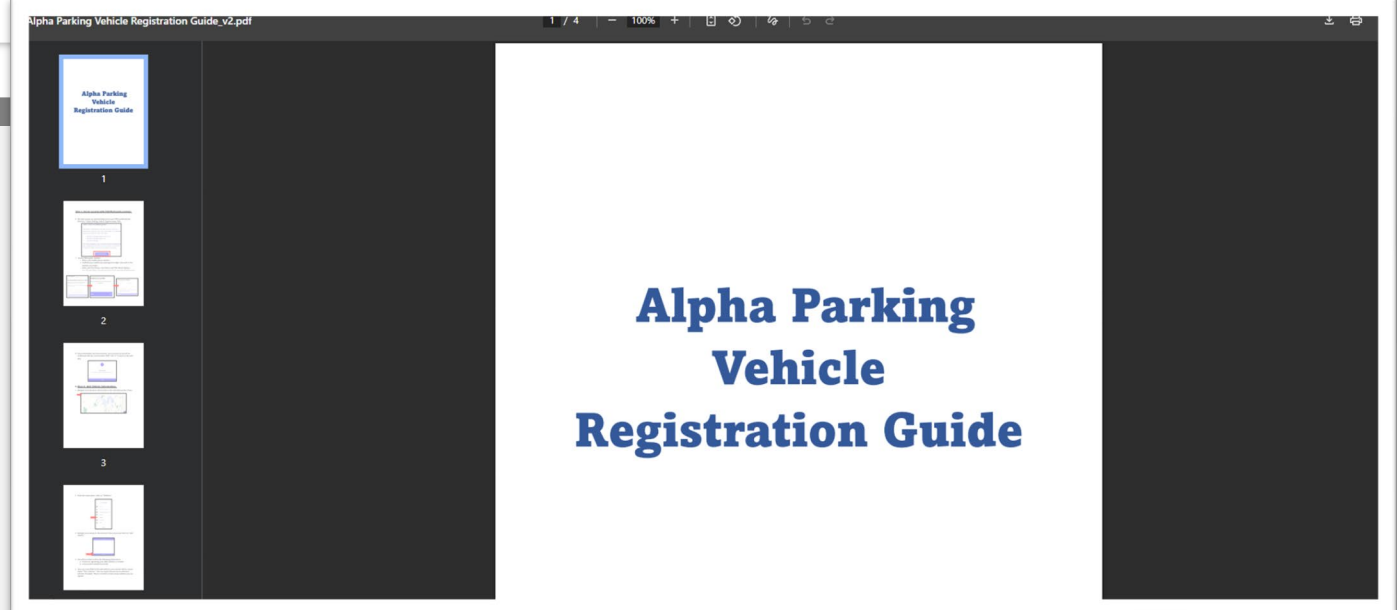
*Employee Name: Ramirez Garcia, Andrea *Email: Andrea.RamirezGarcia@trs.texas.gov
*Department: 4280 - EX-SAFETY AND SECURITY *Account Type: State Employee
*Access Type: Alpha Garage Access ▼

There is a new management company for the parking garage associated with the Alpha Building. You will need to complete the Metropolis registration process.

Any vehicles not registered by November 14, 2024, may be subject to parking fines.

If you need assistance with the registration process, you can utilize this [step-by-step guide](#). If you have any questions, please contact [DL Alpha Parking](#).

If any Employee Information is incorrect, please submit a [TRS Service Portal](#) for correction.



Register for Alpha parking (Simond Ave Garage – Metropolis)

Alpha Parking Garage Registration:

You will receive an email from Metropolis containing a TRS – specific registration link for your vehicle. Using the provided link ensures you won't be charged any fees.

If you have any questions, concerns, or did not receive the link please email alphaparking@Trs.Texas.Gov.



Join TRS on Metropolis

Welcome to Metropolis. We use drive-in, drive-out technology to get you on your way faster. Your parking access, provided by TRS, includes:

- Simond Garage Upper Levels 2-6
- Simond Garage Basement
- Simond Garage

You must register your vehicle before entering the lot. Unregistered vehicles will be subject to receiving a violation, which may include towing or booting.

[Claim parking](#) →

Have a question? Get [support](#).

Thanks!
-The Metropolis Team

Register for a parking (Bravo)

Enter your vehicle Information and click submit.

Employee Information:

*Employee Name: Guzman, Derrick *Email: Derrick.Guzman@trs.texas.gov
*Department: 4280 - EX-SAFETY AND SECURITY *Account Type: State Employee
*Access Type: Bravo Garage Access

If any Employee Information is incorrect, please submit a [TRS Service Portal](#) for correction.

Current Vehicle Information:

Vehicle Information: Please Add, Update or Delete Vehicle Information and Click Submit when finished. Maximum of 4 vehicles. Vehicle registration is for Red River parking only.

+ Add Edit X Delete Refresh

Selected Filter: Default Quick Search: All fields

TRSID	MAKE	MODEL	YEAR	COLOR	LICENSE PLATE NO.	CLASSIFICATION	TOLL PROVIDER	TOLL TAG NO.	STATUS
TRSKBS	Ford	F-150	2017	White	PNT9794	Standard			Active
TRSKBS	Nissan	Altima Coupe 2.5S	2012	White	TTC8876	Standard			Active
TRSKBS	Nissan	Altima	2020	Black	RWT4413	Standard			Active

Submit

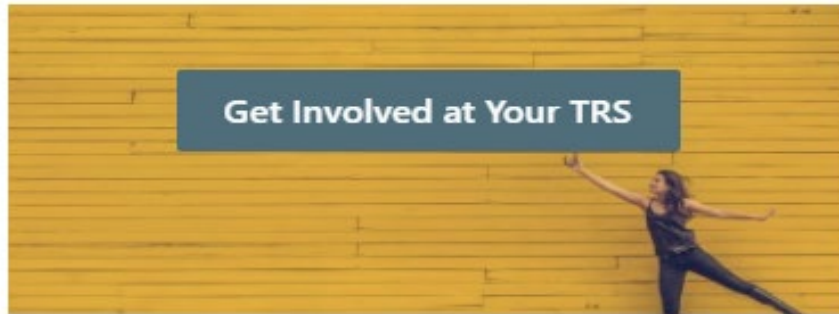
Safety Committee



Department Safety Officers (DSOs) are located on each floor and are trained to assist in:

- Emergency situations and drills
- Spreading awareness and safety information
- Maintaining a safe and secure work environment

Accessing the Safety Handbook



Get Involved Highlights

- ... Diversity and Inclusion
- ... Go Green Committee
- ... Safety Committee**
- ... Veteran Services



Safety Emergency Response

Please refer to the Safety Handbook located on the intranet for additional information regarding safety procedures

Alpha Bravo Emergency Supply Locations

In Hallways:

- 1 AED
- 2 DSO Supply Cabinet

Outside Main Restrooms:

- 3 First Aid Center



First Aid Supply Cabinets



Located on every floor near the Restrooms

Band-Aids/Gauze

Antiseptic Wipes

Cold Pack

Aspirin/Tylenol

Eye wash/patch

Bandage/Wrap

Antibiotic Ointment

Hydrogen Peroxide

First Aid Cream

In a Medical Emergency



Security and Safety

Call EMS: 9-1-1

TRS Security receives an alert notification when 911 is dialed from TRS desktop phones. This helps ensure Security can assist the responders to the emergency area.

Stay on the line with the dispatcher

Shout out for help from co-workers near by

Assist if you are able and willing

Notify your DSO and/or supervisor once emergency personnel have arrived

For further guidance and information please visit the TRS Safety site or review the Safety Handbook.

***Please note:** if you accidentally dialed 911, please stay on the line to inform the operator that it was an error.



Building Evacuations

Security and Safety

Proceed to the Stairs

Descend on the right side of the stairwell – move swiftly but safely.

Mobility Impaired

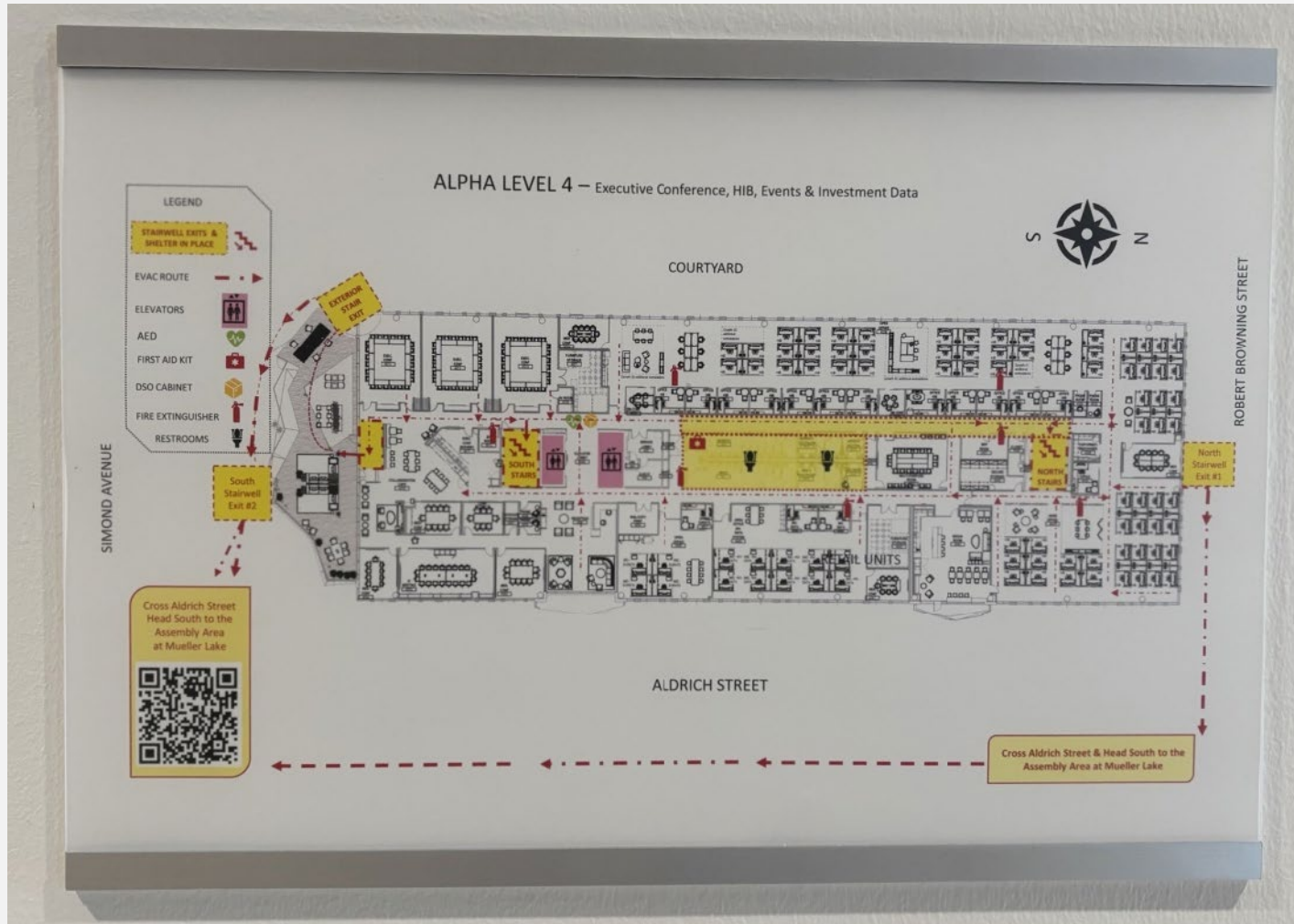
Follow the DSO guidance. Report to the stairwells, find an evacuation buddy or DSO, descend on the right side of the stairwells. Please notify Security of your status.

Get Out

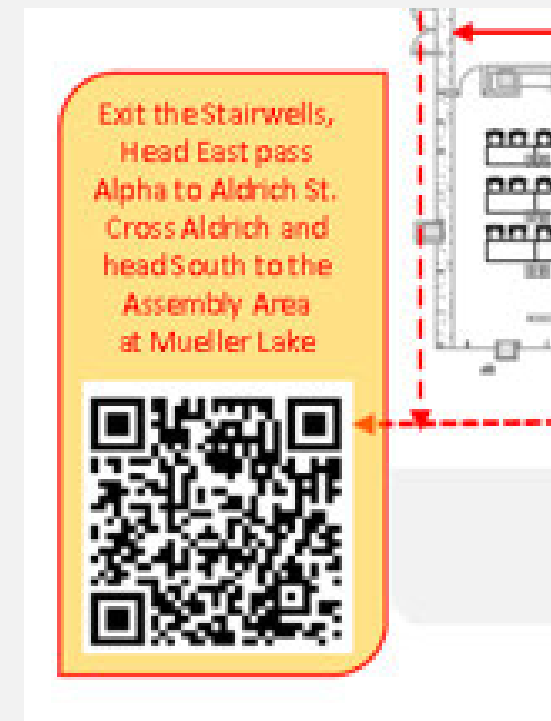
Report to your assigned assembly area to check in

Security and Safety

Evacuation Routes are located outside stairwells on every floor



QR Code – Assembly Area
This an open source QR code that will help you get to the Assembly Area at Lake Mueller.



ALPHA - BRAVO Evacuation Routes & Assembly Area



El Paso Evacuation Routes

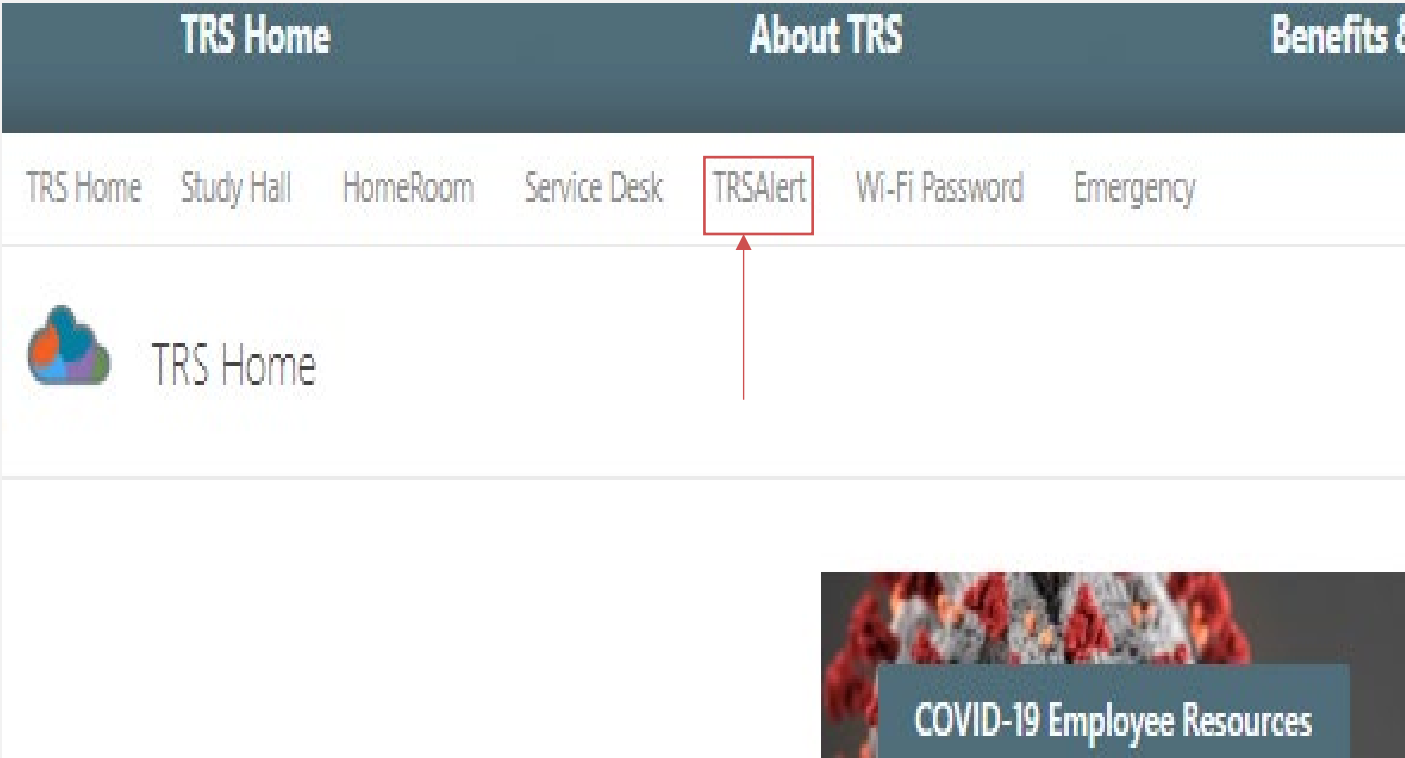
ESC Region 19 Evacuation Plan



As tenants in the ESC 19 Building, we follow their evacuation procedure



Sign up today!



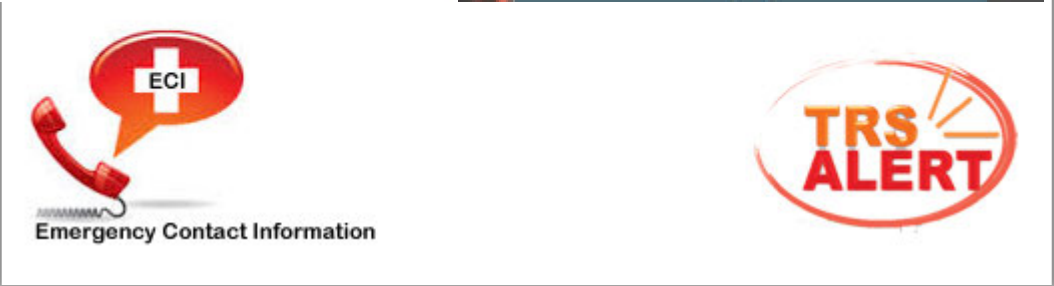
TRSA Alert

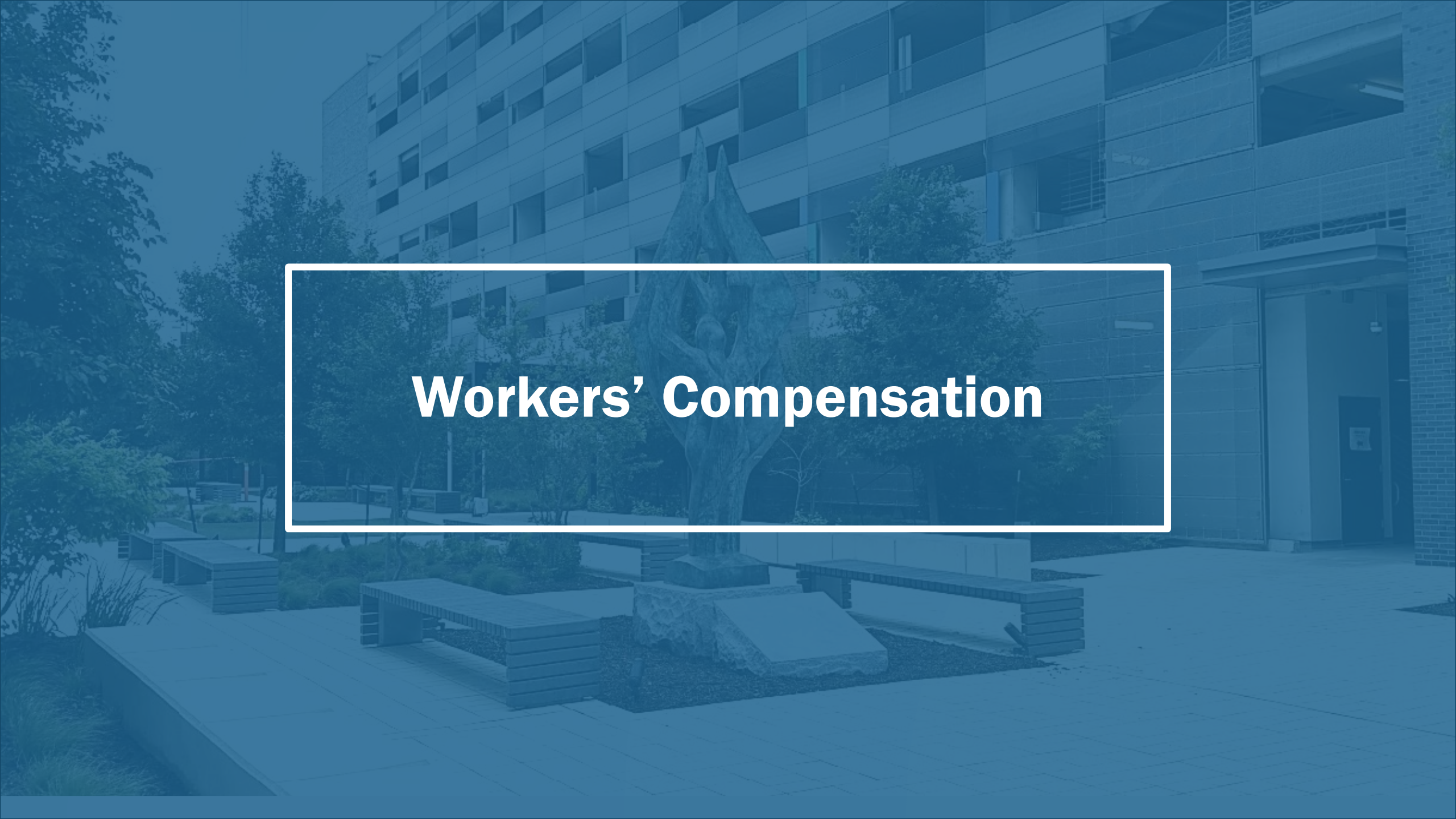
Mass notification system used to alert you of operational delays and any other TRS-wide emergencies that would impact staff. Your work email and TRS-issued cell phone are auto enrolled in TRSA Alert. In order to receive TRSA Alerts on your personal devices you must register them.

Emergency Contact Notifications

Allows TRS to contact your family or other individuals you indicate if you are involved in a personal emergency while at work.

Please be sure to sign up to get critical alerts!



The background image shows a modern building with a grid-like facade of windows and balconies. In the foreground, there is a paved courtyard area with several low, rectangular concrete benches. A large, abstract sculpture made of dark, textured material stands in the center of the courtyard. The entire image is overlaid with a semi-transparent blue filter.

Workers' Compensation

The Workers' Compensation Process

- Reporting an Injury

Report injuries to your supervisor or other management immediately.

- Forms to be Completed and Returned

Forms will be sent to your personal email. Must be completed and returned with 5 days of receipt.

- State Office of Risk Management (SORM)

Workers' Compensation claims are filed with and determined by the SORM.

- Designated Healthcare Network

CareWorks CompKey Plus HCN

www.careworks.com

[800-580-1314](tel:800-580-1314)

Workers' Compensation Contacts



Derrick T. Guzman
WC Coordinator
512-542-3506
Derrick.Guzman@trs.texas.gov



Cynthia Walker
Benefit & Leave Coordinator
512-542-6892
[EmployeeBenefitLeave @
trs.texas.gov](mailto:EmployeeBenefitLeave@trs.texas.gov)



State Office of
Risk Management
512-475-1440
www.sorm.texas.gov



A blue-tinted photograph of a modern building courtyard. In the center, there is a large, abstract sculpture made of dark, textured material, possibly bronze or stone, featuring a central figure with outstretched arms. The sculpture is set on a raised, rectangular base. The courtyard is paved with light-colored, rectangular tiles. In the background, a multi-story modern building with large windows and balconies is visible. The text "The End" is centered in a white box with a thin white border.

The End

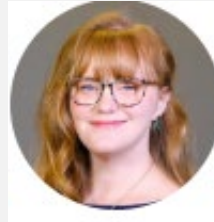
The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, jagged, stone-like pieces. The sculpture is surrounded by a low, rectangular concrete base. The entire scene is overlaid with a semi-transparent blue filter. A white rectangular box is centered over the image, containing the text "Information Security".

Information Security

Information Security Department



Frank Williams
Chief Information Security Officer (CISO)



Kristi Glasgall
Deputy Chief Information Security Officer (CISO)

Operations & Infrastructure

Ensures TRS digital data is defended from unauthorized digital attacks, access, and damage

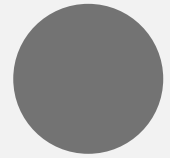
- Oversee the prevention of data infringement
- Monitor and respond to cyber-related threats and attacks
- Direct the analysis and assessment of infrastructure and application vulnerabilities
- Recommend solutions and best practices

Threat & Risk Management/Fraud

Ensures TRS digital and physical data is safeguarded from unauthorized use, disruption, and modification

- Develop and implement strategies, policies, procedures, and solutions
- Direct and determine enterprise-wide information security standards
- Ensure all information systems are functional and secure
- Prevent unauthorized transactions using fraud detection system and continuous monitoring

Why Information Security?



Required by Law – State, Federal

TX Penal Codes, HIPAA/HITECH, IRS, CJIS, SEC



Regulations, Compliance

TAC 202, Internal/External Audit, Policies



TRS Data at Stake

Retirement, Medical, Investments



The background of the slide is a faded, semi-transparent image of the Texas state flag, which features a white five-pointed star on a blue field, with white and red horizontal stripes. The flag is shown waving. Dark blue L-shaped corner graphics are present in the top-left, top-right, bottom-left, and bottom-right corners of the slide.

TRS is Texas' largest public retirement system

6th largest in U.S. public pension plans

Top 25 in the world

Crown Jewels

Information Security is here to protect TRS' most important assets:



Pension Information



Health Information



Proprietary Code

**Governance &
Compliance**

**Security
Monitoring**

**Incident
Response**

**Security
Awareness**

**Risk
Management**

Security Statistics at a Glance

1,007,894

blocked websites



23,763

attempted network intrusions



3,179

email/web virus detections



LAST
7
DAYS

28,834

web application firewall
events blocked



2-4

average number of
security investigations



2-4

average number fraudulent account access

Password/Passphrase Security



Instead of using a passWORD,
try using a **passPHRASE!**

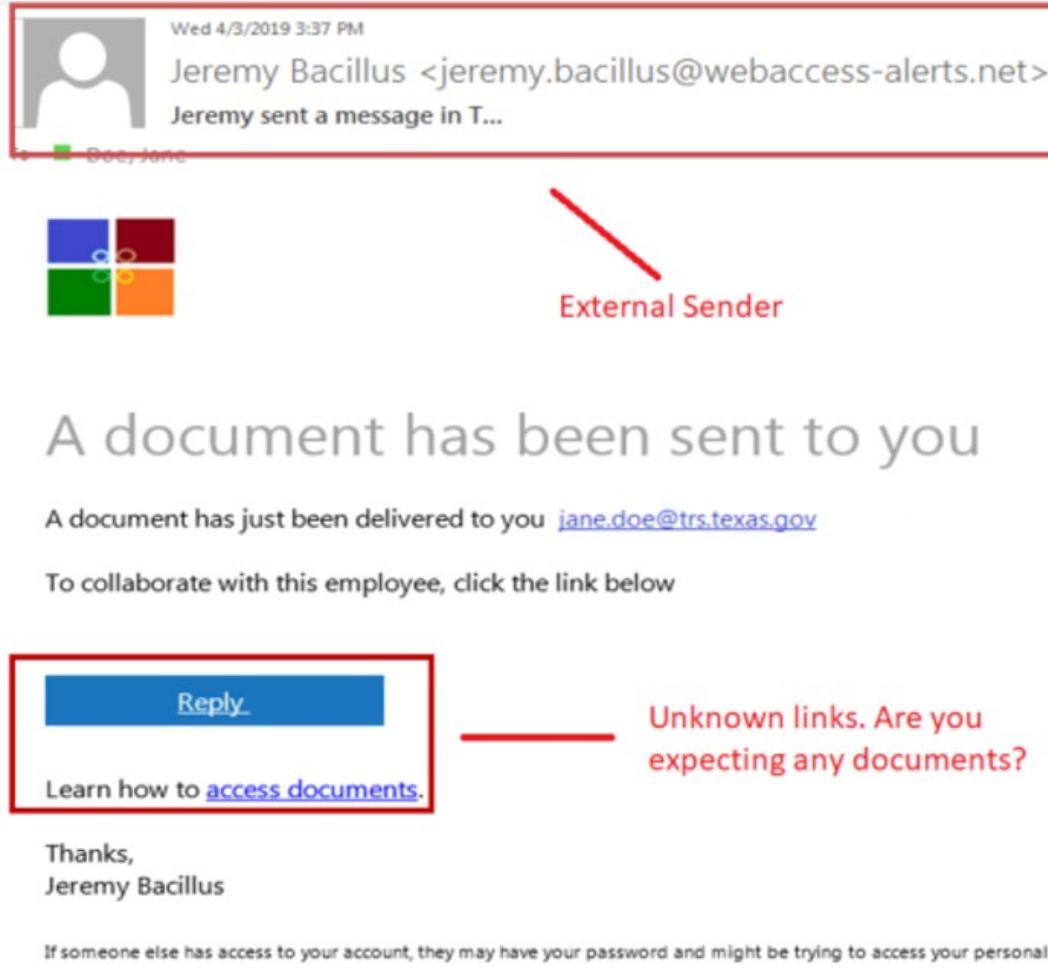
examples: **Cowboys+Butter=Heaven**
Cowboys+Butter=Heav3n

Passwords are tested for weakness and are
required to be changed **every 90 days!**



No one in IT or IS will ever ask for your password, so if that occurs, report it!

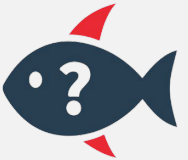
Phishing Awareness



Phishing is when bad actors send malicious emails designed to trick you into falling for a scam - and InfoSec wants you to stay vigilant against them by:

- THINKING BEFORE YOU ACT!
- BEWARE OF URGENT CALLS TO ACTION!
- EXERCISING CAUTION ON EMOTIONAL APPEALS!
- IF IT'S TOO GOOD TO BE TRUE, IT PROBABLY IS!

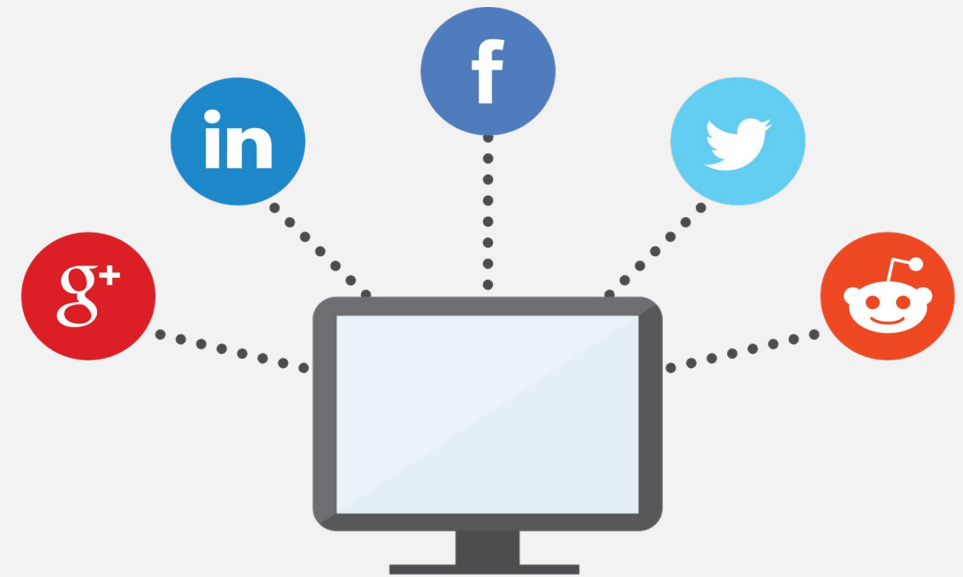
Have a suspicious email?
Click **Report Phishing** button
or
forward it to **Phishing@trs.texas.gov**



CAUTION: This email came from outside TRS. Do not click links/open attachments unless you know the sender and the content is safe.

Safe Social Media Habits

- We monitor **all internet traffic** on TRS networks
- Please review the **TRS Social Media Policy**
- Be mindful of what you post - **DO NOT POST PHOTOS OF YOUR BADGE ONLINE!**
- If you see something odd or suspicious, report it to your manager and InfoSec
- While working remotely, **all policies apply**
- TRS blocks search engine ads because they can lead you to a malicious site



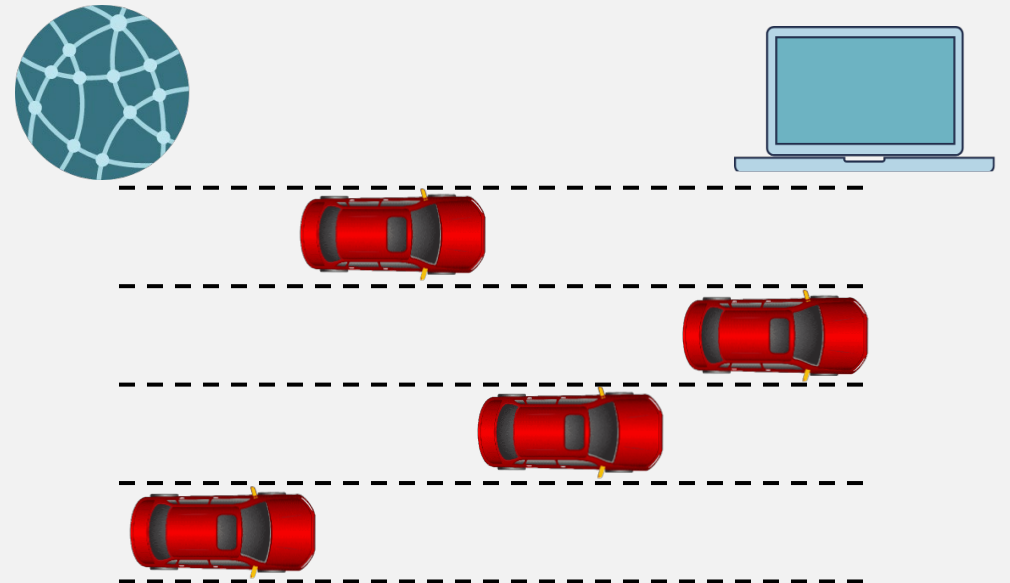
Telework

- If you need to work remotely, contact your manager and OE
- All cloud services (Slack, DropBox, GitHub, etc.) and apps must be approved by TRS before use
- Remember to connect to VPN at least once a week throughout the workday

TRS bandwidth guidelines:

10 Mbps (minimum)

25 Mbps (recommended)



Other Useful Details

A CLUTTERED DESKTOP IS A CLUTTERED MIND!
Remember the **CLEAN DESK POLICY!**

If you receive any suspicious
emails or security alerts,
DON'T CLICK! CONTACT US!

For more information, drop us a line
InfoSec@trs.texas.gov

Remember to lock your computer
when stepping away!

QUESTIONS?

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, textured material, possibly stone or metal, standing on a raised platform. The scene is surrounded by trees and greenery. The entire image is overlaid with a semi-transparent blue filter.

Thank You!

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a courtyard area with several rectangular concrete planters containing various plants and trees. A large, abstract sculpture is visible in the center of the courtyard. The entire image is covered with a semi-transparent blue overlay.

Records & Information Management

Records Management

TRS employees are responsible for maintaining records.

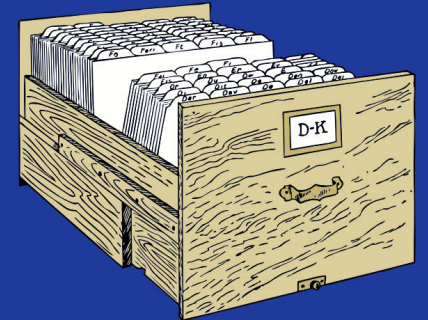


Public Information Act (Gov. Code, Chapter 552)

The requirement to produce public information when requested.

State Records Management Laws (Gov. Code, Chapter 441)

State laws related to the preservation and management of state agency records.



Open Meeting Act, Gov. Code, Chapter 551)

Requires government agencies to keep official business open to the public.

What is a Record?

Information you need to do your job



Recorded information in any format



Created or received by or on behalf of a state agency



Documenting activities in the conduct of state business or use of public resources

Records Retention Schedule

- How all records are managed across the agency (digital and physical)
- A listing of all records created or received by TRS with instructions on how long to keep them

OPS5000 Project Management			
<i>AIN</i>	<i>RS Title</i>	<i>Period</i>	<i>Archival</i>
OPS5000	Project Management	AC+6	
Records related to monitoring and managing the activities and progress of projects and internal initiatives, including business case, scope, project plans, budgets, schedules, close-out and lessons learned, and related correspondence. Includes projects related to the development of systems and software from initial stages through hand-off to production, including planning, requirements analysis, design, verification and testing, quality assurance and installation. Also includes training and guidance to manage change related to rolling out new internal initiatives or tools.			
AC = Completion of project.			

What you need to know



Everyone is responsible for records management



Be aware of records in your email and personal areas (G Drive, OneDrive)



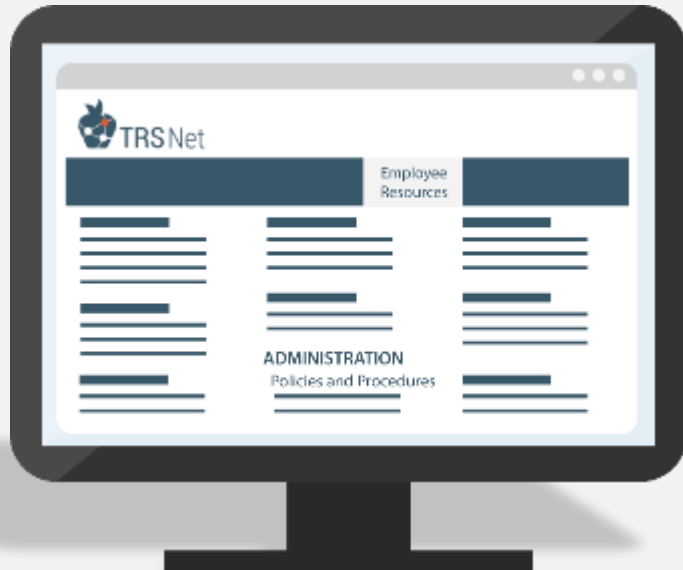
Your workgroup has a file plan with what your records are and where to store them.
Store records in their correct locations.

Contact DL Records Analysts
for questions

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, textured material, possibly bronze or stone, standing on a concrete base. The sculpture has a central, pointed form with several smaller, rounded shapes around it. The entire scene is overlaid with a semi-transparent blue filter. A white rectangular box is centered over the image, containing the text "Organizational Excellence" in a bold, white, sans-serif font.

Organizational Excellence

Employee Handbook & Policies



TRS Intranet

Excellent employee resource. Hosts links to TRS information, handbooks, manuals, policies (nepotism, tuition reimbursement, etc.), and training.

Compliance Training

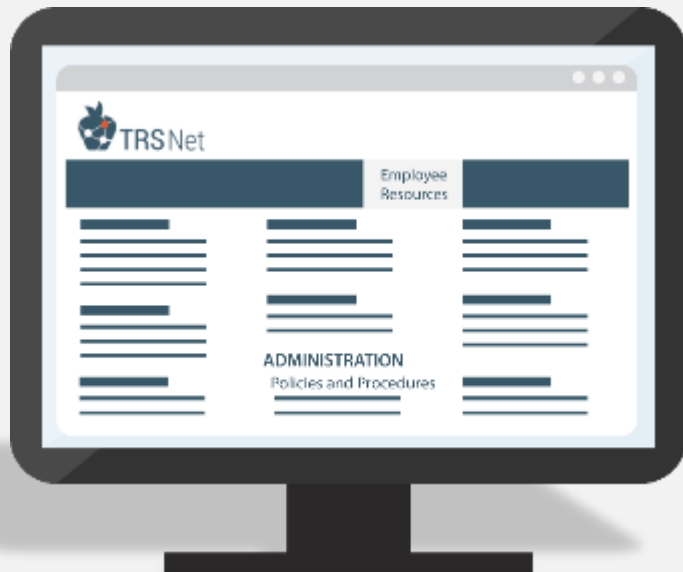
Responsible for completing online compliance trainings, 6+ depending on your position.

Notification and links received via email. Cornerstone access takes effect 2-3 days from start date.

Performance Management

Annual appraisals after 6 month probation

Contact Information



Employee Information

Update your contact information in CAPPs any time there is a change.

Public Disclosures

Completed this section on Employee Data Change Request form. Information subject to Open Records Act.

TRSAAlert (link on intranet)

Register to receive emergency alerts from TRS.

Provide emergency contact information.

Employee Appreciation



Employee
Service Awards

Co-worker
Appreciation

Employee
Appreciation
Day
and Tailgate



Business Hours and Holidays

TRS is open Monday-Friday, 8 AM to 5 PM



Work Schedule

Alternative work schedules may be approved by the Chief Officer and manager

Holiday Schedule

There are 16 state holidays. Generally, TRS employees enjoy a minimum of 12-14 holidays per year.

On state holidays, state offices remain open. You will receive comp time if you work on one of these “skeleton crew” days.

SAO and TRS Holiday schedules are available on the TRS intranet.

Overtime and Compensatory Time



Exempt vs. Non-Exempt

Fair Labor Standards Act

Overtime

Compensatory Time

**Overtime and Compensatory Time Policy
is available on the intranet.**

Outside Work and Remote Work



Work outside of TRS must be reported to your supervisor

Hybrid or remote work schedules are permitted for certain positions

Advance approval from management is required before working outside of Texas

Social Media



Welcome Wednesday Email

Follow Us on Social Media
(Linked In, Facebook, Instagram, YouTube)

Social Media Policies



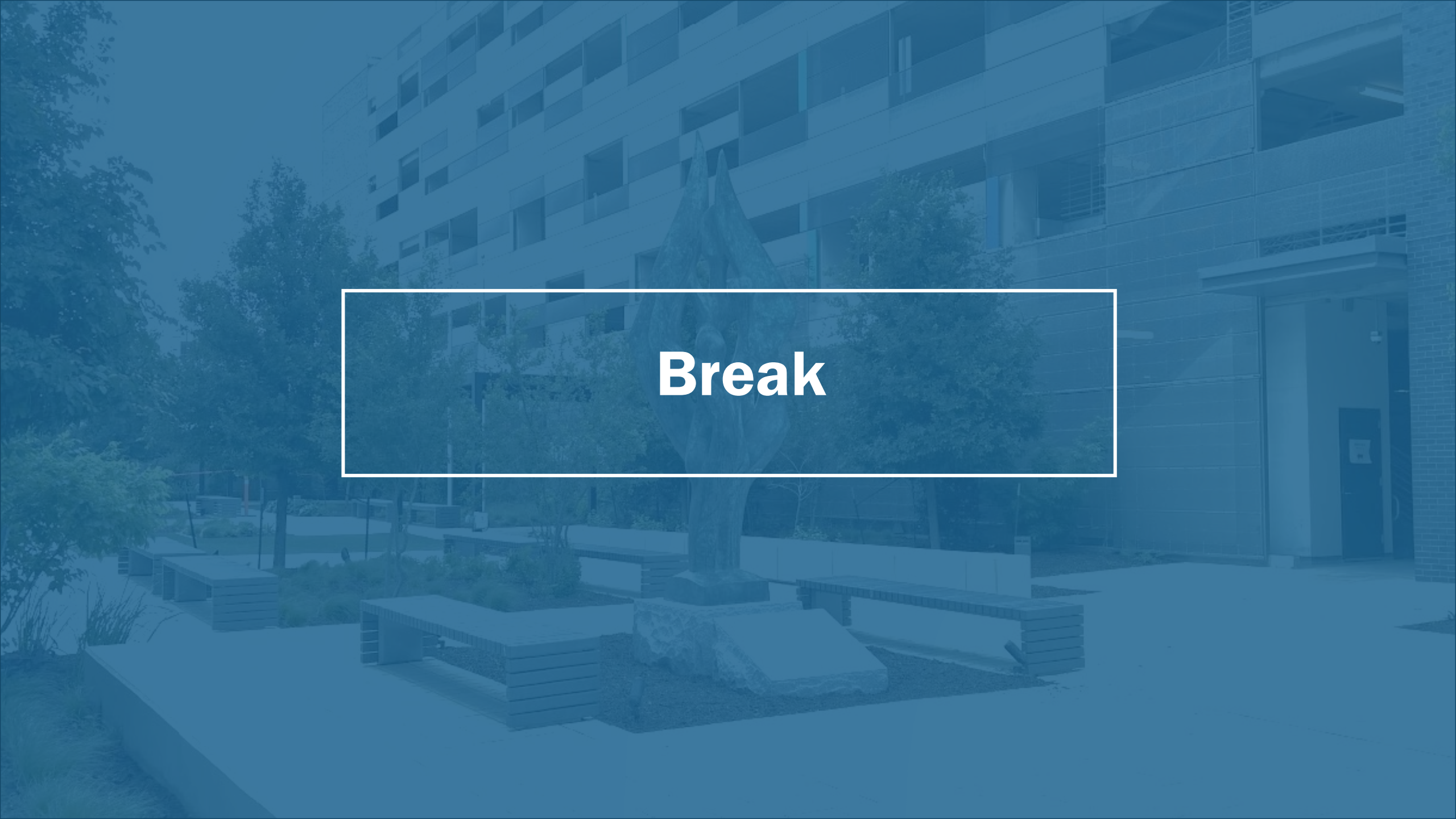
Welcome TO THE TEAM!

“This organization has a passion for excellence, both in serving our members and doing whatever we do extremely well. Meaningful work brings a deep sense of satisfaction. Being surrounded by dedicated, talented professionals with a common purpose is another big positive of working here.”

- Brian Guthrie, TRS Executive Director

Questions?



The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, textured material, possibly stone or metal, standing on a concrete base. The sculpture has a central, pointed form with several smaller, rounded shapes around it. The entire scene is overlaid with a semi-transparent blue filter. A white rectangular box is centered over the image, containing the word "Break" in white text.

Break

Day 2 – Orientation Preview

(Manager Determines Attendance)

*Scheduled Time	Topic
8:30 AM	Building Tours
9:15 AM	Get Involved
9:45 AM	Core Lines of Business
10:30 AM	Benefit Enrollment Consults (Optional)
11:45 AM	Dismissed

Headshots



IT Training



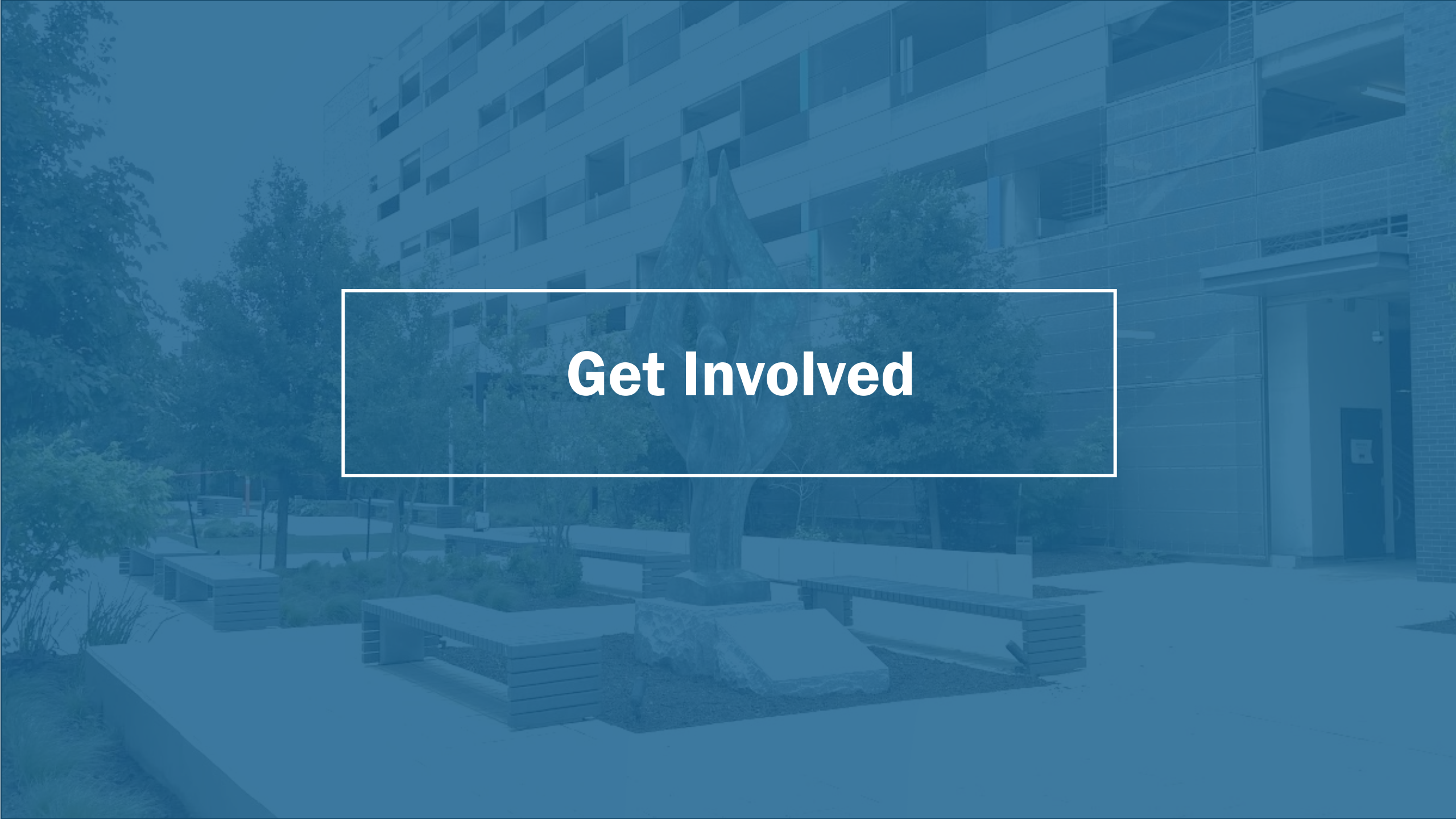
Parking Registration



Welcome to the Teacher Retirement System of Texas

New Employee Orientation – Day Two

- Welcome! Please make yourself comfortable.
- Restrooms are to the left, at the end of the hallway.
- Feel free to get to know each other as we wait for the **Building Tour to begin at 8:30am.**

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a courtyard area with a large, abstract sculpture made of dark, jagged pieces. The courtyard is surrounded by low concrete walls and has some greenery. The entire image is covered with a semi-transparent blue overlay.

Get Involved

Our Work is at the heart of the Mission

TRS Vision:

Earning your trust every day.

TRS Mission:

Improving the retirement security of our members by prudently investing and managing the Trust assets and delivering benefits that make a positive difference in their lives.



TIPS:

4. Attend Day 2 of NEO.

TIPS:

5. Get to know the OCE Council members and talk to them about your interests.

OCE Council Charter

Motto: *We all belong*

Mission/Purpose

Advise
Brain Trust
Liaise

OCE Director
TRS Leadership
TRS Workforce

OCE Council Charter

Motto: *We all belong*

Goals/Pillars

Retention and Satisfaction
Two-way Communication
Values Aligned Culture

TRS Workforce
TRS Members

TRS Employee OCE Council – Calendar Year 2025



Guzman, Derrick
EX-SAFETY AND SECURITY



Medina, Christina
EX-TALENT ACQUISITION GROUP



Rye, Cui
EX-INTERNAL AUDIT



Goodwin, Cynthia
FN-ACCOUNTING AND REPORTING



Lopez, Lisa
EX-IMD LEGAL & COMPLIANCE



Bridgeman, Kathy
EX-CONTRACT MANAGEMENT OFFICE



Brodie, Chris
BS-TRAINING



Reyna, Savanna
BS-CONTACT CENTER T4



McCullough, Craig
NV-INVESTMENT OPERATIONS



Gabaldon, Catherine
HB-HEALTH OPERATIONS



Traugott, Danalynn
EX-INFORMATION SECURITY OFFICE



Henderson, Sonta
EX-COMMUNICATIONS



Klekman, Jon
NV-EXTERNAL PUBLIC MARKETS



Sarsalari, Sam
BS-CONTACT CENTER T8



Turner, Shylee
NV-EMERGING MANAGERS



Dinh, Anh
EX-LEARNING AND DEVELOPMENT



Sevilla, Ren
BS-CONTACT CENTER T6



Jordan, Katasia
FN-BUDGET AND FINANCIAL ANALYSIS



Procter, Sonya
BS-BENEFIT COUNSELING HQ T2



Martin, Alexis
BS-CONTACT CENTER T3



Richmond, Heather
BS-CONTACT CENTER T5



Seguire, Daniel
FN-ANALYTICS & FINANCIAL INSIGHTS



Farmer, Alyssa
NV-INVESTMENT OPERATIONS



Castillo, Monica
EX-SHARED LEGAL & COMPLIANCE



Shrout, Barbara
IT-BUS EXP ARCH & DEMAND MGMT



LaBrie, Lori
EX-SHARED LEGAL & COMPLIANCE



Wilson, Jakaiya
BS-BP RETIREMENT T1

TIPS:

6. Join an Employee Resource Group and/or Committee.

TRS Employee Resource Groups 2025



**To join an ERG, please complete the interest form on the OCE SharePoint site.*

How to Get Involved

Step 1

Outreach, Culture, and Engagement at TRS

The Outreach, Culture, and Engagement (OCE) team focuses on the impact that these three areas have on employees and the TRS keep a pulse on what is happening at the employee level.

Employees are where the work begins, gets done, and generates outcomes. OCE's work supports the sustainment of a workplace conducive to employees doing their best work on behalf of the TRS members and gaining professional satisfaction from it. Through leveraging employee strengths, expanding outreach for the talent pipeline and the HUB program, enhancing organizational culture, and employee engagement.

For more insight into our strategic plan, [click here](#).

OCE Consultation Services

Gain insight from our expertise. From quick documentation reviews to more involved collaborations in process establishment.



Important Links



Strategic Plan & Update



Employee Resource Groups and OCE Council



Pension Education

Step 2

Employee Resource Groups and OCE Council



What is an ERG?

ERG stands for **Employee Resource Group**, which is a group of employees who voluntarily join together in their workplace based on shared characteristics or life experiences. Employee resource groups function to provide employees with:

- support
- career development opportunities,
- professional networking, and
- overall contributions to personal development in the workplace.

Although these groups are rooted in common characteristics, they are also aligned with the mission, values, goals, business practices and objectives of the organization while enhancing organizational culture and employee experience. All TRS employees are welcome to join any and all ERGs.

The **NEW ERG Toolkit** is finally here!

[Click here to check it out](#)

Interested in joining an ERG?

[Complete an interest form](#) and we'll be in touch!

Step 3

ERG and OCE Council Interest Form

We are so excited that you are interested in getting involved with our agency-wide initiative!

Hi, Kellie. When you submit this form, the owner will see your name and email address.

* Required

1. Are you an employee or contractor? *

☐ Employee

☐ Contractor

TRS Committees



**Wellness has been incorporated into the work of our TRS Benefits team.*

Questions?





Pension Services Division



Overview



Purpose

The purpose of Pension Services is to facilitate TRS participants' and employers' pension benefit decisions by delivering valuable, timely, accurate information through exceptional, member focused customer service so they have peace of mind for retirement security.

Objectives and Strategies

Improve the customer service experience for participants and reporting employers.

- Increase engagement with members/participants and reporting employers regarding TRS benefits.
- Expand our services to meet members where they are.
- Improve the reporting employer experience.

Benefit Accounting

- Employer Reporting
- Reporting Exceptions
- Benefit Payments
- Employment After Retirement

Benefit Processing

- Estimates
- Retirements
- Death Claims
- Refunds
- Service Credit Purchase
- Account Services
- Data Resolution

Contact Center

- Incoming Calls
- Callbacks
- Secure Email

Member Education and Counseling (HQ and EPRO)

- Office Visits (in-person, virtual, field)
- Walk-ins
- Benefit Presentations
- Benefit fairs and conferences

Benefit Operation Support

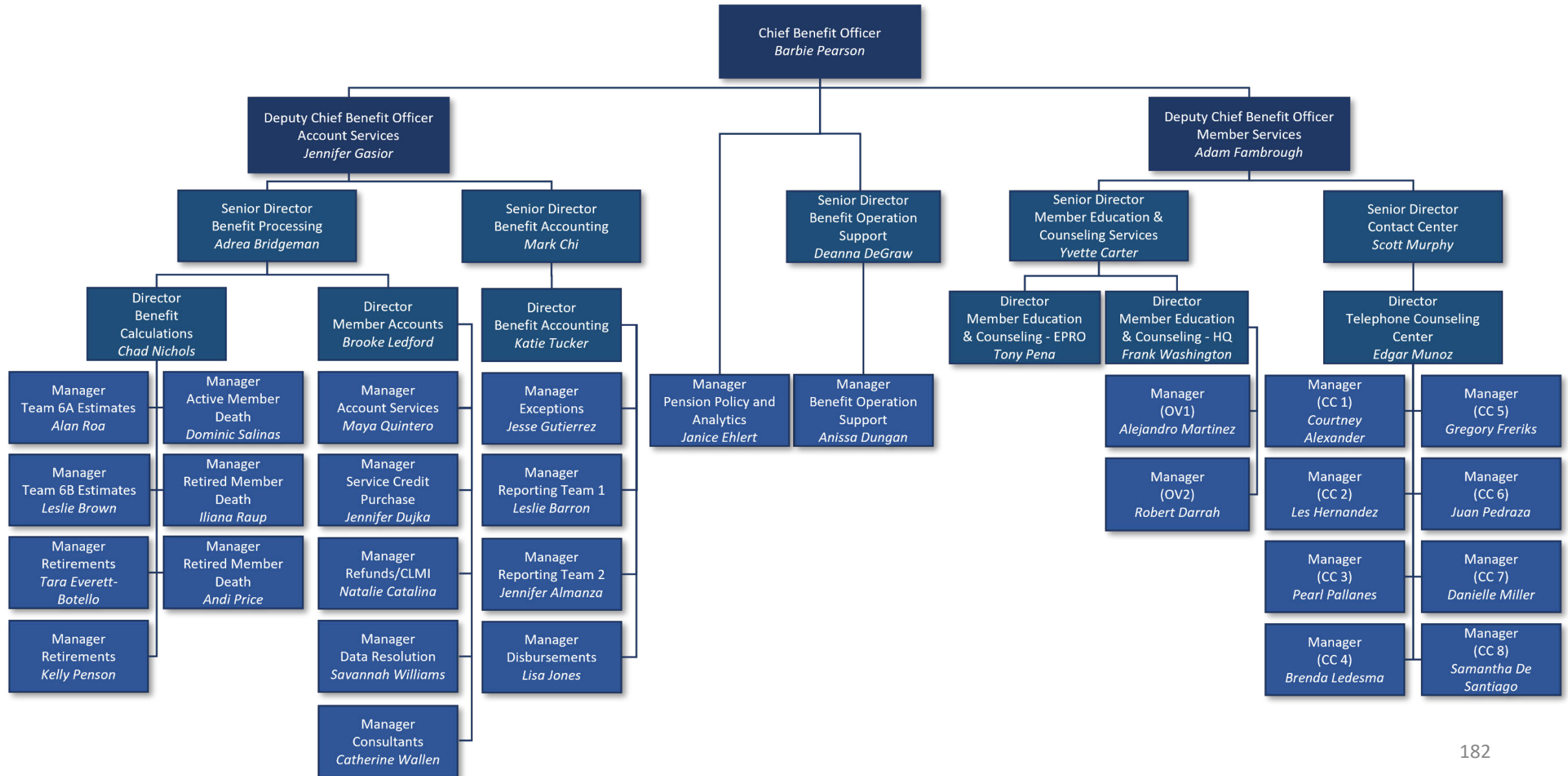
- Foundational Training
- Quality Assurance
- Workforce Management
- Continuous Pension Training

Pension Policy and Analytics

- Determine actuarial impacts
- Run legislative reports
- Audit actuary
- Meet agency actuarial needs
- Manage pension/health dashboard



Organization

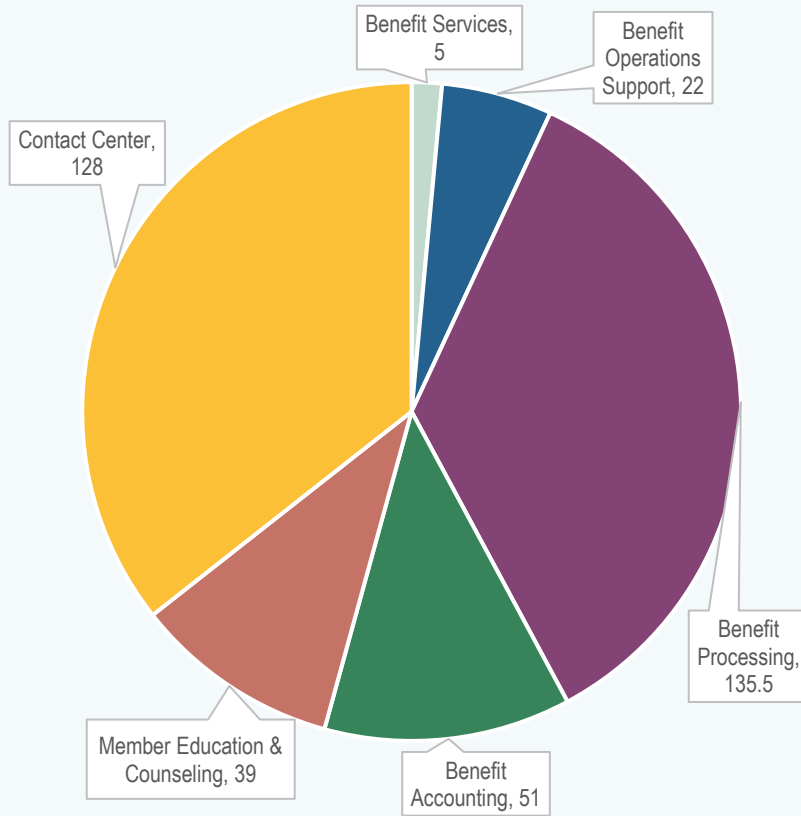




Staffing versus Transactions/Interactions



Pension Services (380.5 Filled Positions)



900,596
Member
Transactions



968,279
Member
Interactions



52 Valid
Complaints*
(0.0028%)

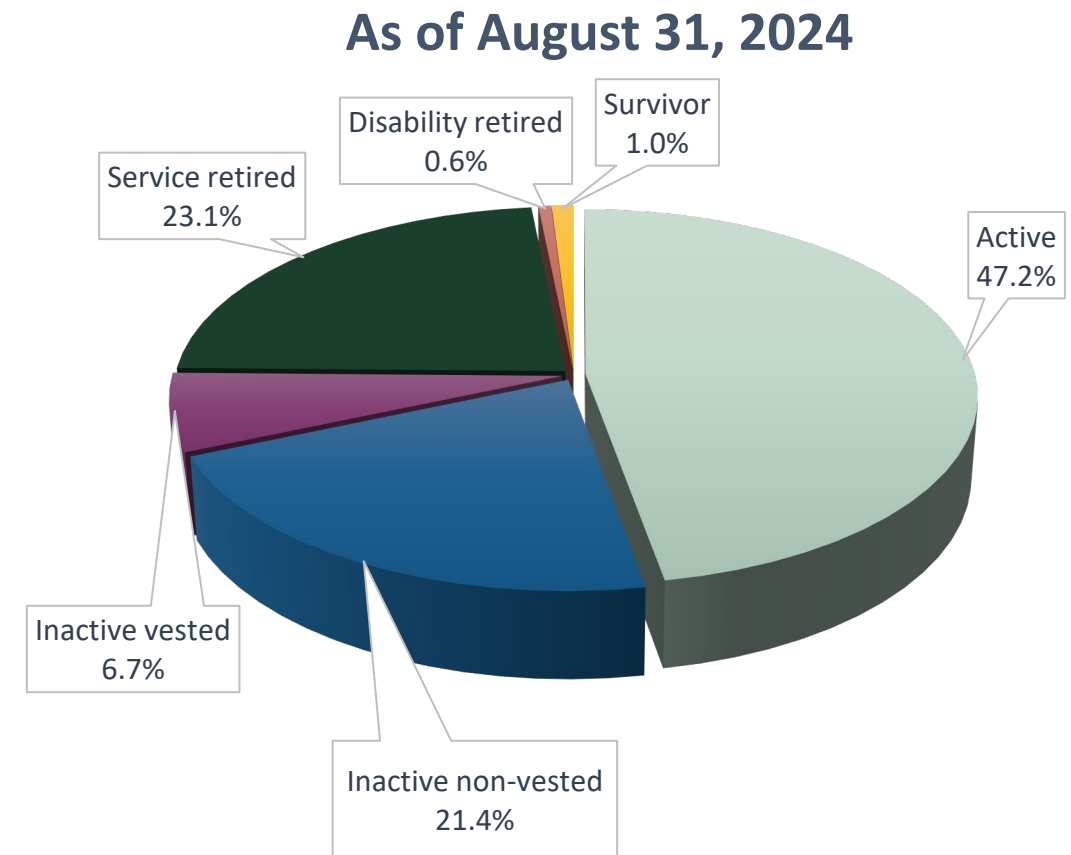


TRS Membership



Members

Member Numbers by Category	
Current Members	FY 2024
Active Contributing	970,874
Inactive Non-vested	439,889
Inactive Vested	138,146
Total Current Members	1,548,909
Retirement Recipients	FY 2024
Service	475,891
Disability	12,127
Survivor	20,683
Total Retirement Recipients	508,701
Total Membership	2,057,610



Data comes from FY2024 TRS Annual Comprehensive Financial Report



Account Services



Account Services is responsible for the accurate and timely employer reporting and processing of benefits and payroll.



Benefit Accounting



Offer support and training to reporting employers
Over 1,340 RE's



Annuity payroll management and data integrity
Over \$13.6B paid annually



Monitor Employment After Retirement



Benefit Processing



Calculate member benefits and process applications
Over 206,000 last year



Demographic or data updates for member accounts
Over 237,000 last year



Process death benefits
Almost 21,000 payments issued last year



Member Services



Member Services is responsible for providing excellent member service through a variety of communication channels.



Contact Center



Incoming Calls
Over 670,000 a year



Call Backs



Secure Messages
Over 44,000 a year



Member Education and Counseling



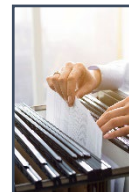
Field Office Visits/Presentations
About 100 a year



Office Visits, Virtual Visits, Walk-ins
Over 19,000 a year



Conventions & Benefit Fairs



Offices in Austin and El Paso



Pension Services Administration



Pension Services Administration is responsible for providing support throughout the division.



Benefit Operation Support



Pension Policy and Analytics



Training
20 new hires trained
10 e-learning courses created



Actuarial Impact Statements



Workforce Management



Legislative Reports



Quality Assurance
11,623 call evaluations
and 1,518 OV evaluations



Audit the Actuary

MYTRS
MEMBER PORTAL

WELCOME JUDY JETSON | Participant ID: 00436814

Accounts	Planning Tools	Benefits	Beneficiary	Payments	Account Management
----------	----------------	----------	-------------	----------	--------------------

Account Summary

Membership Tier	Service Credit	Account Balance
2	21 years	\$94,924.76

Demographic Information

Name:	JUDY JETSON	Phone:	(123) 456-7890
Gender:	Female	Date of Birth:	07/04/1956
Address:	1000 RED RIVER ST AUSTIN, TX 78701 UNITED STATES	Age:	68 years
		Communication Preference:	Email
		Email:	adam.fambrough@trs.texas.gov

Beneficiary Designation

Benefit Type - Death

Beneficiary Type	Relationship	First Name	Middle Name	Last Name	Organization Name
Primary	Other	BAMBAM	G	RUBBLE	
Primary	Child	ELROY		JETSON	

Account Balance as of 1/7/2025

Non-Tax Sheltered:	\$0.00
Tax Sheltered:	\$33,046.54

High Years*

High	Year	Salary
------	------	--------

A screenshot of a web browser displaying the 'TRS Home' website. The top navigation bar is teal with white text for various sections: TRS Home, About TRS, Benefits & Health, Executive & IMD, Financial & BA, Technology, Program & Project, and Resource Services. Below this is a secondary navigation bar with links like Benefit Services, CAPPs, Study Hall, HomeRoom, TRS Service Portal, TRSAlert, Wi-Fi Password, Emergency, and Edit. The main content area features a large teal banner with an image of a person swimming and the title 'Employee Retirement Resources'. Above the banner is a sub-header 'Pension Services' with an 'Edit' link. To the right of the banner is a 'Site access' link. Below the banner, there's a row of icons for '+ New', 'Promote', 'Page details', 'Immersive reader', and 'Analytics', followed by the date 'Published 12/11/2024' and links for 'Share', 'Edit', and a share icon. The content is divided into two columns. The left column has the heading 'View or print the checklist' and a paragraph: 'This information is meant to be a general guide to the retirement process. Your specific timeline may differ, but one thing is certain – planning can help ensure a smooth transition into retirement!'. Below the text is an illustration of a checklist with a red checkmark and a pen. The right column has the heading 'Questions about Retirement?' and a section 'Please contact' with two entries: 'Alexander, Courtney' and 'Martinez, Alejandro', each with a circular profile picture.

[illegible]

 August 26, 2019

JON DOE
100 RED WHEEL CT.
AUSTIN TX 78701-9888

www.texas.gov

Brian K. Gubler
Texas Governor
1002 East Tower Street
Austin, Texas 78701-2088


FBI-AUS

TRIS Participant ID: 60022564

Dear JOHN DOE:

Welcome to the Teacher Retirement System of Texas (TRS) Membership in TRS entitles you to many valuable benefits. Information about TRS benefits, including the TRS Handbook, may be found by visiting our website at [www.trsa.org](#).

Member death benefits are available beginning on your first day of TRS-covered employment. It is important to have a beneficiary designation on file. Please complete the enclosed designation of beneficiary form (TD121), and return it directly to TRS. Your employer is responsible to receive this form on behalf of TRS.

You may elect to apply for group long-term care insurance. Enrollment eligibility criteria and enrollment information is available at [http://members.trsa.org](#) or by calling Generalist Health Insurance Company (Generalist) toll-free at 1-866-686-1970. If you are eligible to apply, you may apply during your first 90-day TRS membership.

Please carefully review the enclosed TRS Notice of Policy Provisions (TRSNOC). The federal notice is all new TRS members. This notice describes how medical information about you may be used and disclosed and how you can obtain access to this information.

If you have any questions, please visit the TRS website or call us at (800) 223-6776.

Sincerely,

Teacher Retirement System of Texas

Enc.



Questions



Questions?



TRS Health Overview



New Employee Orientation
2025



Introduction to TRS Health

Mission

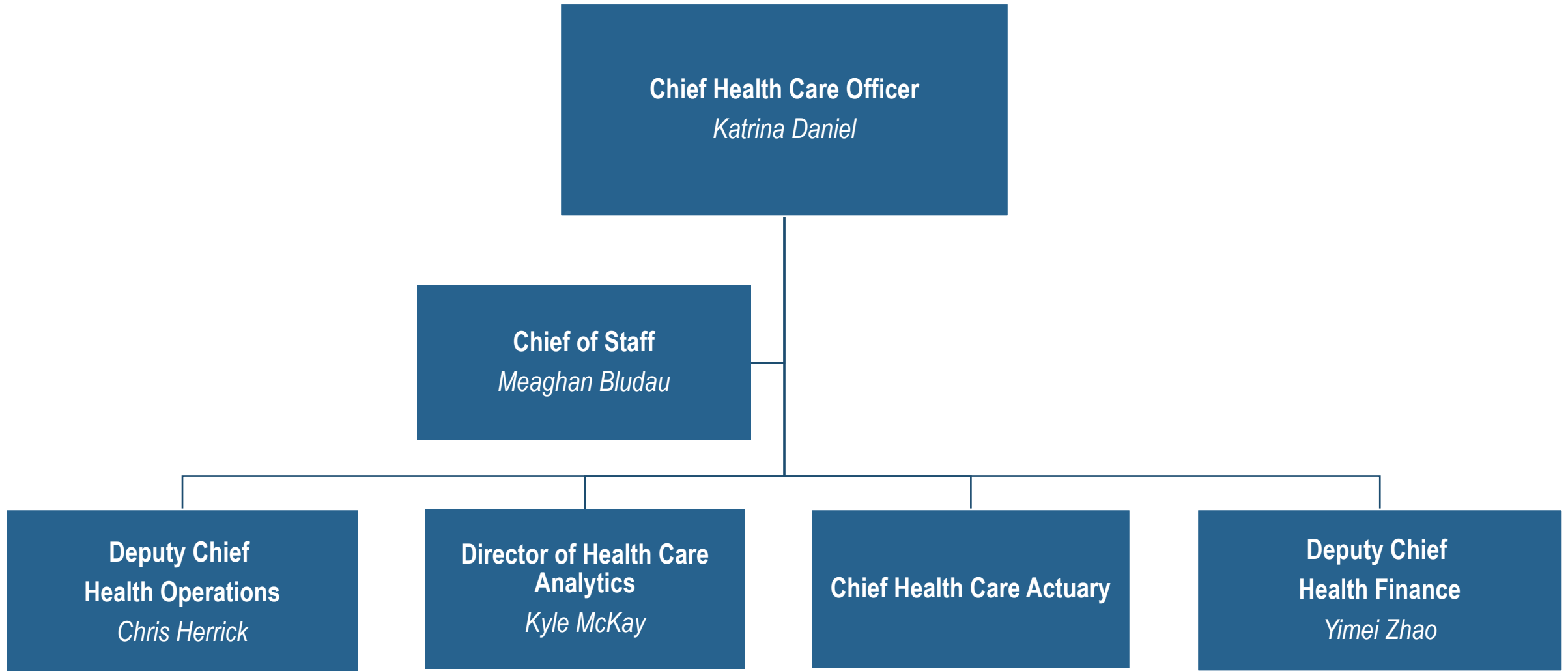
To deliver highly-valued health plans for Texas educators that provide access to affordable, quality health care.

Vision

The clear choice in health plans for Texas educators.

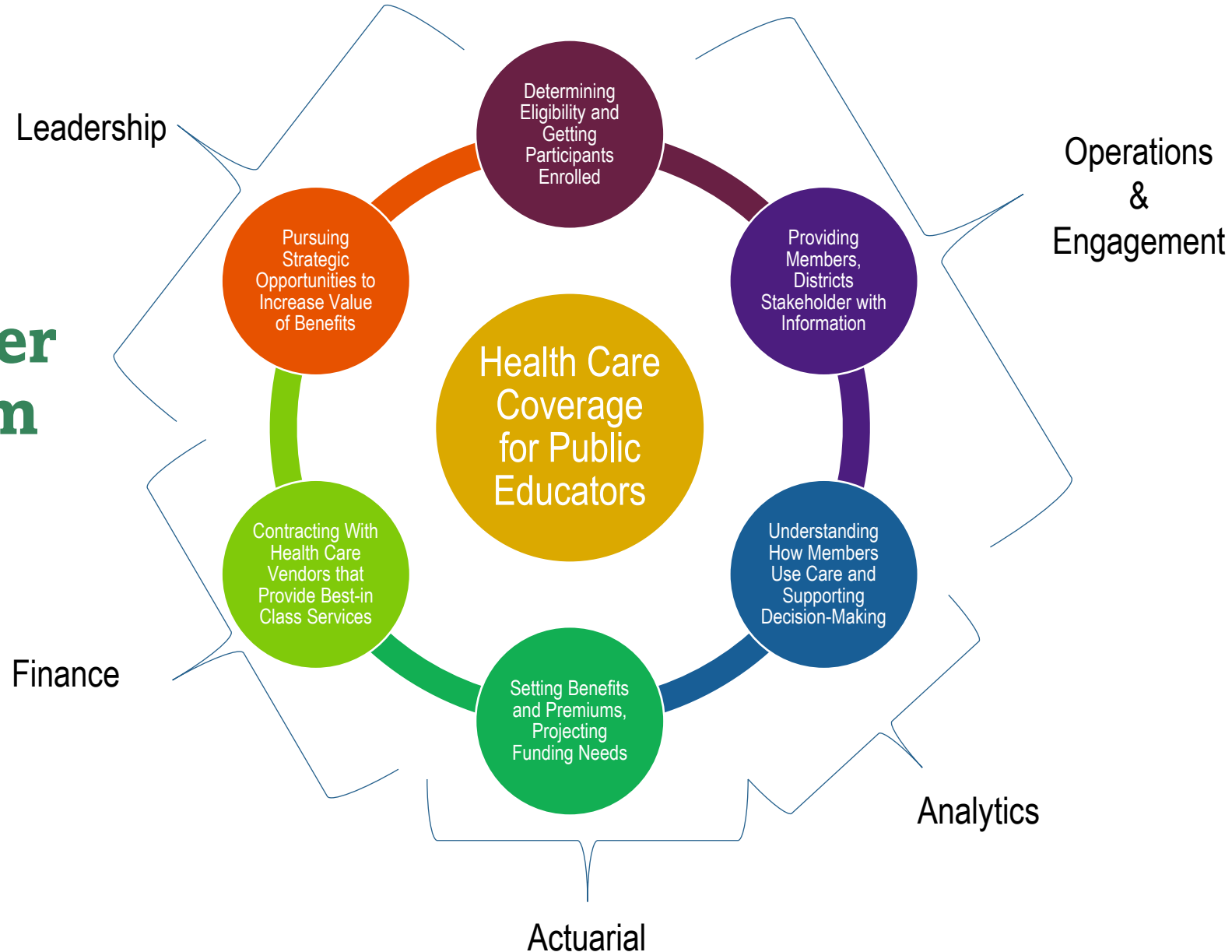


Introduction to TRS Health

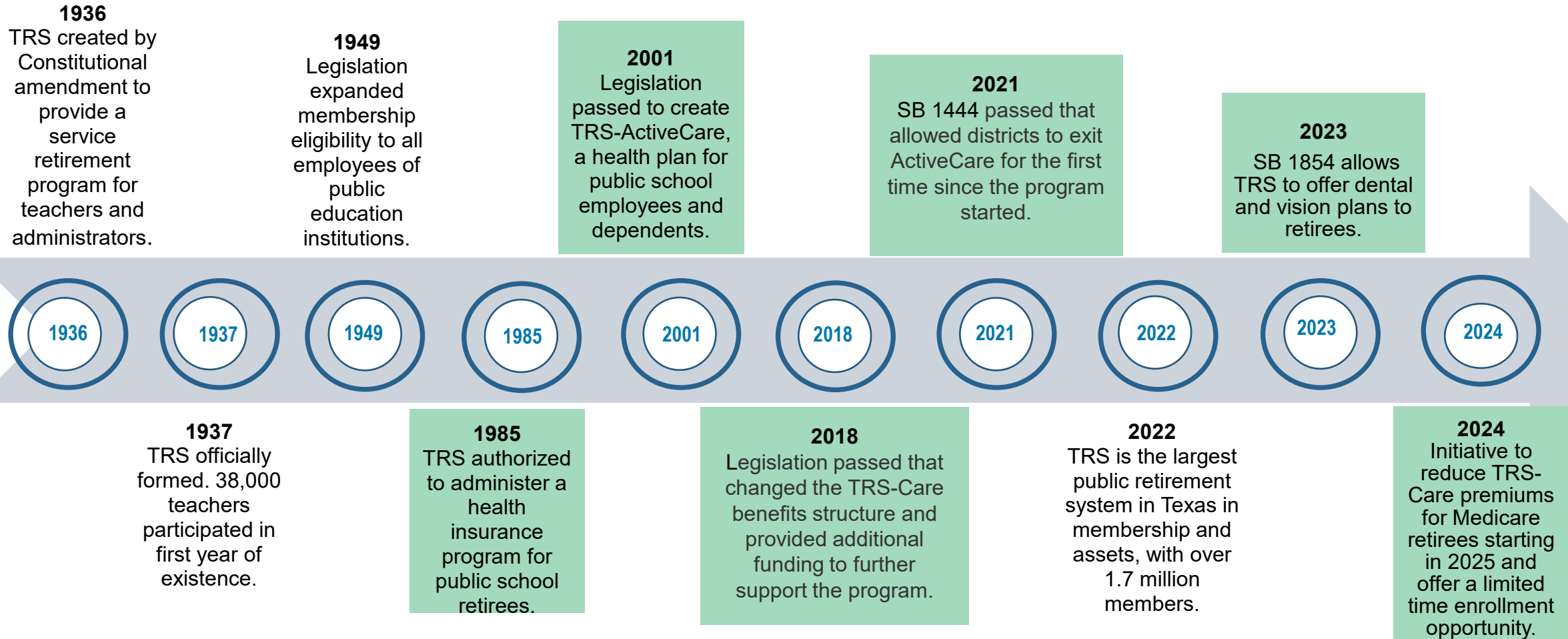


High Degree of Collaboration Across the Division to Deliver for Members

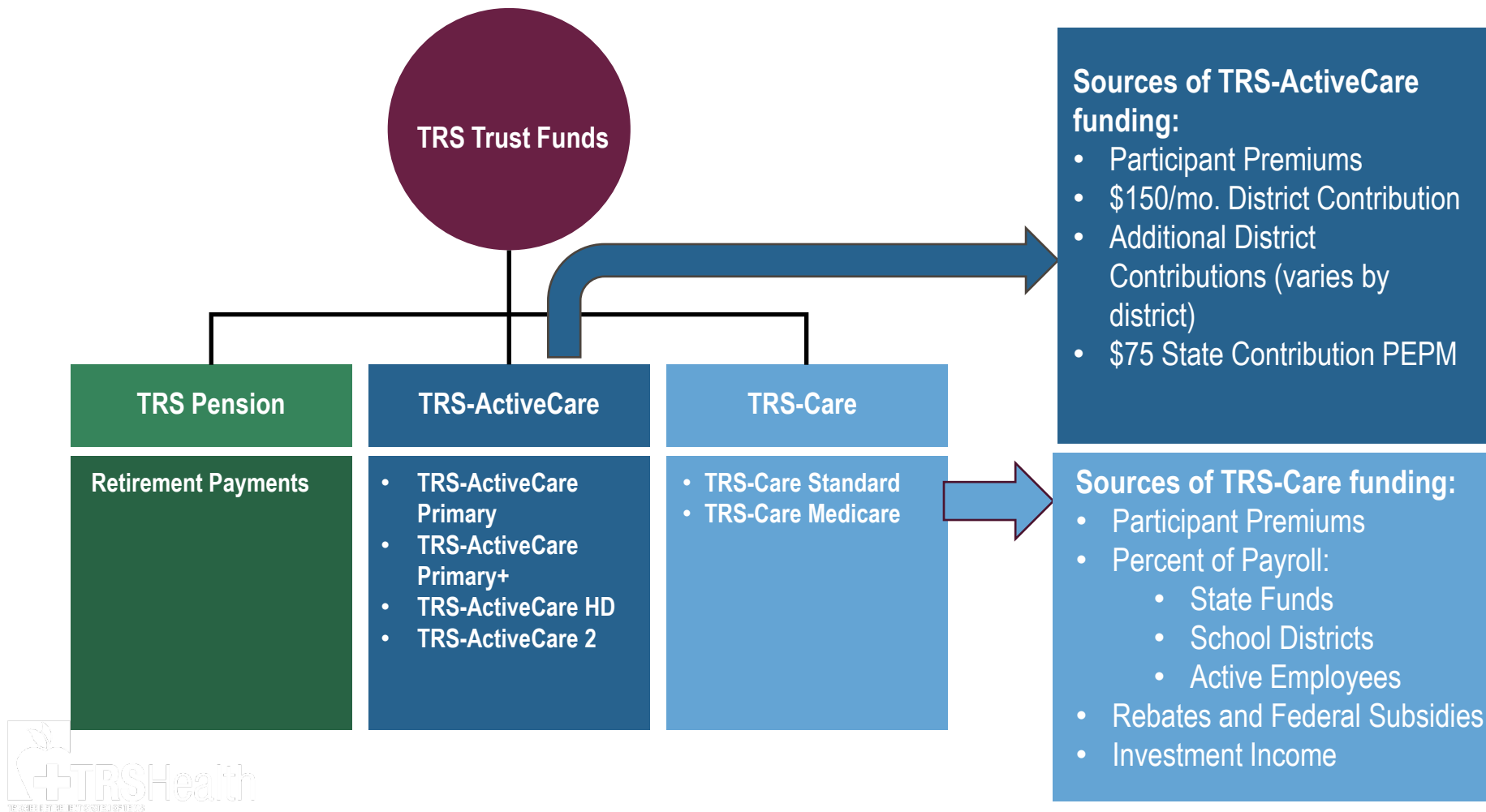
**Together,
We're Greater
than the Sum
of Our Parts**



TRS Has Administered Health Plans for 40 Years

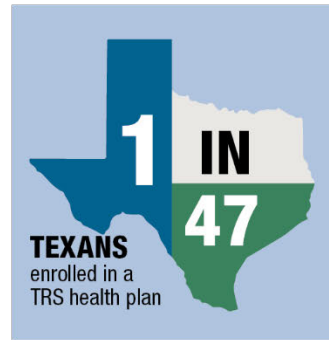


Two of the Three TRS Trust Funds are for Health Care



TRS-ActiveCare and TRS-Care cover different populations, have different benefit plans, and are funded differently.

2024 TRS Health Annual Report Highlights



\$23.4B
saved through cost containment strategies

\$16M
paid in claims per day

638K+
PARTICIPANTS



422K+
in TRS-ActiveCare



216K+
in TRS-Care

\$6B
in claims FY 2024



\$4.2B
Medical claims

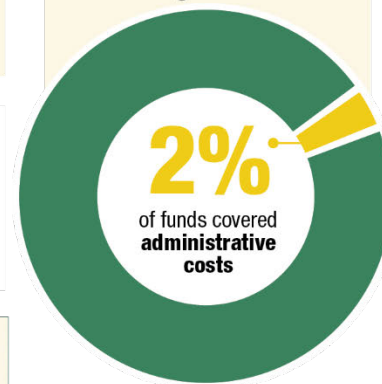


\$1.8B
Pharmacy claims

5,891
babies born in FY 2024



98%
of funds went directly to **medical and prescription drug claims**



42% LESS
than the cost growth of our peers

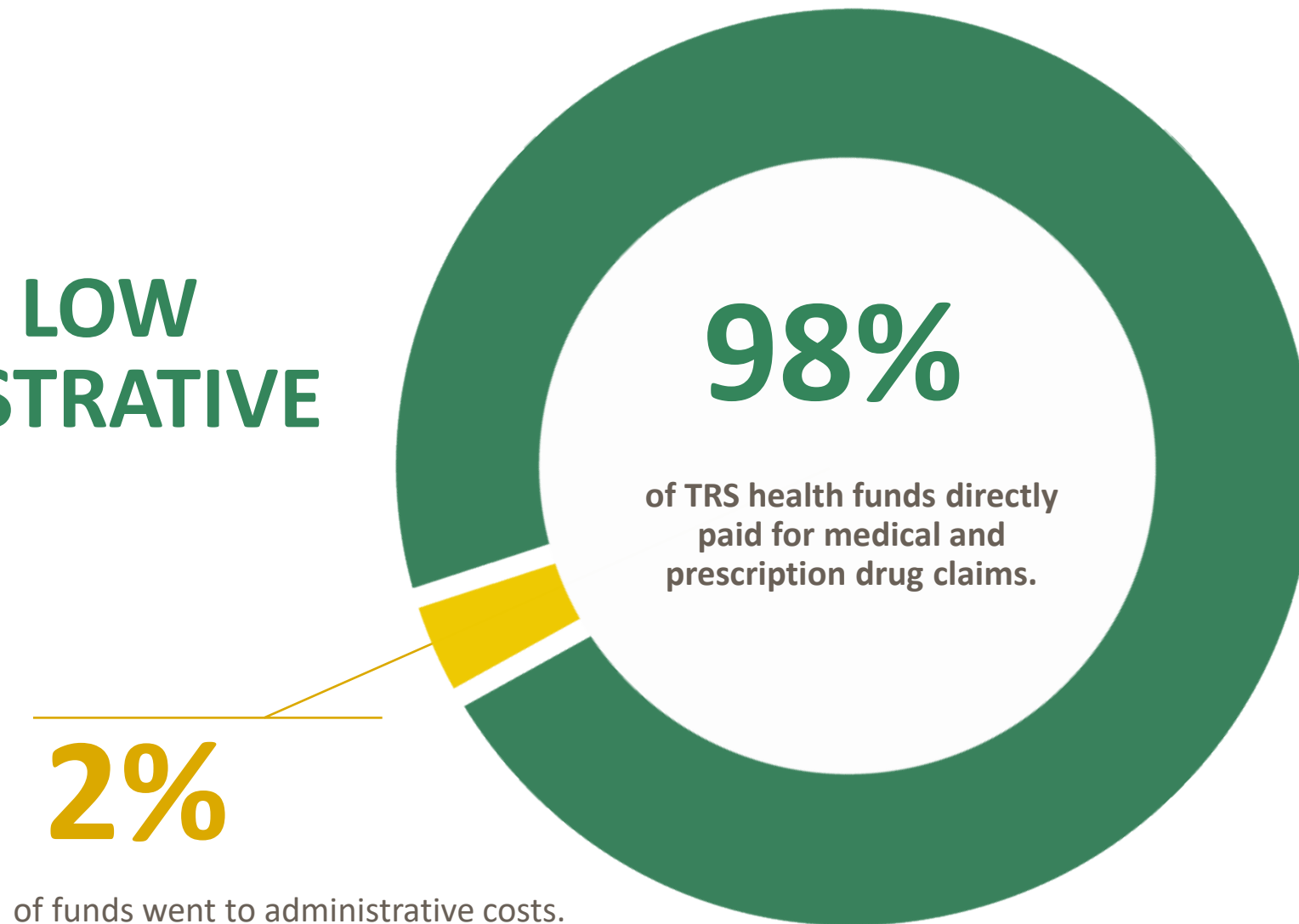
EVERY \$1
in health care spending
GENERATED \$3.56
in economic activity in Texas



340K preventive visits completed (**all plans**)

Delivering high-value plans while actively managing costs

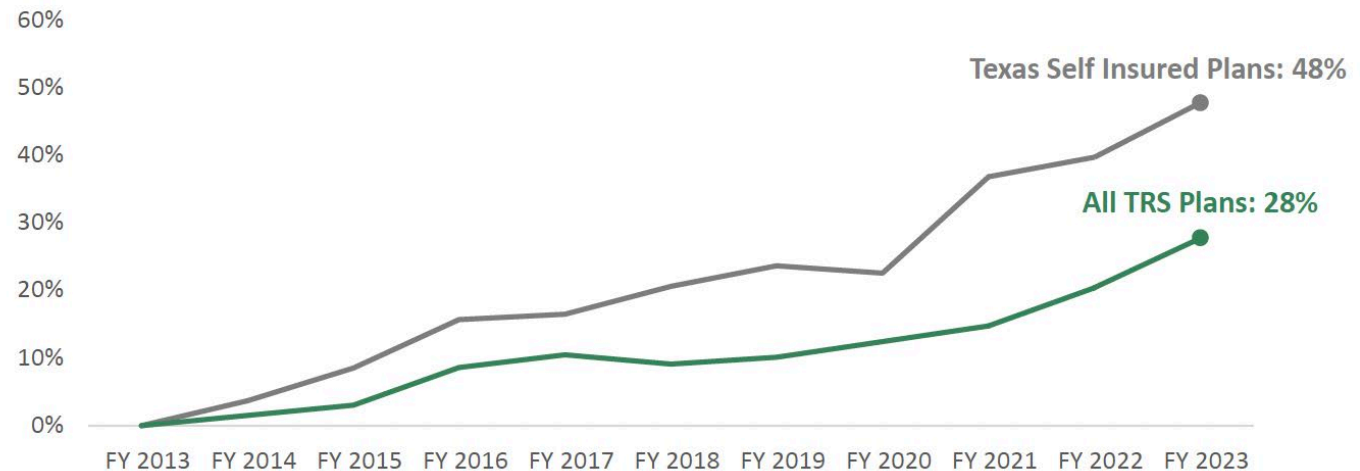
KEEPING LOW ADMINISTRATIVE COSTS



Cumulative cost growth
**42% less than that of
TRS' peers.**

**TRS plans
experienced nearly
half the cost
growth of Texas
self-insured plans.**

Cumulative Increase in Per Member Costs Since 2013



Costs reflect allowed charges to both the plan and the participants. These are net of rebates. TRS plans include all self-insured ASO plans. Milliman data for Texas ASO does not include pharmacy rebates. The comparison does not adjust for changes in plan design or demographics over time.



Who We Serve

Providing High-Value Benefits Tailored to Active, Working Educators

ACTIVE POPULATION

*Gender Demographics:
2/3 enrolled are
females*

- Average age of 44
- Difficulty getting away for care during the day
- Likely to have children on plans



*Three Plan Options
Depending on
Employee Needs*

- TRS-ActiveCare Primary
- TRS-ActiveCare HD
- TRS-ActiveCare Primary+

Tailored Benefits

- Telemedicine
- Back & Joint Pain Therapy
- Mental Health
- Prenatal Care
- Family Coverage

Providing High-Value Benefits Tailored to Retired Educators

RETIRED POPULATION

Demographics of Policy Holders:

2/3 of policy holders are female with an average age of 72.

- Greater reliance on health benefits
- Need a large network of providers



Tailored Benefits:

- Member Outreach
- Preventive Health Education
- Telemedicine
- House Calls Program
- Broad Network Access

Enhancing Value of Health Benefits for Retirees



Retiree satisfaction increased by 26% in 2024 as a result of these enhancements.

2025 Big Year for TRS-Care

Offered optional dental and vision coverage with over **106K** enrollments in the first year

Reduced TRS-Care Medicare Advantage premiums by about **45%** for most retirees

Launched a limited-time enrollment opportunity for Medicare-eligible retirees through **March 2026**

Kept TRS-Care Standard premiums the same for the eighth **year in a row**

Record Breaking Enrollment in Dental & Vision Plans

Enrollment Window (extended)

Oct. 1 – Dec. 17, 2024

OVER 106K enrollments for the 2025 plan year:

 **TRS-Care Dental: 54K**  **TRS-Care Vision: 52K**



700-800 daily applications on average



~6.5K email inquiries received
(Half of those came once the extension was announced)



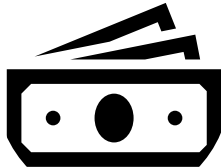
1.1M phone calls answered by TRS and its health partners

- Call volume went up **26%** from FY 2023
- **99%** of calls answered within 180 seconds

Health Care Goals from TRS' Strategic Plan



Improve communication efforts regarding funding needs



Increase the value of healthcare benefits



Improve member health



IMD Overview

BUSINESS
GRAPH

Top Pension Fund

- 16th Largest Pension Fund in the World
- 6th Largest Pension Fund in the U.S.
- Largest Public Pension Trust Fund in Texas
- Manages about \$200 billion in Assets
- Serving 2 million members
- 1 of every 19 Texans is part of TRS

IMD Goals

- Improve the retirement security of Texas educators by prudently investing and managing trust assets.
- Achieve a long-term rate of return that:
 - Exceeds the assumed actuarial rate of 7%
 - Exceeds the long-term rate of inflation by 500 basis points (bp)
 - Exceeds the return of the Fund Policy Benchmark
- Control risk through proper diversification of asset classes.

TRS Fund Strengths



Large

TRS manages the sixth largest U.S. public pension fund with a market value of \$209.6 billion as of Aug. 31, 2024. The fund's size allows for opportunities not available to most of the marketplace.



Long Term

TRS' size and membership composition allow for a long-term view in managing the investment portfolio, while avoiding short-term investment limitations and constraints.



Liquid

With \$131.9 billion in highly liquid assets as of Aug. 31, 2024 (about 63% of the total fund), the TRS portfolio has access to liquidity in excess of what is needed to pay monthly benefits.



Low Leverage

The TRS portfolio has low levels of leverage. Because of this, TRS can better withstand periods of market volatility and is less likely to sustain permanent capital losses during market downturns.



Local

TRS has a member center in El Paso and is exploring another location. The investment team opened a London office in 2015, so TRS has access to U.K. and European opportunities.

50% SALES

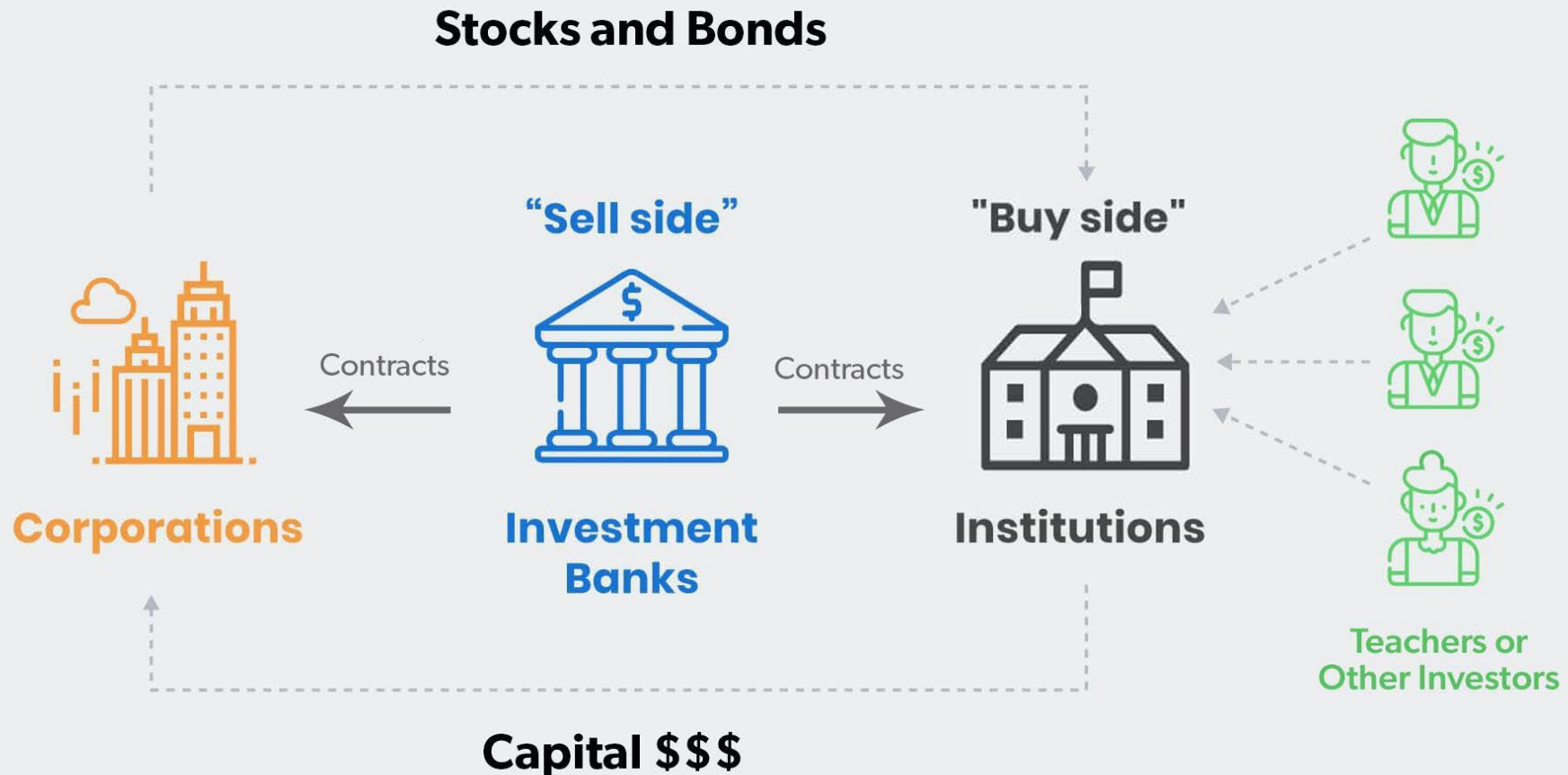
55% LOSS

75% GROWTH

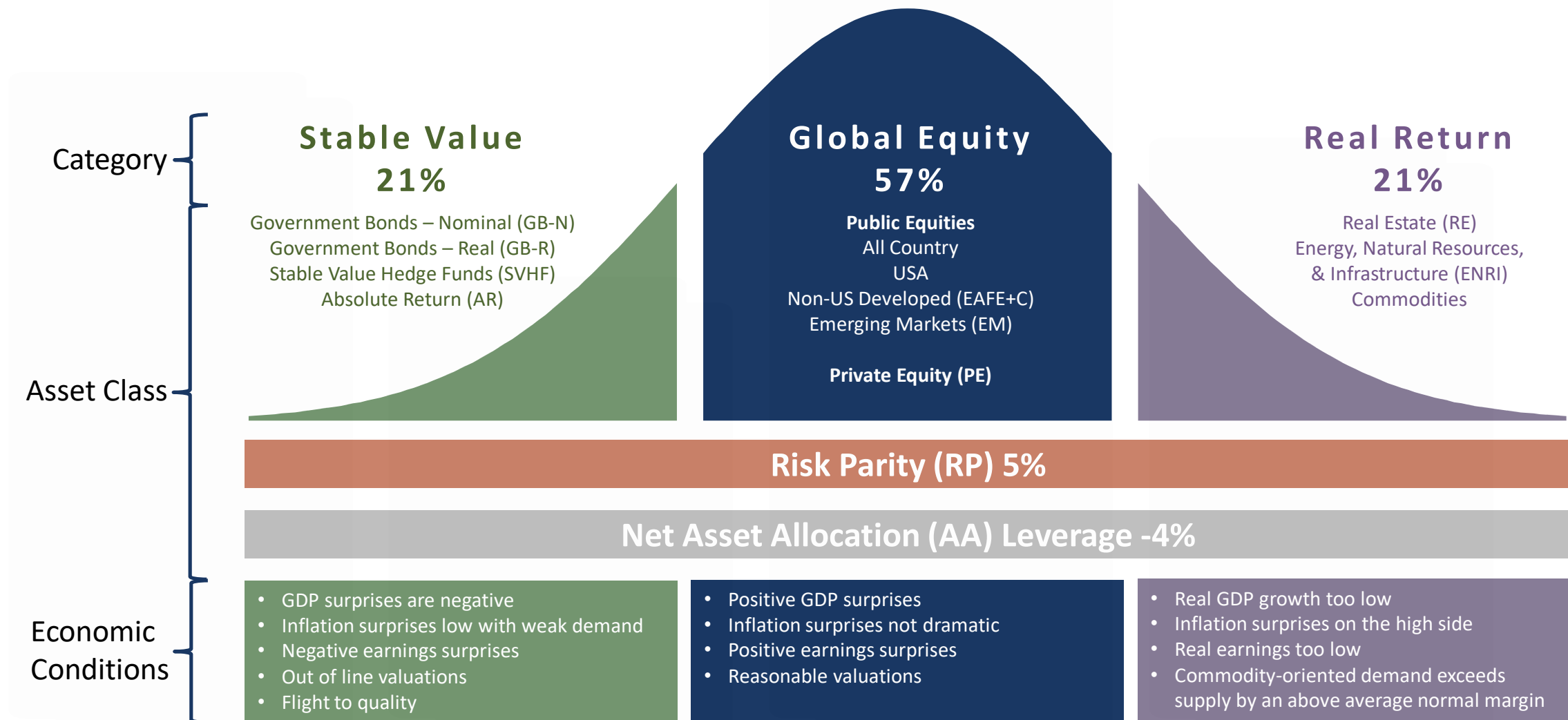
95% PROFIT

This includes banks, advisory firms, etc., who facilitate the sale of securities on behalf of client corporations.

Firms in the financial market that purchase and invest securities with the goal of yielding profit. This includes pension funds who are investment managers like TRS, endowments and foundations, and hedge funds who are hybrid (in that they both raise capital like the sell side and manage capital like the buy side).



TRS Diversification Framework



IMD Unit Structure



IMD Unit Structure



Public Markets

- External Public Markets
- Internal Fundamentals
- Special Opportunities
- Quantitative Equity Group
- Portfolio Solutions

Private Markets

- Private Equity
- Real Estate
- Energy, Natural Resources,
& Infrastructure
- Analytics

Investment Operations

- Budget & Accounting
- Middle Office
- Multi-Asset Trade Operations
- Investment Data & Systems
- Events & Facilities

Risk & Portfolio Management

Trading

Emerging Managers

Talent Management

IMD Legal & Compliance

Performance & Analytics

Investment Management Leadership Team

IMD Executive



Jase Auby, CFA
Chief Investment Officer



Katy Hoffman
Chief of Staff



Eric Lang
Head of Private Markets

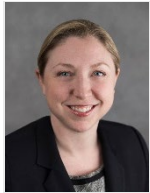


James Nield, CFA
Chief Risk Officer

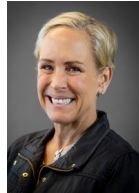


Dale West, CFA
Head of Public Markets

IMD Management Committee



Ashley Baum
Managing Director of Special Opportunities



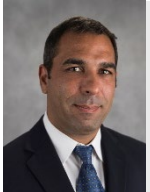
Kendall Courtney
Managing Director of Investment Operations



Brad Gilbert
Managing Director of External Public Markets



Carolyn Hansard
Managing Director of Energy, Natural Resources, and Infrastructure



Jaime Llano - MC Chair
Managing Director of Trading



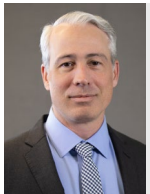
Neil Randall
Managing Director of Private Equity



Kirk Sims, CFA
Managing Director of Emerging Managers



Heather Traeger
General Counsel & Chief Compliance Officer



KJ Van Ackeren - MC Chair
Managing Director of Internal Fundamental



Grant Walker
Managing Director of Real Estate



Horacio Zambrana
Managing Director of IMD Talent Management



Kyle Wynne
Managing Director of Quantitative Equity

Questions?

For more information, visit:

www.trs.texas.gov/investments

For general questions, email:

IMDTalentManagement@trs.texas.gov

For IMD position referrals, email:

IMDRecruiting@trs.texas.gov

Thank you for joining us today, and welcome to TRS!

Benefits Registration

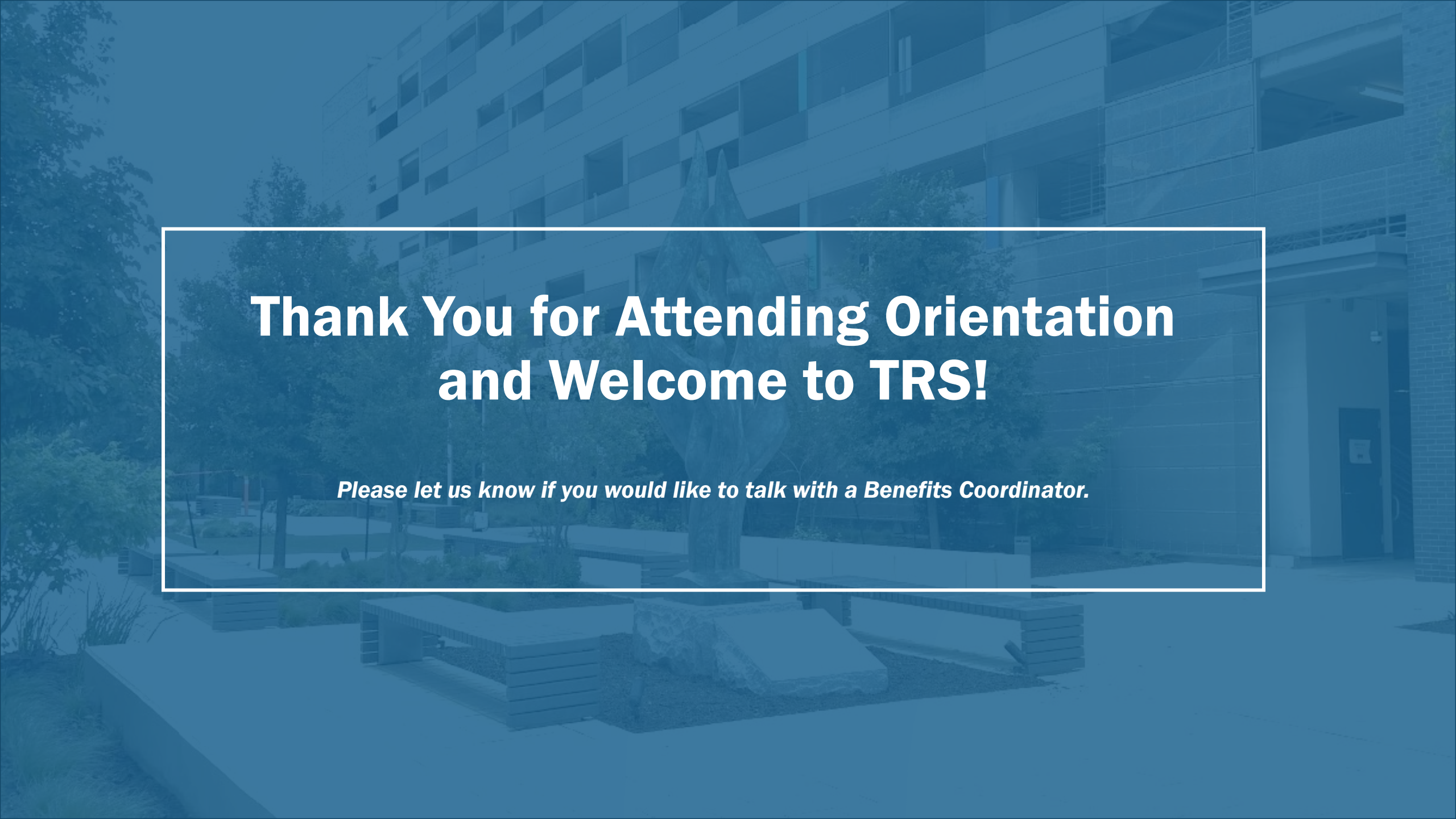


Employees Retirement System (ERS):

- Call Center: (877) 275-4377
- ERS Website: www.ers.Texas.gov

Benefit & Leave Team:

- EmployeeBenefitLeave@trs.texas.gov

The background image shows a modern, multi-story building with a grid-like facade of windows and balconies. In the foreground, there is a large, abstract sculpture made of dark, angular pieces, possibly metal or stone, situated in a landscaped area with some trees and low concrete walls. The entire image is overlaid with a semi-transparent blue filter.

Thank You for Attending Orientation and Welcome to TRS!

Please let us know if you would like to talk with a Benefits Coordinator.