TEACHER RETIREMENT SYSTEM of TEXAS

Instructions for Web Administrators

TRS
TEACHER RETIREMENT SYSTEM OF TEXAS

September 2024

Table of Contents

Responsibilities of a Web Administrator

You have been designated by your Head of Institution to serve as the Web Administrator for your Reporting Employer (RE). As Web Administrator, you are responsible to:

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

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

As the Web Administrator, you are responsible for maintaining all other RE contacts in the RE Portal and assigning the appropriate authority level for their web account. Adding someone as a contact and assigning an authority level will generate emails to the contact giving them their User ID and a temporary password to log into the RE Portal and set up their security profile.

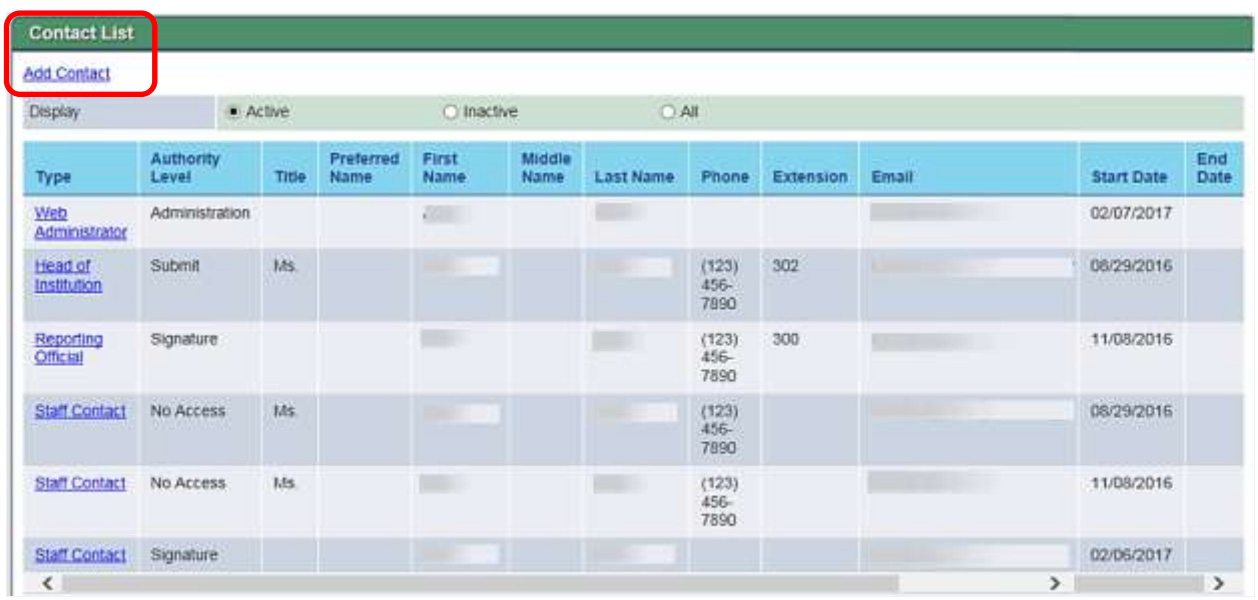
Adding a Contact

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

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

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

Click **Add Contact** to add a new contact.

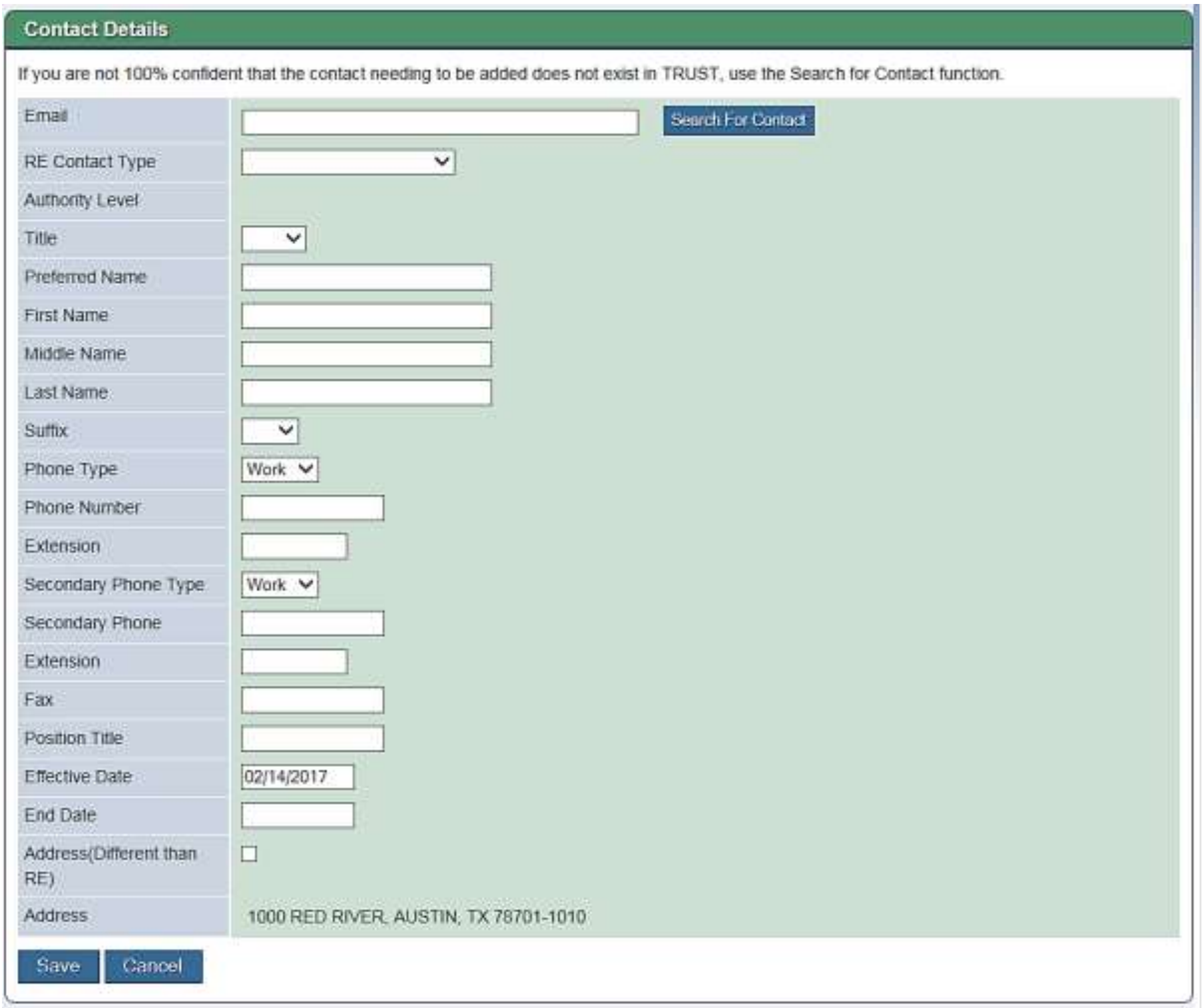

Contact List

Add Contact

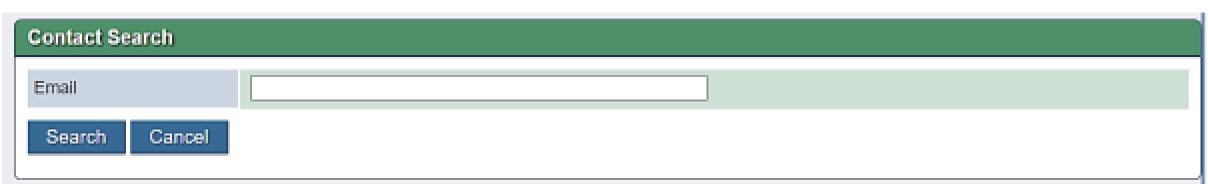
Display ● Active ○ Inactive ○ All

Type	Authority Level	Title	Preferred Name	First Name	Middle Name	Last Name	Phone	Extension	Email	Start Date	End Date
Web Administrator	Administration									02/07/2017	
Head of Institution	Submit	Ms.					(123) 456-7890	302		08/29/2016	
Reporting Official	Signature						(123) 456-7890	300		11/08/2016	
Staff Contact	No Access	Ms.					(123) 456-7890			08/29/2016	
Staff Contact	No Access	Ms.					(123) 456-7890			11/08/2016	
Staff Contact	Signature									02/06/2017	

The **Contact Details** screen appears.



Enter the contact's email address and click **Search for Contact**. The Contact Search screen appears, then click **Search.**



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

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

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

Important Notes:

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

If you save your entry on the Contact Details screen and receive an error message, make sure no punctuation is found in any field that should be alpha character only. For example, Preferred Name should use letters only, free of any punctation.

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

Contact Types

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

An individual person may serve as multiple contact types (i.e., Payroll Contact and Reporting Official). All contact types may receive automated emails from the RE portal depending on their authority level in addition to informative emails from TRS.

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

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

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

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

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

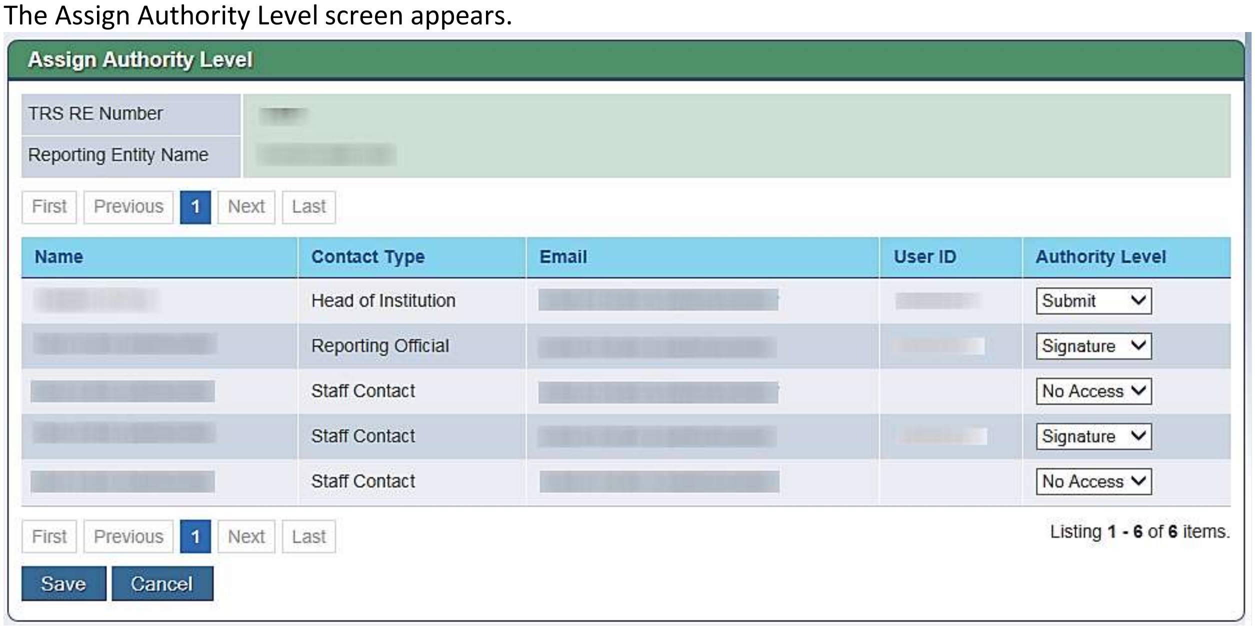
HR Contact: The staff member designated as the lead Human Resource contact for the employer.

Health Care Administrator: <u>this contact type should only be used by REs who are currently participating in TRS ActiveCare.</u> It should be the staff member approved by the RE to have access to HIPAA related health care data/information. This contact type will have access to a new tab in the RE Portal to submit a request to receive a Summary Health Claims Report. Review the Health Care Administrator section of this guide for additional information related to this contact type.

Assigning Authority Level

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

The Assign Authority Level screen appears.



Assign Authority Level

TRS RE Number	
Reporting Entity Name	

First Previous 1 Next Last

Name	Contact Type	Email	User ID	Authority Level
	Head of Institution			Submit
	Reporting Official			Signature
	Staff Contact			No Access
	Staff Contact			Signature
	Staff Contact			No Access

First Previous 1 Next Last   Listing **1 - 6** of **6** items.

Save Cancel

From the drop-down list on the far right, select the contact's authority level, which determines their ability to access the Reporting Employer Portal on behalf of your reporting employer, as well as the actions they can perform if access is granted.

Authority Levels

- **No Access:** The contact will not have access to the Reporting Employer Portal on behalf of your reporting employer. This is the default selection.

- **Display**: The contact will be able to access the Reporting Employer Portal, but will not have the ability to enter, edit, or delete any information.

- **Submit:** The contact will be able to access the Reporting Employer Portal, and will have the ability to create, edit, and delete reports.

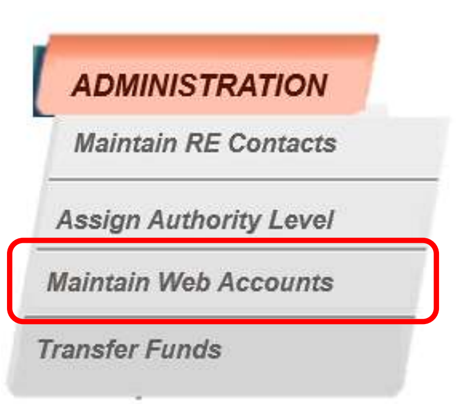
- **Signature:** The contact will be able to access the Reporting Employer Portal, and will have the ability to create, edit, delete reports, and will have the ability to accept or reject report signatures.

- **Administration (only TRS can assign this authority level):** The contact will have web administrator rights with access to create, read, update, and delete activities as well as accept or reject report signatures. The contact will also be able to manage web accounts for other Reporting Employer contacts.

A contact assigned to multiple contact types will appear only once and will have only one authority level. The Web Administrator's authority level cannot be changed, and the Web Administrator contact is not displayed on this screen. Contact TRS if you need to change your reporting employer's Web Administrator contact.

If a new user does not receive their credentials to access the RE Portal, first, make sure that contact has an authority level other than “No Access” assigned to them. Next, you should verify their email address was entered correctly. If the user has an authority level other than no access and the email address is correct and the user did not receive their login credentials through their email, then you will want to contact your IT department to verify the security settings are not blocking the emails from do-not-reply@trs.texas.gov. If you are still having issues, please contact your RE Coach.

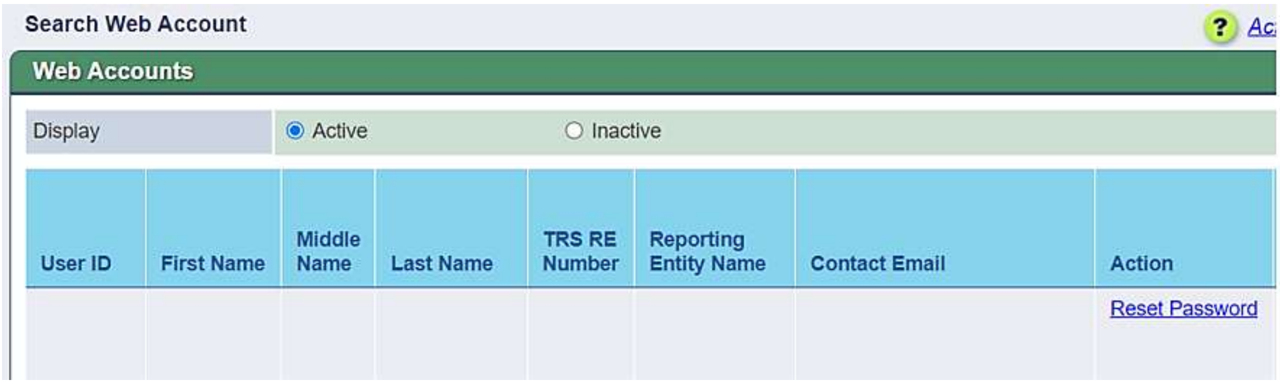
Resetting a Contact’s password



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

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

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



The Web Administrator cannot reset his or her own password. If the Web Administrator gets locked out of the RE Portal, he or she will need to request a password reset by emailing reporting@trs.texas.gov. Please include your four-digit RE number.

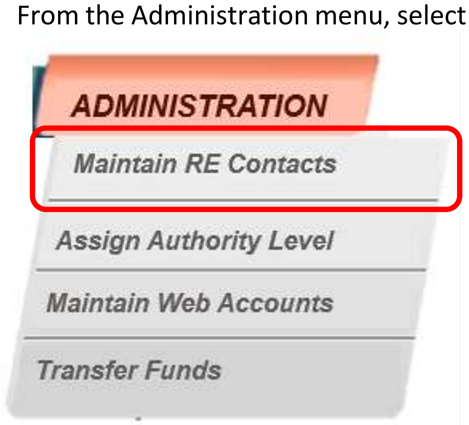
Frozen Accounts

RE Contacts are required to complete the Annual Recertification Agreement within the RE Portal to maintain access. Contacts will be notified starting seven (7) calendar days before the certification end date. If the contact does not log in to recertify their account before the seven-day certification period expires, the account will be *frozen*.

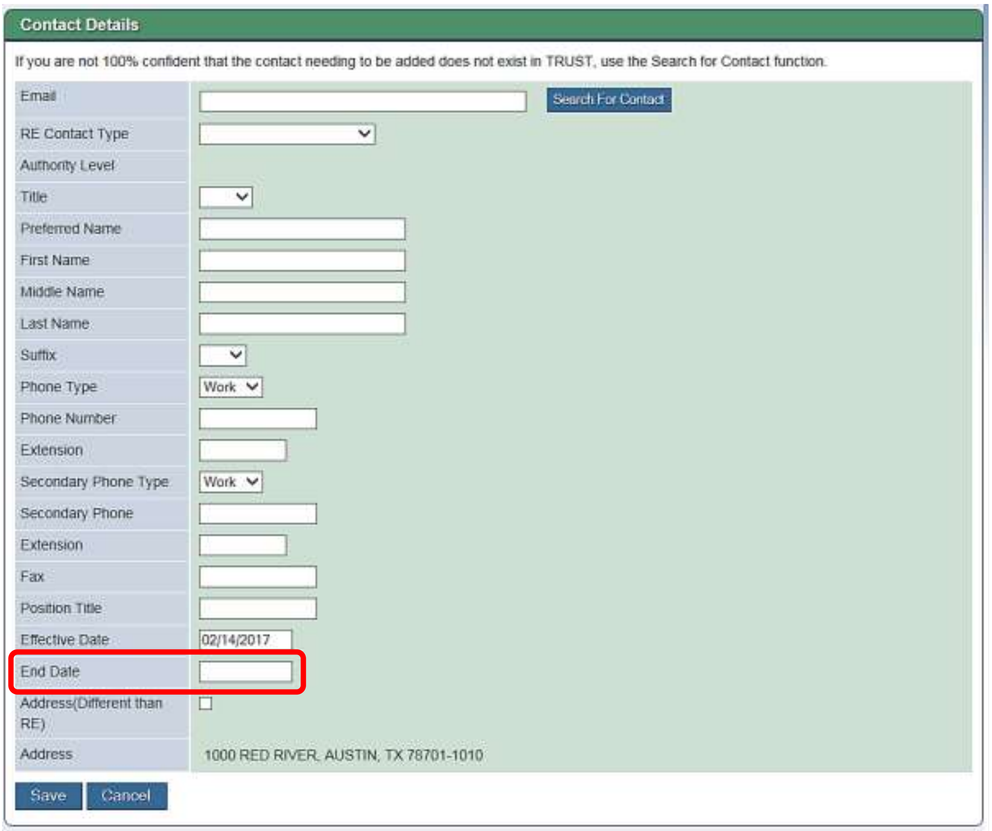
A frozen account may only be unfrozen by TRS by emailing reporting@trs.texas.gov. Once no longer frozen, the user will be able to login and will be prompted to complete the Annual Recertification Agreement before accessing the RE Portal.

Deactivating a Contact's RE Portal access

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



To deactivate a contact, open the contact detail screen for the contact. Enter an ‘End Date’ that is the last date the contact is valid for the reporting employer and click Save. The contact remains valid until that date. The authority level for a contact is automatically set to No Access on the contact’s End Date.



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

It is important to enter an End Date for the old user on the Contact Details screen before attempting to assign a new user. Do not replace the old user information on the Contract Details screen with new contact information.

Changing a Web Administrator

To update the Web Administrator, a new [TRS 597A] form must be completed and sent to [reporting@trs.texas.gov for processing]. Please include your 4-digit TRS reporting employer number in the subject line along with ‘Web Administrator Change’. The top section of the TRS 597A will need to be completed by the Head of Institution and the bottom section will need to be completed by the new Web Administrator. *Electronic signatures are not accepted on the TRS 597A form.*

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

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

Health Care Administrator Contact Type

The Health Care Administrator contact is one that is approved by the RE to have access to HIPAA related health care data/information. This contact type will have access to a new tab in the RE Portal to submit a request to receive a Summary Health Claims Report.

- Must be added as the Health Care Administrator contact type by the RE's web administrator.
- Each RE can only assign *one* Health Care Administrator contact type.
- The Health Care Administrator can also have another contact type assigned for the RE (i.e., Payroll Coordinator and Health Care Administrator).
    - If the contact has multiple active roles for the RE, **do not** select Health Admin authority level. To have access to the RE Portal *and* the Health Claims Data Request tabs, select the appropriate authority level needed for RE Portal access (Display, Submit, or Signature).