



# RE Portal Certifications

## User Guide

July 2025

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## Worklist Items

Certifications will be added as a Worklist item in the RE Portal for Reporting Employers (REs) to certify information requested by the Teacher Retirement System of Texas (TRS). REs will receive an email notification when a new Worklist item is created. If a certification is cancelled and reinitiated, a new notification will be sent to the RE.

REs are expected to submit an ED90 termination record for any employee that terminates *all* employment, regardless of the reason for termination.

*Navigation to the Certifications in the RE Portal:*

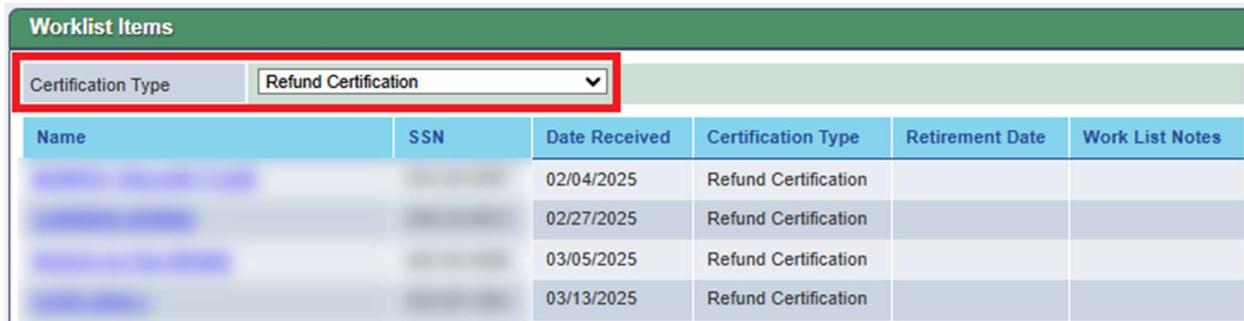
1. Log in to the RE Portal
2. Click on the My Worklist menu
3. Click on Certifications
4. Select the appropriate certification type from the drop-down menu



## Refund Certification

A refund certification will only be sent to an RE if the member requested to refund their TRS account and the member has an open employment on the TRS system. This means that TRS has not received an ED90 for the employee reporting a termination. To avoid receiving this certification unnecessarily, ensure that an ED90 has been submitted for any employee that has terminated all employment with the RE.

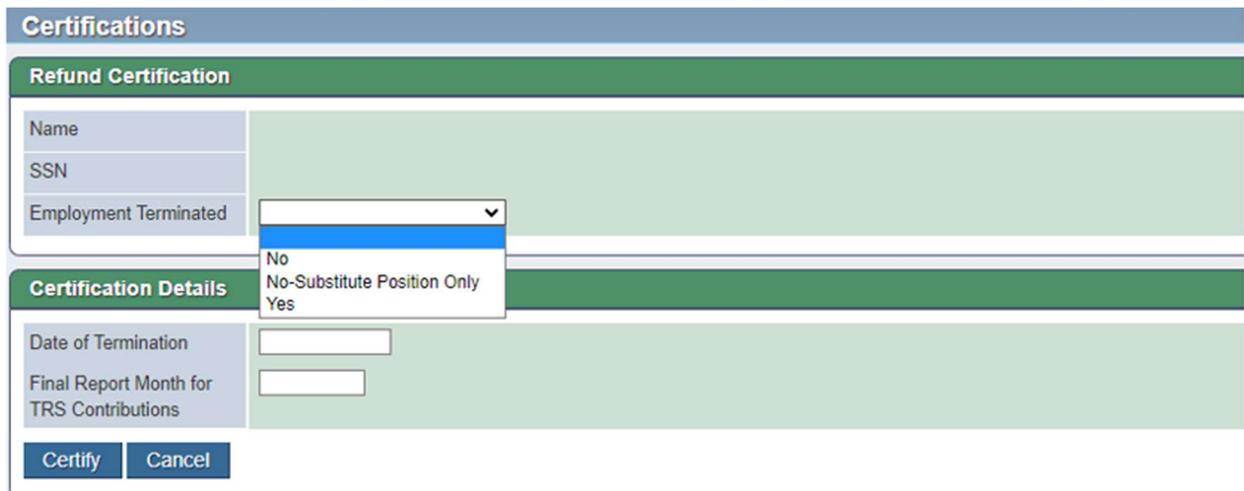
1. Navigate to My Worklist > Certifications
2. Under the Certifications Type menu, select **Refund Certification**
  - The screen will display all pending certifications for the RE.
2. Click the hyperlinked name of the employee to select the specific certification you are needing to complete.



The screenshot shows a 'Worklist Items' section with a dropdown menu for 'Certification Type' set to 'Refund Certification'. Below is a table with the following data:

Name	SSN	Date Received	Certification Type	Retirement Date	Work List Notes
[Redacted]	[Redacted]	02/04/2025	Refund Certification		
[Redacted]	[Redacted]	02/27/2025	Refund Certification		
[Redacted]	[Redacted]	03/05/2025	Refund Certification		
[Redacted]	[Redacted]	03/13/2025	Refund Certification		

When completing the Refund Certification, the employee's full name and social security number will be prepopulated. The RE is responsible for completing the remaining fields.



The screenshot shows the 'Refund Certification' form. The 'Employment Terminated' dropdown menu is open, showing the following options: 'No', 'No-Substitute Position Only', and 'Yes'. The 'Certification Details' section includes fields for 'Date of Termination' and 'Final Report Month for TRS Contributions'. At the bottom are 'Certify' and 'Cancel' buttons.

First, you will need to confirm whether the employee has terminated employment by selecting one of the available options from the drop-down menu.

### Employee Terminated – No

- If the employee has not terminated all employment and is actively working in a position other than substituting, select 'no,' and certify.

Refund Certification	
Name	
SSN	
Employment Terminated	No

Certification Details	
Date of Termination	
Final Report Month for TRS Contributions	

**Certify** Cancel

### Employee Terminated – Yes

- Select this option if the employee has terminated all employment and is not expected to return. Enter the Date of Termination (MM/DD/YYYY format).
  - If the employee was ever employed in an eligible position, enter the final report month in MM/YYYY format.

Employment Terminated	Yes
-----------------------	-----

Certification Details	
Date of Termination	12/31/2024
Final Report Month for TRS Contributions	01/2025

**Certify** Cancel

If the eligible position ended in a prior year, enter the final month they received eligible compensation for that position.

- If the employee was never employed in an eligible position, leave the final report month field blank and only enter the termination date.

Employment Terminated	Yes
-----------------------	-----

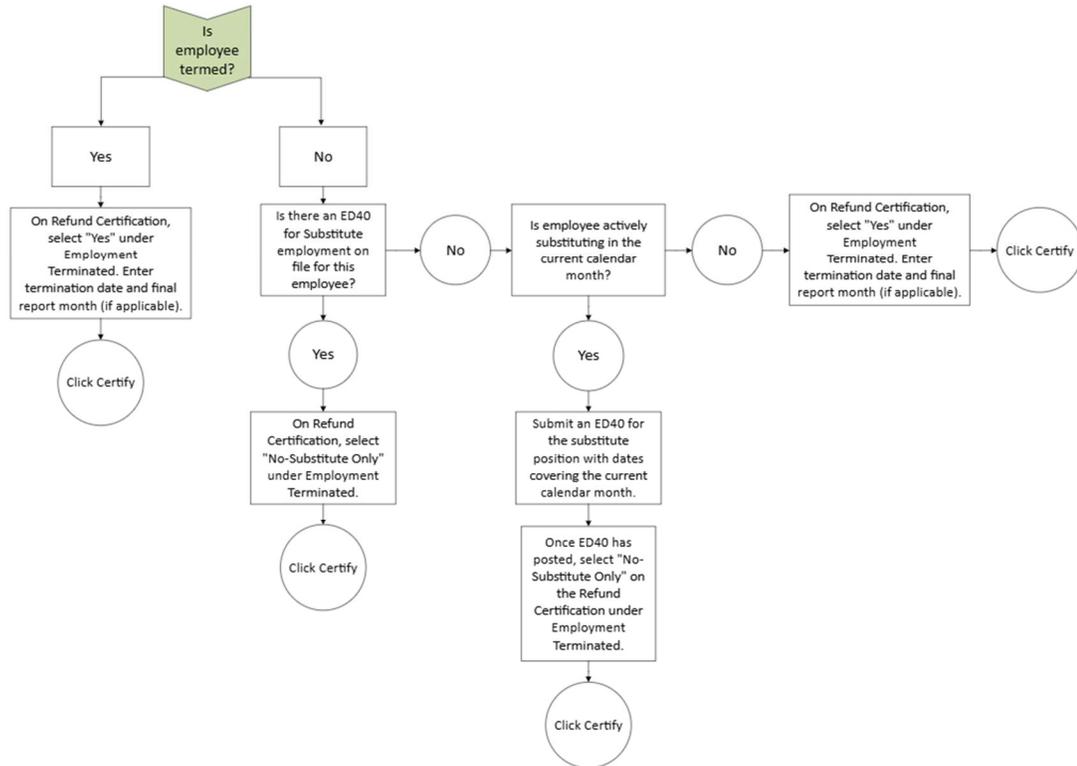
  

Certification Details	
Date of Termination	12/31/2024
Final Report Month for TRS Contributions	

**Certify** Cancel

## Employee Terminated – No-Substitute Position Only

- TRS allows members to refund their account if they terminate all employment with their TRS-covered employer(s) and have not applied for or received a promise of employment with a TRS-covered employer. The only exception is if the member is working as a substitute.



*For TRS purposes, the definition of a substitute is a person who serves on a temporary basis in the place of a current employee and paid at the daily rate of pay as set by the employer.*

Employment Terminated	No-Substitute Position Only ▾
<b>Certification Details</b>	
Non-Substitute Position End Date	<input type="text"/>
Final Report Month for TRS Contributions	<input type="text"/>
<input type="button" value="Certify"/>	<input type="button" value="Cancel"/>
Final Report Month is required only if the person was employed in a TRS Eligible position. Non-Substitute Position End Date is required only if the person was employed in a Non-Substitute Position.	

*If you receive errors when completing the refund certification, please reach out to your TRS Coach for assistance.*

## Retirement Certification (TRS 7)

The Retirement Certification in the RE Portal replaced all previous iterations of the TRS 7 *Notice of Final Deposit before Retirement* forms including electronic and paper forms. Retirement packets issued to members no longer include the TRS 7 form. The Retirement Certification will be sent to an RE's Worklist once TRS has processed the member's retirement application **and** the retirement date elected by the member has passed.

**Submit the Retirement Certification only *after* the correct final eligible compensation has been paid to the member. Do not submit the retirement certification any earlier than the final report month for the member.**

- Under the Certifications menu, select **Retirement Certification**
  - The screen will display all pending certifications for the RE.
  - This screen includes the Retirement Date of the member and Work List Notes
    - Retirement Date
      - This is the effective date of retirement for the member based on the application received by TRS.
      - If a member has concerns about the retirement date listed on the Retirement Certification, please have them contact TRS Benefit Counseling at 800-223-8778.
    - Work List Notes
      - This field allows for additional internal information related to a pending Retirement Certification that other RE Contacts with Signature Authority can review.
        - Example: RE receives a Retirement Certification for an employee on June 1 but the final paycheck is scheduled to be paid to the employee on July 15. You can enter Final Report Month as July 2025. This allows all other RE Contacts for your employer to expect this certification to be completed in July, once the final contribution amount has been confirmed.
      - Any information entered on this field will not be visible to TRS even once the certification has been certified.
- Click the hyperlinked name of the employee to select the specific certification you need to complete.

Certifications					
Worklist Items					
Certification Type	Retirement Certification				
Name	SSN	Date Received	Certification Type	Retirement Date	Work List Notes
<a href="#">Jane Doe</a>		03/28/2023	Retirement Certification	01/31/2023	
<a href="#">John Doe</a>		03/30/2023	Retirement Certification	02/28/2023	

3. Here is a complete look at the Retirement Certification screen:
  - a. The Name and Social Security Number (SSN) fields will be populated by TRS
  - b. Each field is explained further in this guide

Certification Details

Was the participant in a TRS membership eligible position in the last school year of employment?	<input type="radio"/> Yes <input type="radio"/> No
Date of Termination	<input type="text"/>
Total Salary During Final Month	<input type="text"/>
Final Member Contribution	<input type="text"/>
Final Report Month	<input type="text" value="v"/> <input type="text" value="v"/>
Annual Salary Paid for Final Year	<input type="text"/>
Any Non-Creditable Compensation Converted to Salary for Last Five School Years?	<input type="radio"/> Yes <input type="radio"/> No

[Add Non Creditable Compensation Amount](#)

Date	Non Creditable Compensation Amount
------	------------------------------------

Participant Works a Non-Standard Work Week?	<input type="radio"/> Yes <input type="radio"/> No
Did The Member Work a Full Fall Semester in the last year of employment?	<input type="radio"/> Yes <input type="radio"/> No
Date of Certification	<input type="text"/>
Comments	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <small>(You have 1000 characters remaining.)</small>
Work List Notes	<input style="width: 90%;" type="text"/> <small>*Work List Notes are only visible to Reporting Employer staff and will be displayed on the Work List page.</small>

SaveNotes
SaveCert
Download
Certify
Cancel

4. Once you have filled in the information, and before clicking **Certify**, either print this screen or use the 'Download' option if you wish to keep a copy for your records.

## Retirement Certification Fields

Some fields on the certification are dynamic and will display additional options depending on the entry.

### *Eligible Position*

In the last school year of employment, did the employee work in a TRS-eligible position?

Was the participant in a TRS membership eligible position in the last school year of employment?

Yes

No

- **Yes** – complete all fields of the certification as they apply to the TRS membership-eligible position
- **No** – complete the Date of Termination and Final Report Month fields and comments (if needed)

### *Date of Termination*

The effective date of resignation/termination is the date that the member terminates the employment relationship with the employer and *all* employment with the TRS-covered employer ceases. A member must terminate all TRS-eligible and non-eligible employment before retirement. A member has not officially terminated employment with a TRS-covered employer if the member is working, or on paid or unpaid leave with the TRS-covered employer. The date of termination may not align with the date of retirement.

Date of Termination

- MM/DD/YYYY format

### *Total Salary During Final Month*

Enter the TRS-eligible salary that will be paid to the employee in their final check. Include only TRS-eligible salary, as this will be used in the benefit calculation. Payments for accrued leave, including any state or local days, are not considered to be TRS-creditable compensation. These amounts should not be included on this line.

Total Salary During Final Month

### *Final Member Contribution*

Total Member Contribution based on the Total Salary amount in the previous field. Should match the total member contribution withheld from the member's final eligible compensation.

Final Member Contribution

### Final Report Month

The final report month should reflect the monthly report that includes the final member contribution submitted by the TRS-covered employer on behalf of the member.

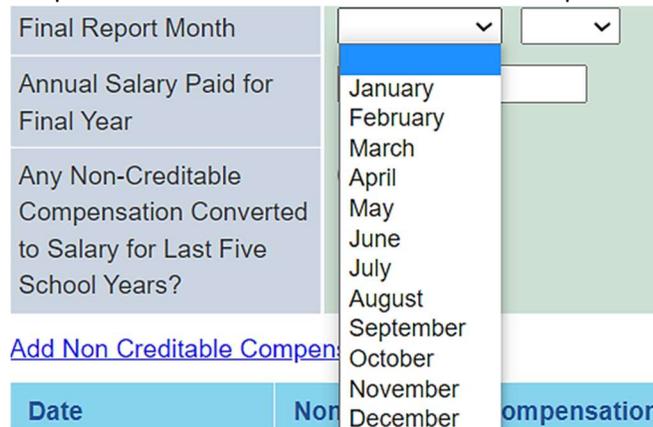
NOTE: It is very important to complete the Final Report Month field correctly. Beginning September 2015, all REs were required to report salary in the month it is paid, regardless of when it was earned. Please ensure that the Final Report Month field is completed based on the employee's final pay date, not based on the employee's termination date. If the member terminated employment in May but will not receive their final TRS-eligible salary until August, the final report month should be listed as August.

**Non TRS-eligible employees:** The final report month should reflect the month their final paycheck was issued. Follow up with an ED90 including the termination date and final report month as listed on the certification, in addition to completing the retirement certification.



Final Report Month

- Use the drop-down menu to select the correct Final Report Month and Year



Final Report Month

Annual Salary Paid for Final Year

Any Non-Creditable Compensation Converted to Salary for Last Five School Years?

[Add Non Creditable Compens](#)

Date Non Compensation

**Note:** If the final payment was issued more than five prior fiscal years ago, you will not be able to complete the Retirement Certification. In this scenario, complete an ED90, and reach out to your RE coach to ask that the certification be removed from your Worklist.

### Annual Salary Paid for Final Year

The Annual Salary field should be entered as all creditable compensation paid to an employee from Sept. 1 to the final report month. Even though the employee may have different contract dates, or your employer has a different fiscal year, enter the salary according to Sept. 1 through Aug. 31. The employee's final salary calculation will be completed by TRS at the time of retirement in accordance with applicable TRS laws and rules that govern salary in the final year of retirement.



Annual Salary Paid for Final Year

**IMPORTANT:** If an employee worked in the prior fiscal year and is receiving their final pay in September of the current fiscal year, only include the compensation being paid as the “Annual Salary Paid for Final Year.” This means that the “Total Salary During Final Month” and the “Annual Salary Paid for Final Year” will be the same amount. Additional information about the employee’s salary can be included in the “Comments” section.

*Please note, if an employee receives ineligible compensation after the final report month for TRS Contributions, such as payout of accrued leave, then the ineligible compensation should not be reported.*

Total Salary During Final Month	\$ 6,000.00
Final Member Contribution	\$ 495.00
Final Report Month	September 2024
Annual Salary Paid for Final Year	\$ 6,000.00
Any Non-Creditable Compensation Converted to Salary for Last Five School Years?	<input type="radio"/> Yes <input checked="" type="radio"/> No

[Add Non Creditable Compensation Amount](#)

Date	Non Creditable Compensation Amount
Participant Works a Non-Standard Work Week?	<input type="radio"/> Yes <input type="radio"/> No
Did The Member Work a Full Fall Semester in the last year of employment?	<input type="radio"/> Yes <input type="radio"/> No
Date of Certification	09/11/2024
Comments	Final pay in September. Employee received \$72,000 from Sept 2023-Aug 2024.

(You have 925 characters remaining.)

### *Non-Creditable Compensation Converted to Salary*

TRS must exclude from benefit calculations any otherwise eligible compensation amounts that have been converted from non-creditable compensation to eligible salary and wages during any of the last three or five school years prior to a member’s retirement (depending on the number of years used in the member’s final average salary computation at retirement). Conversion occurs when an employer agrees to begin paying a member with creditable compensation for services performed that were previously paid by that employer with non-creditable compensation.

- If an employee did not have non-creditable compensation converted for the last five school years, select “**No.**” Do not input any information on the “Add Non-Creditable Compensation Amount” link.
- If non-creditable compensation was converted for the last five school years, select “**Yes**” and click the “Add Non-Creditable Compensation Amount” link.

Any Non-Creditable Compensation Converted to Salary for Last Five School Years?  Yes  No

[Add Non Creditable Compensation Amount](#)

**Non Creditable Compensation**

Date

Non Creditable Compensation Amount

[Save](#) [Delete](#) [Cancel](#)

**IMPORTANT:** The Non-Creditable Compensation information on this new screen can be deleted/edited after clicking **Save** but cannot be changed once you select “Certify” on the Retirement Certification. To edit or delete this information, click on the date hyperlink on the certification.

Any Non-Creditable Compensation Converted to Salary for Last Five School Years?  Yes  No

[Add Non Creditable Compensation Amount](#)

Date	Non Creditable Compensation Amount
<a href="#">02/10/2023</a>	\$ 523.45

Participant Works a Non-Standard Work Week?  Yes  No

Did The Member Work a Full Semester?  Yes  No

Date of Certification

Comments

(You have 1000 characters remaining.)

[Certify](#) [Cancel](#)

*Non-Standard Work Week*

Indicate ‘Yes’ for an employee regularly scheduled to work in a full-time position less than five days a week. An example is an employee working four 10-hour days. Another example is an adjunct professor

who meets TRS eligibility, but their classes only meet on Tuesday and Thursday each week. Indicate 'No' if the employee works in a position that does not meet the definition of a non-standard work week.

Participant Works a Non-Standard Work Week?	<input type="radio"/> Yes	<input type="radio"/> No
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*Full Fall Semester*

Indicate 'Yes' for an employee that worked or received paid leave for each day of the full fall semester in the final year of employment.

Did The Member Work a Full Fall Semester in the last year of employment?	<input type="radio"/> Yes	<input type="radio"/> No
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*Comments*

This field is optional. REs can input any notes relevant to the certification for TRS' consideration.

TRS can also use the comments field to provide feedback on a certification previously completed. If the retirement certification was previously completed for an employee and it appears on the worklist again, review any comments available before completing the certification.

Comments	<div style="border: 1px solid #ccc; padding: 5px;"> <p>(You have 1000 characters remaining.)</p> </div>
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*Work List Notes*

A place for REs to make internal notes regarding the completion of the certification. An example would be "Final Pay August" so the RE contacts know that the certification will not be completed until after the August payroll. TRS cannot view Work List Notes added by the RE.

Work List Notes	<div style="border: 1px solid #ccc; padding: 5px;"> <input type="text" value="Final Pay August"/> </div> <p><small>*Work List Notes are only visible to Reporting Employer staff and will be displayed on the Work List page.</small></p>
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<b>SaveNotes</b>	SaveCert	Download	Certify	Cancel
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- Completed within the Certification
- Displayed on the Worklist Items

Certification Type	Retirement Date	Work List Notes
Retirement Certification	01/31/2023	Final Pay August

- Can only be viewed by RE contacts
- 50 Character Limit
- After an RE inputs notes into the certification, click SaveNotes

- Do not click CERTIFY until the certification is completed

#### SaveNotes

This option will **only** save notes listed within the Work List Notes field of the Retirement Certification. If this field is blank, you do not need to select SaveNotes.

#### SaveCert

Allows RE to save information in the certification (including Work List Notes and comments) without triggering certain validations that require fields to be completed. This allows users to save the information if they need to verify before certifying.



- After an RE completes the fields on the certification, click SaveCert.
  - Do not click CERTIFY until the certification is completed.
- REs can complete the full retirement certification and click SaveCert then return later to Certify the retirement certification. Clicking SaveCert will save the entries made.
- TRS will not receive the certification until an RE clicks Certify.

#### Download the Retirement Certification

- Select the Download option if you need a copy of the certification for your records.
- Download will create a PDF version and will include all fields and notes entered.
- REs must download the certification before clicking Certify. The option to download is not available after it has been certified.
- TRS will not receive the certification until an RE clicks Certify.



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**Retirement Certification**

Name Jane Doe

SSN XXX-XX-XXXX

**Certification Details**

Was the participant in a TRS membership eligible position in the last school year of employment?

 Yes  No

Date of Termination

Total Salary During Final Month \$

Final Member Contribution \$

Final Report Month

Annual Salary Paid for Final Year \$

Any Non-Creditable Compensation Converted to Salary for Last Five School Years?

 Yes  No

Participant Works a Non-Standard Work Week?

 Yes  No

Did The Member Work a Full Fall Semester in the last year of employment?

 Yes  No

Date of Certification

Comments

(You have 1000 characters remaining.)

Work List Notes

**\*Work List Notes are only visible to Reporting Employer staff and will be displayed on the Work List page.**

*Please note, if changes were made after the form was initially downloaded, a new form will need to be downloaded before certifying so that you have a copy of the latest information entered.*

***Certify the Retirement Certification***

- Once all required fields have been completed, click **Certify**.
- Date of Certification is auto populated with the current date and cannot be changed.

[Add Non Creditable Compensation Amount](#)

Date	Non Creditable Compensation Amount
Participant Works a Non-Standard Work Week?	<input type="radio"/> Yes <input type="radio"/> No
Did The Member Work a Full Semester?	<input type="radio"/> Yes <input type="radio"/> No
Date of Certification	<input type="text" value="04/11/2023"/>
Comments	<input type="text"/> (You have 1000 characters remaining.)
<input type="button" value="Certify"/> <input type="button" value="Cancel"/>	

**Please note that once you click on Certify, there is not a way to make any changes to the certification itself. If this occurs, please notify your TRS coach and request a new certification be issued.**

*Considerations for Completing the Retirement Certification*

When completing the certification, there may be other things that need to be considered to ensure TRS is receiving the most accurate information.

- If the employee has never worked in a TRS-eligible position, you will need to complete the retirement certification **and** submit an ED90, ensuring that you include a final report month.
- If the RE is behind on reports when they are completing the retirement certification, it is helpful to include in the comments section the eligible compensation and member contribution for the report month that has not been submitted yet.
  - For example, if the RE is working on July reports and the final report month for that employee is August, the final pay date has passed. The RE can submit the certification with the below notes in the Comments section:  
**Currently working on July reports and will include Compensation = \$4,500 and Member Contribution = \$371.25. Final report month will be August.**

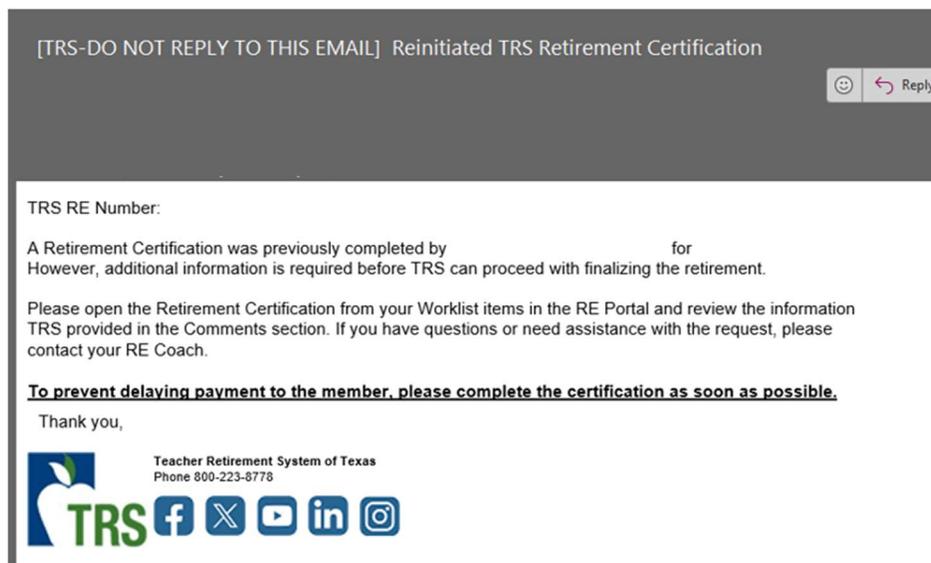
Date of Certification	<input type="text" value="08/26/2024"/>
Comments	<input type="text" value="Currently working on July reports and will include Compensation = \$4,500 Member Contribution = \$371.25. Final report month will be August."/> (You have 861 characters remaining.)
Work List Notes	<input type="text" value="Final Pay August"/> <b>*Work List Notes are only visible to Reporting Employer staff and will be displayed on the Work List page.</b>
<input type="button" value="SaveNotes"/> <input type="button" value="SaveCert"/> <input type="button" value="Download"/> <input type="button" value="Certify"/> <input type="button" value="Cancel"/>	

### Reinitiated Retirement Certification

After a Retirement Certification has been certified by the RE, TRS reviews the information to process the member's retirement application. If additional questions or possible corrections are needed by the RE, a reinitiated retirement certification will be sent to the RE's Worklist for review.

A system-generated email will also be sent to all RE Contacts with Signature or Administrative authority notifying the RE of the reinitiated certification. The email will also reference the employee's name. **All additional questions or corrections will be outlined within the Comments section of the Retirement Certification for you to review.** Once you have reviewed the additional information needed for the certification, you can update the specific fields or provide your response within the Comments section and recertify.

**If the certification is not completed within seven business days, a follow-up email will be sent.**



## Death Certification (TRS 8)

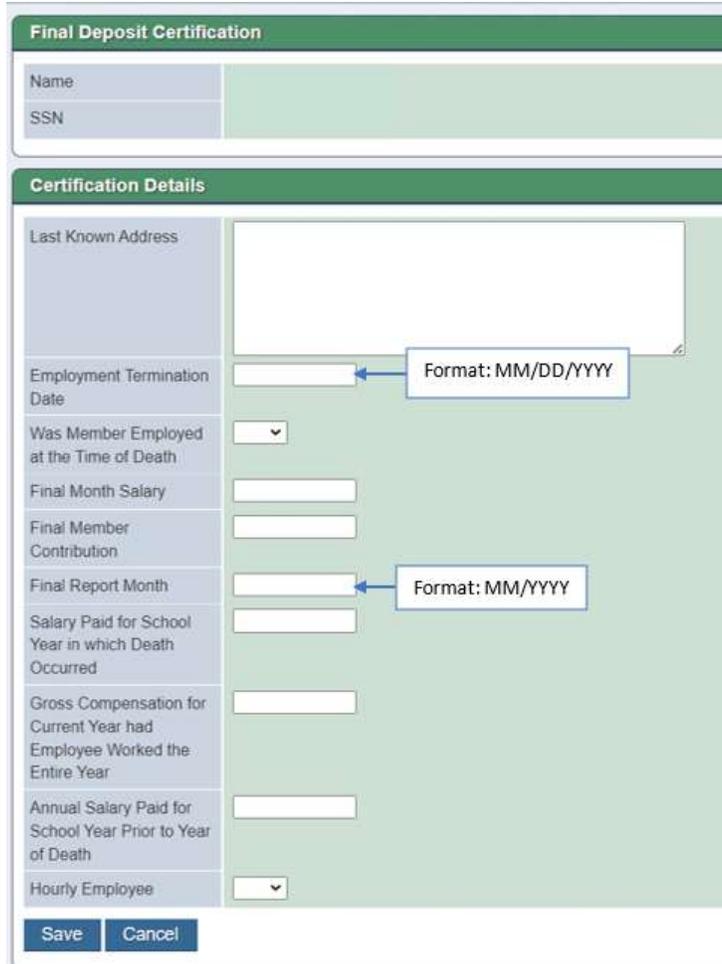
The Death Certification in the RE Portal replaced all previous iterations of the TRS 8 *Notice of Final Deposit of Deceased Member* forms including electronic and paper forms.

1. Under the Certifications menu, select **Death Certification**
  - The screen will display all pending certifications for the RE.



Name	SSN	Date Received	Certification Type	Retirement Date	Work List Notes
<a href="#">Jane Doe</a>		03/28/2023	Death Certification		
<a href="#">John Doe</a>		03/28/2023	Death Certification		

2. Click the hyperlinked name of the employee to select the specific certification you need to complete.
3. Here is a complete look at the Death Certification screen:
  - The Name and SSN fields will be populated by TRS
  - All remaining fields in the certification are required and must be completed by the RE



**Final Deposit Certification**

Name  
SSN

**Certification Details**

Last Known Address

Employment Termination Date Format: MM/DD/YYYY

Was Member Employed at the Time of Death

Final Month Salary

Final Member Contribution

Final Report Month Format: MM/YYYY

Salary Paid for School Year in which Death Occurred

Gross Compensation for Current Year had Employee Worked the Entire Year

Annual Salary Paid for School Year Prior to Year of Death

Hourly Employee

Save Cancel

**IMPORTANT:** Once you have filled in the information, and *before* clicking Save, print this screen if you wish to keep a copy for your records.

- *While the option to download a completed death certification is currently not available, TRS is exploring the option of a download or history screen as a future enhancement.*

### Death Certification Additional Fields

Some fields on the certification are dynamic and will display additional options depending on the entry.

#### *Last Known Address*

Input the last mailing address your RE had on file for the employee. Use standard United States Postal Service (USPS) mailing address format with the delivery address on line one and the city, state and ZIP code on a second line.

Last Known Address	<input type="text"/>
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#### *Employment Termination Date*

This should be the date your RE considered the employee terminated. However, this date cannot be after the Date of Death provided to TRS for the member. This field is in the MM/DD/YYYY format.

Employment Termination Date	<input type="text"/>
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If you receive the error below, please contact your RE coach for assistance.

 ERROR	Termination Date cannot be after the Date of Death for the member.
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#### *Was Member Employed at the Time of Death?*

Was Member Employed at the Time of Death	<input type="text"/>
	<input type="text"/>

- Yes – only select yes if the member was employed with your RE at the time of death.
- No – if the member was not employed at the time of death with your RE. You will also have to complete the Reason for Absence field.

### Reason for Absence

If the member was not employed at time of death, select a reason for absence from the drop-down menu.

Was Member Employed at the Time of Death	No ▾
Reason For Absence	<div style="border: 1px solid black; padding: 2px;"><div style="background-color: #e0e0e0; padding: 2px;">▾</div><div style="background-color: #e0e0e0; padding: 2px;">End of Employment</div><div style="background-color: #e0e0e0; padding: 2px;">Illness</div><div style="background-color: #e0e0e0; padding: 2px;">Injury</div><div style="background-color: #e0e0e0; padding: 2px;">Military Leave</div><div style="background-color: #e0e0e0; padding: 2px;">Other</div></div>
Final Month Salary	
Final Member Contribution	
Final Report Month	

- If the reason for absence is “Other” please provide a brief explanation in the box provided.

Reason For Absence	Other ▾ <div style="border: 1px solid black; height: 60px; width: 100%;"></div>
--------------------	--

### Final Month Salary

The salary fields are the fields that often generate the most questions for our employers. All the salary fields only refer to TRS-eligible compensation. You may need to mark some salary fields as zero if an employee was in an ineligible position. For the first salary fields detailed below, fill out these fields based on what was or will be actually paid to the employee.

Final Month Salary	\$ 0.00
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### Final Member Contribution

Provide the member retirement contribution amount collected from the final month’s salary.

- If the last contract for this individual was **not** TRS-eligible, the Final Member Contribution is still required. However, the system will not allow \$0. Therefore, enter \$1 in this field.
- If the last contract for this individual was TRS-eligible, input the Final Member Contribution withheld from the member’s final month salary.

Final Member Contribution	\$ 0.00
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### Final Report Month

The final report month is the report month that will contain the final member contribution deposit for the employee. This field is a MM/YYYY format.

Final Report Month	
--------------------	--

*Salary Paid for School Year in which Death Occurred*

When entering the eligible compensation paid for the school year in which death occurred, enter the actual salary paid during the current TRS fiscal year (Sept. 1 – Aug. 31).

Salary Paid for School Year in which Death Occurred	<input type="text" value="\$ 0.00"/>
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*Gross Compensation for Current Year had Employee Worked the Entire Year*

This field should be the total annual eligible compensation the member would have been paid if the member had been able to work the remainder of the school year at a normal scheduled. This field should be filled out based on the TRS fiscal year.

Gross Compensation for Current Year had Employee Worked the Entire Year	<input type="text" value="\$ 0.00"/>
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*Annual Salary Paid for School Year Prior to Year of Death*

Enter the eligible compensation paid to the employee for the school year *prior to* the last year of service. Enter the amount based on the TRS fiscal year.

Annual Salary Paid for School Year Prior to Year of Death	<input type="text" value="\$ 0.00"/>
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*Hourly Rate*

If Hourly Employee is Yes, enter the expected number of hours per week and the hourly rate.

Hourly Employee	<input type="text" value="Yes"/>
Number of Hours Scheduled Per Week	<input type="text"/>
Hourly Rate	<input type="text"/>

*If I made a mistake on the certifications, how can I make corrections?*

Please contact your RE coach. Provide the affected member and summary of the correction needed. TRS will review the information to determine if a new certification is needed for the member. If needed, a new certification will be issued through the RE Portal for the RE to complete.

## Employment After Retirement (EAR) Certifications

### Certify Actual Dates Worked

If a retiree is reported as working at multiple REs and combining substitute and non-substitute work within the same calendar month, then TRS needs each RE to certify the number of days worked in the report month. Once TRS receives the reported information from all REs on their respective Employment After Retirement (ER) Report, certifications will be sent out to each RE to certify the actual dates worked in the calendar month.

1. To find the certification, navigate to My Worklist>Certifications
2. Under the Certifications menu, select **Maintain EAR Actual Dates Worked**
  - a. The screen will display all pending certifications for the RE.
3. Click the hyperlinked name of the employee to select the specific certification you need to complete.

Name	SSN	TRS RE Number	Reporting Entity Name	Date Sent	Certification Type
<a href="#">[Employee Name]</a>	[SSN]	[TRS RE Number]	[Reporting Entity Name]	01/15/2019	Maintain EAR Actual Dates Worked
<a href="#">[Employee Name]</a>	[SSN]	[TRS RE Number]	[Reporting Entity Name]	01/30/2019	Maintain EAR Actual Dates Worked
<a href="#">[Employee Name]</a>	[SSN]	[TRS RE Number]	[Reporting Entity Name]	11/01/2019	Maintain EAR Actual Dates Worked
<a href="#">[Employee Name]</a>	[SSN]	[TRS RE Number]	[Reporting Entity Name]	12/09/2019	Maintain EAR Actual Dates Worked

Review the Reported Days and Employment Type for the month requested for the certification and verify that the information is accurate.

#### Certify Actual Dates

Name	
SSN	
TRS RE Number	
Reporting Entity Name	
Reported Days	16
Employment Type	Substitute
WorkList Status	Initiated

If any information needs to be updated, review the reported information and submit an ER27. If you need further assistance, reach out to your TRS coach.

If the information is correct, continue by selecting each day the retiree worked within the calendar month, **noting that working any part of the day counts as a whole day for EAR purposes**. If you have any comments regarding the employment, include this information in the comment section of the certification and click "Save."

**Select Actual Worked Dates**

Select the no of days worked

This Retiree has been reported by multiple RE's and please provide the actual dates worked for the following report period.

**March 2025**

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Comments

The number of days selected must match the 'Reported Days'. Include days worked and any paid leave days.

**Please note:** Working any part of the day, is counted as one calendar day, whether it is for one hour or eight hours.

### Certify Full-Time Months

If a retiree is reported as working full-time by a TRS-covered employer, TRS will send a certification to determine what months the retiree will continue to work in a full-time capacity within the current school year.

1. To find the certification, navigate to My Worklist>Certifications
2. Under the Certifications menu, select **EAR Full-Time Certification**
  - a. The screen will display all pending certifications for the RE.
3. Click the hyperlinked name of the employee to select the specific certification you need to complete.

Name	SSN	TRS RE Number	Reporting Entity Name	Date Sent	Certification Type
<a href="#">[Hyperlinked Name]</a>	[SSN]	[TRS RE Number]	[Reporting Entity Name]	10/06/2021	EAR Full Time Certification
<a href="#">[Hyperlinked Name]</a>	[SSN]	[TRS RE Number]	[Reporting Entity Name]	02/03/2022	EAR Full Time Certification
<a href="#">[Hyperlinked Name]</a>	[SSN]	[TRS RE Number]	[Reporting Entity Name]	02/03/2022	EAR Full Time Certification

If you receive this certification and the retiree did not work more than 92 hours, review the reported information and submit an ER27 to make the necessary corrections. If you need additional assistance, reach out to your TRS coach for further guidance on adjusting the information originally reported.

If the retiree is expected to work in a full-time capacity, select the months throughout the year that they will be expected to work **more than 92 hours**.

**Please note:** There may be some months with fewer working days, such as months with federal holidays and summer months where the retiree may still be considered as a full-time employee for your employer, but for TRS purposes they would not be considered full-time if they did not exceed 92 hours. **Only select the months that the retiree will exceed 92 hours in the calendar month.**

Once you have selected all the months that the retiree will exceed the 92 hours, click “Save.”

### Certify Total Compensation Per Month

If a retiree received a second strike notification from TRS due to exceeding the one-half time limits, TRS needs to verify how much total gross compensation was *earned* in the month the retiree exceeded to determine the necessary next steps.

1. To find the certification, navigate to My Worklist>Certifications
2. Under the Certifications menu, select **EAR Compensation Earned**
  - a. The screen will display all pending certifications for the RE.
3. Click the hyperlinked name of the employee to select the specific certification you need to complete.

Name	SSN	TRS RE Number	Reporting Entity Name	Date Sent	Certification Type
				05/21/2024	EAR Compensation Earned

Complete the certification with the compensation amount they earned in the report month given on the certification.

Certify Total Compensation per Month

Name	
SSN	
RE Name	
RE Number	
Status	Initiated <span style="font-size: small;">▼</span>

If you receive this certification and the retiree did not work full time in the month indicated on the certification, review the information originally reported, and submit an ER27 to make any necessary corrections. If you need additional assistance, reach out to your TRS coach.

If you have any additional comments about the retiree’s employment, enter the information in the “RE Comments” section. Once all information has been entered, click “Save” at the bottom of the certification.

Total Compensation Earned in 03/2025	<input style="width: 80%;" type="text" value="0"/>
RE Comments	
Coach Comments	
<input style="width: 40px;" type="button" value="Save"/> <input style="width: 40px;" type="button" value="Cancel"/>	

### Certify Non-Profit Tutor Reported

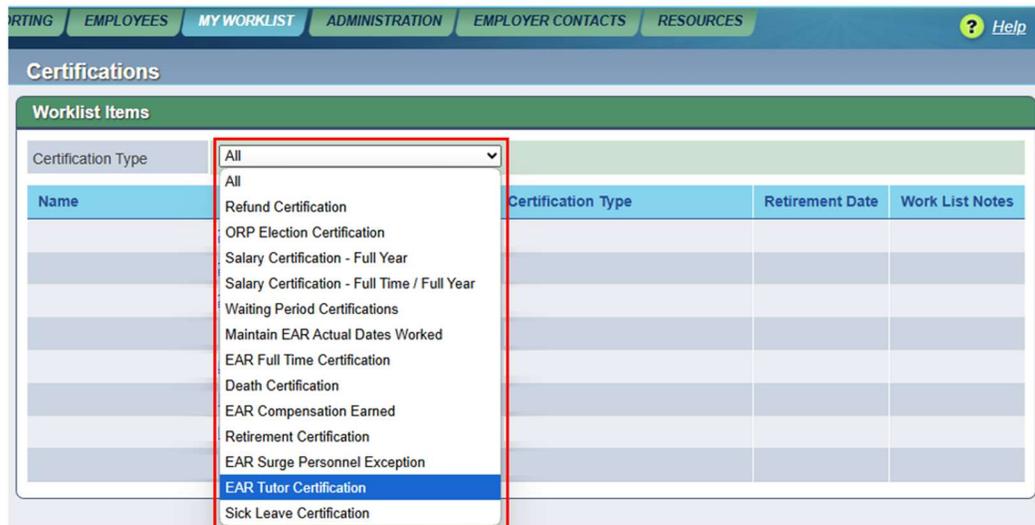
TRS retirees may work for an RE in a tutoring position that meets the requirements of and be reported as a Non-Profit Tutor.

If a retiree was reported with one of the employment types below, TRS requires that you certify that their employment meets the criteria for the Non-Profit Tutor Exception:

- B = Non-Profit Tutor Substitute
- N = Non-Profit Tutor Half-Time or Less

- T = Non-Profit Tutor Full Time

1. To find the certification, navigate to My Worklist>Certifications
2. Under the Certifications menu, select **EAR Tutor Certification**
  - a. The screen will display all pending certifications for the RE.



3. Click the hyperlinked name of the employee to select the specific certification you need to complete.

If you are receiving this certification for a retiree who was reported as one of the employment types listed above in error or does **not** meet the criteria for the Non-Profit Tutor Exception, review the reported information and submit an ER27 to make the necessary corrections. If you need additional assistance, reach out to your TRS coach.

Please note, Non-Profit Tutor must meet the specific criteria listed on the certification to be classified as one of the above employment types on the ER Report. If a retiree is working as a tutor but does not meet the Non-Profit Tutor exception, report the retiree with the appropriate employment type based on their work agreement. If you have questions about a retiree meeting the criteria, reach out to your TRS coach for further guidance. Once you have read the criteria and verified that the retiree meets all the requirements, select all the boxes and then click “Save.”

### Certify Non-Profit Tutor Reported

Non-Profit Tutor employment as defined in SB 1356 allows a retiree to work for an RE in a tutoring position that meets the requirements of 33.913 of the Education Code. If this tutoring is the retiree's only employment for the calendar month, they are not subject to forfeiture of their monthly annuity if they work more than one-half time. Applies to service and disability retirees.

TRS RE Number	
Name	
SSN	
Report Month	
Status	Initiated 

I have read Section 33.913 and Section 22.092 of the Education Code and Chapter 31 of the TRS Rules and certify that the above-named retiree's position complies with the criteria set forth in these TRS laws and rules. I certify that the retiree's position meets all of the following eligibility criteria for Non-Profit Tutor in the report month noted above:

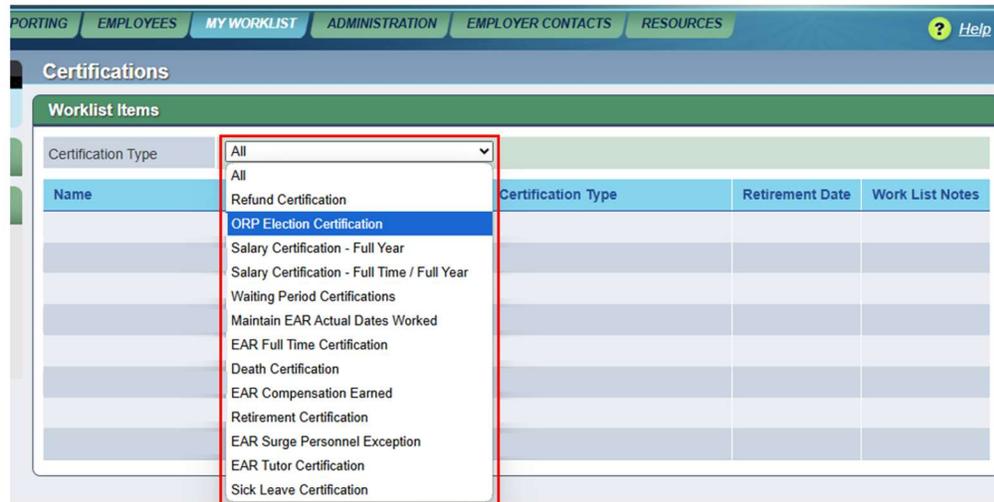
Eligibility Criteria 1		<input type="checkbox"/> Applied for the position in a manner specified by the non-profit organization
Eligibility Criteria 2		<input type="checkbox"/> Designated in the application whether the retiree plans to provide tutoring · For compensation, or on a volunteer basis, or both; and · In person, online or both
Eligibility Criteria 3		<input type="checkbox"/> Not to be included in the registry of persons not eligible for employment by a public school under Section 22.092
Eligibility Criteria 4		<input type="checkbox"/> The superintendent or chief executive officer, or the person designated by the superintendent or chief executive officer is overseeing the tutoring program

Save	Cancel
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## Optional Retirement Program (ORP) Certifications

If TRS needs to verify an ORP election, an ORP Election Certification will be sent to the RE's Worklist items. TRS initiates this certification solely to verify the election, and does not replace the current ORP Election procedure, requiring the [TRS28](#) form. For information about ORP elections, review the [ORP Brochure](#).

1. To find the certification, navigate to My Worklist>Certifications
2. Under the Certifications menu, select **ORP Election Certification**
  - a. The screen will display all pending certifications for the RE



3. Click the hyperlinked name of the employee to select the specific certification you need to complete

Once the name is selected, the following screen will display:

The screenshot shows the 'ORP Election Certification' form. The form has a title bar 'ORP Election Certification'. Below the title bar are four fields: 'Request Type' (set to 'ORP Election Certification'), 'Status' (set to 'Initiated'), 'TRS RE Number', and 'Reporting Entity Name'. The form is currently empty of data.

Complete the fields on the certification as follows:

**Certification Details**

ORP Eligible Date	First Date the employee was eligible to elect ORP (mm/dd/yyyy).
ORP Eligibility Notification Date	Date that employee was notified of their eligibility to elect ORP (mm/dd/yyyy).
ORP Election Date	Date that employee made their election (mm/dd/yyyy).
ORP Effective Date	The date that the ORP election was made effective (mm/dd/yyyy).
Final Report Month for TRS Contributions	If the employee was previously in a TRS eligible position, include the month that they will receive their Final TRS eligible compensation (mm/yyyy).
Date of Certification	
Comments	

Save Cancel

TRS may provide some comments within the certification, such as asking to verify the final report month. Once you have reviewed the additional information needed for the certification, you can update the specific fields or provide your response within the Comments section and click “Save” to submit the certification.