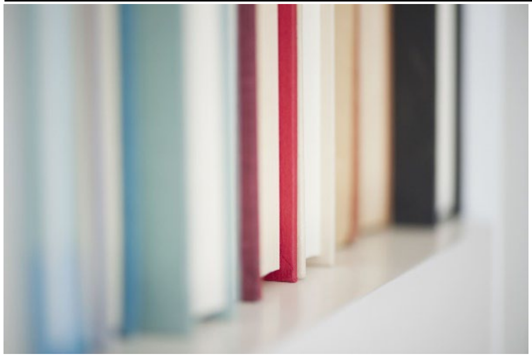
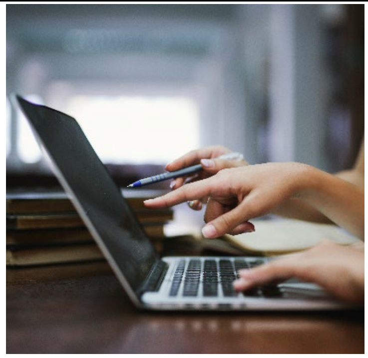
TEACHER RETIREMENT SYSTEM of TEXAS





RE Portal Chat

User Guide

TRS
TEACHER RETIREMENT SYSTEM OF TEXAS

March 2023

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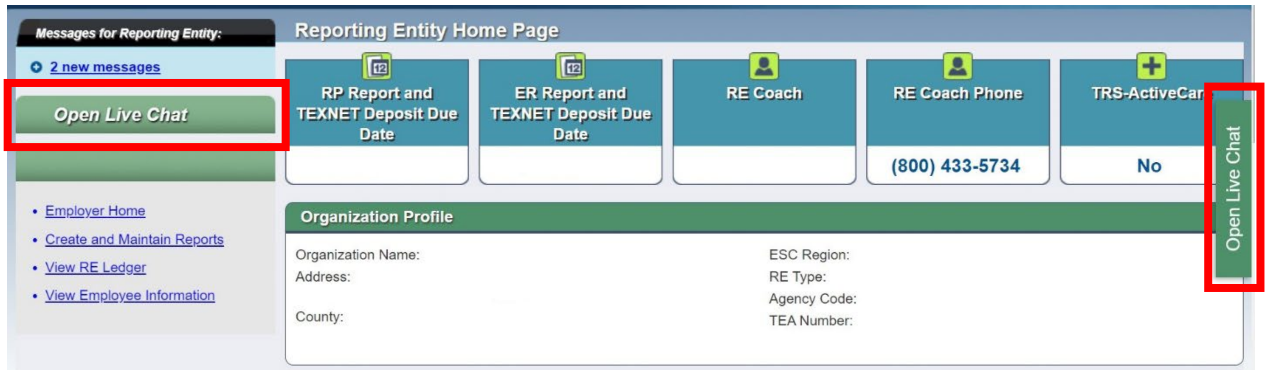
Who can use RE Chat?

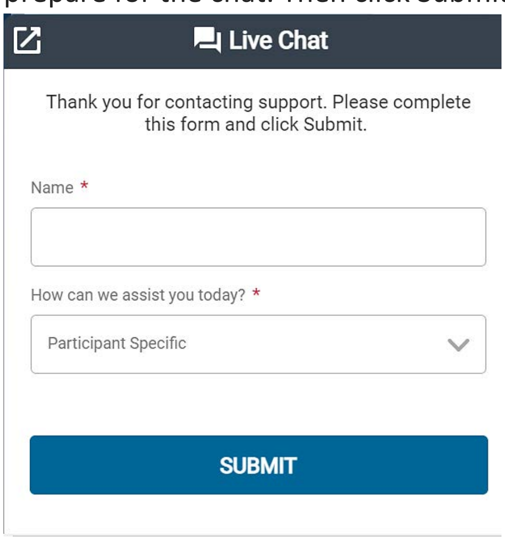
To use this new feature, RE contacts must have access and be logged into the RE Portal. RE contacts without an assigned authority level will not be able to access the RE Portal or chat. Any updates that need to be made to contact types or authority levels must be done by the RE's Web Administrator. If the Web Administrator needs to be updated for the RE, please complete the [TRS 597A] and email it to [reporting@trs.texas.gov] for processing.

How to start an RE Chat

1. Login to the RE Portal
2. Click "Open Live Chat" in the left-hand menu or on the ride side of the screen



3. Input your Name and select an [Available Chat Topic]. Selecting a chat topic will allow the RE Coach to prepare for the chat. Then click Submit.



4. This will initiate the chat. Depending on the topic selected, the RE contact may receive additional resources to review while pending a chat with an RE Coach. ***For security purposes, the RE Coach will ask certain verification questions at the start of the chat.***
5. The chat dialogue box can be expanded into a separate screen so REs can keep the chat the forefront of their work.

How to end a chat

To end the chat, click the 'X' in the top right corner of the chat dialogue box. The RE contact will be prompted to confirm they want to end the chat.

Chat Support Requests

IMPORTANT: To protect our members' information, please do not disclose member specific or personal information through the chat application. While a participant's name may be shared with the RE Coach to resolve an outstanding issue, please do not disclose the social security number, TRS participant ID, date of birth, gender, or other Personal Identifiable Information (PII). If information other than the participant's name must be shared to resolve the issue, please use another communication method instead of Chat.

Chat is ideal for short, quick questions that REs have about TRS reporting and will allow RE contacts to receive the information while working within the RE Portal. Some questions that will be great for chat are:

- How do I know if a new employee is a TRS retiree?
- When will TRS show my TEXNET deposit on the RE ledger?
- What record do I need to submit to resolve the demographic error on the RP report?
- How do we update the Web Administrator for our RE?

TRS will not be able to answer complex questions or share member specific information through chat. When this happens, the RE Coach will request to move the conversation to a phone call or email to complete the request. Some common support requests that will likely be converted to a call or email are:

- Scenarios that require a member's social security number
- Complex error resolutions
- Errors that require an override
- Fund transfer requests
- Ongoing corrective processes

In many situations, TRS may require REs to submit screenshots or written documentation to resolve the error. Currently, the chat feature does *not* allow REs or RE Coaches to send screenshots or attachments. This information must be sent by email. For example, if you need to submit a superintendent contract or a compensation plan for review, it must be submitted to your RE Coach via email. Hyperlinks should also not be included in the chat as the RE Coaches cannot click on any hyperlinks for security reasons.

Chat is not intended for REs to check on the status of an email or override sent to the RE Coach. RE Coaches are expected to work all inquiries in the order received, including emails and override requests.

Chat Availability

Chat with an RE Coach

Chat will be available 9 a.m. – 12 p.m., and 1 p.m. – 4 p.m. each business day from the 11th through the end of the calendar month. Chat will *not* be available the 1st through the 10th of the month. Chat is not available during this timeframe so that RE Coaches can support REs during the week reports are due. During this time, the RE Coaches experience a high number of complex questions and override requests which need to be handled by email or phone call.

Chat Resources

There will be some additional resources to use when chat is not available. Need a reminder of the due date? Select Laws/Rules in chat to receive information about the Report and TEXNET due dates.

Available Chat Topics

Available Reasons - Quick View
1. Forms 2. Laws/Rules 3. RE Training 4. Report Assistance 5. Other

Reason	Description
Forms	Inquiries relating to TRS forms
Laws/Rules	Inquiries about current TRS laws/rules, pending legislation, proposed laws/rules
RE Training	Inquiries about upcoming presentations for a group Scheduling a one-on-one training with an RE coach RE training proposal
Report Assistance	Inquiries about report status, simple errors, validation runs
Other	Any topic not covered in the other options.