



RE Portal Certifications

User Guide

August 2024

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New Worklist Items

In April 2023, TRS added two Reporting Employer (RE) certifications to the RE Portal under the My Worklist menu. These new certifications replaced the TRS 7 *Notice of Final Deposit before Retirement* and the TRS 8 *Notice of Final Deposit of Deceased Member* forms previously used by TRS.

The TRS 7 form will now be completed through the Retirement Certification and the TRS 8 form will now be completed through the Death Certifications.

Certifications will be added as a Worklist item for REs to complete during the benefit process. REs will receive an email notification of a new worklist item. If a certification is cancelled and a new one issued, 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. Login 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



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 will no longer include the TRS 7 form.

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.

1. Using the Certification Type dropdown 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
 - 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.
2. Click the hyperlinked name of the employee to select the specific certification you are needing to complete.

Name	SSN	Date Received	Certification Type	Retirement Date	Work List Notes
Jane Doe		03/28/2023	Retirement Certification	01/31/2023	
John Doe		03/30/2023	Retirement Certification	02/28/2023	

3. Here is a complete look at the Retirement Certification screen:
 - a. The Name and 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"/> <input type="text"/>
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" value="08/22/2024"/>
Comments	<input type="text"/> (You have 1000 characters remaining.)
Work List Notes	<input type="text"/> *Work List Notes are only visible to Reporting Employer staff and will be displayed on the Work List page.
<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"/>	

4. **IMPORTANT:** Before clicking Certify, please select the “Download” option if you are needing a copy of the certification for your records. Download will create a PDF version and will include all fields and notes entered.
 - To download, make sure pop-up blockers are disabled. The file will go to your computers download folder.
5. Once all information has been verified as true and accurate and the form is downloaded (if needed), please click “Certify” to send this form to TRS for processing.

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 field 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 retirement date.

Date of Termination

- MM/DD/YYYY format

IMPORTANT: Please note, an ED90 still needs to be submitted once the retirement certification has been completed to close out the employment. For *all* employees, including ineligible employees, the ED90 must include the termination date and final report month.

Total Salary During Final Month

Enter the TRS-eligible salary that will be paid to the employee in their final check. Please be sure to 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	<input type="text"/>
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Final Report Month

The final report month should reflect the monthly report the final member contribution the TRS-covered employer will submit on behalf of the member and on which it will be included.

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.

If the employee's last position held with the RE was *not* TRS membership eligible. Please submit an ED90 with the termination date and final report month in addition to the retirement certification.

Final Report Month	<input type="text"/>	<input type="text"/>
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- Use the drop down menu to select the correct Final Report Month and Year

Final Report Month	<input type="text"/>	<input type="text"/>
Annual Salary Paid for Final Year	<input type="text"/>	<input type="text"/>
Any Non-Creditable Compensation Converted to Salary for Last Five School Years?	<input type="text"/>	<input type="text"/>
Add Non Creditable Compens	<input type="text"/>	<input type="text"/>
Date	Non	ompensation

-

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 your employer may have a different contract time frame, please enter the salary accordingly. The employee's final salary calculation will be done on the TRS side, in accordance with applicable TRS Laws and Rules that govern salary in the final year of retirement.

Annual Salary Paid for Final Year	<input type="text"/>
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IMPORTANT: If an employee worked in the prior fiscal year and is receiving their final pay in September of the current fiscal year, please 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.

The screenshot shows a form with the following fields and values:

Total Salary During Final Month	\$ 6,000.00
Final Member Contribution	\$ 485.00
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.)

Please note, final salary calculations will be completed at the time of retirement in accordance with the TRS Laws and Rules governing salary in the final year of retirement.

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 Death 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
02/10/2023	\$ 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 is regularly scheduled to work in a Full-Time position less than 5 days a week. An example is an employee working (4) ten-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 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. Please review the comments field before completing the certification if the retirement certification was previously completed for an employee and the employee's retirement certification is on the worklist again.

Comments	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <p>(You have 1000 characters remaining.)</p>
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SaveNotes/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	<input type="text" value="Final Pay August"/> <small>*Work List Notes are only visible to Reporting Employer staff and will be displayed on the Work List page.</small>
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SaveNotes	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 Reporting Employer contacts.
- 50 Character Limit
- After an RE inputs notes into the certification, click SaveNotes.
 - **Do *not* click CERTIFY until the certification is completed.**

- REs can enter notes and click SaveNotes then return at a later time to Certify the retirement certification. Clicking SaveNotes will save the notes entered as “Work List Notes” on the Certification list.
- TRS will not receive the certification until an RE clicks **CERTIFY**.

SaveCert

Allows RE to save information in the certification without triggering certain validation that require fields to be completed. This allows users to save the information if they are needing to verify the information and then come back to this screen.



- 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 at a later time 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

- Please select the Download option if you are needing a copy of the certification for your records.
- Download will create a PDF version and will include all fields and notes entered.
- TRS will not receive the certification until an RE clicks **CERTIFY**.



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.

Date of Certification	08/22/2024
Comments	(You have 1000 characters remaining.)
Work List Notes	*Work List Notes are only visible to Report

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 never worked in a TRS eligible position, not only will you need to complete the retirement certification but also **must** submit an ED90 and making sure to include a FRM.
- If the RE is behind on reports when they are completing their 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 FRM for that employee is August, and the final pay date has passed. The RE can submit the certification with the below notes in the Comments:

Currently working on July reports and will include Compensation = \$4,500 Member Contribution = \$371.25. Final report month will be August.

Date of Certification	08/28/2024
Comments	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	Final Pay August *Work List Notes are only visible to Reporting Employer staff and will be displayed on the Work List page.

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.

- Using the Certification Type dropdown menu, select **Death Certification**
 - The screen will display all pending certifications for the RE.



The screenshot shows the RE Portal interface. At the top, there are navigation tabs: RTING, EMPLOYEES, MY WORKLIST, ADMINISTRATION, EMPLOYER CONTACTS, and RESOURCES. A Help icon is visible in the top right corner. Below the navigation is a header for 'Certifications'. Underneath, there is a 'Worklist Items' section. A dropdown menu labeled 'Certification Type' is set to 'Death Certification'. Below the dropdown is a table with the following data:

Name	SSN	Date Received	Certification Type	Retirement Date	Work List Notes
Jane Doe		03/28/2023	Death Certification		
John Doe		03/28/2023	Death Certification		

- Click the hyperlinked name of the employee to select the specific certification you are needing to complete.
- 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	<input type="text"/> Format: MM/DD/YYYY
Was Member Employed at the Time of Death	<input type="checkbox"/>
Final Month Salary	<input type="text"/>
Final Member Contribution	<input type="text"/>
Final Report Month	<input type="text"/> Format: MM/YYYY
Salary Paid for School Year in which Death Occurred	<input type="text"/>
Gross Compensation for Current Year had Employee Worked the Entire Year	<input type="text"/>
Annual Salary Paid for School Year Prior to Year of Death	<input type="text"/>
Hourly Employee	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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

 - While the option to download a completed certification is currently not available, TRS is exploring the option of a download or history screen for 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.

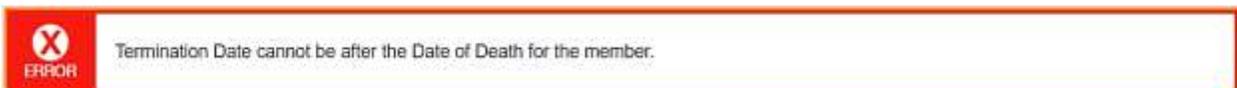
Last Known Address	<input type="text"/>
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Employment Termination Date

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 a 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.



Was member employed at the Time of Death?

- 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.

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

- If the member was employed at time of death is No, select a reason for absence from the drop-down menu.

Was Member Employed at the Time of Death	No ▾
Reason For Absence	▾ End of Employment Illness Injury Military Leave Other
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 ▾
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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, please 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. Please enter \$1 in this field.
- If the last contract for this individual was TRS eligible, please 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	
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Salary Paid for School Year in which Death Occurred

When entering the eligible compensation paid for the school year in which death occurred, please 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

The annual eligible compensation 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 school’s semester dates, not 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 school’s dates, not 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"/>
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

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

Please contact your RE coach. Provide the affected member and brief 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.