

# Fall 2020 TRS RE Portal Changes and Enhancements



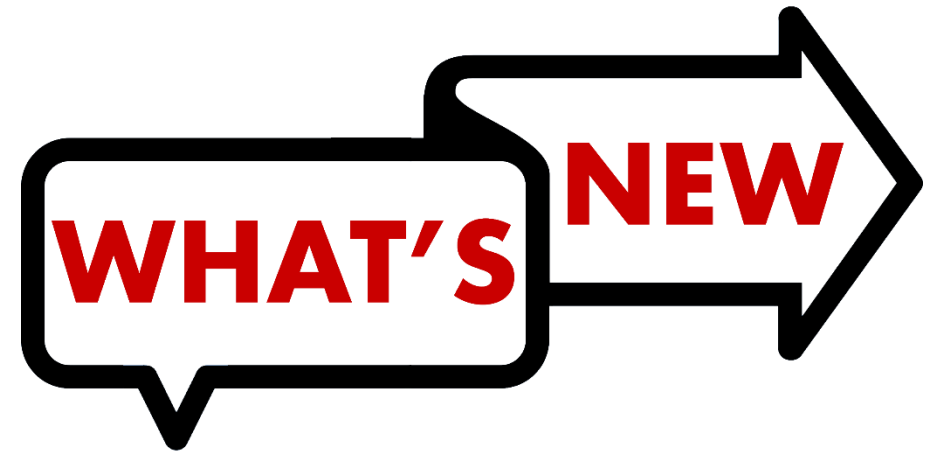
This presentation is intended as a high level overview of TRS Laws and Rules related to reporting. This presentation should not be viewed as a comprehensive overview of the TRS reporting process.

The information in this presentation is based on the TRS Laws and Rules as of the 2020-2021 fiscal year

Please see the various RE Portal training and resources available on the TRS website for more complete information.

## View Employee Information Screen Enhancements

- New message at top of screen
- Salary Cap
- New Member Days completed
- ORP Participation and Vesting status
- Current TRS eligible contract
- View for ED, RP and ER transactions



# View Employee Information – No TRS Account

## Employee Information

? [Activity Help](#)

### Search Employee

SSN or TRS-Assigned  
Temp ID

[REDACTED]

Last Name

smith

Date of Birth

Search

Clear

### Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

SSN or TRS-Assigned  
Temp ID

[REDACTED]

TRS Member

No

New Member  
Contributions Due

Yes

# View Employee Information Screen – ED 20 received only

In the example below, TRS received demographic information for the employee but does not have ED Contract or RP Payroll Info reported. If the person is hired into a TRS eligible position, the New Member contribution will be due for the first 90 days of employment.

**Employee Information**

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

As Of Date	08/13/2020
SSN or TRS-Assigned Temp ID	[REDACTED]
First Name	[REDACTED]
Middle Name	[REDACTED]
Last Name	[REDACTED]
Suffix	NONE
New Member Days completed as of 1st of Current Month	
In a TRS Eligible Position	No
TRS Eligible Date Range	
Subject to Salary Cap	Yes

[View ED Contract Info](#)[View RP Payroll Info](#)

# View Employee Information---Current TRS Member

**As of date:** date the search was completed in the RE portal

## Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

As Of Date	06/04/2020	New Member Contributions Due	Yes
SSN or TRS-Assigned Temp ID	[REDACTED]	New Member Days completed as of 1st of Current Month	80
First Name	[REDACTED]	In a TRS Eligible Position	Yes
Middle Name	[REDACTED]	TRS Eligible Date Range	03/13/2020 - 06/05/2020
Last Name	[REDACTED]	Subject to Salary Cap	Yes
Suffix	NONE		
TRS Member	Yes		

[View ED Contract Info](#)

[View RP Payroll Info](#)



# View Employee Information – Active Member Continued

**New Member Days completed as of 1<sup>st</sup> of Current Month:** The number of days remaining in the 90-day new member period as of the 1<sup>st</sup> of the month in which the search was completed. In the example, as of June 1<sup>st</sup> the employee completed 80 of the 90 days, with 10 days remaining.

## Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

As Of Date	06/04/2020	New Member Contributions Due	Yes
SSN or TRS-Assigned Temp ID	[REDACTED]	New Member Days completed as of 1st of Current Month	80
First Name	[REDACTED]	In a TRS Eligible Position	Yes
Middle Name	[REDACTED]	TRS Eligible Date Range	03/13/2020 - 06/05/2020
Last Name	[REDACTED]	Subject to Salary Cap	Yes
Suffix	NONE		
TRS Member	Yes		

[View ED Contract Info](#)[View RP Payroll Info](#)

## View Employee Information - Continued

### Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

As Of Date	06/04/2020	New Member Contributions Due	Yes
SSN or TRS-Assigned Temp ID	[REDACTED]	New Member Days completed as of 1st of Current Month	80
First Name	[REDACTED]	In a TRS Eligible Position	Yes
Middle Name	[REDACTED]	TRS Eligible Date Range	03/13/2020 - 06/05/2020
Last Name	[REDACTED]	Subject to Salary Cap	Yes
Suffix	NONE		
TRS Member	Yes		

[View ED Contract Info](#)

[View RP Payroll Info](#)

**In a TRS Eligible Position:** "Yes" or "No". Indicates that the employee has a TRS eligible position active in the TRS database on the "as of date". This could be for any TRS covered employer and may indicate concurrent eligible employment. Work with your employee to determine if they've terminated employment



## View Employee Information - Continued

### Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

As Of Date	06/04/2020	New Member Contributions Due	Yes
SSN or TRS-Assigned Temp ID	[REDACTED]	New Member Days completed as of 1st of Current Month	80
First Name	[REDACTED]	In a TRS Eligible Position	Yes
Middle Name	[REDACTED]	TRS Eligible Date Range	03/13/2020 - 06/05/2020
Last Name	[REDACTED]	Subject to Salary Cap	Yes
Suffix	NONE		
TRS Member	Yes		

[View ED Contract Info](#)[View RP Payroll Info](#)

**TRS Eligible Date Range:** the date range of the eligible TRS position(s) active on the "as of date"

# View Employee Information - Continued

**Employee Information**

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

As Of Date	06/04/2020	New Member Contributions Due	Yes
SSN or TRS-Assigned Temp ID	[REDACTED]	New Member Days completed as of 1st of Current Month	80
First Name	[REDACTED]	In a TRS Eligible Position	Yes
Middle Name	[REDACTED]	TRS Eligible Date Range	03/13/2020 - 06/05/2020
Last Name	[REDACTED]	Subject to Salary Cap	Yes
Suffix	NONE		
TRS Member	Yes		

[View ED Contract Info](#)[View RP Payroll Info](#)

**Subject to the Salary Cap:** "Yes" or "No". If yes, the employee can only be reported with eligible compensation up to the [IRS Salary limit](#) set for the fiscal year.

# View Employee Information – Viewing Contract and Payroll Data

## Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

**Note:** This employee is an ORP participant and not eligible for TRS membership.

As Of Date	08/24/2020	New Member Days completed as of 1st of Current Month	Over 90 days
SSN or TRS-Assigned Temp ID	[REDACTED]	In a TRS Eligible Position	No
First Name	[REDACTED]	TRS Eligible Date Range	
Middle Name		Subject to Salary Cap	Yes
Last Name	[REDACTED]	ORP Election Date	07/03/2017
Suffix	NONE	ORP Vesting Status	Yes
TRS Member	No		

[View ED Contract Info](#)

[View RP Payroll Info](#)

**View ED Contract Info:** displays ED 40 contract/position records posted by your RE. Will not display contract/position records posted by other employers.

# View ED Contract Info Screen

## Positions

TRS Membership Eligible	Beginning Date of Contract/Work Agreement	Ending Date of Contract/Work Agreement	Position Code	Employment Type	Full-Time Equivalent (FTE)	ORP Eligible Position	Non-Standard Work Week	Adjunct Faculty	
Yes	08/10/2020	05/28/2021	02	F	40	No	No	No	
Yes	08/05/2019	05/22/2020	02	F	40	No	No	No	
Yes	08/06/2018	05/24/2019	02	F	40	No	No	No	
Yes	08/10/2017	05/31/2018	02	F	40	No	No	No	
Yes	08/12/2016	06/02/2017	02	F	00	No	No	No	
Yes	08/14/2015	06/03/2016	02	F	00	No	No	No	
Yes	08/15/2014	06/05/2015	02	F	00	No	No	No	
Yes	08/20/2013	06/02/2014	03	F	00	No	No	No	



## View Employee Information - Continued

### Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

**Note:** This employee is an ORP participant and not eligible for TRS membership.

As Of Date	08/24/2020	New Member Days completed as of 1st of Current Month	Over 90 days
SSN or TRS-Assigned Temp ID	[REDACTED]	In a TRS Eligible Position	No
First Name	[REDACTED]	TRS Eligible Date Range	
Middle Name		Subject to Salary Cap	Yes
Last Name	[REDACTED]	ORP Election Date	07/03/2017
Suffix	NONE	ORP Vesting Status	Yes
TRS Member	No		

[View ED Contract Info](#)[View RP Payroll Info](#)

**View RP Payroll Info:** displays RP transaction records posted by your RE. Includes compensation, contributions (member and employer), position code(s) and time worked reported. Will not display data posted by other employers. Data is available from the time the RE Portal went live (September 2017) forward.

# View RP Payroll Information screen

## RP Payroll Info

Years	TRS RE Number	Report Month
<a href="#">+ 2020</a>		
<a href="#">+ 2019</a>		
<a href="#">+ 2018</a>		

## RP Payroll Info

Years	TRS RE Number	Report Month	Record Type Code	Position Code	Hours Worked	Hours Scheduled	Days Worked	Zero Days Reason Code	Eligible TRS Gross Compensation (Adjustment)	Performance Pay Gross (Adjustment)
<a href="#">- 2020</a>										
2020		July	RP20	02	000	00	00	A	4677.92	0.00
2020		June	RP20	02	000	00	00	A	4677.92	0.00
2020		May	RP20	02	000	40	16		4977.92	0.00
2020		April	RP20	02	000	40	21		4677.92	0.00
2020		March	RP20	02	000	40	17		4677.92	0.00
2020		February	RP20	02	000	40	20		4677.92	0.00
2020		January	RP20	02	000	40	19		4677.92	0.00
2019		December	RP20	02	000	40	15		4977.92	0.00
2019		November	RP20	02	000	40	16		4677.92	0.00
2019		October	RP20	02	000	40	23		4677.92	0.00
2019		September	RP20	02	000	40	20		4677.92	0.00
<a href="#">+ 2019</a>										
<a href="#">+ 2018</a>										



# View Employee Information - Continued

## Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

**Note:** This employee is an ORP participant and not eligible for TRS membership.

As Of Date	08/24/2020	New Member Days completed as of 1st of Current Month	Over 90 days
SSN or TRS-Assigned Temp ID	[REDACTED]	In a TRS Eligible Position	No
First Name	[REDACTED]	TRS Eligible Date Range	
Middle Name		Subject to Salary Cap	Yes
Last Name	[REDACTED]	ORP Election Date	07/03/2017
Suffix	NONE	ORP Vesting Status	Yes
TRS Member	No		

[View ED Contract Info](#)

[View RP Payroll Info](#)

**ORP Election Date:** indicates the participant elected ORP. Provides the date the employee elected ORP in lieu of TRS.

**ORP Vesting Status:** "Yes" or "No". Indicates that the participant has vested in ORP.

# View Employee Information Screen for a Retiree

**As of date:** date the search was completed in the RE portal

## Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

**Note:** Member retired after September 1, 2005. If the employment of the retiree exceeds one-half time in the report month, TRS-Care and Pension Surcharges are due on all pay received in that month. See Pension Surcharge and TRS-Care Surcharge guidelines for more information.

As Of Date	08/24/2020	TRS Retiree	Retired after September 1, 2005
SSN or TRS-Assigned Temp ID	[REDACTED]	Retirement Date	05/31/2007
First Name	[REDACTED]	Monthly TRS-Care Surcharge Amount	\$535.00
Middle Name	[REDACTED]	Pension Surcharge (% of salary paid in the calendar month)	15.20%
Last Name	[REDACTED]		
Suffix	NONE		

[View ER Employment Info](#)

[View ER Transaction Info](#)

## View Employee Information – Retiree continued

**Surcharges:** Pension and/or TRS-Care Surcharges will only be displayed if applicable to the retiree searched.

### Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

**Note:** Member retired after September 1, 2005. If the employment of the retiree exceeds one-half time in the report month, TRS-Care and Pension Surcharges are due on all pay received in that month. See Pension Surcharge and TRS-Care Surcharge guidelines for more information.

As Of Date	08/24/2020	TRS Retiree	Retired after September 1, 2005
SSN or TRS-Assigned Temp ID	[REDACTED]	Retirement Date	05/31/2007
First Name	[REDACTED]	Monthly TRS-Care Surcharge Amount	\$535.00
Middle Name	[REDACTED]	Pension Surcharge (% of salary paid in the calendar month)	15.20%
Last Name	[REDACTED]		
Suffix	NONE		

[View ER Employment Info](#)

[View ER Transaction Info](#)

# View Employee Information – Retiree continued

## Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

**Note:** Member retired after September 1, 2005. If the employment of the retiree exceeds one-half time in the report month, TRS-Care and Pension Surcharges are due on all pay received in that month. See Pension Surcharge and TRS-Care Surcharge guidelines for more information.

As Of Date	08/24/2020	TRS Retiree	Retired after September 1, 2005
SSN or TRS-Assigned Temp ID	[REDACTED]	Retirement Date	05/31/2007
First Name	[REDACTED]	Monthly TRS-Care Surcharge Amount	\$535.00
Middle Name	[REDACTED]	Pension Surcharge (% of salary paid in the calendar month)	15.20%
Last Name	[REDACTED]		
Suffix	NONE		

[View ER Employment Info](#)

[View ER Transaction Info](#)

**View ER Employment Info:** displays employment information posted by your RE via an ER Record. Includes: Position Code, Employment Start and End dates, Employment Type and Paid through 3<sup>rd</sup> Party flag. Will not display contract/position records posted by other employers.

## View ER Employment Info

### Positions

Position Status	TRS RE Number	Position Start Date	Position End Date	Position Code	Employment Type	Paid Through 3rd Party?
EAR		07/01/2020	07/31/2020	05	H	No
EAR		06/01/2020	06/30/2020	05	H	No
EAR		05/01/2020	05/31/2020	05	H	No
EAR		04/01/2020	04/30/2020	05	H	No
EAR		03/01/2020	03/31/2020	05	H	No
EAR		02/01/2020	02/29/2020	05	H	No
EAR		01/01/2020	01/31/2020	05	H	No
EAR		12/01/2019	12/31/2019	05	H	No
EAR		11/01/2019	11/30/2019	05	H	No
EAR		10/01/2019	10/31/2019	05	H	No
EAR		09/01/2019	09/30/2019	05	H	No
EAR		08/01/2019	08/31/2019	05	H	No
EAR		09/01/2018	06/03/2019	05	H	No
EAR		08/01/2018	08/31/2018	05	H	No

## View Employee Information – Retiree continued

### Employee Information

The information provided is based on the most recent data available, but may be affected by outstanding data. This data is subject to audit, adjustments and correction.

**Note:** Member retired after September 1, 2005. If the employment of the retiree exceeds one-half time in the report month, TRS-Care and Pension Surcharges are due on all pay received in that month. See Pension Surcharge and TRS-Care Surcharge guidelines for more information.

As Of Date	08/24/2020	TRS Retiree	Retired after September 1, 2005
SSN or TRS-Assigned Temp ID	[REDACTED]	Retirement Date	05/31/2007
First Name	[REDACTED]	Monthly TRS-Care Surcharge Amount	\$535.00
Middle Name	[REDACTED]	Pension Surcharge (% of salary paid in the calendar month)	15.20%
Last Name	[REDACTED]		
Suffix	NONE		

[View ER Employment Info](#)[View ER Transaction Info](#)

**View ER Transactions Info:** displays transactions posted by your RE via an ER Record. Includes: Time worked, Compensation and Surcharges. Will not display contract/position records posted by other employers. Data is available from the time the RE Portal went live (September 2017) forward.



# View ER Transaction Info

## RP Payroll Info

Years	TRS RE Number	Report Month
+ <a href="#">2020</a>		
+ <a href="#">2019</a>		
+ <a href="#">2018</a>		

## ER Transaction Info

Years	TRS RE Number	Report Month	Record Type Code	(Original) Position Code	(Original) Employment Type	Hours Worked	Days Worked	Zero Days Reason Code	Total Gross Compensation	Pension Surcharge Contribution
- <a href="#">2020</a>										
2020		July	ER20			072	09		6838.04	
2020		June	ER20			000	00	A	6888.04	
2020		May	ER20			136	17		6838.04	
2020		April	ER20			168	21		6838.04	
2020		March	ER20			136	17		6838.04	
2020		February	ER20			160	20		6838.04	
2020		January	ER20			152	19		6838.04	
2019		December	ER20			021	04		1804.00	

## Temporary vs. Part Time Employment

- Temporary employment is total employment lasting less than 4 ½ months

$<$  18 weeks

- Irregular or seasonal employment that will cover more than 4 ½ months of the school year must be listed as Less Than Half Time



$\geq$  18 weeks

“The contract start date for this position is prior to the current report month and RP transactions for the prior months do not exists.”



ED 40 posted 09/01/2019-08/31/2020



No RP 20 was submitted September through December, no RP 25s on January RP



RP Transactions 01/01/2020-08/31/2020

"Days worked must be reported for the first month of employment in a TRS eligible position. The TRS Eligible Contract start date for this position is <<Contract Start Date>> "



ED 40 posted 08/17/2020-05/28/2021

No RP 20 was submitted for time worked, no RP 25 on September RP



RP September 2020

Current Validation 544: (will continue to be Warning for **ineligible** employees)

*“For regular payroll report period <<report month>> <<report year>>; no records found for <<first name>> <<last name>> <<ssn>>. If the employee has terminated, please submit ED90.”*

New Validation 804 currently Warning for **Eligible** employees

*“For regular payroll report period <<report month>> <<report year>>; no records found for <<first name>> <<last name>> <<ssn>>. If the employee has terminated, please submit ED90 **If the employee did not work and did not receive any pay in the report period, please submit an RP20 with zeros to confirm.**”*

“Current month report cannot complete due to balance owed for one or more contribution. Please review the RE Ledger and submit any TEXNET deposit needed to pay outstanding balances.”





# SSN search box added to Details screen

Report Summary Screen

Organization Name		TRS RE Number		Organization Type	Reporting Entity
RE Coach		Status		RE Type	Public School

View Report Details

Report Period

August 2020

SSN or TRS-Assigned Temporary ID

Search

First

Previous

1

2

Next

Last

Record Status	Record Type Code	Employee Identification Number	Date of Birth	Gender Code	Last Name	First Name	Middle Name	Generation	Position Code	Hours Worked (Adjusted)
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- Training sessions targeted to HR personnel
- Modules of individual topics
- Introduction to TRS reporting

