

UPDATE

UPDATE: TRS-ACTIVECARE ENROLLMENT FOR TRS-CARE RETIREES RETURNING TO WORK

We are issuing this revision to a recent article to employers regarding TRS-ActiveCare options for return-to-work retirees. Please review the updated information below:

Retirees currently enrolled in TRS-Care who are returning to work may have questions about the health care benefits their employer offers. The information below is to help them understand their options. Those options vary depending on if the retiree returning to work is eligible for Medicare or not. The employee has options and needs to be made aware of all of them.

Return-to-Work Retirees Who Are Not Eligible for Medicare

Return-to-work retirees who are not eligible for Medicare may have enrolled in TRS-Care Standard. If a retiree returns to work for 10 or more hours per week for a Texas public education employer who participates in TRS-ActiveCare, that retiree is eligible to enroll in TRS-ActiveCare. However, they are not required to do so and can stay in TRS-Care Standard. State law prohibits them from being enrolled in both. The return-to-work retiree should review plan options in TRS-ActiveCare to see if they want to enroll. If they do nothing, they will stay with TRS-Care Standard.

Their options are:	Make no changes – Keep TRS-Care Standard and do not enroll in TRS-ActiveCare	Contact TRS to drop TRS-Care Standard and enroll through their employer in TRS-ActiveCare*
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**When the return-to-work employee leaves employment with their district, they are eligible to reenroll in TRS-Care because this loss of coverage is a Special Enrollment Event (SEE). TRS must receive their application to reenroll within 31 days of leaving employment.*

Return-to-Work Retirees Who are Eligible for Medicare

Return-to-work retirees who are eligible for Medicare may have enrolled in the TRS-Care Medicare Advantage plan. If the retiree returns to work for 10 or more hours per week for a Texas public education employer who participates in TRS-ActiveCare, that retiree is eligible to enroll in TRS-ActiveCare.

Under the Medicare Secondary Payer (MSP) law, the retiree can keep their current TRS-Care Medicare Advantage coverage and sign up for TRS-ActiveCare as well. However, the return-to-work retiree is not required to do so. The return-to-work retiree should review the plan options in TRS-ActiveCare to see if they want to enroll. If they do nothing, they will stay in TRS-Care Medicare Advantage plan.

Their options are:	Make no changes – Keep TRS-Care Medicare Advantage and do not enroll in TRS-ActiveCare	Contact TRS to drop TRS-Care Medicare Advantage and enroll through their employer in TRS-ActiveCare*	Keep TRS-Care Medicare Advantage and enroll through their employer in TRS-ActiveCare <i>(In this case, the employer-sponsored plan, TRS-ActiveCare, is primary and TRS-Care Medicare Advantage is the secondary plan.)</i>
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**When the return-to-work employee leaves employment with their employer, they are eligible to reenroll in TRS-Care because this loss of coverage is a Special Enrollment Event (SEE). TRS must receive their application within 31 days of leaving employment.*

Keep in mind, if they enroll in TRS-ActiveCare and keep their TRS-Care Medicare Advantage plan, they'll pay three separate premiums:

1. TRS-ActiveCare through their employer,
2. TRS-Care Medicare Advantage, to TRS, **and**
3. Medicare Part B to the Social Security Administration (TRS recommends the retiree contact Medicare to inform them of their return-to-work status)

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NEW TRS CERTIFICATIONS IN THE PORTAL

My Worklist

Maintain Semester Dates

NEW

Certifications

In 2020, TRS established a faster way for Reporting Employers (RE) to submit the required forms (TRS7 and TRS8) for retirement and death benefits through the TRS portal as electronic forms. In April 2023, REs will be able to submit this information to TRS as a certification, through the “My Worklist” tab in the portal.

When a member submits their retirement application, TRS will push the certification to the respective RE for completion. The certification will be made available 15 days prior to the member’s effective retirement date.

These certifications will work like the Refund Certification and will close out the member’s employment record with that respective RE, so that the RE does not have to also complete the ED90 record.

As for now, this screen will **not** have a download option. We recommend printing the screen prior to submitting the certification if you need documentation for your records. Semester dates will not auto-populate but will be editable on the certification.

Since this is a new function in the RE portal, please reach out to your coach with any issues or errors that you experience upon completing the certifications.

To see further instructions and guidance for completing the TRS7 and TRS8 forms, please refer to information [here](#). A quick reference guide will be available to REs once the new certifications have been added to the RE Portal.

TRS DELETED RECORDS FOLLOW UP

The Governmental Accounting Standards Board (GASB) requires TRS to have sufficient controls to ensure our REs will report complete and accurate data. As part of this initiative, if records are deleted from your monthly Regular Payroll (RP) or Employment After Retirement (ER) reports, TRS will contact you once the reports reach a “Complete” status. A member of the TRS reporting exceptions team will confirm whether any RP and/or ER records were deleted, and, if so, explain why the deletions were valid.

Common valid reasons for deleting records are as follows:

- RP20 records were deleted because they were for retirees, so they were reentered as ER20s on the ER report.
- RP20 records were combined because they were not wholly separate and were combined with another RP20.
- Records were deleted because the record was generated in error.

When a record is deleted for a valid reason, REs should take appropriate corrective action to prevent your software system from resending the unneeded records in a future report month.

Examples of possible corrective actions to take:

- Update all TRS retirees in your software system so records will be sent as ER20 records going forward.
- Check with your software provider to determine if a system setting will automatically combine payroll records that are not wholly separate.
- Ensure that you have terminated employees in your system after a separation from service has occurred.
- Consider using the Zero Day Reason Code of C (employee on less than 12-month pay scheduled) when reporting irregular employees who have not terminated but did not work or receive any pay in the report month.

TRS would like REs to minimize recurrences of record deletions. This minimizes the number of contacts TRS has to pursue to ensure our controls are in place. Taking appropriate, corrective actions to prevent future exception reports will lessen the burden of these reports.

Please respond to the email from your coach any time it is necessary to delete a record for any reason. Even if you have discussed deleting a record with your coach, an exception email will be sent to you after the report has reached “Complete” status. Documentation of your explanation is retained for audit purposes.

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TRS DELETED RECORDS FOLLOW UP *continued from page 2*

As a reminder, REs may not remove records from the report for the sole purpose of bringing the report to “Complete” status, unless directed to do so by their coach. A coach might direct an RE to remove a record because of a defect in the RE Portal that does not allow a record to process at that time.

Section 821.101(b) of the Texas Government Code states that, “A person commits an offense if the person knowingly or intentionally makes or permits the making of a false record for or statement to the retirement system in an attempt to defraud the retirement system.” Therefore, when an RE contact certifies the report is correct by signing the report, but records have been removed from that report to bring the report to “Complete” status to avoid penalties, that RE contact is engaging in fraudulent reporting.