

TEACHER RETIREMENT SYSTEM of TEXAS

UPDATE

2022 REPORTING EMPLOYERS SATISFACTION SURVEY

TRS Reporting Employers (REs), we need your help. TRS has once again commissioned the Public Policy Research Institute (PPRI) at Texas A&M University to conduct the annual Reporting Employers Survey. The survey is designed to provide TRS with feedback so we can continue to improve the services we provide.

The survey should be completed by the individual who submits reports to TRS. As such, all RE Payroll Contacts should expect to receive an email with the survey invite in January.

Please note, if any survey recipient is not the individual that submits reports to TRS, the email will ask for the survey to be forwarded to the appropriate contact or for the recipient to provide the appropriate individual's contact information. If you or a colleague receives the survey, please take a few minutes to complete it. If you think you should have received a survey but did not, please check your spam folders or contact [Kirby Goidel](mailto:kgoidel@tamu.edu) at kgoidel@tamu.edu or (979) 458-0104.

The survey will be confidential, so feel free to provide your honest feedback. We look forward to sharing the results with you and working to improve our customer service. If you have any questions about the survey, feel free to email [Sunitha Downing](mailto:sunitha.downing@trs.texas.gov) (sunitha.downing@trs.texas.gov) at TRS or [Kirby Goidel](mailto:kgoidel@tamu.edu) at PPRI.

VERIFY MEMBERSHIP ELIGIBILITY ERRORS

If you receive error messages 570 or 573 in the RE Portal, these notify an RE that they are reporting an employee as working hours that do not correspond to the member's TRS eligibility status.

Error Message 570: "Please verify TRS membership eligibility for this employee. Based on prior reporting, employee may be in a TRS-eligible position since the hours reported are one-half or more of the full-time equivalent. If you feel the reported information related to this error is correct, please contact TRS."

Error Message 573: "Please verify TRS membership eligibility for this employee. Based on prior reporting, the hours reported are less than half of the full-time equivalent. If you feel the reported information related to this error is correct, please contact TRS."

When these errors occur, the RE needs to verify that the reported hours are correct and confirm that the posted contract for the employee has the correct Full-Time Equivalent (FTE) for the position. Once both have been confirmed, the RE will need to determine if the employee's membership eligibility needs to be reevaluated.

If the hours are correct, the person's eligibility has not changed, and the change in hours is temporary, an override will need to be processed to allow the records to post. As documentation for the override request, you will be asked to provide answers to the following questions to your coach:

1. How many hours per week is this employee hired to work?
2. What is the FTE of the position the employee is in (FTE must be listed as 00 if there is no FTE for the position, or between 30-40 hours per week if there is an FTE for the position)?
3. Provide an explanation for why hours are more or less than expected for this report month (ex. Unpaid holidays, unpaid leave, temporary increase or decrease in workload, etc.).
4. Provide a statement with the date the employee is returning to agreed-upon hours.

Email the answers to these questions for each person receiving the above errors to your reporting coach. This will enable your coach to create and submit the override for review in a timely manner.

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REPORTING ADJUNCTS – SEMESTER TO SEMESTER

As we finish up the fall semester for the 2022 fiscal year, we know that adjunct eligibility can change from semester to semester based on the number of clock hours adjunct employees are expected to work. To determine the number of clock hours that adjunct faculty are expected to work per week, their work hours must be converted. Employment is originally measured in semester or course hours or credits, instructional units, or any other unit representing class or instructional time. Each hour of instruction in the classroom or lab must be counted as a minimum of two clock hours. This reflects instructional time as well as preparation, grading, and other time typically associated with one hour of instruction. If the employer has established a greater amount of preparation time for each hour in the classroom or lab, the employer's standard will be used to determine the number of clock hours scheduled for work.

If all time worked is tracked for the employee, hours worked for the report month must be reported in lieu of converting to clock hours and report hours scheduled.

Eligibility is established at the time of hire and at each work agreement change. For higher education institutions, this may require an eligibility review at the beginning of **each semester**. Below are a few examples of how TRS eligibility can change from semester to semester based on the amount of clock hours that the adjuncts are expected to work.

Please keep in mind that if the employee's eligibility has changed and their initial contract was set up for the entire year, then an ED45 may be needed to update the employee's eligibility for the semester. ED45s should be submitted in the same month that the change occurs to avoid multiple adjustments needing to be submitted.

Example #1	Hours	Eligibility	Explanation
Fall Semester	18 hours	Not Eligible	The adjunct becomes TRS eligible in the Spring semester since the total employment continued for more than one semester. Rule 25.1(g)
Spring Semester	24 hours	Eligible	
Example #2	Hours	Eligibility	Explanation
Fall Semester	20 hours	Not Eligible (Temporary)	If employment is expected to terminate at the end of the Fall semester, this is a type of temporary employment and the employee is not TRS eligible.
Spring Semester	0 hours	No Employment	
Example #3	Hours	Eligibility	Explanation
Fall Semester	20 hours	Eligible	TRS-eligible employment begins with the Fall semester since the employment is expected to continue for more than one semester. Rule 25.1(g)
Spring Semester	Coarse load unknown	Expect the employee to return. Will need to re-evaluate eligibility at the beginning of the semester	

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Example #4	Hours	Eligibility	Explanation
Fall Semester	Expected to work 24 hours, but classes are dropped and changed to 18 hours per week.	Eligible/changed to ineligible retroactively once classes are dropped.	If the classes are dropped in any semester, that retroactively changes the TRS eligibility status of the employee.
Spring Semester	0 hours	No Employment	

Example #5	Hours	Eligibility	Explanation
Fall Semester	20 hours	Eligible	Adjunct is TRS eligible in the Fall due to the expectation of employment continuing. Adjunct is not TRS eligible in the Spring since their hours dropped to less than half time. If the adjunct resumes working half time or more in the Summer semester, they would return to TRS-eligible status.
Spring Semester	12 hours	Not Eligible	
Summer Semester	20 hours	Eligible	

ERROR 803 - INCLUDE YOUR TEXNET RECEIPT(S) WITH YOUR EMAIL

If your Regular Payroll or Employment After Retirement report is populating error 803, and you have already made a TEXNET to reconcile the balance owed, please send your coach a copy of your TEXNET receipt. If you have made multiple TEXNETs to cover the entire balance due across all buckets, please include any additional receipts.

If an override is needed, your coach will use this TEXNET receipt to submit your report into the override queue for review.

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TRS REPORT GRACE PERIOD REMINDER

Over the past few months, TRS has carefully monitored the report completion data for Reporting Employers (REs). Based on the data reviewed, feedback from REs and the reporting staff, TRS has decided to **delay** the 14 calendar day grace period until the **September 2022** report period.

The one-month reporting grace period will continue through the **August 2022** report period. We will continue to monitor feedback from REs and report completion data throughout the remainder of the year. This is effective for both Regular Payroll (RP) and Employment After Retirement (ER) Reports.

As a reminder, the grace period is **NOT** a change to the actual due date for the report and there is **NO** grace period for TEXNET deposits. Penalty interest is assessed if your TEXNET is not submitted by the due date or if you are making positive corrections to a prior month's report.

Penalty fees are assessed if your report is not in a COMPLETE status within the grace period. The goal is to complete by the due date if at all possible.

Below is the updated report due date and penalty fee grace period deadline schedule for FY 2022. Additional information on how penalty fees accrue can be found on our [Penalty Fees webpage](#).

Report Month	Regular Payroll Report and TEXNET Due Date	Regular Payroll Grace Period Deadline	Employment after Retirement Report and TEXNET Due Date	Employment after Retirement Grace Period Deadline
September 2021	Oct. 6, 2021	Nov. 5, 2021	Oct. 8, 2021	Nov. 10, 2021
October 2021	Nov. 5, 2021	Dec. 6, 2021	Nov. 10, 2021	Dec. 10, 2021
November 2021	Dec. 6, 2021	Jan. 6, 2022	Dec. 10, 2021	Jan. 10, 2022
December 2021	Jan. 6, 2022	Feb. 4, 2022	Jan. 10, 2022	Feb. 10, 2022
January 2022	Feb. 4, 2022	March 4, 2022	Feb. 10, 2022	March 10, 2022
February 2022	March 4, 2022	April 6, 2022	March 10, 2022	April 8, 2022
March 2022	April 6, 2022	May 6, 2022	April 8, 2022	May 10, 2022
April 2022	May 6, 2022	June 6, 2022	May 10, 2022	June 10, 2022
May 2022	June 6, 2022	July 6, 2022	June 10, 2022	July 8, 2022
June 2022	July 6, 2022	Aug. 5, 2022	July 8, 2022	Aug. 10, 2022
July 2022	Aug. 5, 2022	Sept. 6, 2022	Aug. 10, 2022	Sept. 6, 2022
August 2022	Sept. 6, 2022	Oct. 6, 2022	Sept. 6, 2022	Oct. 10, 2022

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REPORTING MID-YEAR POSITION CHANGES

Employee position changes often occur in the middle of the year. For TRS reporting purposes, it's important to report the changes to TRS in the report period when the change occurred. Submit your Employee Data (ED) report records in a timely manner to reduce the number of corrective steps that you might have to take later.

If an employee changes positions in January 2021, the position change must be reported on the January ED report. You should report the position change with an ED45 record with the adjustment reason code filled in with "end/add." This record will end the previous position and begin the new one in the TRS reporting system in a single step.

Alternatively, the RE can use an ED45 to report the position code with the adjustment reason code of "end" and then submit a new ED40 record. If this method is used, the ED45 must post to the TRS system first before the ED40 can be submitted for the new position. In either method, the ED records must post before the RP report is completed.

It is extremely important to submit the ED45 in the month the change actually occurs, even if the member will not be paid for the new position until the next month. Submitting the ED45 at the correct time will ensure that the RP records attach to the correct contract in the TRS reporting system.

If you do not submit the ED45 until the month the employee is first paid for the new position, the RP records will not attach to the correct contract and message 801 will display in the portal. Message 801 reads: "The contract start date for this position is prior to the current report month and RP transactions for the prior months do not exist."

While this message is currently a warning that does not impact your ability to complete the report, it will be converted to an error in the future. When it becomes an error, an RE will not be able to complete their report until they correct the previous records.

TRS-CARE INFORMATION FOR RETIRING EMPLOYEES

Do you have employees considering to retire next year? If eligible, they'll have the option to enroll in TRS-Care, the health care program for retired public educators. To prepare for this milestone, they can review 2022 TRS-Care plan benefits and watch webinar recordings from this fall.

- [2022 TRS-Care Plan Resources](#)
- [TRS-Care Eligibility & Enrollment](#)

This includes the latest presentations about 2022 plan benefits from the medical and pharmacy vendors for each plan. They can hear directly from Blue Cross and Blue Shield of Texas and CVS Caremark for the TRS-Care Standard plan for non-Medicare retirees, and UnitedHealthcare and Silver Script for TRS-Care Medicare plans.

If Spanish is their primary language, the presentations and materials are also available in Spanish.

- [TRS Planes de Salud](#)

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TRS-ACTIVECARE REGIONAL RATING RESOURCES

Beginning in the 2021-22 plan year, TRS-ActiveCare will regionally rate its plans by the 20 Education Service Center (ESC) regions. This will regionalize plan premiums while still providing Texas-sized stability and purchasing power.

If a member of your employer's leadership team was unable to attend a regional rating meeting in-person, they can still review TRS' resources about this change.

- [Video detailing regional rating factors](#)
- [Recorded regional rating presentation for employers](#)
- [Regional rating webpage](#)
- [Your Future Your Way website hub](#)
 - How to request claims data
 - Guidance for joining/leaving TRS-ActiveCare
 - Questions for brokers
 - Value of TRS-ActiveCare
 - And more!

Upcoming Deadlines

- **Participating employers who elect to leave:** if you decide to leave TRS-ActiveCare for the 2022-23 plan year, you must submit your notice and paperwork to TRS by Dec. 31, 2021. Please note that if you decide to opt out of TRS-ActiveCare, you may only rejoin after a period of five plan years. Your five-year commitment to stay out of the program will begin on Sept. 1, 2022.
- **Non-participating districts who elect to join:** if you decide to join TRS-ActiveCare for the 2022-23 plan year, you must submit your notice and paperwork by Dec. 31, 2021. Your five-year commitment to stay in the program will begin on Sept. 1, 2022. If you do not join this year, you may join in others. The five-year commitment will still apply, no matter what year you join.

Participating employers who elect to stay: **if you decide to remain in TRS-ActiveCare for the next plan year, you are not locked in the plan for five years.** We do not require official notice or paperwork for this decision. You can continue to evaluate your health care options each year. The five-year commitment to remain out of TRS-ActiveCare would only apply *after* you elect to discontinue.

WATCH AND LEARN: TRS MEMBER EDUCATION VIDEO SERIES

Learn all about your TRS pension benefits by watching our [Member Education Videos](#)! Help us spread the word about the series by downloading a [poster](#) from our website and displaying it at your school.