

## TEACHER RETIREMENT SYSTEM of TEXAS

# UPDATE

## RE COACH UPDATES

In recent months, the Reporting Employer (RE) coach staff has experienced an increase in turnover. This has impacted the coach to RE ratio. Currently, we have 11 RE coaches with an average of 122 REs per coach.

We are working to fill our vacant positions and train new staff members as quickly as possible. As new staff members are released from training, the ratio of coaches to REs will be reduced, which will help improve our service.

We want to reassure you that we are working diligently to provide the best support possible in a timely manner. We ask for your continued patience with any transitions we might face in the coming months. Just as you may be experiencing staffing shortages, we too are facing similar challenges.

How this may impact your RE:

- You may be notified that a new RE coach has been assigned
  - Note: Your RE coach is listed in the RE portal
- Slower response times
  - Our current response times are within two business days
  - Due to the increased coach to RE ratio, response time may be longer than what you have experienced in the past

If the service level of the RE coach causes your RE to accrue penalty fees, a waiver will be considered. However, we ask that you account for the current response time when requesting support and try to complete the reports on the original due date rather than the penalty fee grace period deadline.

To help achieve the best service, please keep the following information in mind when requesting support:

### Response Time:

- Two business days
- This pertains to all requests, including:
  - Voicemails
  - Emails
  - Overrides/Transfers
  - Phone Calls/Meeting Requests
- All requests and correspondence are worked in the order they are received. If you have not received a response, please allow your coach up to the two business days to respond before sending a follow-up message. If you do not receive a response within the two business days, please forward the original request to [Reporting@trs.texas.gov](mailto:Reporting@trs.texas.gov), and make sure to include your four-digit RE number.

### Business Hours:

- 8 a.m.–5 p.m., Monday–Friday
- Any requests for assistance (questions, overrides, etc.) received after 4 p.m. may be considered ‘received’ the next business day.

### RE Portal Validation Schedule:

- RE Portal validations are scheduled to run on the hour and half hour from 6 a.m.–6 p.m.
  - Example: 6 a.m., 6:30 a.m., 7 a.m.
- Any information entered after 6 p.m. will not validate until the following morning
- Validation run processing times can take longer the week of the report due dates.
- The portal is unavailable each day from approximately 7 p.m. until 10 p.m.

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## PROPERLY REPORTING REMOTE INSTRUCTIONS

As schools across the state continue to develop new teaching styles to support remote instruction due to the ongoing pandemic, we have identified a few scenarios that need to be addressed regarding remote instruction. If your district has a scenario not outlined below or would like help applying your district's leave policy to the scenarios, please provide as much information as possible about the leave policy or scenario to your RE coach. We are happy to review the information for your school to ensure proper reporting of your employees. The scenarios outlined below should be applied for both active employees and TRS retirees.

### Substitute Scenarios

For scenarios 1, 2 and 3, TRS has determined that the employee placed in the classroom is considered a substitute if the conditions below are met:

- The employee in the classroom is being paid at the daily substitute rate, AND
- The arrangement is not permanent, and the teacher is expected to resume working in-person.

#### Scenario 1:

- The teacher of record is working remotely (non-permanent basis), teaching the students remotely and fulfilling all duties of their position, except for in-person classroom management/monitoring.
- Another employee is placed in the classroom for in-person student management/monitoring.

#### Scenario 2:

- The teacher of record is on leave but is fulfilling some of the duties of their position, including but not limited to lesson plans, grading and asynchronous instruction. The teacher does not perform in-person classroom management/monitoring.
- Another employee is placed in the classroom for in-person student management/monitoring.

#### Scenario 3:

- The teacher of record is working offsite at a school event (i.e. athletic events, stock shows) and is fulfilling some of the duties of their position, including but not limited to lesson plans, grading and asynchronous instruction. The teacher does not perform in-person classroom management/monitoring.
- Another employee is placed in the classroom for in-person student management/monitoring.

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## PROPERLY REPORTING REMOTE INSTRUCTIONS *continued from page 2*

### Non-Substitute Scenarios

For scenarios 4 and 5, TRS has determined that the employee placed in the classroom when the teacher is remote is not a substitute because this is the permanent work schedule for the teacher of record.

Please note that since the employee placed in the classroom is not a substitute, the following apply:

- If the employee placed in the classroom is not a TRS retiree, TRS eligibility may apply. Please make sure eligibility is evaluated from the date of hire for this position.
- If the employee placed in the classroom is a TRS retiree, the retiree and employer are subject to Employment after Retirement limits and surcharges when applicable.

#### ***Scenario 4:***

- The teacher of record is hired to permanently perform all job requirements remotely, including teaching the students. The job requirements exclude in-person classroom management/monitoring.
- Another employee is placed in the classroom for in-person student management/monitoring.

#### ***Scenario 5:***

- The teacher of record is originally hired to work in-person. Later, the teacher's job requirements change to allow the teacher to perform all job requirements remotely, including teaching the students. The teacher's new job requirements exclude in-person classroom management/monitoring.
- Another employee is placed in the classroom for in-person student management/monitoring.

TRS appreciates the feedback that we have received and will continue to work with REs to ensure that all employees are properly reported. If you have a remote instruction that has not yet been identified by TRS, please reach out to your coach with as much information about the work agreement and leave policy, so we can review to determine if they would be considered a substitute or may need to be evaluated for TRS eligibility.

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## REFUND CERTIFICATIONS – ED90 WORKAROUND

TRS Laws and Rules state that an individual may request a refund of their TRS contributions if they have terminated all employment with all TRS-covered REs, are not expected to resume employment, and have not applied for work at another TRS-covered employer, or are only working in a substitute capacity.\*

If you have an employee who is eligible to refund their TRS account, it is important to properly complete the refund certifications to avoid future reporting issues.

Refund certifications should only be certified if:

- 1) The individual **has terminated all** employment with your RE and is not expected to return. You would ordinarily submit an ED90 (a termination record) for this individual, but the refund certification will take the place of an ED90.
- 2) The individual is **currently a substitute** with your RE and is expected to continue in that role only.

Please do not certify that an individual has terminated if:

- 1) The individual has **not terminated**, but they are not working during the summer months. If they are still considered an employee and are expected to return, then they are not eligible for a refund.
- 2) The individual is still an employee, has **not terminated**, but is not working due to current school closures.
- 3) The individual has **not terminated** but is not receiving pay (i.e. – 10-month contract paid over 10 months). Lack of pay over the summer months does not qualify someone for a refund of TRS contributions.
- 4) The individual has temporarily terminated employment but is already hired or expected to resume working in the future.

Prior to completing the refund certification for the individual, please make sure to review their last posting with your RE. This can be seen under the View Employee Information section in the RE Portal. In the event that the Final Report Month for TRS contributions was **not** reported with a Zero Days Reason Code of F; you will need to submit an ED90 as a workaround instead of completing the refund certification. Once the ED90 has posted, the refund certification will no longer be listed as a worklist item.

*\*Special considerations for individuals whose only employment is as a substitute:*

In order for the refund certification to be accepted, a substitute must have a current contract including the month that the certification is being completed. If an ED40 including the current month is not on record, an error will result when completing the certification. If the previous contract has ended, but this person is still considered to be employed as a substitute, a new ED40 including the current month may be created to allow the refund certification to be completed.

## TRS SYSTEM MAINTENANCE CYCLES

TRS system updates are normally scheduled for the third weekend of the month. The exception to the normal maintenance schedule is for emergency fixes and for annual member statement processing. If an emergency fix is needed, we will try to plan around normal business hours; however, there may be times that this is not possible. The TRS portal may be down during these times; if that happens we will send out prior notification if there is a need for unplanned maintenance cycles.

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## TRS-ACTIVECARE INTENT SURVEY CONCLUSIONS

The RE portal survey for employers to declare their intent to stay in, leave, or join TRS-ActiveCare for the 2022-23 plan year closed on Dec. 31, 2021. It will open again later this year for employers to declare their intent for the 2023-24 plan year.

For the 2022-23 plan year, 90% of participating employers chose TRS-ActiveCare's comprehensive health benefits. The plan remains unmatched in size and stability. This plan year, it will begin a new era as TRS-ActiveCare moves to a regional rating system.

The regional rates will be announced at the April 28–29 board meeting. If your employer wants to know more about regional rating, all TRS resources are available on the [Your Future, Your Way online hub](#). We encourage you to share the online hub with any district leaders and stakeholders who have questions about the process.

All employers also have access to a District Ambassador (DA), a specialized strategic partner for your TRS-ActiveCare needs and decisions. Your DA can:

- provide information about trends in the employee health care marketplace to inform district decision making,
- offer Annual Enrollment and health fair support,
- conduct TRS-ActiveCare benefits and wellness presentations, and
- analyze utilization trends to collaboratively reduce participant costs.

You can find your DA using this directory on the [BCBSTX website](#).

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## 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.