

## TEACHER RETIREMENT SYSTEM of TEXAS

**UPDATE****NEW EMPLOYMENT AFTER RETIREMENT LIMITS ADOPTED BY TRS BOARD OF TRUSTEES**

The TRS Board of Trustees adopted amendments to the TRS rules for Employment After Retirement (EAR) during the Sept. 16-17 meeting. The rule changes are effective Nov. 1, 2021 and include new EAR limits that provide a standard number of hours or days that a TRS retiree can work in each calendar month. The limits will no longer be based on the number of workdays in the calendar month.

Effective Nov. 1, 2021, a TRS retiree who works no more than 92 hours in a calendar month will be considered employed one-half time or less and will not trigger surcharges. If a retiree who combines substitute and other TRS-covered employment in the same calendar month and works no more than 11 days in a calendar month, they will not trigger surcharges. A retiree with a retirement date after Sept. 1, 2005, who works more than the limit in the calendar month will trigger surcharges.

For calendar months prior to November 2021, the limits will continue to be calculated based on the workdays in that calendar month. The new limits will impact the ER Reports for Reporting Employers (REs) starting with the November 2021 report period. The updated limits are listed in the chart below, as well as on the [EAR Limits](#) page of the TRS website.

**EAR Limits for FY22 - September 2021-August 2022**

Month	Total Number of Workdays in Calendar Month	Number of Hours a Retiree Working One-Half Time or Less May Work Without Triggering Surcharges	Number of Workdays Retiree Combining Substitute and Other TRS-Covered Employment May Work Without Triggering Surcharges
September 2021	22 days	88 hours	11 days
October 2021	21 days	84 hours	10 days
November 2021	22 days	92 hours	11 days
December 2021	23 days	92 hours	11 days
January 2022	21 days	92 hours	11 days
February 2022	20 days	92 hours	11 days
March 2022	23 days	92 hours	11 days
April 2022	21 days	92 hours	11 days
May 2022	22 days	92 hours	11 days
June 2022	22 days	92 hours	11 days
July 2022	21 days	92 hours	11 days
August 2022	23 days	92 hours	11 days

When a TRS retiree who retired after Sept. 1, 2005, works more than one-half time in the calendar month for a TRS-covered employer, the employer is required to pay surcharges to TRS. Please use the View Employee Information link in the [RE Portal](#) to determine if the retiree retired before or after Sept. 1, 2005, and if the TRS-Care surcharge applies for a particular retiree.

Please note: Working any part of a day, including a Saturday or Sunday, counts as one of the days a retiree may work when combining substitute and other work in the same calendar month.

**Retirees who retired prior to Jan. 1, 2021 can work in any capacity without forfeiting their monthly benefits, but if the above limits are exceeded, surcharges will apply if their retirement date is after Sept. 1, 2005.**

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## RE PORTAL PROCESSING RUNS

As a reminder, the RE Portal validations are scheduled to run every half hour from 6 a.m.-6 p.m. For example, if you submit a report for validation at 7:08 a.m., it may not go through processing until the 7:30 a.m. processing run, which may not finish posting until closer to 8 a.m. The RE Portal is unavailable each day approximately 7 p.m. until 10 p.m., so if you try to login between this time frame an error message will display stating that the system is unavailable.

Additionally, please note that validation run processing times can take longer the week of the report due dates due to a larger volume of reports being submitted.

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## RESOURCES ABOUT JOINING OR LEAVING TRS-ACTIVECARE

With the passage of Senate Bill 1444 ([SB 1444](#)), education employers have more choices about employee health benefit options. Recently, TRS held conversations with leadership from education employers to discuss the bill and its implications. They went over topics like the future regional structure of the health plans, the process for joining and leaving TRS-ActiveCare, how to request claims data, and more.

If a leadership member from your employer was unable to attend, they can access a [recording and relevant materials here](#).

### Surveys and Forms for Joining or Leaving TRS-ActiveCare

SB 1444 requires employers that want to join TRS-ActiveCare to notify TRS by Dec. 31 of the year before the plan year they plan to join. They must then stay in TRS-ActiveCare for at least five plan years. It also allows employers currently in TRS-ActiveCare to choose to leave by notifying TRS by Dec. 31 of the year before the plan year they intend to leave the plan. They must then remain out of TRS-ActiveCare for at least a five-year period before they can rejoin TRS-ActiveCare. This provision protects the stability of TRS-ActiveCare.

TRS is collecting information about employers' plans regarding TRS-ActiveCare for the 2022-23 school year and is asking all employers to complete a survey. Completing the survey does not complete the process of leaving or joining TRS-ActiveCare.

After you complete the survey, we'll send you the necessary forms you must complete. While we're asking all employers to complete our survey, only employers that decide to join or leave TRS-ActiveCare are required to submit a formal notice to TRS. You can submit this notice in the [Reporting Entity \(RE\) portal](#).

Only existing RE contacts with signature authority or above will be able to respond to the survey for the employer.

If an employer wants to set up a new contact in the RE Portal to complete the Statement of Intent, the person they select will need to have signature authority. This means they'll also have access to broader information in the system, including payroll information. Please contact your existing web administrator for assistance managing RE Portal accounts.

To help employers with this decision, TRS has a process for requesting the last 36 months of claims data.

For more information about the implementation of SB 1444, including steps to join or leave TRS-ActiveCare and the claims data process, visit <https://www.trs.texas.gov/Pages/healthcare-your-way.aspx>.

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## TRS-CARE INFORMATION SESSIONS FOR RETIRING EMPLOYEES

TRS recently completed information sessions about the upcoming 2022 TRS-Care plan year. If you have employees considering retirement in the next year, you can point them to these resources:

- 2022 TRS-Care Standard Webinar
- 2022 TRS-Care Medicare Advantage Webinar
- [2022 TRS-Care Plan Resources](#)

The webinar recordings will explain what their new health benefits with TRS-Care will be. The plan resources page will also outline the specifics of each plan.

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## WATCH & 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.