

TOP ARTICLES: Reminder: Penalty Fee Grace Period Change • Phishing Email Scam • TRS Member Annual Statements Coming Soon! • And More!

## Legend

Articles are marked by topic!

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Reporting and  
Training for REs



Health Benefits



Information Security



General  
Communications



## Critical Tips for Reporting Time Worked



The new fiscal year is a great time for Reporting Employers (RE) to review their processes and ensure accurate data reporting. The most common error involves how REs submit time worked on monthly reports.

### Non-TRS Retirees

For active employees, the time worked and reported in the monthly Regular Payroll (RP) report must reflect the actual work performed in the report month, not the compensation paid. Incorrect reporting can prevent a TRS member from earning a creditable year of service with TRS.

*Example:* If an employee works in August but does not receive compensation until September. August RP20 should report the time worked in August, and September RP20 should report the time worked in September along with the compensation paid.

MONTH	Aug. RP20	Sept. RP20
DAYS	21	20
HOURS	168	160
COMPENSATION	\$0	\$5000

### TRS Retirees

The same expectation is required when reporting time for all TRS retirees. Your monthly Employment After Retirement (ER) record should reflect the actual time worked within that month, not the compensation they received. TRS uses this data to determine if employer surcharges are due. Therefore, it's important your employer is **only reporting actual time worked or paid leave within the report month**. Incorrect reporting can lead to overreported surcharges and affect a retiree's annuity payment.

*Example:* Retiree worked more than the half-time limit in August and September but received compensation in September and October, the surcharges would only be triggered in the months that the retiree exceeded half-time limits. No surcharges are due in October, even if the compensation was earned in a previous month the retiree exceeded the half-time limits.

MONTH	Aug. ER20	Sept. ER20	Oct. ER20
DAYS	21	20	0
HOURS	168	160	0
COMPENSATION	\$0	\$5000	\$5000
PENSION SURCHARGE	\$0	\$825	\$0
TRS-CARE SURCHARGE	\$535	\$535	\$0

## Reminder: Penalty Fee Grace Period Change



Reminder, for the **September 2024** report period, Reporting Employers (REs) have a **21-calendar day grace period** to avoid penalty fees. All remaining months (October 2024 through August 2025) will have a **14-calendar day grace period**. Monthly RP and ER reports not completed by the end of the grace period deadline will incur penalty fees.

The grace period does *not* change the due date for reports and TEXNET deposits as outlined in Texas Government Code Sec. [825.408](#). Instead, it gives REs extra time to bring the reports to a complete status before penalty fees are assessed. Additional information about [report due dates](#) and [penalty fees](#) can be found on our website.

### Reporting Period Deadlines for FY 2025

Below are the due dates and penalty fee deadlines for each month in the upcoming fiscal year.

Report Month	Regular Payroll Report and TEXNET <u>Due Date</u>	Regular Payroll Report Grace Period Deadline	Employment After Retirement Report and TEXNET <u>Due Date</u>	Employment After Retirement Report Grace Period Deadline
September 2024	Oct. 4, 2024	Oct. 25, 2024	Oct. 10, 2024	Oct. 31, 2024
October 2024	Nov. 6, 2024	Nov. 20, 2024	Nov. 8, 2024	Nov. 22, 2024
November 2024	Dec. 6, 2024	Dec. 20, 2024	Dec. 10, 2024	Dec. 24, 2024
December 2024	Jan. 6, 2025	Jan. 20, 2025	Jan. 10, 2025	Jan. 24, 2025
January 2025	Feb. 6, 2025	Feb. 20, 2025	Feb. 10, 2025	Feb. 24, 2025
February 2025	March 6, 2025	March 20, 2025	March 10, 2025	March 24, 2025
March 2025	April 4, 2025	April 18, 2025	April 10, 2025	April 24, 2025
April 2025	May 6, 2025	May 20, 2025	May 9, 2025	May 23, 2025
May 2025	June 6, 2025	June 20, 2025	June 10, 2025	June 24, 2025
June 2025	July 3, 2025	July 17, 2025	July 10, 2025	July 24, 2025
July 2025	Aug. 6, 2025	Aug. 20, 2025	Aug. 8, 2025	Aug. 22, 2025
August 2025	Sept. 5, 2025	Sept. 19, 2025	Sept. 5, 2025	Sept. 19, 2025



Do your employees come to you with questions about their TRS retirement benefits? TRS offers group retirement sessions and one-on-one counseling sessions to help address these needs.

**Now, get ready because TRS will be on the road, bringing our retirement sessions to locations across Texas!**

It's now easier than ever to learn about TRS benefits and retirement options. Please encourage your employees to join us at one of our retirement sessions throughout the school year. Whether they prefer the camaraderie of a [group presentation](#) or the personalized touch of a [one-on-one session](#) with a TRS counselor, we've got them covered.

**Stay Updated!** Please check these schedules frequently for the latest updates. You'll find all the details you need including locations, dates, RSVP information (via *MyTRS* and phone), registration deadlines, and more. Don't miss out – register today!

**Reserve Your Seat!** Reservations are limited and are on a first-come, first-served basis, so be sure to secure your spot by the deadlines listed on the TRS website. Once you register, you will receive a confirmation email with your scheduled date and time. Remember, TRS is your go-to for scheduling meetings. **Please do not call meeting locations for information.**



We can't wait to see you and your employees soon and help you navigate your retirement journey!

### Session Success! Huge Thanks for Sharing Your Feedback on Your Experience!

*Below are direct quotes from our members sharing positive feedback from interactions with TRS counseling team members.*

*The dialogue was great. The person was extremely helpful. I felt like I could get any question answered without judgment. I feel more comfortable with the process because of them. THANK YOU.*

*Everything was very informational and professional. The entire staff was extremely welcoming and professional!*

*I have no recommendations for improvement. It was a great experience, and I am more confident about retiring.*

*No improvements necessary. It was a very pleasant and informative meeting. The young lady that assisted me was very knowledgeable, very nice, and made the process so much easier.*



## Pension Phishing Email Scam



Multiple phishing campaigns have targeted state employees and TRS members with fake services offering pension planning advice. One such scam uses the subject title “TRS of Texas Pension Review Call.” We want to remind reporting employers and our members about the dangers of these scams, which specifically target pensions and pension services. These planning services are not offered or endorsed by TRS, and we urge you to exercise caution if you receive an email request related to these types of services.

Some examples we’ve reviewed encourage members to click on a URL advertising pension planning services. The link directs you to set up a call with an advisor, requiring you to submit personal credentials to confirm the appointment. You can select a date and time, and once submitted, you will receive a confirmation email.

As a reminder, TRS will not request personal identifying information through email. Always research or contact TRS directly if you have any doubts.



## Reporting Accurate Demographic Information

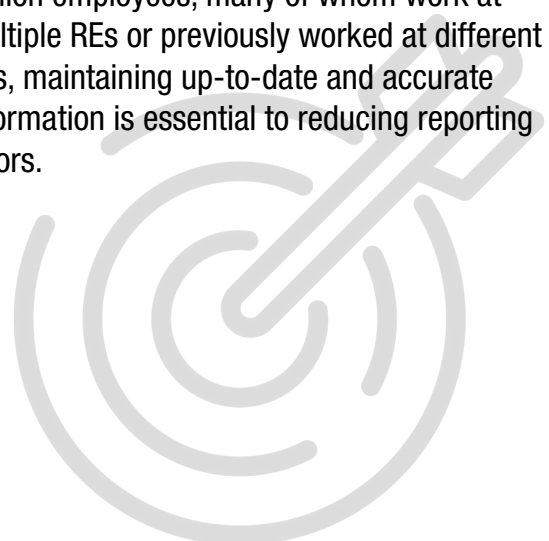


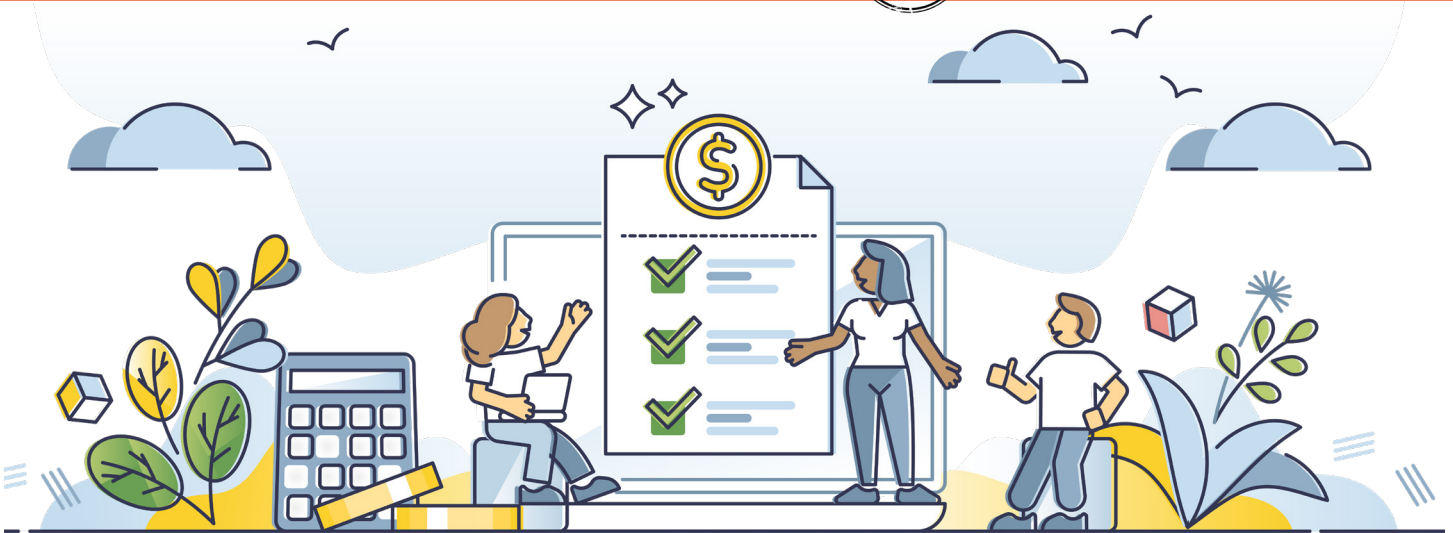
Accurately reporting all employees of the Teacher Retirement System of Texas is crucial. This includes using the employee’s name as it appears on their social security card and their date of birth and gender as shown on their government-issued identification.

*If the employee does not have a social security number, please request a TRS Temporary ID Number. The process for requesting a TRS Temporary ID Number can be found on page three of the [June 2021 TRS Update Newsletter](#).*

The State Auditor’s Office (SAO) conducts census data audits annually at Reporting Employers (REs) around the state, reviewing demographic information submitted to TRS.

Accurate reporting helps maintain the employees’ accounts. With over 1300 Reporting Employers submitting data for more than one million employees, many of whom work at multiple REs or previously worked at different REs, maintaining up-to-date and accurate information is essential to reducing reporting errors.





**This Fall:** TRS members will soon receive their TRS annual statements!

Statements include:

- Total reported member contributions for the 2023-24 fiscal year. (This includes all reported TRS-eligible compensation and member contributions paid Sept. 1, 2023 – Aug. 31, 2024, by all Reporting Employers (REs).
- Total accumulated contributions in the member's account.
- Service credit recognized by TRS.

**Reminder:** Annual salaries recorded on the statements reflect amounts paid. *These months may differ from those in their annual or school year contract.*

If a TRS member finds a salary discrepancy, review the data reported to TRS via monthly Regular Payroll (RP) reports. You can access this information in the RE Portal under View Employee Information > View RP Payroll Info. After reviewing, contact your TRS coach for assistance if the salaries were not reported correctly.

**Important Note:** If your employer did not complete all FY 2024 reports (September 2023 - August 2024) by the Sept. 13, 2024 deadline, the member's statement may be inaccurate. Please inform the TRS-eligible employees about which report months were not included. The missing months are any reports not completed by Sept. 13, 2024.

TRS does not reprint or create new annual statements; however, the account balances will be reflected on the member's *MyTRS* account once all months are reported.

**Notice on Correcting Errors:** Errors or omissions in eligible salary or service must be corrected within five years from the end of the school year in which service was rendered. Similarly, compensation not reflected on the statement must be verified within five years from the end of the school year in which it is paid. If adjustments are not made within the applicable time frame, the member may not establish a year of service credit or include the full eligible compensation for TRS benefits.

**More Information:** TRS encourages all members to review their annual statements carefully. If members have any questions related to their statement, first refer them to the 2024 Annual Statement page on the TRS website: [2024 Annual Statement Information Page](#).



TRS and Reporting Employers (REs) share the responsibility of protecting our members' Personally Identifiable Information.

PII includes, but is not limited to, the following: first name or first initial and last name combined with one or more of the following data elements: social security number, date and place of birth, mother's maiden name, driver's license number, state identification card number, passport number, financial account number, or other unique identifying number, characteristic, or code.

PII also encompasses any other information that TRS determines could be used to identify an individual, including data derived from records of individual TRS participants. This includes the TRS Participant ID (PID).

If your RE needs to transmit documentation containing member PII to TRS for updating a demographic record, it must be sent in a secured format. TRS reporting coaches can provide a link for sending documents securely via encrypted email.

Please do not send member PII to TRS unless it is requested by your coach, and you have access to a secure delivery method provided by TRS or your employers' IT department. This includes screenshots of RE Portal screens. If a record won't save due to an error, and an RE coach requests a screenshot, please send it securely or request a secure message from your coach.



### To summarize:

- Do not send any PII to TRS unless requested by your coach in a secure format.
- Do not include PII if using the TRS RE Portal Chat function. Please call or use a secure email option instead.
- When emailing your coach, use directional language instead of emailing RE Portal screenshots containing PII. For example, "I need assistance with a suspended record on my September Regular Payroll (RP) Report for J Smith."
- Utilize secure email when sending messages containing PII, which have been requested by your coach.
- TRS member information is confidential and protected by TRS laws and rules. While PII is shared between the RE and TRS, RE coaches are limited by state law on what information can be shared with an employer. For example, TRS coaches cannot provide the name of former or concurrent employers, or specific TRS retirement application data received from a member.



## TRS Seeking TRS-Care Retirees Advisory Committee Nominations Through Nov. 4



Do you know an active school administrator who wants to make a difference for Texas educators? Nominate them! You can also nominate yourself.

The Teacher Retirement System of Texas Retirees Advisory Committee for TRS-Care is made up of active and retired public educators.

The RAC holds public meetings on retiree group coverage, recommends minimum standard and plan features, and recommends changes to rules and legislation affecting TRS-Care. Visit [Retirees Advisory Committee for TRS-Care](#) to learn more.

### TRS is seeking nominations for a recent RAC vacancy for the active school administrator position.

Nominate someone you know who is:

- in an administrative leadership role at your school district
- passionate about making a difference for Texas educators
- eager to represent the opinions of TRS-Care retirees
- interested in learning about what happens behind the scenes in health care

### TRS will accept nominations for this RAC vacancy through Nov. 4, 2024.

TRS will evaluate nominees on the following criteria:

- length of experience as a TRS member and/or retiree
- participation in education-related volunteer programs
- professional activities and experience serving on board committees and with decision-making organizations, especially related to health care or other benefits
- credentials, awards or other meritorious recognition
- participation in TRS-Care (for retired nominees)
- geographic diversity
- experience in health care benefits or related field

To nominate yourself or someone else, send a cover letter (or letter of recommendation) and the nominee's resume to the address or email below. The letter must state that the nomination is for the vacant RAC position and include a summary of the nominee's qualifications.

Teacher Retirement System of Texas Attention:  
Chief of Staff, TRS Health  
1000 Red River St., Austin, TX 78701  
Or via email to  
[healthcarecomm@trs.texas.gov](mailto:healthcarecomm@trs.texas.gov)

Staff will interview qualified nominees and make recommendations to the TRS Board of Trustees at their Dec. 5-6, 2024 meeting. The term for this new RAC member will expire Jan. 31, 2026.



We look forward to adding new voices and perspectives to this important committee!





*Please share with your employees!* TRS is interested in featuring members early in their careers for a video series spotlighting how you can connect with your retirement system to maximize your benefits. As part of the video series, TRS will connect you with a TRS Benefits Counselor to receive an overview on helpful resources and information you can use to better understand your future retirement benefits.

We look forward to sharing this video as a helpful resource for other members -- just like you -- who are wondering how they can connect with their retirement system at this point in their careers. There's no better time to start planning than today.

Please share the word and share your interest by emailing [communications@trs.texas.gov](mailto:communications@trs.texas.gov). We look forward to hearing from you!





## RE Training:

### Logging into the RE Portal



Many people find that a video explanation is the best way to learn! Take advantage of more than a dozen informative videos in the [TRS Video Library](#) to understand TRS processes and reports for reporting employers.

## Now Accepting Nomination Forms for 2025 TRS Board of Trustees Election



TRS is now accepting nominations for eligible members to qualify as candidates for the election of the Public School District Employee position on the TRS Board of Trustees. To qualify, 250 signatures from eligible members must be collected and turned in by the deadline, Jan. 27, 2025.

Nominate yourself or someone you think would be a great fit representing you in this position which will be for a six-year term beginning no earlier than Sept. 1, 2025 and ending Aug. 31, 2031, [here](#).



## Follow TRS on Social Media



Click [Here](#) to Rate This Issue of the *Update*

## Navigating Life Events With Ease



Career changes often necessitate updates to your account information and other essential actions. That's why the [TRS Life Event Resource Kit/Employer Toolkit](#) is so important – it's a comprehensive guide to help guide members during life and career transitions.

TRS members will find the “[Terminating Employment](#)” section of our Career Events Resource Toolkit holds valuable answers to common questions like:

- How do I know if I am eligible to retire?
- If I terminate employment, am I eligible for TRS-Care?
- If I'm not eligible for TRS benefits, will TRS return my contributions?
- How can I request a refund?

Explore the [Life Event Resource Kit](#) today! Whether starting a new job, transitioning, or planning for retirement, these events have a significant impact. We're here to help you make the most of your benefits – in all ways possible – with each step forward.

## Member Education Videos



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.

