

## TEACHER RETIREMENT SYSTEM of TEXAS

**UPDATE**

## UPCOMING 2020-21 TRS-ACTIVECARE TIMELINES

Annual Enrollment dates for the 2020-21 TRS-ActiveCare plan year have been set for July 15 through Aug. 21. If your district does custom enrollment dates, they must be within that date range. If you set your dates early in the enrollment window, you can help your employees have their physical medical ID card for the plans' start date on Sept. 1.

All TRS-ActiveCare participants will receive a new medical and pharmacy ID card with a new member identification number by Sept. 1. Employees who make a new plan choice after Aug. 7 will receive an updated ID card after Sept. 1. Everyone will be able to access the digital version of their ID card on Sept. 1 whether they have chosen a new plan or were automatically enrolled in one.

Employees that take no action during Annual Enrollment will have the plan that most closely matches their existing one. See the table below to know which plans will mirror each other.

Current TRS-ActiveCare Plan	Plan the Participant will Roll into if No Action is Taken
TRS-ActiveCare 1- HD	TRS-ActiveCare HD
TRS-ActiveCare Select	TRS-ActiveCare Primary+
TRS-ActiveCare Select 2	TRS-ActiveCare Select 2

TRS is proud of the collaboration that enabled us to offer a new plan featuring copays and improved pricing, broader networks and lower premiums for families with children.

**Please note that this year, we want all employees to take action during Annual Enrollment and we ask that the Benefit Administrators (BAs) help us accomplish this goal.** We worked closely with district leadership across the state to enhance our value of care and we want employees to know there are new choices to make that can best fit their needs and empower their health.

## TRS SETS NEW TRS-ACTIVECARE RATES AND BENEFITS

On April 17, the TRS Board of Trustees adopted new rates and benefits for the 2020-21 plan year. Through savings garnered by procuring a competitive contract with a new health plan administrator, Blue Cross and Blue Shield of Texas (BCBSTX), we were able to provide more value-added benefits that came from collaborating with districts across the state.

In general, we're providing improved pricing, broader networks, simplified coverage, lower premiums for families with children, and a new plan that includes copays for doctor visits and generic medications. **These enhancements are one of the reasons having your employees closely evaluate their plan options is so important this year.**

You can see the specific rates and benefits in our [Plan Highlights PDF here](#). To read more specifics, visit our rates and benefits web page. We'll have a more thorough enrollment guide available next month. The BCBSTX customer phone line and website that will include a provider search tool and cost estimator will also be available next month.

For more information, visit [our announcement landing page](#).

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## REPORTING SUMMER WORK AT ISDS AND CHARTERS

There are some employees whose regular school year job is subject to Statutory Minimum contributions, but who plan to also work in the summer outside of their regular contract as a wholly separate job. In this case, position code 09 will be used to designate those employees.

- Position code 09 will only be used by ISDs and charter schools.
- Position code 09 will only be used for employees whose regular school year positions are subject to Statutory Minimum, and who plan to work during the summer in a wholly separate job (example: teachers, principals, etc.).
- Position code 09 should **not** be used for people who are working during the summer outside of their regular contract when their regular position is not subject to Statutory Minimum (example: food service workers, support staff, etc.).
- ED40s (a record type used to report new employment and position records) for position code 09 may only contain contract dates between May 15-Aug. 31 of each year.
- ED40s for position code 09 must be submitted in the month the employee begins their summer contract/work agreement.
- RP20s (reports an employee's compensation and contribution information for the current month) for position code 09 will only be accepted for report periods May-October of each year.
- The Public Education Employer Contribution will be due on 100% of the TRS-eligible salary reported under position code 09.
- Statutory Minimum contributions are not due on salary earned and reported under position code 09.
- The State Minimum field will be left blank on Regular Payroll (RP) records for position code 09.
- Employers will continue reporting pay that was accrued during the instructional year and paid out over the summer months under the position code for that job. This will be a **separate RP** record, under the employee's normal job code. Employers will continue to report and pay Statutory Minimum contributions on salary above the State Minimum that was earned during the employee's regular contract for the instructional year.
- RP20s for pay earned during the summer months under position code 09 will be accepted up to two months after the end of the summer work contract.
- Days and hours worked during the summer contract should only be reported on a position code 09 RP record during the time the employee is actually working. Once the 09 summer contract has ended, no further days and hours should be reported under that position.
- If pay for summer work is issued more than two months after the end of the 09 contract, that pay will need to be added to the RP20 for the employee's current fiscal year contract. That record will result in validation errors, however this is expected. Then, the RE will need to email their coach with a breakdown of how much salary and contribution is for summer work and how much is for the regular school year. The coach will verify the information and process an override for the record.

## REFUND CERTIFICATIONS – IMPORTANT INFORMATION

As the school year comes to a close, typically there is an increase in the number of refund certification requests that are being sent for Reporting Employers (REs) to complete. It is very important to properly complete the refund certifications to avoid future reporting issues.

TRS Laws and Rules state that an individual may only request a refund of their TRS contribution if they have **terminated** all employment with all TRS-covered employers, 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.\*

**REFUND CERTIFICATIONS – IMPORTANT INFORMATION** *continued from page 2*

Refund certifications should only be certified if:

- 1) The individual **has terminated all** employment with your entity and is not expected to return. An ED 90 (a termination record) would ordinarily be submitted for this individual, but the refund certification will take the place of an ED 90.
- 2) The individual is **currently a substitute** with your entity and is expected to continue in that role only.

Please do **not** certify that an individual has terminated if:

- 1) The person 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 person is still an employee, has **not terminated**, but is not working due to current school closures.
- 3) The person 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 person has temporarily terminated employment, but is already hired to or expected to resume working in the future.

Incorrectly certifying an employee as terminated can have consequences for your reporting in the future. For example, if someone is certified as terminated and receives their refund over the summer, when they return to work in the next school year the following will happen:

- 1) A new ED 20 will need to be submitted with a new employment start date since the refund certification will have terminated the previous employment relationship.
- 2) If a member receives a refund, then they withdraw their membership in TRS. This means that when they return to work, they are considered a new member and thus subject to New Member Contributions for the months that contain the employee's 1st – 90th day of employment. This can cause extra expense for your district, since your employer is paying the New Member Contributions.

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

A substitute must have a current contract including the month that the certification is being completed in order for the refund certification to be accepted. 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.