

UPDATE

ANNUAL RECERTIFICATION NEEDED FOR ALL RE PORTAL CONTACTS

Now that we have been using the new Reporting Entity (RE) Portal for one year, TRS will require RE Portal contacts to recertify their user agreement. This process will take place annually, and will require users to complete an Annual Recertification Agreement within the RE Portal. Please note that this is the same certification process required during your initial login and setup of your RE Portal account. You will receive a recertification message seven calendar days before the certification deadline.

If you do not log in to recertify your RE Portal account before the seven-day certification period expires, the account will be locked. A locked account may only be unlocked by the user’s RE Portal coach. Upon unlocking the user’s account, the user will be required to complete the Annual Recertification Agreement before being able to move further into the RE Portal.

To recertify your web account:

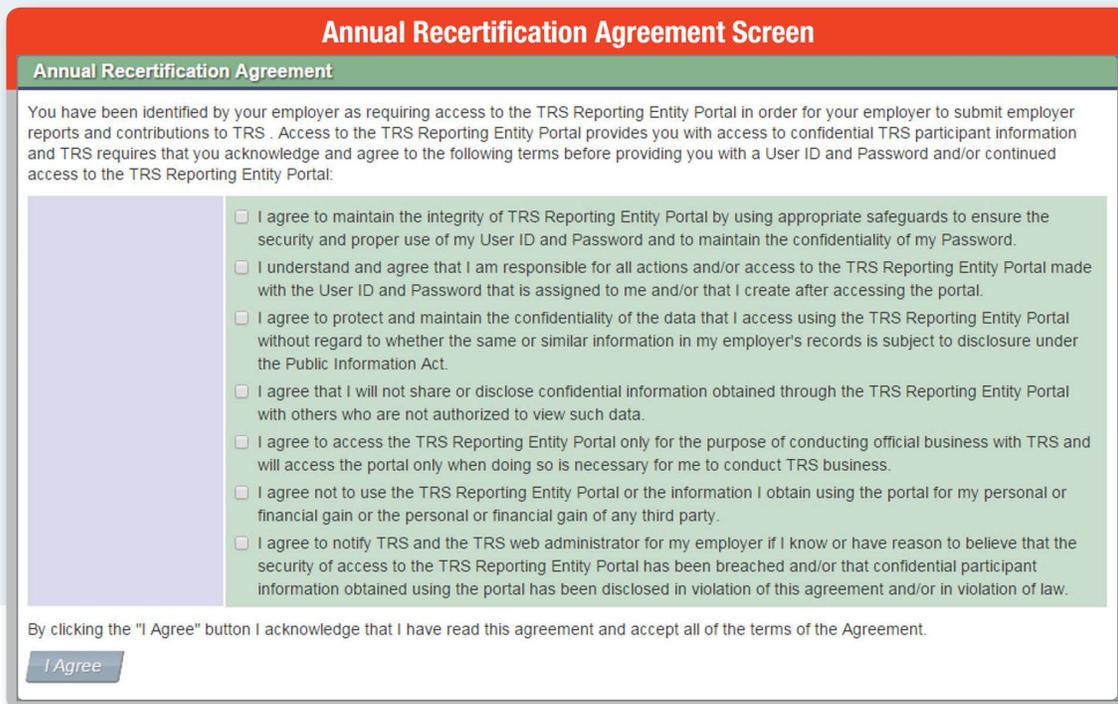
1. Log in to the RE Portal.

- If the login date is within seven days before the certification deadline, the Annual Recertification Agreement screen appears.

2. Check each box on the agreement screen as you finish reading each statement.

3. Click “I Agree.”

- The certification agreement is saved.
- The RE Portal homepage appears.



Note: If your RE has received messages from TRS stating that you have not yet acknowledged the Annual Recertification Agreement, the Web Messages screen appears. You must acknowledge the messages before proceeding.

continued on page 2 >

continued from page 1

SUBMISSION OF ED40 RECORDS FOR MEMBERS IN ORP-ELIGIBLE POSITIONS

When submitting ED40 records, it is very important to note when a member's employment changes. It is especially important to input the correct information on the ED40 record for higher education members who have elected to enroll in the Optional Retirement Program (ORP).

There are three scenarios related to ORP and entering data on ED40 records:

SCENARIO 1:

The employee is already enrolled and participating in ORP prior to the beginning of the fiscal year.

Action:

Submit the ED40 record with "TRS Membership Eligibility" flag of No and an "ORP Eligible Position" flag of Yes. The "Beginning Date of Contract/Work Agreement" and "Ending Date of Contract/Work Agreement" fields should reflect the dates the employee was hired to work in that fiscal year.

SCENARIO 2:

The employee is hired into a TRS-eligible position during the fiscal year that is also an ORP-eligible position.

Action 1:

Submit the initial ED40 record with "TRS Membership Eligibility" flag of Yes and an "ORP Eligible Position" flag of Yes. The "Beginning Date of Contract/Work Agreement" and "Ending Date of Contract/Work Agreement" fields should reflect the dates the employee was hired to work in that fiscal year.

Please note: If the member later decides to elect ORP during the initial election period*, but has contributed to TRS for the months prior to the ORP election, then an additional action will need to be completed:

Action 2:

Submit an ED45 adjustment record to both end the TRS-eligible position and to add the ineligible position using an "Adjustment Reason Code" of End/Add. Ensure all of the original fields match the information that was submitted on the initial ED40 record. Then, complete all of the new fields with the ORP contract information. Be sure to indicate the "New TRS Membership Eligibility" flag as No and the "New ORP Eligible Position" flag as Yes. The "New Beginning Date of Contract/Work Agreement" field is the date the employee's ORP participation began (the effective date of the ORP election).

*Must submit a completed TRS 28 election form by the end of the ORP election period.

SCENARIO 3:

The employee is hired into a TRS-eligible position during the fiscal year that is also an ORP-eligible position; however, the employee decides to remain in TRS and does not elect ORP.

Action:

Submit the initial ED40 record with "TRS Membership Eligibility" flag of Yes and an "ORP Eligible Position" flag of Yes. The "Beginning Date of Contract/Work Agreement" and "Ending Date of Contract/Work Agreement" fields should reflect the dates the employee was hired to work in that fiscal year.

No ED45 adjustment record is needed since the employee did not elect to participate in ORP.

continued from page 2

NEW TRS MEMBERSHIP CARDS MAILED

In a continuous effort to improve service to our members, we are pleased to announce that we are issuing official TRS Membership Cards to participants. Please notify your employees that they should expect to receive their new cards, by mail, this summer. Participants will find that their membership card can be a beneficial, convenient resource to use when communicating with us. It also serves as a tangible representation of being part of the TRS member community. The membership card includes information that will be helpful when contacting our Telephone Counseling Center and using the automated telephone system or speaking with a Benefit Counselor. Please note that the participant's name and unique Participant Identification Number (PID) are printed on the front of the card. The back of the card includes important information about our operating hours and toll-free numbers. If your employees have questions related to their new TRS Membership Card, please advise them to call **1-844-203-5280**.

Along with issuing this card, we are launching a new automated telephone system in September. Here's what to expect:

- When you call TRS, please be ready to provide personal information such as your PID, social security number, and date of birth.
- If you call from a telephone number that is currently on file with TRS, you will be able to easily authenticate your identity by providing your social security number.
- If you call from a telephone number that is not currently on file with TRS, you will be asked to provide personal information, including your PID, to authenticate your identity.
- There will no longer be a need to set up and maintain a Personal Identification Number (PIN).

Helpful tips:

- Keep this card in your wallet or another safe, convenient place.
- File this helpful information with your other important TRS records.
- **Please note:** This card is **not** related to your health insurance card and **cannot** be used in place of your health insurance card.

NOMINATIONS SOUGHT FOR TRS BOARD OF TRUSTEES PUBLIC SCHOOL DISTRICT EMPLOYEE POSITION

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. The term begins as early as Sept. 1, 2019 and ends Aug. 31, 2025.

For the first time, TRS is offering two ways in which a nominee may collect the required 250 signatures of eligible members for nomination. An eligible member for this election is a current employee of a public school district, charter school, or regional education service center.

A nominee may collect the 250 signatures electronically by declaring his/her interest to become a nominee to the [Secretary to the Board of Trustees](#). Once the member's eligibility is validated, the member's name will be posted on the [nomination site](#) where the nominee may direct eligible members to sign the nominee's electronic petition. The names of nominees will be listed on a first-come, first-listed basis. To sign the electronic petition, eligible members will need to provide identifying information in order to verify their eligibility to sign the petition. The process is easy and only takes a few minutes. For an electronic petition, the nominee does not need to submit anything further to TRS but must have 250 eligible member signatures by Jan. 21, 2019 to be considered a candidate.

TRS will also continue to allow nominees to collect 250 signatures of eligible members with paper petitions. TRS must receive the nominee's paper petitions no later than Jan. 21, 2019. You may download a [petition \(pdf\)](#) from the Resources section on the Nominations for TRS Board of Trustees Public School District Employee position page on the [TRS website](#); or if you do not have access to a printer, please contact the [Secretary to the Board of Trustees](#) to request a petition be mailed to you.