



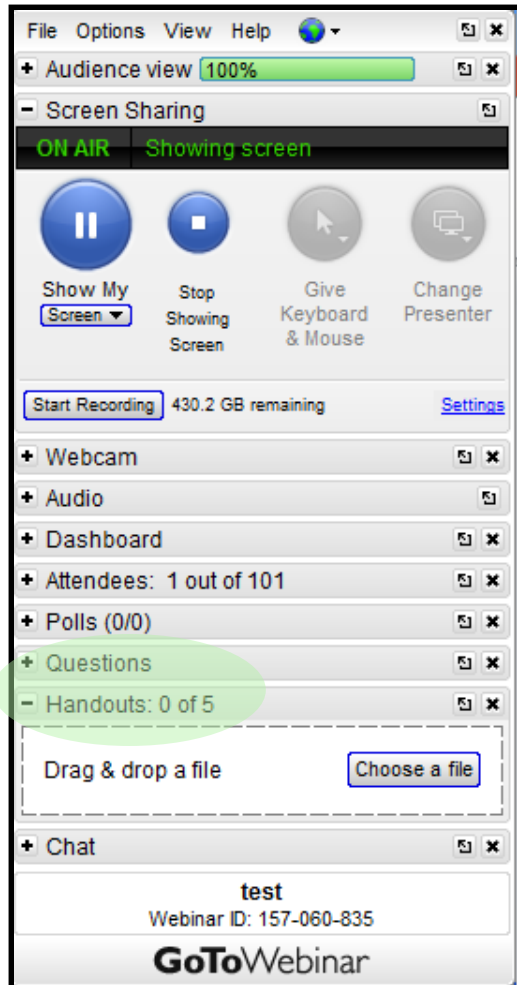
# Eligibility & Enrollments

August 26, 2020

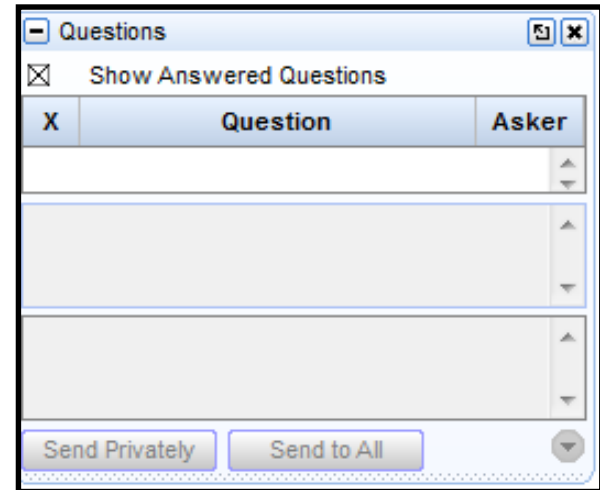
# Friendly reminders

- This presentation contains general information.
  - It is meant to be used as a guide during the webinar.
  - All participants are muted during the webinar.
  - Have a question?
    - » Type your question in the Questions area during the webinar.  
The moderator will see it and respond.
  - There will be a question-and-answer period at the end of the webinar.
  - Please maximize your screen size to have full use of the webinar's features.
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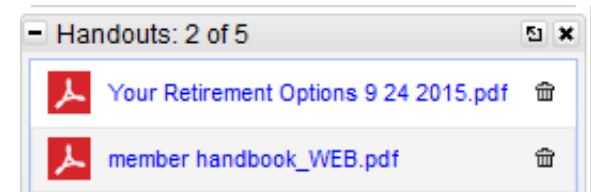
# Go To Webinar features



Type questions here.



Download handouts from today's webinar here.



# What you need to know...

- What positions are eligible for TRSL membership?
  - Dual employment: Are members working two jobs covered by different systems?
  - The enrollment process:
    - » Employer/Membership Information Site (EMIS)
    - » Forms
  - Is the member's job covered by another system?
  - Wrap-up
-

# Index 2.0: TRSL Membership

- Employer's Reference guide on TRSL membership eligibility and enrollments process

**TRSL**

**EMPLOYER MANUAL** **INDEX 2.0**

**INDEX 2.0: TRSL Membership** *June 2018*

## CONTENTS

- [Eligibility for TRSL membership](#)
- [Plan types](#)
- [Membership eligibility](#)
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  - [Visas](#)
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The information in this section is provided to help you determine an employee's eligibility for membership and the steps needed to enroll the eligible employee in TRSL.

State laws govern the rules of TRSL membership eligibility and enrollment. Some of them are referenced below:

- Definition of Teacher (eligible for membership) – [LSA R.S. 11:701\(33\)](#)
- Part-time Employee Membership Eligibility – [LSA R.S. 11:162](#)
- Enrollment Timeline (60 days) – [LSA R.S. 11:722](#)
- Retain Membership provision (at least 5 years eligibility service credit) – [LSA R.S. 11:723](#)
- TRSL Secondary Employer Criteria – [Louisiana Administrative Code](#) Title 58, Part III, §201.

# Check employee's status

- ***Prior to enrollment***, use Member Summary screen to check employee's TRSL membership status

The screenshot shows the 'Member Summary' screen. A red oval highlights the 'Member Summary' title. A pink callout box contains two steps: '1. Enter Employee SSN under Query Record' and '2. Click on Member Summary under Members Menu'. The 'Query Record' section has an SSN input field with the number '2' and 'Select' and 'Clear' buttons. The left sidebar lists 'Searches' (Member Search, Beneficiary Search) and 'Members' (Member Summary, Account History, Member Notations, Monthly Salary/Contributions, Annual Salary History, Benefit Payroll, Benefit Payee, COLA History, 1099-R Information, Retirement Benefit Payment History). The main content area shows 'Address Date: 08/11/2009' and 'Address:'. Below this is a form for 'Birth Date' and 'Age'. The 'Status Information' table shows one record with status 'ACTIVE'. The 'TRSL Regular Plan Information' section shows 'Date of Service Accrual: 08/25/2008', 'Average Comp: \$1,649.94', and 'Social Security Eligibility Date:'. A table below shows 'Service Credit for Benefit Computation' and 'Member Contributions'. A yellow box at the bottom highlights 'Service credit for eligibility as of 06/30/2019: 10.93' with a red arrow pointing to it.

**Query Record**

SSN  
2

Select Clear

**Member Summary**

Address Date: 08/11/2009  
Address:

Birth Date: Age:

**Status Information**

Sys	Seq	Status	Code	Date	DROP Record
4		ACTIVE	(A)	08/25/2008	

**TRSL Regular Plan Information**

Date of Service Accrual: 08/25/2008  
Switch-Over Date:  
Social Security Eligibility Date:

Average Comp: \$1,649.94

Original Retirement Plan

Service Credit for Benefit Computation		Member Contributions	
Regular Service	10.93	Tax-Sheltered Regular Savings	14,524.25
		Regular Salary Report as of 10/2019	374.28
Estimate as of 06/30/2019	10.93	Total Contributions	14,898.53

Service credit for eligibility as of 06/30/2019: 10.93

# TRSL membership eligibility

- Definition of “Teacher” – LSA R.S. 11:701(33)
  - **Eligible positions**
    - » All K-12 employees
      - Excludes school bus positions, school custodians/janitors, and school maintenance employees
    - » Visa holders other than F-series or J-series
      - Exception: J-1 visa holders are TRSL eligible
  - **Employment status**
    - » Work **more** than 20 hours per week (employees who work 20 hours or **less** are considered part-time)
    - » Position is not seasonal or temporary
-

# Part-time, seasonal, or temporary

**Generally employees who are part-time, seasonal, or temporary are not eligible for membership**

## **Exceptions that require mandatory enrollment & reporting:**

- Five (5) year rule {Effective 7/1/2003}
    - » Five or more years of eligibility service credit
      - Applies to members in PreK-12 classroom teacher positions
  - Ten (10) year rule
    - » 10 or more years of eligibility service credit
  - Secondary employment
    - » Full-time at another TRSL-reporting agency, while working part-time, seasonal, or temporary in a TRSL-eligible position at your agency
      - W-2 earnings
      - Form 1099 payments
-



# What if the member works two different positions with the same employer?

- Louisiana law states that individuals must contribute to the public retirement systems for which they are eligible based on their public employment if they have more than one eligible employment.
    - » **EXAMPLE:** *A non-vested teacher's aide works 20.25 hours per week, contributing to TRSL plus works 20.25 hours per week as a school bus aide, which requires contributions to LSERS.*
    - » **REMEMBER:** A vested TRSL member who works in two positions, each eligible for a different retirement system, has membership retention rights which may dictate the system to which contributions are made.
-

# To use Enrollments in EMIS:

- The staff member must be authorized to perform enrollment function (ENR).
- This is granted on *Authorized Contacts* (Form 1).
- This is not available to state agencies.

**TRSL** Teachers' Retirement System of Louisiana  
8401 United Plaza Blvd, Ste 300 • Baton Rouge, LA 70809-7017  
PO Box 94123 • Baton Rouge, LA 70804-9123  
Telephone: (225) 925-6446  
Toll free (outside the Baton Rouge area): 1-877-ASK-TRSL (877-275-8775)  
www.TRSL.org • web.master@trsl.org

Form 1 (04/18)

**EO-1**  
Employer number  
OK to Image

**Submit original form ONLY.**  
No copies, faxes, or scans are accepted.

If submitting multiple forms, please complete: Page \_\_\_\_ of \_\_\_\_

**Authorized Contacts**

**Print in ink or type all entries except signatures.** Designate personnel who will be responsible for certifying and accessing data. The contact must provide an email address to access the TRSL database. **Notify TRSL if a contact changes so that unauthorized personnel will not have access to TRSL records.** The designated employee(s) should be familiar with the accuracy of the data as the employer will be responsible, under the provisions of LSA-R.S. 11:888(B) (C), for any errors that result from incorrect certifications. Personnel will receive communication such as email messages and Employer eNews Updates.

Access to TRSL member information is governed by the provisions of LSA-R.S. 44:1 et seq. Information on TRSL DROP participants and retirees is more specifically governed by LSA-R.S. 44:16 A and B. Any distribution or other use of this information in violation of these statutory provisions will be the sole responsibility of the employer.

Name of Employer \_\_\_\_\_

PO Box/Street Address \_\_\_\_\_

City, State, 9-Digit Zip \_\_\_\_\_

Telephone Number (with area code) \_\_\_\_\_ Fax Number (with area code) \_\_\_\_\_ Agency Website Address \_\_\_\_\_

1. Name of Designated Personnel \_\_\_\_\_ Email Address (required) \_\_\_\_\_

Title \_\_\_\_\_ Telephone Number (with area code) \_\_\_\_\_

Authorized Signature? ☐ Yes ☐ No  
NOTE: If no is checked, inquiry is the only access right allowed.

Check desired access rights from the following:

<input type="checkbox"/> Inquiry	<input type="checkbox"/> Enrollments	<input type="checkbox"/> Sick/annual leave update corrections
<input type="checkbox"/> Prior year certifications/corrections	<input type="checkbox"/> Terminations	<input type="checkbox"/> Agency Certification (form 11B)
<input type="checkbox"/> Retiree insurance deduction	<input type="checkbox"/> File submission	<input type="checkbox"/> Salary report (only for employers with no more than 25 employees)
<input type="checkbox"/> Home address update	<input type="checkbox"/> Contribution correction	<input type="checkbox"/> ORP salary report (only for employers with no more than 25 employees)

Authorized Signature (use only if "yes" box checked) \_\_\_\_\_ Date Signed (mm dd yyyy) \_\_\_\_\_ If replacing or deleting a previous designee, provide name to be deleted \_\_\_\_\_

2. Name of Designated Personnel \_\_\_\_\_ Email Address (required) \_\_\_\_\_

Title \_\_\_\_\_ Telephone Number (with area code) \_\_\_\_\_

Authorized Signature? ☐ Yes ☐ No  
NOTE: If no is checked, inquiry is the only access right allowed.

Check desired access rights from the following:

<input type="checkbox"/> Inquiry	<input type="checkbox"/> Enrollments	<input type="checkbox"/> Sick/annual leave update corrections
<input type="checkbox"/> Prior year certifications/corrections	<input type="checkbox"/> Terminations	<input type="checkbox"/> Agency Certification (form 11B)
<input type="checkbox"/> Retiree insurance deduction	<input type="checkbox"/> File submission	<input type="checkbox"/> Salary report (only for employers with no more than 25 employees)
<input type="checkbox"/> Home address update	<input type="checkbox"/> Contribution correction	<input type="checkbox"/> ORP salary report (only for employers with no more than 25 employees)

Authorized Signature (use only if "yes" box checked) \_\_\_\_\_ Date Signed (mm dd yyyy) \_\_\_\_\_ If replacing or deleting a previous designee, provide name to be deleted \_\_\_\_\_

**Form 1**

# Enrollments process

- When entering the employee's SSN into EMIS, ensure the SSN entered matches the SSN on the employee's Social Security card.

The screenshot shows the EMIS (Employer Member Information System) interface. At the top is a navigation bar with links: Home, Members, Employers, Reports, Updates, Submit Files, and Logout. Below the navigation bar, on the left, is a 'Query Record' section with a label 'Welcome, Employer:', an 'SSN' input field, and 'Select' and 'Clear' buttons. A callout box points to the SSN field with the text: 'Always Double-Check: Compare SSN entered to the employee's SS card'. To the right of the 'Query Record' section is the 'Enrollments' section, which contains the following text: 'Enrollments allows employers and TRSL to enroll members in TRSL. After entering the member's SSN and clicking 'Select' the appropriate screen will display to allow the specific enrollment to be processed. The enrollment will be adding a member to TRSL, processing an enrollment for a member who already belongs to TRSL or processing a return-to-work enrollment for a member who has retired and returned to work.'

# To use Enrollments in EMIS:

- Once you have determined the employee meets eligibility for TRSL:
    - » **Active member:** Enroll individual within 60 days of employment.
    - » **Rehired retiree:** Enroll individual within 30 days of re-employment.
-

# Enrolling active members in EMIS (member not known to TRSL)

- **Original Retirement Plan:**
  - » Individuals eligible for membership in a state public retirement system **before** January 1, 2011.
- **2011 Retirement Plan:**
  - » Individuals eligible for membership in a state public retirement system **between** January 1, 2011 and June 30, 2015.
- **2015 Retirement Plan:**
  - » Individuals eligible for membership in a state public retirement system **on or after** July 1, 2015.

Enter Enrollment Information Below	
System:	4
Employer ID:	
Employer Type:	Primary
<i>Primary - Employed on full-time or part-time basis. If part-time, member works everyday at partial pay.</i>	
<i>Secondary - Part-Time/Temporary employment. Member works full-time with another TRSL employer and will receive zero service credit.</i>	
First Name:	
Middle Initial:	
Last Name:	
Suffix:	
Date of Birth (mm/dd/yyyy):	
Enrollment Date (mm/dd/yyyy):	
Contract Months:	9
Type:	Full Time
Gender:	Male
Address:	
City:	
State:	LA
Zip:	
Personal E-Mail Address (optional):	

Submit

# Enrolling active members in EMIS (member is known to TRSL)

When the member is already in TRSL's system, there is less data to enter.

## Enrollments

SSN: <input type="text"/>	Date of Birth: <input type="text"/>
Name: <input type="text"/>	

### Instructions for Enrolling Existing Members:

1. Complete all required fields and click 'Submit'.

### Status Information

System	Status	Status Code	Status Date
4	REFUNDED	(W )	02/20/2001

### Employment History

Employer ID	Employer Name	System	Start Date	End Date	RTW Type
0097	TRSL	4	01/05/1998	10/27/2000	

### Enter Enrollment Information Below

System:	4 ▼
Employer ID:	<input type="text"/>
Employer Type:	Primary ▼
<i>Primary - Employed on full-time or part-time basis. If part-time, member works everyday at partial pay.</i>	
<i>Secondary - Part-Time/Temporary employment. Member works full-time with another TRSL employer and will receive zero service credit.</i>	
Enrollment Date (mm/dd/yyyy):	<input type="text"/>
Contract Months:	9 ▼
Type:	Full Time ▼
Gender (update gender if needed):	Female ▼
Address:	1118 JASON DRIVE
City:	DENHAM SPRINGS
State:	LA
Zip Code:	70726

**Submit**

# You must complete the Employee Attestation section.

- Have the member complete *Forfeiture of Retirement Benefits – Attestation of Understanding* (Form 2FRB)
- Keep this form for your records.

Employment History					
Employer ID	Employer Name	System	Start Date	End Date	RTW Type
0097	TRSL	4	01/05/1998	10/27/2000	

Enter Enrollment Information Below	
System:	4 ▼
Employer ID:	0097
Employer Type:	Primary ▼
<i>Primary - Employed on full-time or part-time basis. If part-time, member works everyday at partial pay.</i>	
<i>Secondary - Part-Time/Temporary employment. Member works full-time with another TRSL employer and will receive zero service credit.</i>	
Enrollment Date (mm/dd/yyyy):	01/30/2017
Contract Months:	9 ▼
Type:	Full Time ▼
Gender (update gender if needed):	Female ▼
Address:	1118 JASON DRIVE
City:	DENHAM SPRINGS
State:	LA
Zip Code:	70726

Forfeiture of Benefits - Employee Attestation	
Please respond to the following questions.	
1. Through his or her employment, was the individual first eligible for membership in a public retirement system <u>on or after</u> January 1, 2013?	<input checked="" type="radio"/> Yes <input type="radio"/> No
2. For individuals who were first eligible for membership in a public retirement system <u>prior to</u> January 1, 2013, and terminated service before this date. Has the individual been re-employed in a position <u>on or after</u> January 1, 2013, which would again make him or her eligible for public retirement membership?	<input type="radio"/> Yes <input checked="" type="radio"/> No
3. Is the individual eligible for membership in a public retirement system by assuming an elected office <u>on or after</u> January 1, 2013, or by virtue of previous public service?	<input type="radio"/> Yes <input checked="" type="radio"/> No

# Employee Attestation section

## ***Forfeiture of Benefits - Employee Attestation***

*Please respond to the following questions.*

- |  |   |
|--|---|
| 1. Through his or her employment, was the individual first eligible for membership in a public retirement system <u>on or after</u> January 1, 2013?   | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| 2. For individuals who were first eligible for membership in a public retirement system <u>prior to</u> January 1, 2013, and terminated service before this date. Has the individual been re-employed in a position <u>on or after</u> January 1, 2013, which would again make him or her eligible for public retirement membership? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| 3. Is the individual eligible for membership in a public retirement system by assuming an elected office <u>on or after</u> January 1, 2013, or by virtue of previous public service?  | <input type="radio"/> Yes <input checked="" type="radio"/> No |


## ***Select one of the following verification statements***

- ☒ Form 2FRB signed by employee. I hereby certify that this employee has received and executed *Forfeiture of Retirement Benefits - Attestation of Understanding* (Form 2FRB), and that this form will be permanently maintained in the personnel records of this employer.
- ☐ Form 2FRB not signed by employee. State law, La. R.S. 11:293 requires that this employee receive and execute *Forfeiture of Retirement Benefits - Attestation of Understanding* (Form 2FRB). The enrollment of this employee cannot be completed until Form 2FRB is properly executed in compliance with state law.

**Submit**



# Individuals may be subject to the forfeiture of retirement benefits if convicted of a “public corruption crime.”

	<b>Teachers' Retirement System of Louisiana</b>	Form 2FRB (12/12)
	8401 United Plaza Blvd, Ste 300 • Baton Rouge, LA 70809-7017 P.O. Box 94123 • Baton Rouge, LA 70804-9123 Telephone: (225) 925-6446 • Fax: (225) 925-4779 <a href="http://www.trsl.org">www.trsl.org</a>	<b>00-2FRB</b>

### Forfeiture of Retirement Benefits – Attestation of Understanding

All individuals employed on or after January 1, 2013 are required to read and sign this attestation form.

La. R.S. 11:293 provides for the forfeiture of retirement benefits by a public employee or elected official (hired or beginning service on or after January 1, 2013) convicted of a “public corruption crime.” This law defines “public corruption crime” as a state or federal felony committed on or after January 1, 2013, in which the sentencing judge finds that the public servant acted willfully and in the course and scope of his official capacity and that any of the following apply:

1. The public servant realized or attempted to realize a financial gain for himself or for a third party.
2. The public servant committed any criminal sexual act with or upon the person of a minor, and there was a direct association between the public servant and the minor related to the public servant's employment.

The statutory text of La. R.S. 11:293, setting forth the provisions of law governing forfeiture of benefits, is below.

<b>Section 1 — Member Information</b>	
Name: Last, first, MI, middle initial, etc.	Social Security number
<input type="text"/>	<input type="text"/>

<b>Section 2 — La. R.S. 11:293. Forfeiture of retirement benefits; public corruption crimes</b>
<p>A. As used in this Section, the following words or phrases shall have the following meanings:</p> <p>(1) “Conviction” or “convicted” means a criminal conviction, guilty plea, or plea of nolo contendere that is final, and all appellate review of the original trial court proceedings is exhausted.</p> <p>(2) “Public corruption crime” means a state or federal felony committed on or after January 1, 2013, in which the sentencing judge finds the public servant acted willfully and in the course and scope of his official capacity and the evidence establishes either of the following:</p> <p>(a) The public servant realized or attempted to realize a financial profit or a financial gain for himself or for a third party.</p> <p>(b) The public servant committed any criminal sexual act with or upon the person of a minor, and there was a direct association between the public servant and the minor related to the public servant's employment.</p> <p>(3) “Public retirement system” means any state, statewide, or any local public retirement system, plan, or fund.</p> <p>(4) “Public servant” means a public employee or an elected official as defined in R.S. 42:1102 who is a member, former member, deferred retirement option plan participant, or retiree under the provisions of any public retirement system and who meets any of the following criteria:</p> <p>(a) His first employment making him eligible for membership in a public retirement system began on or after January 1, 2013.</p> <p>(b) He was employed in a position making him eligible for membership in a public retirement system prior to January 1, 2013, but he terminated his service prior to that date and is reemployed in such a position on or after that date.</p> <p>(c) He assumes an elective office on or after January 1, 2013, and by virtue of that service or previous public service he is eligible for membership in a public retirement system.</p> <p>B.(1) Following the conviction of a public corruption crime, the sentencing court shall determine if the conviction warrants forfeiture as provided in this Subsection or garnishment as provided in R.S. 11:292. In order to determine the appropriate remedy the sentencing court shall review the following factors:</p> <p>(a) The nature of the offense.</p> <p>(b) The prior service of the public servant and the appropriateness of any mitigating factors.</p> <p>(2)(a) If the court determines that forfeiture is appropriate, the court may order the forfeiture of the public servant's right to receive any benefit or payment of any kind under this Title except a return of the amount contributed by the public servant to the retirement system without interest, subject to Subparagraph (b) of this Paragraph.</p>

Page 1 of 2

Form 2FRB (12/12)
<b>00-2FRB</b>

(b) If the court orders the public servant to make restitution to the state or any political subdivision of the state for monetary loss incurred as a result of the public corruption crime for which he is convicted, the court may order restitution to be paid from the amount contributed by the public servant to the retirement system.

(c) Subject to the requirements of Paragraph (3) of this Subsection, the court may award to the member's spouse, dependent, or former spouse, as an alternate payee, some or all of the amount that, but for the order of forfeiture under Subparagraph (a) of this Paragraph, may otherwise be payable. Upon order of the court, the retirement system shall provide information concerning the member's membership that the court considers relevant to the determination of the amount of an award under this Subparagraph. The system shall also calculate the spousal share of the public servant's benefit for the sentencing court in accordance with existing community property law. Any dependent's share shall be calculated in the same manner as a spousal share. In determining the award, the court shall consider the totality of the circumstances, including but not limited to:

(i) The role, if any, of the member's spouse, dependent, or former spouse in connection with the crime.

(ii) The degree of knowledge, if any, possessed by the member's spouse, dependent, or former spouse in connection with the crime.

(3) An award ordered under Subparagraph (2)(c) of this Subsection may not require the retirement system to:

(a) Provide a type or form of benefit or an option not otherwise provided by the retirement system.

(b) Provide increased benefits determined on the basis of actuarial value.

(c) Take an action contrary to the system's governing laws or plan provisions other than the direct payment of the benefit awarded to the spouse, dependent, or former spouse.

(4) All of the convicted public servant's service credit attributable to employer contributions and interest on those contributions that are not otherwise assigned pursuant to Subparagraph (2)(c) of this Subsection shall be forfeited, and any dollar amount of such employer contributions and interest, together with any funds in the individual's deferred retirement option plan account, shall be applied to reducing the balance of the unfunded accrued liability of the system in a manner determined by the system's board of trustees. If the system has no unfunded accrued liability, the employer contributions and interest shall revert to the system's trust.

C. Notwithstanding the provisions of Subsection B of this Section, survivor benefits being received by the surviving unmarried spouse, the surviving minor child, or the surviving physically or mentally handicapped child who is entitled to a survivor benefit of a deceased public servant convicted of a public corruption crime shall be based solely on the amount of the public servant's benefit forfeited to the retirement system and shall not be based on any amount remitted to the public servant.

D. No provision of this Section shall impinge on any judicially recognized community property interest of a current or former spouse.

E. Each public retirement system shall create an attestation form explaining the provisions of this Section and shall provide such attestation form to each employing agency. Each employing agency shall provide every public servant with such attestation form and such public servant shall be required to sign the form indicating that he has read it and understands the contents thereof.

F.(1) A parish prosecutor shall inform the secretary of the Department of Public Safety and Corrections in writing when a conviction for a state public corruption crime is entered against a person who the prosecutor knows, or has reason to believe, is a member of a public retirement system and who is subject to the provisions of this Section. The secretary shall compile such information and transmit it to the appropriate public retirement system.

(2) The secretary of state, upon being notified by a United States attorney of a felony conviction for a federal public corruption crime, whether or not such conviction qualifies as a conviction as defined by this Section, shall promptly transmit to each public retirement system information pertaining to such conviction.

G. The provisions of this Section shall apply only to benefits earned on or after January 1, 2013.

<b>Section 3 — Attestation</b>	
I, <input type="text"/> , have read this form,	
Forfeiture of Retirement Benefits – Attestation of Understanding, and understand its contents.	
Signature	Date (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>

Page 2 of 2

*Must be signed by all new hires subject to the law & kept in their personnel file.*


# Most La. public employees cannot contribute to Social Security for their public jobs.

Therefore, these employees are subject to the following provisions:

- Government Pension Offset (GPO)
- Windfall Elimination Provision (WEP)

*Form must be signed by all new hires and forwarded to TRSL.*

**Form 2SS**

		<b>Teachers' Retirement System of Louisiana</b> 8401 United Plaza Blvd, Ste 300 • Baton Rouge, LA 70809-7017 PO Box 94123 • Baton Rouge, LA 70804-9123 Telephone: (225) 925-6446 • Fax: (225) 925-4779 www.trsl.org	Form 2SS (10/14) <b>00-2SS</b> (Form SSA-1945)												
<b>Statement Concerning Your Employment in a Job Not Covered by Social Security</b>															
Employee Name	Employee SS# <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>														
Employer Name	Employer ID# <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>														
<p>Your earnings from this job are not covered under Social Security. When you retire, or if you become disabled, you may receive a pension based on earnings from this job. If you do, and you are also entitled to a benefit from Social Security based on either your own work or the work of your husband or wife, or former husband or wife, your pension may affect the amount of the Social Security benefit you receive. Your Medicare benefits, however, will not be affected. Under the Social Security law, there are two ways your Social Security benefit amount may be affected.</p> <p><b>Windfall Elimination Provision (WEP)</b></p> <p>Under the Windfall Elimination Provision, your Social Security retirement or disability benefit is figured using a modified formula when you are also entitled to a pension from a job where you did not pay Social Security tax. As a result, you will receive a lower Social Security benefit than if you were not entitled to a pension from this job. For example, if you are age 62 in 2005, the maximum monthly reduction in your Social Security benefit as a result of this provision is \$313.50. This amount is updated annually. This provision reduces, but does not totally eliminate, your Social Security benefit. For additional information, please refer to the Social Security publication, "Windfall Elimination Provision."</p> <p><b>Government Pension Offset (GPO)</b></p> <p>Under the Government Pension Offset, any Social Security spouse or widow(er) benefit to which you become entitled will be offset if you also receive a federal, state, or local government pension based on work where you did not pay Social Security tax. The offset reduces the amount of your Social Security spouse or widow(er) benefit by two-thirds of the amount of your pension.</p> <p>For example, if you get a monthly pension of \$600 based on earnings that are not covered under Social Security, two-thirds of that amount, \$400, is used to offset your Social Security spouse or widow(er) benefit. If you are eligible for a \$500 widow(er) benefit, you will receive \$100 per month from Social Security, \$500 - \$400 = \$100. Even if your pension is high enough to totally offset your spouse or widow(er) Social Security benefit, you are still eligible for Medicare at age 65. For additional information, please refer to the Social Security publication, "Government Pension Offset."</p> <p><b>For more information</b></p> <p>Social Security publications and additional information, including information about exceptions to each provision, are available at <a href="http://www.socialsecurity.gov">www.socialsecurity.gov</a>. You may also call toll free 1-800-772-1213, or, for the deaf or hard of hearing, call the TTY number 1-800-325-0778, or contact your local Social Security office.</p> <p><b>I certify that I have received TRSL Form 2SS (Form SSA-1945) that contains information about the possible effects of the Windfall Elimination Provision (WEP) and the Government Pension Offset (GPO) on my potential future Social Security benefits.</b></p> <table border="1"><tr><td>Signature of Employee ▶</td><td>Date (mm-dd-yyyy) <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table></td></tr></table>				Signature of Employee ▶	Date (mm-dd-yyyy) <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										
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Form SSA-1945 (11-2004)															

# TRSL notifies the member that he/she has been enrolled.



www.trsl.org  
225.925.6446  
225.925.6366  
web.master@trsl.org/  
Post Office Box 94123  
Baton Rouge LA 70804-9123

September 22, 2010

Member Name  
Address 1  
Address 2  
Address 3  
City, State, ZIP

ID No: 9999

Dear Member:

Welcome to the Teachers' Retirement System of Louisiana (TRSL), the state's largest public retirement system. Your employer, NUNEZ COMMUNITY, submitted your enrollment to TRSL effective 01/01/2011.

Please take a moment to read the attached sheet containing important information for newly hired public employees. Effective January 1, 2011, individuals who choose public employment will fall under the retirement provisions contained in Act 992 passed in the 2010 legislative session. Act 992 creates a new tier of retirement benefits for individuals whose first employment makes them eligible for membership in TRSL or one of the other state retirement systems (State Employees, School Employees, or State Police) on or after January 1, 2011.

Our records indicate you were a member of TRSL prior to January 1, 2011. As such, you fall under the retirement eligibility provisions applicable to membership prior to this date (see attached for detailed information).

If you have contributed to other Louisiana public retirement systems, you may be eligible to retain your membership in that system or transfer your contributions and service credit to TRSL. If you were previously a member of TRSL and withdrew your contributions, you are eligible to restore your service credit by repaying the withdrawn contributions, plus interest.

We encourage you to visit our website at [www.trsl.org](http://www.trsl.org) where you will find additional information about your membership in TRSL. We also ask that you check out the *TRSL Member Handbook* and *Your New TRSL Membership* brochure located under the Publications link. We find that information in these publications answers many questions new members have.

You can also view your personal retirement information online through TRSL's easy and secure Member Access system. To obtain a user ID and password, visit our website at [www.trsl.org](http://www.trsl.org), click on the Member Access Login link at the top right of the screen, and follow the easy instructions. After completing a one-time registration, your personal identification number (PIN) will be mailed to the address TRSL has on file for you within one to two business days. With this PIN, you will be able to create your user ID and password, and begin enjoying the convenience of online access 24 hours a day, seven days a week.

If you have specific questions concerning your membership in TRSL, please contact us at 225-925-6446 or toll free (outside the Baton Rouge calling area) at 1-877-ASK-TRSL (1-877-275-8775).

Sincerely,  
Teachers Retirement System of Louisiana

This member is in TRSL's  
**Original Retirement Plan.**

# TRSL notifies the member that he/she has been enrolled.



• www.trsl.org  
t 225.925.6446  
a 225.925.6366  
e web.master@trsl.org,  
Post Office Box 94123  
Baton Rouge LA 70804-9123

July 1, 2015

Member Name  
Address 1  
Address 2  
Address 3  
City, State, Zip

ID No: 9999

Dear Member:

Welcome to the Teachers' Retirement System of Louisiana (TRSL), the state's largest public retirement system. Your employer, NUNEZ COMMUNITY, submitted your enrollment to TRSL effective 07/15/15.

Effective July 1, 2015, individuals who choose public employment will fall under the retirement provision contained in Act 226 of the 2014 legislative session. Act 226 created a new tier of retirement benefits for individuals whose first employment makes them eligible for membership in TRSL or one of the other state retirement systems on or after July 1, 2015. Our records indicate you were not a member of TRSL prior to July 1, 2015; therefore, you are enrolled under the retirement provisions provided in Act 226.

If you were a member of one of the state retirement systems, i.e. Teachers' Retirement System of Louisiana, Louisiana State Employees Retirement System, School Employees Retirement System or the State Police Retirement System, prior to January 1, 2011 or between January 1, 2011 and June 30, 2015, we need to verify your prior state system membership to determine the retirement tier you must be enrolled in. To begin the process, please visit our website at [www.trsl.org](http://www.trsl.org) and complete the *Certification of Prior Membership in State System* (Form 2C) and forward it to the applicable retirement system(s) for verification. Once confirmation is received from the other system(s), we will notify you, in writing, as to which retirement provisions apply to your membership. If prior state system membership cannot be confirmed, you will remain under the plan provisions provided in Act 226.

If you have contributed to other Louisiana public retirement systems, you may be eligible to retain your membership in that system or transfer your contributions and service credit to TRSL. If you were previously a member of TRSL and withdrew your contributions, you are eligible to restore your service credit by repaying the withdrawn contributions, plus interest.

We encourage you to visit our website at [www.trsl.org](http://www.trsl.org) where you will find additional information about your membership in TRSL. We also ask that you check out the *TRSL Member Handbook* and *Your New TRSL Membership* brochure located under the Publications link. We find that information in these publications answers many questions new members have.

You can also view your personal retirement information online through TRSL's easy and secure Member Access system. To create a user ID and password, visit our website at [www.trsl.org](http://www.trsl.org), click on the Member Access Login link at the top right of the screen, and follow the easy instructions.

If you have specific questions concerning your membership in TRSL, please contact us at 225-925-6446 or toll free (outside the Baton Rouge calling area) at 1-877-ASK-TRSL (1-877-275-8775).


Sincerely,  
Teachers' Retirement System of Louisiana

Toll-Free: 1-877-ASK-TRSL | TDD: 225-925-3653  
Teachers' Retirement System of Louisiana is an equal opportunity employer and complies with Americans with Disabilities Act.

- This member was not known to TRSL. Therefore, we must determine which plan the member will be in:
- **Original Retirement Plan,**
- **2011 Retirement Plan, or**
- **2015 Retirement plan**



# Certification of Membership in State System



**Teachers' Retirement System of Louisiana**  
 8401 United Plaza Blvd, Ste 300 • Baton Rouge, LA 70809-7017  
 PO Box 94123 • Baton Rouge, LA 70804-9123  
 Telephone: (225) 925-6446 • Fax: (225) 925-4779  
 Toll free (outside the Baton Rouge area): 1-877-ASK-TRSL (877-275-8775)  
 www.trsl.org • web.master@trsl.org

Form 2C (03/15)  
**00-2C**

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**Certification of Membership in State System**

**Important:** Complete the entire form. Follow the specific instructions for each section. All dates should be in mm/dd/yyyy format. Information on this form will be used to establish your TRSL benefit structure. This form will not be used to initiate a transfer or reciprocal recognition of service with any other retirement systems to combine any other service you may have with your TRSL service. If you are interested in combining all of your service into TRSL, please refer to our brochure *Purchases and Transfers of Service Credit*, which is available on our website at [www.trsl.org](http://www.trsl.org).

**Section 1 — Member Information**

Name: Last, first, MI, suffix (Jr., III, etc.)		Today's date / /
Street / P.O. Box		enrollment
City, state, zip		Social Security number - -
Daytime telephone ( )	Evening telephone ( )	Date of birth / /
Email address		enrollment
Current Employer		

---

**Section 2 — Instructions**

If you were a member of one of the state systems listed below *prior to January 1, 2011, OR between January 1, 2011, and June 30, 2015*, select the system in which you were a member, provide additional information to assist the other system in identifying your records, and mail this form to the system selected.

☐ **Teachers' Retirement System of Louisiana**  
PO Box 94123, Baton Rouge, LA 70804-9123

☐ **Louisiana State Employees' Retirement System**  
PO Box 44213, Baton Rouge, LA 70804-4213

☐ **Louisiana School Employees' Retirement System**  
PO Box 44516, Baton Rouge, LA 70804-4516

☐ **State Police Pension and Retirement System**  
9224 Jefferson Hwy, Baton Rouge, LA 70809

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**Additional Information** (such as position held; approximate dates; name, if different than Section 1; etc.)

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**Section 3 of this form must be certified by the state system in which you were previously a member.**

**Section 3 — Certification of prior state service (to be completed by the state system)**

I certify that this employee was a member of the following state system during the time period selected below:  
**SELECT ONE:** ☐ prior to January 1, 2011    ☐ between January 1, 2011, and June 30, 2015    ☐ after June 30, 2015


Name of retirement system		Enrollment begin date(s)
Name of authorized representative		Enrollment end date(s)
Title	Daytime telephone ( )	Date signed (mm/dd/yyyy)
Signature of authorized representative		

**Retirement System: Please send this form to TRSL after certifying.**

- This form is used to determine what plan a member falls under.
- The employee will forward the form to the appropriate retirement system for certification of service.
- That system will then return the form to TRSL.

**Form 2C**

# For state agencies...



**Teachers' Retirement System of Louisiana**  
 8401 United Plaza Blvd, Ste 300 • Baton Rouge, LA 70809-7017  
 PO Box 94123 • Baton Rouge, LA 70804-9123  
 Telephone: (225) 975-6446  
 Toll free (outside the Baton Rouge area): 1-877-ASK-TRSL (877-275-8775)  
 www.TRSL.org • web.master@trsl.org

Form 2R (05/18)  

00-2R

**Submit original form  
ONLY. No copies, faxes,  
or scans are accepted.**

### Election to Retain Membership

---

Section 1 — Member Information

Name Last, first, middle initial, BL, etc.		Social Security number <div style="display: flex; justify-content: space-around; width: 100%;"> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> </div>	
Street / P.O. Box		Attach copy of card	
City, State, Zip		Date of birth <div style="display: flex; justify-content: space-around; width: 100%;"> <div style="border-bottom: 1px solid black; width: 20px;"></div> <div style="border-bottom: 1px solid black; width: 20px;"></div> <div style="border-bottom: 1px solid black; width: 20px;"></div> <div style="border-bottom: 1px solid black; width: 20px;"></div> <div style="border-bottom: 1px solid black; width: 20px;"></div> <div style="border-bottom: 1px solid black; width: 20px;"></div> <div style="border-bottom: 1px solid black; width: 20px;"></div> <div style="border-bottom: 1px solid black; width: 20px;"></div> <div style="border-bottom: 1px solid black; width: 20px;"></div> <div style="border-bottom: 1px solid black; width: 20px;"></div> </div>	
Daytime telephone ( )	Evening telephone ( )		

Louisiana Revised Statute 11:223(A) allows any person who is a member of the teachers' Retirement System of Louisiana (TRSL), who has service credit of **at least five years** in TRSL, and who becomes employed in other public employment where he or she is no longer eligible for membership in TRSL but is eligible for membership in another statewide retirement system, to remain a member of TRSL in lieu of membership in the other statewide retirement system by filing a notice, in writing, with TRSL within 60 days after the effective date of employment.

I understand that by this form, I have elected to remain a member of TRSL. I also understand that this election is irrevocable.

Applicant's signature (do not print or type)

Date signed (mm-dd-yyyy)

---

Section 2 — To be completed by employer

Name of employee		Employer's telephone number ( )	
Street / P.O. Box		City, state, zip	
Title of position			
Name of statewide retirement system (do not include TRSL under)			Agency number <div style="display: flex; justify-content: space-around; width: 100%;"> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> </div>

**Employment Status**

☐ Full-time   
 ☐ Part-time   
 ☐ Unclassified (if applicable)   
 Full-time equals \_\_\_\_\_ hours per day  
 Annual full-time earnings \$ \_\_\_\_\_   
 This employee will work \_\_\_\_\_ hours per week.

**Applicant is being enrolled in:**

☐ Regular Plan   
☐ Plan B   
**Basis of employment**  
☐ 9 months   
☐ 10 months   
☐ 11 months   
☐ 12 months   
 For what percent of the first year will the applicant be employed? \_\_\_\_\_%

Date of employment

**Check the appropriate box for each category below:**

☐ YES ☐ NO\* His/her first employment making him eligible for membership in a Louisiana public retirement system began on or after January 1, 2013.  
☐ YES ☐ NO\* He/she was employed in a position eligible for membership in a Louisiana public retirement system prior to January 1, 2013, but he/she terminated service prior to January 1, 2013. Through re-employment on or after January 1, 2013, he/she is again eligible for membership in a Louisiana public retirement system.  
☐ YES ☐ NO\* He/she assumes an elective office on or after January 1, 2013, and by virtue of that service or previous public service, he/she is eligible for membership in a Louisiana public retirement system.

\* If the answer to all three questions above is NO, you do not have to complete the "Forfeiture of Benefits" section below.

**Forfeiture of Benefits - Employee Attestation (Check the appropriate box below whether or not the employee has signed Form 2FRB.)**

☐ YES I hereby certify that this employee has received and executed TRSL's *Forfeiture of Retirement Benefits - Attestation of Understanding* (Form 2FRB), and that this form will be permanently maintained in the personnel records of this employer.  
☐ NO State law, La. R.S. 11:293, requires that this employee receive and execute TRSL's *Forfeiture of Retirement Benefits - Attestation of Understanding* (Form 2FRB). The enrollment of this employee cannot be completed until Form 2FRB is properly executed in compliance with state law.

Signature of employer's authorized representative

Date signed (mm-dd-yyyy)

- This form is used to complete the employee's enrollment in TRSL.
- TRSL will process the enrollment.

Form 2R

# Can members retain TRSL membership even if the job is covered by another retirement system?

**TRSL** Teachers' Retirement System of Louisiana  
8401 United Plaza Blvd, Ste 300 • Baton Rouge, LA 70809-7017  
PO Box 94123 • Baton Rouge, LA 70804-9123  
Telephone: (225) 925 6446  
Toll free (outside the Baton Rouge area): 1-877-ASK-TRSL (877-275-8775)  
www.TRSL.org • web.master@trsl.org

Form 2R (06/18)  
**00-2R**

**Submit original form ONLY. No copies, faxes, or scans are accepted.**

**Election to Retain Membership**

**Section 1 — Member information**  
Form 1 and 2, TRSL Subform 1, 1 only

Street/PO Box \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Daytime telephone ( ) \_\_\_\_\_  
Evening telephone ( ) \_\_\_\_\_

Social Security number \_\_\_\_\_  
Attach copy of card \_\_\_\_\_  
Date of birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
mm dd yyyy

Louisiana Revised Statute 11:723(A) allows any person who is a member of the Teachers' Retirement System of Louisiana (TRSL), who has service credit of **at least five years in TRSL**, and who becomes employed in other public employment where he or she is no longer eligible for membership in TRSL but is eligible for membership in another statewide retirement system, to remain a member of TRSL in lieu of membership in the other statewide retirement system by filing a notice, in writing, with TRSL within 60 days after the effective date of employment.

I understand that by this form, I have elected to remain a member of TRSL. I also understand that this election is irrevocable.

Applicant's signature (Do not print or type) \_\_\_\_\_ Date signed form (mm dd yyyy) \_\_\_\_\_

**Section 2 — To be completed by employer**

Name of employer \_\_\_\_\_  
Street/PO Box \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Title of position \_\_\_\_\_

Employer's telephone number ( ) \_\_\_\_\_  
City/State/Zip \_\_\_\_\_

Name of statewide retirement system (select or write normally fill under) \_\_\_\_\_ Agency number \_\_\_\_\_

**Employment Status**  
☐ Full-time ☐ Part-time ☐ Unclassified (if applicable) Full-time equals \_\_\_\_\_ hours per day.  
Annual full-time earnings \$ \_\_\_\_\_ This employee will work \_\_\_\_\_ hours per week.

Date of employment \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
mm dd yyyy

**Applicant is being enrolled in:**  
☐ Regular Plan ☐ Plan B **Basis of employment**  
☐ 9 months ☐ 10 months ☐ 11 months ☐ 12 months For what percent of the first year will the applicant be employed? \_\_\_\_\_%

**Check the appropriate box for each category below:**  
☐ YES ☐ NO\* His/her first employment making him eligible for membership in a Louisiana public retirement system began on or after January 1, 2013.  
☐ YES ☐ NO\* He/she was employed in a position eligible for membership in a Louisiana public retirement system prior to January 1, 2013, but he/she terminated service prior to January 1, 2013. Through re-employment on or after January 1, 2013, he/she is again eligible for membership in a Louisiana public retirement system.  
☐ YES ☐ NO\* He/she assumes an elective office on or after January 1, 2013, and by virtue of that service or previous public service, he/she is eligible for membership in a Louisiana public retirement system.

\* If the answer to all three questions above is **NO**, you do not have to complete the "Forfeiture of Benefits" section below.

**Forfeiture of Benefits - Employee Attestation (Check the appropriate box below whether or not the employee has signed Form 2FRB.)**  
☐ YES I hereby certify that this employee has received and executed TRSL's Forfeiture of Retirement Benefits - Attestation of Understanding (Form 2FRB), and that this form will be permanently maintained in the personnel records of this employer.  
☐ NO State law, La. R.S. 11:293, requires that this employee receive and execute TRSL's Forfeiture of Retirement Benefits - Attestation of Understanding (Form 2FRB). The enrollment of this employee cannot be completed until Form 2FRB is properly executed in compliance with state law.

Signature of employer's authorized representative \_\_\_\_\_ Title \_\_\_\_\_ Date signed (mm dd yyyy) \_\_\_\_\_

TRSL members with at least five years of TRSL service credit, who become employed in a position eligible for membership in another statewide retirement system, can elect to retain their TRSL membership.

*Form must be completed in 60 days of new employment.*

**Form 2R**

# Remember to indicate type of employment

- **Primary employer:** Any member working in a TRSL-eligible position as a full-time employee or any member working as a part-time, temporary, or seasonal employee, and has the required number of years of service with TRSL to require participation.
- **Secondary employer:** Any member who has a primary employer, and works for a second employer in a TRSL-eligible position as a part-time, temporary, or seasonal employee or via independent contract paid by 1099 (1099 contract limits apply).

*Service credit is only given for primary employment.*



# Enrollments screen

**Enrollments**

**Instructions for Enrolling New Members:**

1. Complete all required fields and click 'Submit'.
2. NOTE: F visas are not eligible for membership with TRSL. J-1 visas are eligible as of 08/15/2009.
3. The street address should be on one line. *However, if the entire address won't fit on one line because it contains an apartment, suite or building number, input the apartment, suite or building number on the Street Address line and the street address on the Address 2 line.*
4. Punctuation, such as a period, comma, or semi-colon, is not allowed.

**Enter Enrollment Information Below**

System:	4
Employer ID:	
Employer Type:	Primary

*Primary - Employed on full-time or part-time basis. If part-time, member works everyday at partial pay.*

*Secondary - Part-Time/Temporary employment. Member works full-time with another TRSL employer and will receive zero service credit.*

First Name:	
Middle Initial:	
Last Name:	
Suffix:	
Date of Birth (mm/dd/yyyy):	
Enrollment Date (mm/dd/yyyy):	
Contract Months:	9
Type:	Full Time
Gender:	Male
Address:	
City:	
State:	LA
Zip:	
Personal E-Mail Address (optional):	

**Submit**

- Example Entry Screen if the employee has never contributed to TRSL before

*NOTE: If you enroll the member with any incorrect information, please contact your Accountant Liaison immediately to correct it before any further processing.*

**CAUTION:** Double-check that SSN is correct!

# Enrollment errors

- Contact your TRSL Accountant Liaison for assistance with any enrollment errors.
  - » EXAMPLES: Incorrect SSNs, incorrect date of employment (hire date), enrollment to be deleted if employee was not eligible to participate in TRSL, etc.
- *Note: Do not enroll and term with the same date.*

**TRSL Liaisons**

To view the name and/or contact information for your agency's liaisons, use the search box below. You can search by the employer name, employer ID, or liaison's first or last name. You will see an accountant liaison and a retirement analyst liaison for each agency; please refer to the following list of liaisons' specialties:

- **Contact your Accountant Liaison:** For help with Contributions Exception Reports, Salary Rejections lists, contribution rates, ORP reports, enrollment eligibility, etc.
- **Contact your Retirement Analyst Liaison:** For help with questionable years, service credit certifications, sick leave certifications, actuarial cost corrections, etc.

---

**Other Employer Services Staff**

<b>DEPARTMENT DIRECTOR</b> <a href="#">Ed Branagan</a> (225) 925-4846	<b>ACCOUNTANT MANAGER</b> <a href="#">Karla Henderson</a> (225) 925-6462	<b>RETIREMENT SUPERVISOR</b> <a href="#">Jeff George</a> (225) 925-1887
<b>ORP VENDOR LIAISON</b> <a href="#">Paula Rhodes</a> (225) 925-7863	<b>EMPLOYER TRAINING</b> <a href="#">Sharon Lachney</a> (225) 925-4097	<b>EMPLOYER TRAINING</b> <a href="#">Heather Landry</a> (225) 925-7093

# Some things to think about

- If you hire an employee who has a Refunded status in EMIS, you will need to submit an *Enrollment Application/ Employment Notification* (Form 2).
  - Please terminate an employee as soon as you know they will not be continuing to work for you.
    - » Do NOT terminate a member on the same date as the enrollment date.
    - » Contact your TRSL Accountant Liaison for assistance with any enrollment errors.
-

# What we covered

- Enrollments should be processed through our EMIS system.
    - » State agencies will submit paper forms for TRSL staff to complete the enrollment process (for active members).
  - Additional forms will need to be completed for active members.
    - » Do not hold enrollments for active members, even if a refund application has been submitted. If the member is rehired within the 90-day period, a refund is not due.
-

# Points to remember

**Query Record**

SSN

Select

Clear

**Member Summary**

The Member Summary contains a summary of the member's account at TRSL. Limited information will be available on beneficiaries and survivors of deceased members.

Due to the public records law, the home address, benefit payment address, date of birth, gender, bank information and designation of beneficiaries is not accessible for retirees of TRSL and those members participating or who have completed participation in DROP.

Double-check SSN  
(compare to copy of SS  
card)

Know time  
frames to  
complete  
enrollments

- 30 days for retirees
- 60 day for actives

- Determine if position is covered by TRSL
- Check for prior membership in TRSL

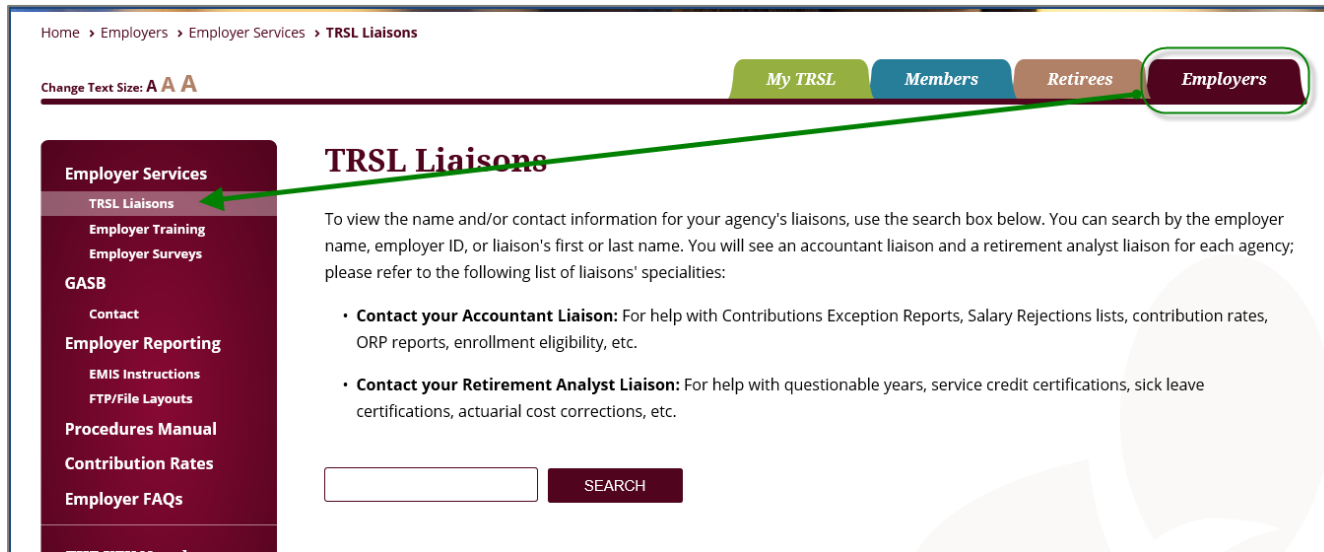
1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53	54	55	56	57	58	59	60

# Employer Services Department

- Focuses exclusively on employer needs.
  - Its primary responsibility is to assist and train employers:
    - » To be in compliance with state and federal laws governing TRSL's defined benefit plans and the Optional Retirement Plan (ORP)
    - » Other employer-related issues
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# Contact your Accountant Liaison

- From the home page at [www.TRSL.org](http://www.TRSL.org), follow the Employers tab to the “TRSL Liaison” page.



- To view your agency's liaisons, use the search box. You can search by the employer name, employer ID, or liaison's first or last name. You will see an accountant liaison and a retirement analyst liaison for each agency.

# Employer training

- Upon request, we provide customized training and support with any of the following reporting tasks:
  - » Retrieval, review, and completion of outstanding questionable year reports
  - » Completion of sick and/or leave data reporting
  - » Information gathering
- Please note: TRSL is currently not conducting on-site training due to COVID-19. We plan to launch virtual employer training via GoTo Webinar soon. Stay tuned for more details...

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# Employer Procedures Manual



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## Procedures Manual

The online procedures manual is a comprehensive guide to all TRSL processes and procedures that employers need for reporting retirement data.

 [Online Reporting Error Messages](#)

Procedures Manual (by index number)		
Index	Subject	Revised Date
Intro	<a href="#">Introduction</a>	07/2017
0.0	<a href="#">Employer/Membership Information Site (EMIS)</a>	01/2018
1.0	<a href="#">Authorized Contacts &amp; Employer Directory Contacts</a>	07/2017
2.0	<a href="#">TRSL Membership</a>	06/2018
3.0	<a href="#">Beneficiary Designation</a>	08/2018
4.0	<a href="#">Contribution Reporting &amp; Corrections</a>	12/2018
5.0	<a href="#">Online Member Access &amp; Statements</a>	08/2018

# Questions?



# The Key is published electronically



TRSL's employer bulletin

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- February
  - May
  - August
  - November
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# We are here for you!



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