

Agenda

- Employer Membership Information Site (EMIS)/Authorized Contacts
- TRSL Eligibility and Enrollments
- Monthly Contribution/Salary Reporting
- Service Credit Certifications/Corrections
- Retirement Processes/Issues
- Return-to-Work in TRSL-Covered Positions



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Index 0.0: Employer Membership Information Site (EMIS) Index
1.0: Authorized Contacts & Employer Directory Contacts

Provides an overview of TRSL's employer access database and how to obtain employer access to EMIS

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Employer/Membership Information Site (EMIS)

TRSL's employer database

Employers can

- Certify/correct employee data
- Upload required files/reports
- View various reports



Updates	Submit Files	Log
Agency Certification (Form 118)		
Annual Leave Update		
Contribution Correction		
Enrollments		
Full-Time Only Corrections		
Furlough Certification and Update		
Home Address Update		
ORP Salary Entry (up to 100 employees only)		
Prior Year Salary Corrections		
Questionable Year Certification		
Retiree Voluntary/Insurance Deduction		
Salary Contribution Entry (up to 100 employees only)		
Sick Leave Days Paid Update		
Sick Leave Add and/or Update		
Terminations		

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Reports available in EMIS

Employer contacts with EMIS access can create various reports at any time

Various report options include:

- Enrolled Not Reported
- Reporting Not Enrolled
- Ending DROP Participation
- Members Eligible to Retire
- ORP to TRSL Election Eligibility

Reports	Updates
Active/Active DROP Member Service	
Annual Leave	
Enrolled Not Reported	
Ending DROP Participation	
Furloughed Employees Certification	
Insurance/Voluntary Deduction	
Members Eligible to Retire	
Questionable Years	
Reporting Not Enrolled	
Sick Leave	
Sick Leave Errors	
ORP to TRSL Election Eligibility	

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Enrolled Not Reported

Lists Active and Retired members employed by your agency but have months in which earnings/contributions have not been reported as expected.

- To get the most current results you must select the last month for which a salary/contribution file was submitted.
- Can help you identify members who should be terminated



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Reporting Not Enrolled

Lists people for which your agency has reported earnings/contributions to TRSL without a corresponding enrollment.

- Enter the system code and the current fiscal year
- Can help you identify people who need to be enrolled



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Ending DROP Participation

Report lists members from your agency who will end DROP for the time period selected

- Can query future and past dates (month/year)
- Employers should pull this report up to three months in advance to ensure deductions/contributions resume if employee continues working after DROP.



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Members Eligible to Retire

Provides a list of employees who will be eligible to retire based upon information reported to TRSL and on the fiscal year selected.

- Report will also list employees who are currently in DROP and working after DROP.



Member Inquiry Test Environment
Members Eligible to Retire Report

The Members Eligible to Retire Report provides a detailed report or a summary report of members eligible to retire. The report will include employees who meet eligibility requirements by June 30 of the projected fiscal year selected. The projection assumes that a full year of service credit will be added to the employee's current service years.

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ORP to TRSL Election Eligibility

Used to identify the ORP to TRSL Election eligibility status of ORP participants with earnings in FY 2024 or FY 2025. (Report will be modified after 07/01/2025 to only include those in the 5-year group as the 1-year group will no longer be applicable.)

- Can select One Year Window, Five Year Window, or both
- Can select any combination of Eligible, Not Eligible, May Be Eligible, Withdrawal Complete, and Approaching Close of Window (window closes within 2 years)



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EMIS system codes

Status Information				
Sys	Seq	Status	Code	Date
4		ACTIVE	(A)	07/19/2021

- System 2** School Lunch Plan A – For school food service employees (closed plan; no new entrants)
- System 3** School Lunch Plan B – For school food service employees in 20 parishes that also participate in Social Security
- System 4** TRSL Regular Plan – Defined Benefit Plan for "teachers" in TRSL eligible positions
- System 6** ORP (Optional Retirement Plan) – Defined Contribution Plan; for employees who chose ORP during employment at a Louisiana public institution of higher education; opted out of TRSL's Regular Plan (System 4)

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Form 1: Authorized Contacts

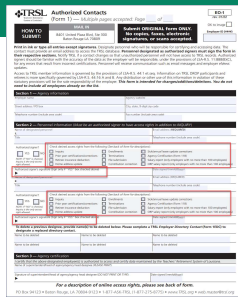
Grants EMIS access rights to designated employer personnel

Section 2 (Authorized signer):

- ✓ Check all access rights desired for each designated employer personnel
- Must include staff member's signature for access other than Inquiry
- Complete bottom of section 2 to **delete previously designated personnel** no longer needing TRSL database access for your agency

Section 3 must be signed by employer's Agency Head or Agency Head Designee

- Check desired access rights from the following (See back of form for descriptions):
- Inquiry
 - Prior year certifications/corrections
 - Retiree insurance deduction
 - Home address update
 - Enrollments
 - Terminations
 - File submission
 - Contribution correction
 - Sick/annual leave
 - Agency Certificat
 - Salary report (on
 - CRP salary report



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EMIS access rights

Inquiry (INQ)	Offers view-only access
Enrollments (ENR)	Use to enroll new hires and retirees returning to work in TRSL-covered positions
Sick/Annual Leave Update/Corrections (SLU)	<ul style="list-style-type: none"> Sick Leave – Use to update employers' sick leave usage Annual Leave - (Higher ed and state agencies only) – Use to report annual leave balances
Prior Year Certifications/Corrections (PYC)	Use to update Actual Earnings (gross earnable compensation), Full-Time Only Earnings, and Questionable Year Certifications for a closed out (or prior) fiscal year
Terminations (TRM)	Use to report employee's last day of work or last day of leave
Agency Certification – Form 11B (AGC)	Use to certify current year information for an employee who is retiring or entering DROP

Description of access rights available on reverse side of TRSL's *Authorized Contacts (Form 1)*

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EMIS access rights (cont'd)

Retiree Insurance Deduction (INS)	(For non-Office of Group Benefits employers) - Use to report or update insurance deductions from retiree's benefit check
File Submission (FSM)	Use to upload required files/reports securely without encryption
Salary Report (SAL)	(Only for employers with no more than 100 employees) - Use to report monthly salary and contributions during the current fiscal year
Home Address Update (ADR)	Use to update mailing address for active employee
Contributions Corrections (CCR)	Use to add, delete, or replace employee's monthly actual and/or full-time earnings during the current fiscal year
ORP Salary Report (ORP)	(Only for employers with no more than 100 employees in ORP) - Use to report monthly salary and contributions for ORP participants during the current fiscal year

Description of access rights available on reverse side of TRSL's *Authorized Contacts (Form 1)*

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Form 1EDC: Employer Directory Contacts

- Updates or replaces agency contacts
- Ensure your agency has the following designated contacts:
 - **Agency Head (AH)** – Must sign Section 3 of Form 1 to authorize access rights
 - **Retirement Contact (RC)** – Employer request letters addressed to RC
- Include email addresses/phone numbers, including extension/position title for each contact

NOTE: Not all categories require an employer contact.

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Membership Eligibility - SPECIAL CONDITIONS

Part-time, seasonal, or temporary employment (cont'd) (Non-retirees)

Generally, employees who are part-time, seasonal, or temporary are not eligible for TRSL membership. However, there are exceptions that require mandatory enrollment & reporting:

Five (5) year rule (Eff. 7/1/2003)

Five or more years of eligibility service credit

- Applies **ONLY** to members in PreK-12 "**classroom teacher**" positions who are paid with W-2 earnings
- Can work 20 hours or less per week

Ten (10) year rule

Ten or more years of eligibility service credit

- Applies to positions other than "classroom teacher"
- W-2 employees only
- Can work 20 hours or less per week

Definition of a "classroom teacher"

A "classroom teacher" is defined as:

An employee of a school board or any other educational institution under the control of BESE whose job description and assigned duties include the instruction of pupils in traditional or nontraditional classroom situations for which daily pupil attendance figures are kept; and who is classified under Object Code 112 in the La. Administrative Code, or is performing those functions, on a substitute basis, of an individual classified under Object Code 112.

Positions other than classroom teacher eligible under the 10-year rule include:

- Administrators
- Therapists (speech, physical, occupational)
- Counselors
- Aides
- Clerical/Secretarial staff
- Etc.

Membership Eligibility - SPECIAL CONDITIONS

Part-time, seasonal, or temporary employment (cont'd) (Non-retirees)

Generally, employees who are part-time, seasonal, or temporary are not eligible for TRSL membership. However, there are exceptions that require mandatory enrollment & reporting:

Secondary employment

Has **primary employment** at another TRSL-reporting agency, while also working part-time, seasonal, or temporary in a TRSL-eligible position at your agency

- ✓ W-2 earnings
- ✓ Form 1099 payments – *certain criteria*

ORP participants in TRSL positions

ORP participants are 100% vested; continued participation is mandatory even if future employment in a TRSL eligible position is part-time, seasonal, or temporary.

- ✓ W2 earnings
- ✓ Form 1099 payments – *if secondary employment rule applies*

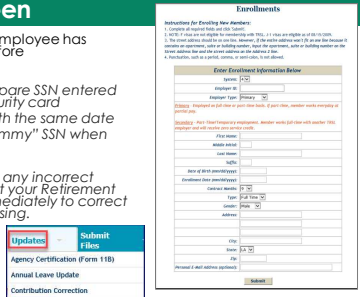
Enrollments screen

Example entry screen if the employee has never contributed to TRSL before

Tips:

- **Double-check SSN:** Compare SSN entered to employee's Social Security card
- **Do Not enroll and term with the same date**
- **Do Not use an invalid "dummy" SSN when enrolling**

If you enroll a member with any incorrect information, please contact your Retirement Benefits Analyst Liaison immediately to correct it before any further processing.



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Enrollments - SPECIAL CONDITIONS

Enrollment error – ORP status
EMIS online enrollment not allowed for employees in ORP (Optional Retirement Plan)

- Enroll with Form 16, *Application for Optional Retirement Plan or Change of Carrier, or;*
- Submit a Form 21R, *Election to Join TRSL after ORP Participation*, if ORP participant is eligible to join TRSL



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Joining TRSL after ORP Participation

1 Year Window vs. 5 Year Window

ORP Participants with a 1-Year Window to Join TRSL

- ORP First Eligible Date before Aug. 1, 2020, and were active and contributing as of June 2024
- 1-Year Window that closes on June 30, 2025
- Must be eligible for TRSL at time of election (5-year/10-year rule for part-time, seasonal, or temporary)
- ORP to TRSL Election Eligibility is displayed on the Member Summary screen

Member Summary



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Employer contribution rates

Once your contribution report has been posted with salaries reported, TRSL will calculate the employer contribution amount.

FISCAL YEAR	TRSL SUB-PLAN	EMPLOYEE NORMAL COST	EMPLOYER RATE				Total Employer Contribution
			Normal Cost	Admin Expense Rate	AFC Rate*	Shared UAL	
2025-26	K-12 Regular Plan	8.0%	3.67%	0.36%	1.75%	15.17%	20.95%
	Plan A	9.1%					
	Plan B	5.0%					
2024-25	Higher Ed Regular Plan	8.0%	3.05%	0.36%	1.75%	15.17%	20.33%
	K-12 Regular Plan	8.0%					
	Plan A	9.1%					
	Plan B	5.0%	3.10%	0.38%	1.50%	15.90%	20.88%
	Higher Ed Regular Plan	8.0%					

*K-12 Regular Plan includes university laboratory schools; * Effective FY 2024-25, used to directly pay for PBIs (permanent benefit increases) for TRSL retirees & benefit recipients*

Note: FY 2025-26 employer rates subject to change if voters approve a constitutional amendment requiring a large one-time payment to the UAL during the March 29, 2025 statewide election

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Earnable compensation

Compensation (wages, salary, and other payments) earned by the member during the full normal working time in a position that is TRSL-eligible
Defined in La. RS 11:701(10)

All earnable compensation is reported as "Actual Earnings"

- Member and employer contributions must be made on all earnable compensation
- Report contributions in the fiscal year earned (July 1 through June 30)
- Contribution reports and payments are due by the 15th of each month
- Payments made after close of fiscal year should be moved to the correct fiscal year

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Common Examples of Earnable Compensation

Earnable compensation includes, but is not limited to, the following:

- PIP earnings for members who participated in the Professional Improvement Program
- Overtime, bonuses, stipends, tax revenues
- Additional compensation, such as compensation for planning time, etc. in accordance with LSA R.S. 17:418 (does not apply to employees of the state special schools or the schools and programs administered through the special school district)
- Extra pay for after-school daycare programs
- Extra pay for collecting fees at ball games
- Cash housing allowances
- Full salary for members on extended sick leave paid at 65%

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Examples of Payments That Are Not Earnable Compensation

- Payment in lieu of unused sick or annual leave
- Payment for any duties/work performed while driving or riding on a bus unless employee has retained membership in TRSL
- Lump sum payments for discontinuation of contractual services
- Form 1099 only payments for non-retirees without a Primary Employer
- Form 1099 secondary employer payments are not reportable if all of the following occur
 - Employee is not a TRSL retiree
 - Individual contract is for \$1,000 or less
 - Cumulative amount of Form 1099 payments issued by a single secondary employer to an employee in a fiscal year is \$15,000 or less

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Full-time earnings

Definition (for monthly salary reporting):
 • Compensation the employee would have been paid had she/he worked full-time in a TRSL-eligible position **for the entire month**

- **Must be equal to or greater than actual earnings**
 - Can never be less than actual earnings
 - **Do Not** reduce because the employee is docked or on leave without pay (LWOP)

For part-time employees eligible to contribute to TRSL, the amount should reflect the compensation that the member would have earned if he worked full-time for the entire month

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Types of contributions

This is not an exhaustive list. Contact your Retirement Analyst Liaison for assistance.

Tax sheltered (Type 30)	Tax unsheltered (Type 10)
<ul style="list-style-type: none"> • Active members only (including members working after DROP) • Includes paid sabbatical or extended sick leave • Employees on workers' compensation and using their sick leave 	<ul style="list-style-type: none"> • Employees on workers' compensation (contributions via third-party payments) • USERRA payments • TRSL retirees who returned to work in a TRSL-eligible position and are classified as "retired teachers" or enrolled under RTW Option 1 or RTW Option 2. • Employer contributions

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Monthly Salary and Contributions Reports

- Employers are required to send contribution reports (salary/contributions files) each month detailing employees' earnable compensation and contributions paid by TRSL-covered employees. File layout can be found in Index 18.0.
- Direct upload on EMIS via File Submission is the most common method.
- If you use File Submission, you will receive either a summary report immediately telling you the file was accepted along with a list of any individual records that were rejected or an error report if the entire file was rejected.
- The error report will list the records that caused the file to be rejected along with a reason for each record.

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Monthly Salary and Contributions Reports

As of July 1, 2024, TRSL began rejecting salary/contribution files that contained ORP participants. If your file is rejected because it contains an ORP participant then you must remove that record and resubmit your file.

You must include the ORP participant on your ORP file. If you already submitted that month's ORP file then you must add that ORP participant's data to the next month's ORP file.

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Identifying Errors from Monthly Salary/Contribution Reports

- Two reports available:
- **Contribution Exceptions**
 - **Salary Rejections**

Both should be reviewed and corrected/reconciled each month to ensure accurate and timely membership and salary/contribution reporting.

Contact your assigned Retirement Benefits Analyst Liaison for assistance with these reports.

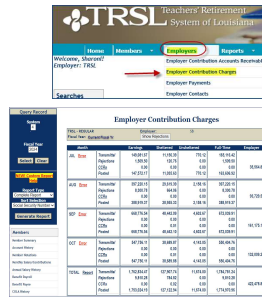
You may be contacted by an Employer Services Department staff member who is not your assigned liaison on www.TRSL.org

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Contribution Exceptions Report

Identifies reporting and enrollment errors
 Should be reviewed, cleared, or reconciled each month
 Retrieve from the Employer Contribution Charges screen under the Employers menu in EMS

- Available for each applicable retirement plan (System 4, 3, 2)
- Two ways to retrieve report
 - Clicking on "Error" link
 - "Generate Report" button



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Retrieving the Contribution Exception Report

Default SSN Sort

Click on the last "Error" message on the screen

- Pulls cumulative report sorted by SSN
- Leading zeros in SSNs will not appear

Employer Contribution Charges						
TRSL - REGULAR		Employer		SC 60		
Fiscal Year: 2023		Show Rejections				
Month	Transaction	Earnings	Shared	Unshared	Full-Time	Employer
JUL	Report	1,237,676.57	97,645.49	19.20	1,240,912.51	
	Rejections	7,756.00	620.50	0.00	7,756.00	
	CCDs	-5,151.96	412.16	0.00	-2,692.32	
	Posted	1,224,767.51	96,619.80	19.20	1,230,486.51	303,742.45
AUG	Report	1,648,844.21	130,303.92	132.20	1,659,039.29	
	Rejections	8,011.25	607.30	33.60	8,611.25	
	CCDs	-4,902.04	392.16	0.00	-4,602.04	465,710.87
	Posted	1,635,939.32	129,904.46	98.60	1,636,722.06	
SEP	Report	7,348,789.65	581,962.39	4,695.27	7,354,294.04	
	Rejections	0.00	0.00	0.00	0.00	
	CCDs	-134.48	-25.22	14.46	-144.64	1,822,481.52
	Posted	7,348,655.17	581,937.17	4,683.73	7,350,708.80	
OCT	Report	10,228,719.79	811,716.56	4,197.77	10,230,907.30	
	Rejections	0.00	0.00	0.00	0.00	
	CCDs	-11,819.23	881.22	0.00	-2,240.33	2,833,888.74
	Posted	10,217,496.35	810,835.14	4,197.77	10,230,297.26	

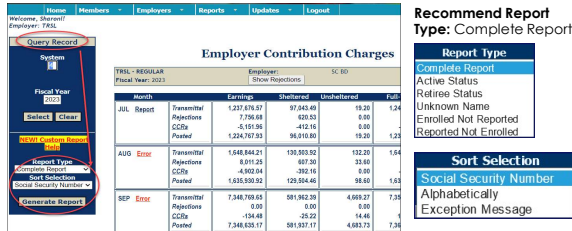
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Retrieving the Contribution Exception Report

Customized Report

From "Query Record" section of the Employer Contribution Charges screen, choose Report Type & Sort Selection, then click "Generate Report"



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Salary rejections with \$0 earnings/contributions

Rejections with \$0 Actual Earnings, \$0 Contributions, and \$0 Full-time Earnings require no action!

Salary Rejections						
Month/Year	SSN	Actual Earnings	Sheltered Contributions	Unsheltered Contributions	FullTime Earnings	Error Message
07/2023		0.00	0.00	0.00	0.00	PERSON IN ESTIMATED STATUS
07/2023		0.00	0.00	0.00	0.00	PERSON IN ESTIMATED STATUS
07/2023		0.00	0.00	0.00	0.00	PERSON IN ESTIMATED STATUS
TOTAL:		0.00	0.00	0.00	0.00	
08/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
08/2023		0.00	0.00	0.00	0.00	PERSON IN ESTIMATED STATUS
08/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
08/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
08/2023		0.00	0.00	0.00	0.00	PERSON IN ESTIMATED STATUS
08/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
08/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
08/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
08/2023		0.00	0.00	0.00	0.00	FULLTIME REQUIRED
TOTAL:		0.00	0.00	0.00	0.00	

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Clearing exceptions & rejections

Online updates in EMIS

- Contribution Correction (current fiscal year only)
- Enrollments
- Terminations

Must have specific access rights designated on Authorized Contacts (Form 1)

Updates	Submit Files	Log
Agency Certification (Form 118)		
Annual Leave Update		
Contribution Correction		
Enrollments		
Full-Time Only Corrections		
Full-Time Certification and Update		
Home Address Update		
Journal Entry Review		
OSP Salary Entry (up to 100 employees only)		
Prior Year Salary Corrections		
Quarterly Year Certification		
Retiree/Retiree/Insurance Deduction		
Salary Contribution Entry (up to 100 employees only)		
Sick Leave Data Paid Update		
Sick Leave ADD and/or Update		
Terminations		

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Contribution Corrections (CCR)

Corrects salary reporting in the current fiscal year

- Add, edit, or delete monthly salary postings reported

Contribution Correction

System: 4 Employer: _____
 SSN: _____ Fiscal Year: Current Fiscal Year
 Name: _____ Reporting Month/Year: 11/

Instructions for using Contribution Correction:

1. Click Edit or Add in the first column to open the line for editing.
2. Enter the actual earnings and full-time earnings and click Replace if replacing data that has been posted for the month. If only actual earnings OR full-time earnings is changing, enter the same amount for the field not changing and enter the new amount for the field that is changing.
3. Enter the actual earnings and full-time earnings and click Add or Add Zero; if adding a posting for the month. Adding zeroes can only be done for July, August and June in which 0.00 should be entered for the actual earnings and full-time earnings. Full-time earnings are required for the rest of the months.
4. Click Delete or Delete Zeroes to delete the posting for the month.
5. Click Cancel to undo changes entered or to return to the initial display.
6. Enter actual earnings and full-time earnings with the decimal. For example, to enter \$10 key in 10.00.
7. Contribution Type 30 is for sheltered contributions and Contribution Type 10 is for unsheltered contributions.

	Actual Earnings	Full-Time Earnings	Contribution Amount	Contribution Type	
Edit	2736.00	2736.00	218.88	30	Delete

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Terms/definitions

- **Questionable year:** A fiscal year record that meets one of TRSL's criteria to require service credit certification or correction
- **Actual earnings:** All earnings during a specified fiscal year earned by a member that meets the definition of earnable compensation
- **Full-time earnings:** Total compensation amount that would be payable if the employee worked full-time for the entire fiscal year in a TRSL-covered position plus any extra earnings
- **Service credit:** A measure of the number of years a member has worked and contributed to TRSL per the service credit formula

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Terms/definitions (cont'd)

Service credit formula:

- Actual earnings / Full-time earnings = Service credit for benefit computation
- Service credit for benefit computation / % effort = Service credit for eligibility

Percent (%) effort formula:

- # hours worked / # hours in a full workday
- Example: Employee works 5 hours per day; normal full-time is 7 hours per day; 5/7 hours = 71% effort

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Retrieving Questionable Years Report



Query Record

Employer ID:

Report Selection:

- Retirement Actions Pending
- All Outstanding Questionable Years
- Fiscal Years from Involvement by 3 years old
- Fiscal Years Greater than 3 years old
- By Fiscal Year

Sort Selection:

- Fiscal Year
- Member Status
- Report Code

Questionable Years Report

The Questionable Years Report generates a list of members who have questionable years requiring certification. There are five options for creating reports and four different ways to sort the report.

- Option 1: Retirement Actions Pending - This report will list questionable years for which TRSL has requested certification via a Questionable Years Letter. This report will primarily consist of members presently going through the retirement process or approaching retirement eligibility.
- Option 2: All Outstanding Questionable Years - This report will list all outstanding questionable years for your agency. A Retirement Actions Pending section will be listed at the front of the report.
- Option 3: Fiscal Years Less Than/Equal to 3 Years Old - This report will list all outstanding questionable years less than or equal to three years old from the current fiscal year. A Retirement Actions Pending section will be listed at the front of the report only for fiscal years less than or equal to 3 years old.
- Option 4: Fiscal Years Greater than 3 Years Old - This report will list all outstanding questionable years greater than three years old. A Retirement Actions Pending section will be listed at the front of the report only for fiscal years greater than 3 years old.
- Option 5: By Fiscal Year - This report will list all outstanding questionable years for a range of fiscal years or a single fiscal year of your choosing.

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RTW Supplement

Retirees who elect to return to work under **RTW Option 2 provision** (available to full-time direct employees under the 2020 RTW Law) will accrue service credit to be used to calculate a supplemental benefit for the retiree upon termination of all RTW re-employment.

The retiree's original retirement benefit will be suspended during RTW Option 2 employment.

NOTE: a retiree's benefit cannot be resumed until TRSL has received the **Form 11 RTW** and the employer has entered an **online termination date** after retiree's last day of work.

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Employer sick leave certification

- Certification of sick leave days used for all fiscal years of employment, including fiscal years during DROP
- Certification of sick leave days paid at retirement

Must have access rights designated on Authorized Contacts (Form 1)

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Sick leave days used

Employers must certify sick leave information for each fiscal year (July 1 – June 30)

- Months of contract (9, 10, 11, or 12) must be entered for each fiscal year
- Number of sick leave days used
- If applicable, number of summer school days worked with summer school percent effort (can be different than regular school year percent effort)

Year	Months of Contract	Sick Leave Days Used	Summer School Days Worked	Summer School Percent Effort	Total Sick Leave Days
2019	12	14,000	0.00	0	14,000
2020	09	9,000	0.00	0	9,000
2021	09	4,500	0.00	0	4,500
2022	09	4,500	0.00	0	4,500
2023	09	4,500	0.00	0	4,500
2024	09	4,500	0.00	0	4,500
2025	09	2,250	0.00	0	2,250
2026	09	13,500	0.00	0	13,500
2027	09	4,500	0.00	0	4,500
2028	09	22,500	0.00	0	22,500
2029	09	11,250	0.00	0	11,250
2030	09	5,625	0.00	0	5,625


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Sick leave days used during DROP participation

No *Employment History* sequence line(s) in EMIS for member's fiscal years in DROP

To enter sick leave days used during DROP:

- Uncheck 'Use Employment History' box
- Enter *Employment Dates*:
 - For Beginning Date field, enter member's DROP begin date
 - For Ending Date field, enter member's DROP end date

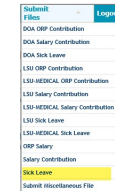


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Submit sick leave by data file

- Employers can submit a data file to update the sick leave usage for their employees
- Allows for historical information to be saved in a separate location
- Most software vendors have created a file path to use

Starting position	Field description	Data type	Length
1	Employer ID	Numeric	4
5	Social Security number	Numeric	9
14	Fiscal year	Numeric	4
18	Contract months	Numeric	2
20	Sick leave days used	Numeric	5*
25	Summer percent effort (050 for 50%)	Numeric	3
28	Summer days worked	Numeric	5*
TOTAL 32 bytes (characters)			



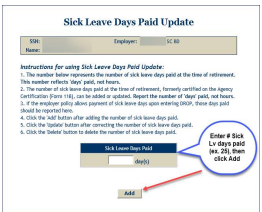
Tip: Check Sick Leave Summary Report for sick leave records rejected from the uploaded sick leave data file.

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Sick leave days paid at retirement

Employers must report number of sick leave days paid at time of retirement or DROP.

- Report number of days, not hours
- Report even if 0.00 days paid



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Address benefits, not employment

RTW Laws do not prohibit (or allow) employment.

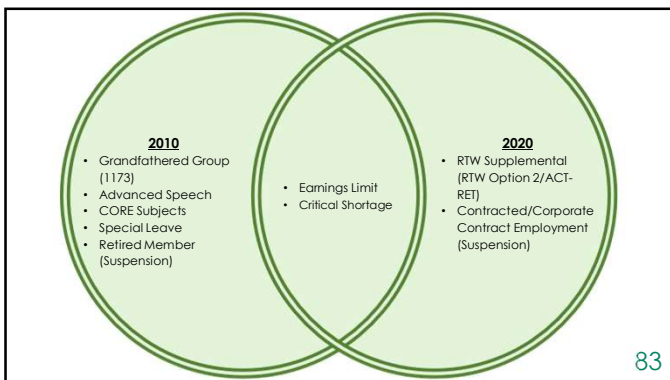
Their purpose is to **specify how retiree benefits are impacted** during reemployment and whether contributions are required.

There are no exemptions or waivers, but some categories of the laws are more permissible than others.

Standard 12-month waiting period exists

- Can be reemployed, cannot receive benefit
- Can earn service credit

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Notice of Reemployment

TRSL must be notified of all scenarios in which a TRSL retiree is providing TRSL-eligible services.

Failure to do so will result in charges to your agency.

The **online enrollment** serves as official notice and acts as certification of employment dates and type

- Enrollments are expected within **30 days of hire**
- Forms are supplemental to the online enrollment
- Certification statements may be included in enrollment process (excluding critical shortage)

Termination dates should also be submitted

- Form 7A required for refunds of contributions
- 11 RTW required for ACT-RET

The laws are applied based on the enrollment info submitted; the online enrollment is the catalyst to putting specific impacts into motion

Examples:

- **Suspension of benefits:** online enrollment "flips switch" to turn benefit off
- **Earnings limits:** Applied to gross salary reported by the employer
- **Service credit (earned under RTW Option 2):** dependent on employer's fiscal year certifications
- **Election to switch laws (or applicable provision):** Effective upon employer's submission of new enrollment

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Annual retiree audit

- **No later than August 15:** Employers must report to TRSL the earnings of all persons paid in the prior fiscal year, including earnings for part-time, substitute, or temporary employment as well as independent or corporate contract work.
NOTE: This includes earnings reported on IRS Form W-2 and those reported on IRS Form 1099.
- **Upon receipt of the file:** TRSL auditors will identify all retirees, comparing the employer data to the information submitted in EMIS over the course of the prior year. Additional certification may be required for variances or unreasonable reporting.

REMINDER: Submitting timely, accurate enrollments is key to avoiding overpayment charges that can occur with the annual retiree audit.

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Determining Retirees RTW Group

1. Is date of retirement before July 1, 2020?
 - No – 2020 RTW Group
 - Yes – Next question
2. Does retiree have previous RTW employment history?
 - No – 2010 Group
 - Yes – group indicated by last RTW employment type

Standard **12-month waiting period** exists

- Reemployment is not prohibited – however, retirees **cannot receive their TRSL benefit** AND an employment income during this time frame.

2010 RTW Law

Retired **before** July 1, 2020

- Position typically determines provision & benefit impact

2020 RTW Law

Retired **on or after** July 1, 2020

- Hiring method determines "options"

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Identifying retiree's group

Status Information

Emp ID	Emp Int	Employer Name	RTW Type	RTW Portal	Employment Dates
4	0	BRQPACT	(RR)	06/30/2016	BRQP Summary
4		JRTW01-394	(SC)	08/02/2014	

Employment History

Emp ID	Emp Int	Employer Name	RTW Type	RTW Portal	Employment Dates
R		ST JAMES SC BD			10/18/1970 to 06/22/2000
R		ST JAMES SC BD	RTW-ACT1173	A	01/01/2007 to 05/08/2007
R		ST JOHN SC BD	RTW-ACT1173	A	12/01/2006 to 05/24/2007
R		ST JOHN SC BD	RTW-ACT1173	A	11/01/2007 to 12/20/2007
R		ST JAMES SC BD	RTW-ACT1173	A	02/01/2008 to 06/30/2008

Please make selection below to continue.

Portal A: 2010 RTW Law (Group to which retiree currently belongs)

Portal B: 2020 RTW Law

Continue Enrollment

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2010 RTW Provisions			
Benefit Impact	No impact	Earnings Limit (25% of Benefit)	Suspended benefit
Position eligibility	Grandfathered group, advanced speech, certain classroom teachers and critical shortage positions	Substitute classroom teacher, tutor, proctor, nurse, literacy instructor, presenter of professional development	All other positions, including administrative, athletic, clerical, paraprofessional, food services, etc.
Contribution requirement	Yes , refundable upon terminating reemployment	Yes , refundable upon terminating reemployment	No

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2020 RTW Options				
Option	RTW Option 1 Earnings Limit / 25% FAC	RTW Option 2 Suspended benefit	Contract Employment Suspended Benefit	No Impact Critical Shortage
Provision eligibility	Available to all part-time and full-time direct employment positions	Available to all full-time direct employment positions	Applies to all employment by contract or corporate contract	certain classroom teachers and critical shortage positions
Contribution requirement	Yes , refundable upon terminating reemployment	Yes , accrues supplemental benefit (1 RTW & DOI needed to resume)	No (DOI needed to resume)	Yes , refundable upon terminating reemployment

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No impact provisions - <u>retired before July 1, 2020</u>	
Those who retired before July 1, 2010 (grandfathered group) or who hold an advanced speech degree can be reemployed in any position, any capacity, with no impact .	
Otherwise, the following position-centric categories are available	
Critical Shortage	Full- and part-time classroom teachers in any subject where a shortage exists Full- and part-time certified speech therapist, speech pathologist, audiologist, educational diagnostician, school social worker, school counselor school psychologist, interpreters, educational transliterators, or educators of the deaf or hard of hearing
Core Subject	Full- and part-time, directly employed retirees certified in math, science, English language arts, or special education (excluding gifted/talented)
Special Leave	Certified directly employed retirees age 62+ with 30+ years of service , when filling a teaching vacancy due to maternity, military, or extended sick leave or sabbatical

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Critical Shortage Declaration Process

To declare a critical shortage for your parish: CONTINUOUS PROCESS

- A general statement that you are soliciting applications for future employment of certified teachers must be:
 - Advertised at least **once per month, continuously** in official journal
 - Posted at career development office of every post-secondary institute within 120-mile radius of the **beginning of each semester**
- Additionally, must prominently display a list of unfilled positions and **any** position filled with a retiree on employer's website or the governing authority's website

To utilize critical shortage for a specific position: ANNUAL PROCESS

- Retiree must be **certified** in subject area or position
- Must have an applicant pool of **fewer than three**

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Customized training available!

Available via online webinar or in-person/on-site based on your job duties and *Update Permissions* in EMIS

Kelly Resnick
 Email: kelly.resnick@ttsl.org
 Phone: 225-925-6929

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Surveys

Please complete online survey to help us improve future trainings!

- Survey link will be sent to all attendees via email this week
- Survey link closes in two weeks



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